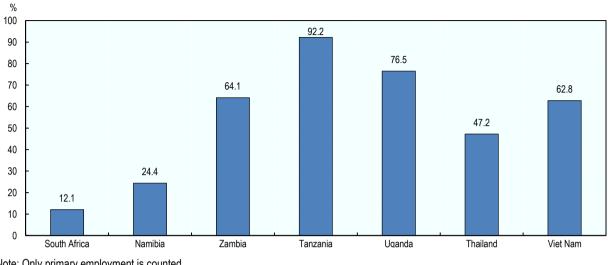
# **2.** The food economy today: Low productivity and bad jobs

Using household and labour force surveys of seven developing and emerging economies in Africa and Asia, this chapter examines the size and composition of the food economy and the conditions under which youth are employed in the food economy. The chapter provides descriptive statistics about the quantity and quality of youth employment within the food economy for Namibia, South Africa, Tanzania, Thailand, Uganda, Viet Nam and Zambia. It includes a specific analysis on the impact of the restrictive policy measures taken in 2020 during the COVID-19 crisis on youth employed in the food economy, with a focus on South Africa. Rising incomes and changing lifestyle and dietary choices are poised to transform agri-food systems across developing countries, with potentially large implications for the quantity and quality of youth employment. Rapid urbanisation is expected to shift employment off-farm and increase employment opportunities in manufacturing and services (Allen, Heinrigs and Heo, 2018<sub>[1]</sub>). In light of the demographic structure, particularly in Africa, youth will both drive these changes in consumption and make opportunities out of this evolving economic landscape. In 2020, youth (15-29 years old) in the five African countries of this study (Namibia, South Africa, Tanzania, Uganda and Zambia) represented on average 30% of the total population and 50% of the working-age population (UN DESA, 2019<sub>[2]</sub>). In the two Asian countries (Thailand and Viet Nam), youth represented around 25% of the total population, and 30% of the working-age population, which will place additional pressure on labour markets. Youth educational attainment and aspirations have risen over recent decades, increasing both skills and aspirations mismatch and decreasing levels of job satisfaction among youth.

For seven emerging and developing economies in Africa and Asia, this chapter examines the size and composition of jobs in the food economy and the conditions in which youth are employed in the agri-food sector. The chapter provides a broad description of youth in the food economy and their working conditions, with a focus on differences across rural and urban areas, and women in the sector. Finally, it includes a special focus on the impact of the lockdown measures taken during the COVID-19 crisis on youth working in the food economy in South Africa. Although some commonalities can be drawn from the seven countries, the countries differ widely in their level of human and economic development and thus feature different agriculture and food system characteristics. It is worth keeping in mind each country's socio-economic context when interpreting the results in this chapter (see Annex A for some basic socio-economic indicators by country).

#### **Employment in the food economy**

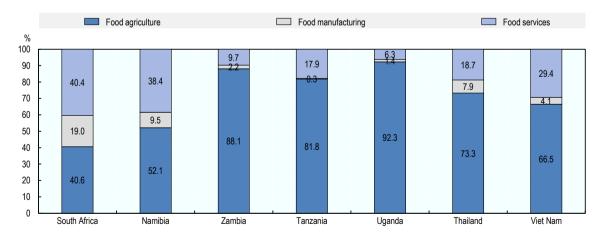
In the majority of the sample countries, food economy jobs account for at least half of total employment. Following the classification scheme outlined in Allen et al.  $(2016_{[3]})$  and in Allen, Heinrigs and Heo  $(2018_{[1]})$ , the food economy encompasses food agriculture, food processing, food marketing and food-away-fromhome (see Annex A for more information). We observe large disparities between upper middle- and low-income African countries, ranging from 12% in South Africa to 92% in Tanzania (Figure 2.1). In Thailand and Viet Nam, food economy employment accounts for about half of total employment (Figure 2.1).





Agriculture makes up an important share, if not the vast majority, of food economy jobs. In the lesser developed African countries (Tanzania, Uganda and Zambia), food agriculture jobs encompass 88.1% to 92.3% of all food economy jobs. In Namibia, South Africa, Thailand and Viet Nam, the food economy is more diversified, with downstream activities taking up a larger part of food economy employment (Figure 2.2). The diversity of food economy activity appears to largely depend on the diversification of the broader economy.

## Figure 2.2. Distribution of total food economy employment by economic sector in selected African and Asian countries

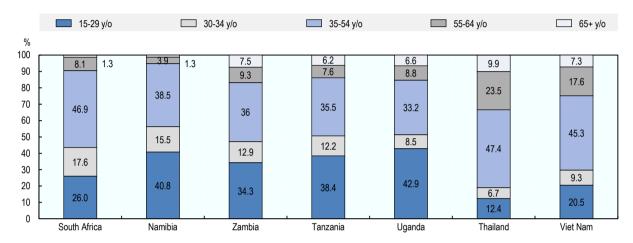


Note: Only primary employment is counted. Source: Authors' calculations.

Note: Only primary employment is counted. Source: Authors' calculations.

#### Youth employment in the food economy

Youth comprise a significant share of food economy workers, especially in the five African countries. Figure 2.3 shows the share of food economy workers in each age group. Except for South Africa, youth represent nearly 40% of food economy workers in the African countries studied. In the two Asian countries, the share of youth working in the food economy is relatively lower but remains significant (about 12.4% in Thailand and 20.5% in Viet Nam).



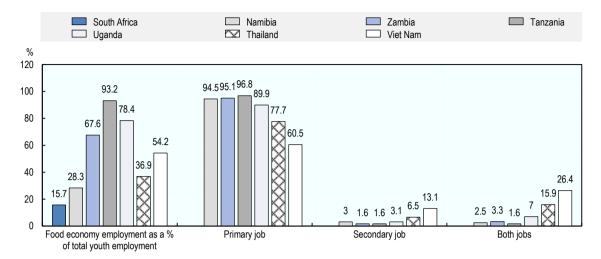


Source: Authors' calculations.

Working youth are likely to be employed in the food economy. In lower-income countries, 54% to 93% of youth are employed in food economy jobs (Figure 2.4). Youth have a lower rate of participation in the food economy in upper middle-income countries, ranging from 16% in South Africa to 37% in Thailand. In these countries, whose economies are more diversified, youth typically have higher levels of educational attainment, have greater aspirations and follow job opportunities in other sectors.

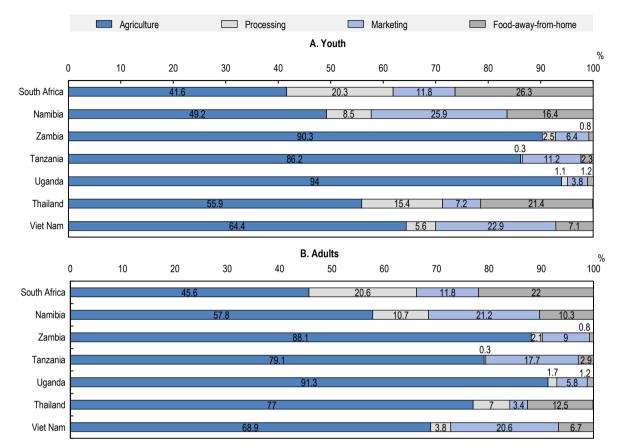
Food economy employment tends to be the primary employment of youth. For 90% to 97% of African youth, their jobs in the food economy were their primary employment. Youth in the two Asian countries hold jobs in the food economy as both their main and secondary employment, notably in Viet Nam (Figure 2.4).

## Figure 2.4. Percentage of youth-held food economy employment in total youth employment and distribution between primary and secondary jobs, in selected African and Asian countries



Note: "Primary job" shows the percentage of youth whose main employment is in the food economy; "Secondary job" shows the percentage of youth whose secondary employment is in the food economy; and "Both jobs" shows the percentage of youth whose primary and secondary jobs are in the food economy. Secondary job information was not available for South Africa. Primary, secondary and "both" job numbers total 100. Source: Authors' calculations.

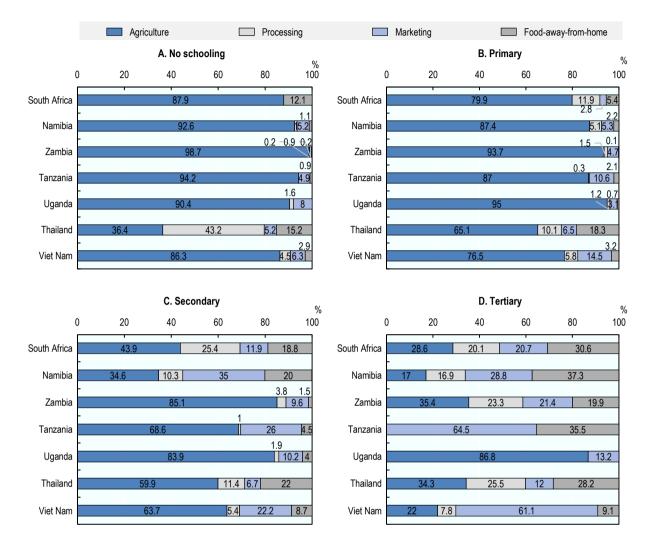
As is the case for adults, agricultural work remains the prevalent form of youth food economy employment. While this is especially true for lower-income countries, youth are finding more opportunities downstream in middle-income countries (Figure 2.5). In some middle-income countries (Namibia, South Africa, Thailand and Viet Nam), youth are more likely than adults to find jobs downstream, mainly in food processing and food-away-from-home. In a study examining youth participation in the agri-food systems of Africa, Asia and Latin America, Dolislager et al. (2021[4]) similarly find that youth are more likely than adults to work in a diverse range of food economy activities, outside of farming.





Agriculture remains a prominent employer for all levels of education, but educated youth have a higher probability of holding a job in downstream segments of the food economy (i.e. processing, marketing and food-away-from-home). Figure 2.6 shows the distribution of youth across their food economy segments, by their level of educational attainment. For each group, agriculture employs more than half of the youth who received either no schooling or only a primary or secondary education. Youth in Tanzania and Uganda are exceptions, where completing tertiary education was uncommon at the time of data collection. Thailand also presents an exception, wherein youth without a primary education also manage to find employment in downstream segments.

Source: Authors' calculations.



# Figure 2.6. Distribution of youth employment across food economy segment, by level of education, in selected African and Asian countries

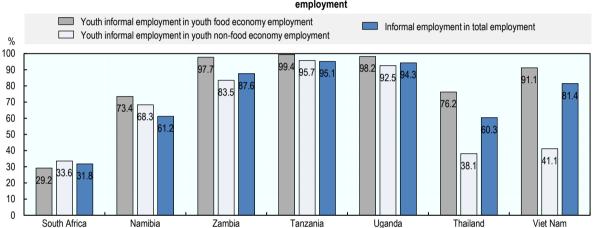
Source: Authors' calculations.

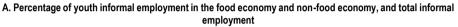
# Working conditions: Informal and vulnerable employment, earnings, and skills mismatch

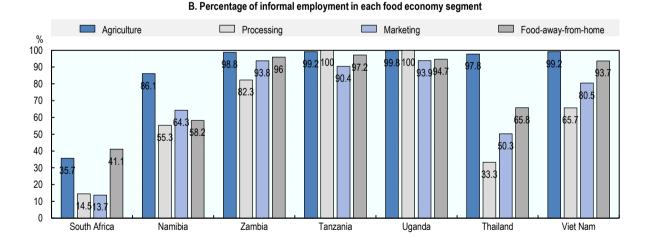
Many food economy jobs do not meet international standards on decent work, making Sustainable Development Goal (SDG) 8 difficult to reach. Decent work entails productive employment opportunities that pay fair income and protect workers, whether that protection is occupational safety and health standards in the workplace, through employment-based social safety nets, or the recognition and facilitation of collective bargaining rights. SDG 8 outlines a number of indicators and targets that should be measured to advance towards sustained, inclusive and sustainable economic growth that includes full and productive employment and decent work for all. SDG 8 encompasses cultivating decent jobs and entrepreneurship and formalising enterprises (Target 8.3); eradicating unfair pay discrimination (Target 8.5); eliminating child labour (Target 8.7); and protecting labour rights and promoting safe working environments (Target 8.8).

The majority of jobs in the food economy are informal. Informal jobs entail work that is undeclared and, therefore, unregulated and without social safety nets for workers. With the exceptions of South Africa and Thailand, the majority of youth-held jobs in each food economy segment are informal (Figure 2.7). The prevalence of informality among youth working in the food economy is higher than the informal employment rate in total employment. Informality is also highest in agriculture employment for all seven countries, but in the lower-income African countries, it is the norm in all segments of the food economy. This high incidence of informal work in the food economy warns that the majority of these youth are at high risk of vulnerability to poverty, of low job security, of no employment-based social insurance coverage and potentially of future vulnerability to poverty in old age, due to lack of employment-based retirement pension affiliation and contributions.

## Figure 2.7. Prevalence of informal employment amongst youth food economy jobs, in selected African and Asian countries



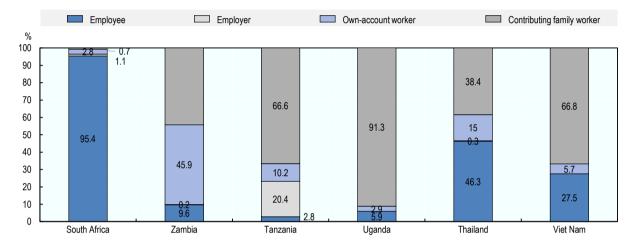




Source: Authors' calculations.

Most youth food economy workers hold vulnerable forms of employment. Own-account workers and contributing family workers are considered to have vulnerable employment, as they have less job and income stability than employees or employers, and contributing family workers are often unpaid. Almost no youth in the food economy is an employer, and the high prevalence of own-account and contributing

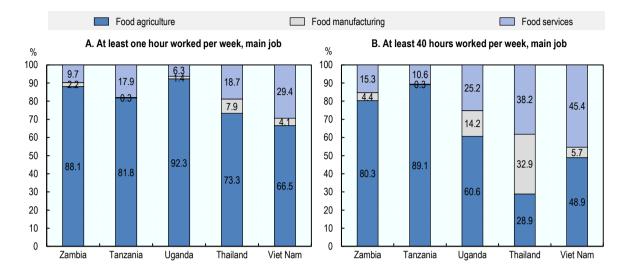
family work confirms the poor quality of most food economy jobs and the difficulties youth face in securing gainful employment in this sector (Figure 2.8). These results are in line with a previous OECD study  $(2017_{[5]})$  that shows that very few youth in fact succeed as entrepreneurs or "agripreneurs" who are able to employ other people. Self-employed entrepreneurs are more likely own-account workers making a subsistence living. Successful youth entrepreneurs have very specific profiles, and therefore any youth entrepreneurship programme should target high potential youth so that their enterprises can create salaried jobs (OECD, 2017<sub>[5]</sub>). The majority of youth, especially rural youth, will not succeed as entrepreneurs, and it is important to manage expectations and not create unrealistic aspirations by overselling youth entrepreneurship as a panacea to the youth employment challenge (OECD, 2017<sub>[6]</sub>).



## Figure 2.8. Percentage of youth informal food economy jobs by status in employment, in selected African and Asian countries

The majority of food economy jobs are not full-time equivalent or full-year employment. Figure 2.9 shows the differences within the set of all food economy jobs, wherein agriculture represents the lion's share of any employment when employment is defined as at least one hour worked per week (Panel A). Panel B shows that when employment is defined as working a minimum of 40 hours per week, a much larger proportion of gainful employment is found in the service and industry sectors in Thailand, Viet Nam and Uganda and to a certain extent Zambia.

Note: Data not available for Namibia. Source: Authors' calculations.

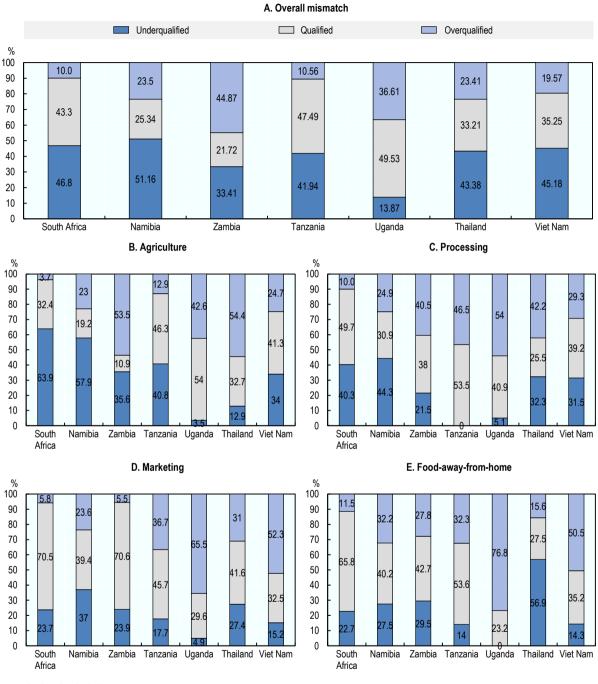


# Figure 2.9. Distribution of food economy employment by economic sector, in selected African and Asian countries

Source: Authors' calculations.

There is a high level of skills mismatch among youth in the food economy. Two-thirds of all food economy jobs held by youth do not correspond to their level of educational qualification. For the purposes of this study, youth are considered qualified according to the most frequently attained level of education in each occupational category, by country (ISCO-08). Just over one-third (40%) of all food economy youth are underqualified for their jobs, and just about one-quarter (24%) are overqualified (Figure 2.10).

## Figure 2.10. Percentage of mismatched youth in the food economy by food economy segment, in selected African and Asian countries



Source: Authors' calculations.

Youth working in the food economy earn less per hour than their counterparts working outside of the food economy. Table 2.1 displays the overall median hourly wage for youth working in and out of the food economy. Youth employed in the non-food economy earn more than both youth and non-youth working in the food economy. This is likely due to the influence of agricultural wages, which represent the majority of food economy jobs.

Food agriculture youth workers consistently earn the least, not only compared to youth outside the food economy, but also as compared to the earnings of youth in other food economy segments. In some cases, youth in downstream segments of the food economy can out-earn non-food economy youth, as observed in South Africa, Tanzania and Uganda (Table 2.1).

	South Africa	Namibia	Tanzania	Uganda	Thailand	Viet Nam
Food economy youth	18.3	5.8	684.3	787.3	39.4	17 307.7
Non-food economy youth	21.3	11.5	1 010.4	1 052.4	47.7	19 893.9
Agriculture	16.7	4.6	673.6	866.1	37.5	16 666.7
Processing	20.0	11.5	N/A	1 484.7	38.8	17 230.8
Marketing	22.9	6.8	1 837.9	787.3	48.1	19 098.1
Food-away-from-home	19.0	7.8	1 616.6	592.8	40.4	14 423.1

Table 2.1. Median hourly wage for food economy and non-food economy youth in local currency unit, in selected African and Asian countries

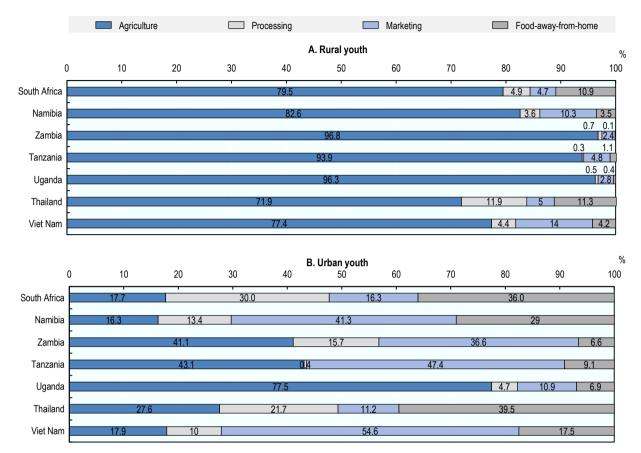
Note: Data not available for Zambia. N/A = not available. Source: Authors' calculations.

#### Rural versus urban food economy

As with most economic activities, urban and rural food economies hold different employment prospects for youth. Rural food economy jobs are predominantly on-farm, whereas downstream activities thrive in urban areas. However, rural non-farm activity is also emerging in the middle-income countries in both regions, with around 20% (in Namibia, South Africa, Thailand and Viet Nam) of youth employment found in food processing, food marketing and food-away-from-home (Figure 2.11). Indeed, while traditionally there is a division between rural and urban food activities, there are often feedback loops between the two areas. Circular or seasonal mobilities often exist across these cities, with urban households having parts of their livelihoods in rural areas and vice versa (Allen and Heinrigs, 2016<sub>[7]</sub>).

Downstream food economy jobs held by youth are predominantly located in urban areas. Youth employment in the middle-income countries is characterised by low shares of jobs in agriculture, high shares of jobs in food-away-from-home, and variable shares of jobs in food processing and marketing. The more developed countries, South Africa and Thailand, have relatively high shares of urban food processing jobs; the lesser developed countries have much larger shares of urban food marketing (Figure 2.11).

Urban youth in the lower-income African countries (Tanzania, Uganda and Zambia) are predominantely involved in food agriculture or food marketing. Food-away-from-home represents less than 10% of urban food economy jobs in this group of countries who are also largely agrarian in transition. In Uganda, particularly, the share of employment in urban agriculture remains high (78%), which can be partly accounted for by low levels of urbanisation (22%) at the time of data collection (Figure 2.11).



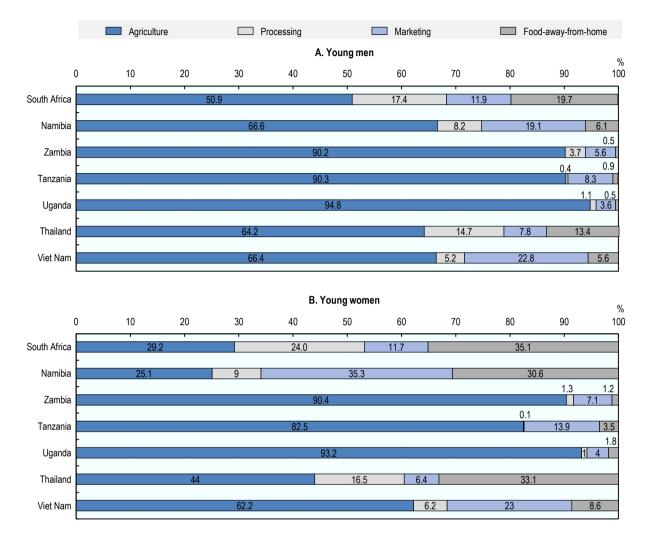


Source: Authors' calculations.

#### Young women in the food economy

Women play an important role in the food economy, as the majority of food economy jobs are agricultural and women are generally thought to be overrepresented in agricultural work in developing countries (Meinzen-Dick, 2019[8]). Gender norms shape the role women are expected to play in the cultivation, processing and production of food. However, women are not necessarily given the same opportunities as men in agri-food systems or able to use agricultural employment opportunities to achieve economic independence or empowerment. This section assesses how young women fare in the food economy compared to men and adult women and analyses pay gaps and education mismatch in the food economy.

Across all seven countries studied, women participate in the labour force at nearly equal or slightly lesser rates than men. Within the food economy, young women in the lower middle- and low-income African countries (Tanzania, Uganda and Zambia) are just as likely to work in agriculture as young men. In the upper-middle-income African countries (Namibia and South Africa), young women participate in agricultural work at about half the rate of young men (Figure 2.12). In economies where downstream segments are more developed (Namibia, South Africa, Thailand and Viet Nam) more young women than men work in food processing, marketing and food-away-from-home activities, and in particular in the food-away-from-home segment, which includes all services related to food catering (Figure 2.12).





Source: Authors' calculations.

Young women tend to earn less than young men in the food economy, even in sectors where they are meant to be over-represented. In Uganda and Viet Nam, the average median pay gaps are the highest, at 37.5% and 16.6% respectively (Table 2.2). There are still higher gaps by sector: in Uganda, the pay gap for food-away-from-home is 67%, while in Namibia, the youth gender pay gap for food-away-from-home is 39%. By segment, there are exceptions: in South Africa, Tanzania and Thailand, young women earn more in food marketing than young men on average; and in Namibia, Thailand and Uganda, young women in agriculture appear to earn slightly more than young men.

## Table 2.2. Median hourly wage of food economy youth by gender and food economy segment, in local currency units, in selected African and Asian countries

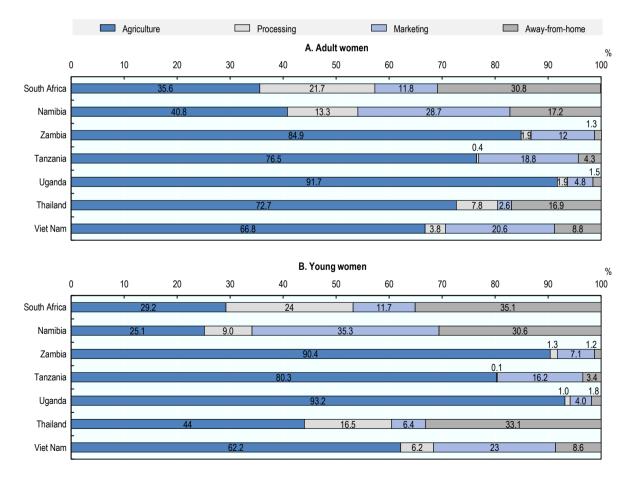
		South Africa	Namibia	Tanzania	Uganda	Thailand	Viet Nam
Young men	Total food economy	18.5	5.8	684.3	955.6	40.0	18 269
Young women	Total food economy	18.1	5.9	577.4	592.8	38.8	15 734

Young men	Agriculture	16.9	4.5	684.3	769.8	37.5	17 308
	Processing	20.8	12.7	N/A	1 484.7	38.8	18 619
	Marketing	21.9	8.2	404.2	962.3	46.9	20 769
	Food-away-from-home	20.8	11.2	1 616.6	962.3	42.9	17 752
Young women	Agriculture	15.6	4.9	577.4	1 077.8	38.5	15 071
	Processing	19.5	9.4	N/A	N/A	38.5	15 976
	Marketing	23.6	5.8	1 837.9	513.2	62.5	17 684
	Food-away-from-home	17.2	6.6	N/A	393.1	40.0	11 834

Note: Information not available for Zambia. Source: Authors' calculations.

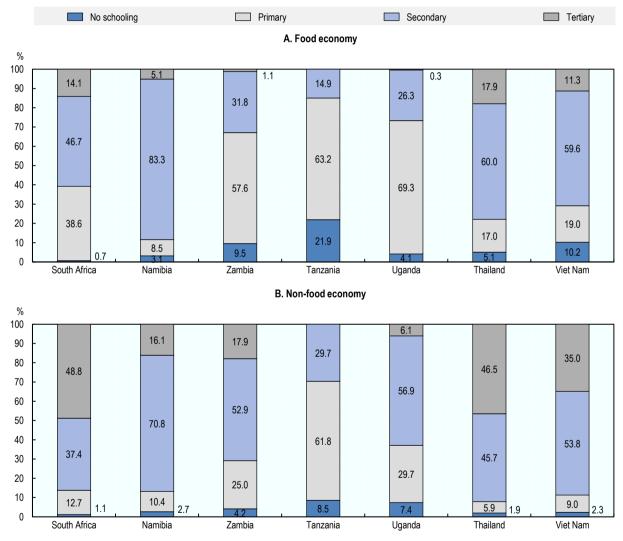
Compared to adult women, young women are less likely to work in the food economy. When in the food economy, young women in Namibia, South Africa, Thailand and Viet Nam are more likely to find jobs in the downstream segments, which may be a result of higher educational attainment, while young women in Tanzania, Uganda and Zambia tend to work in agriculture (Figure 2.13). This may also be linked to lower access to land and capital to work in upstream activities and agriculture in a profitable manner, resulting in lower-return activities. For those with higher educational attainment, this may reflect a preference to enter more lucrative off-farm activities.

## Figure 2.13. Distribution of food economy jobs held by adult women and young women, by food economy segment, in selected African and Asian countries



Source: Authors' calculations.

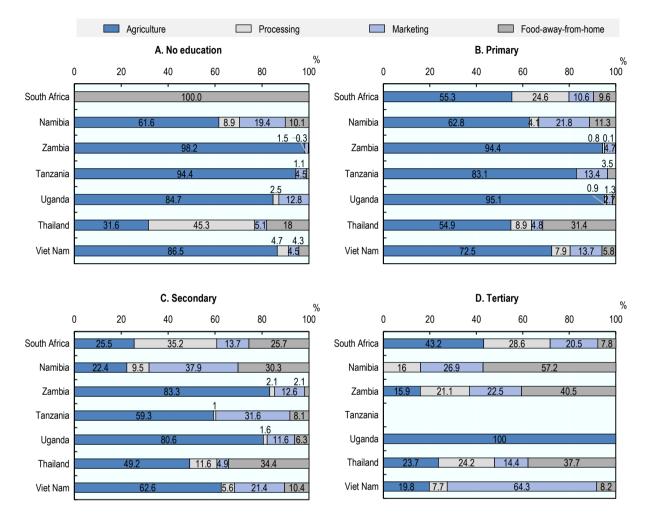
Young women working in the food economy have a lower level of education than women in non-food economy jobs. Young women employed outside of the food economy tend to have at least a secondary level of education (Figure 2.14). On average, 20% of young women employed in non-food economy jobs have a tertiary degree, as opposed to 6% among those in the food economy. Similarly, more young women (52%) employed in non-food economy jobs obtain a secondary level of education, compared to the food economy (46%). This pattern is notable for all the middle-income countries, where a significantly larger share of young women report attending and/or attaining a tertiary level of education.





Source: Authors' calculations.

Young women working in downstream segments of the food economy tend to have a higher level of education. A large share of young women working in food processing, food marketing and food-away-fromhome segments have a tertiary education. Not surprisingly, young women in the food economy with a primary education or less are more likely to work in the agricultural production segment, but a nonnegligible proportion of young women with secondary degrees are also found in agriculture in Tanzania, Uganda and Zambia, as well as Thailand and Viet Nam, pointing to a large degree of skills mismatch and limited opportunities to move to downstream activities Figure 2.15.



# Figure 2.15. Distribution of young women across food economy employment by level of education, in selected African and Asian countries

Note: No information is available for tertiary educated women in Tanzania. Source: Authors' calculations.

Despite their substantial involvement, women often find themselves at a disadvantage in the food economy, notably the agricultural sector, which comprises the bulk of food economy employment, but also in food-away-from-home, where women are most likely to be employed. Women have reduced access to resources, technology, and opportunities in agriculture and rural areas, are paid less than male workers and suffer from reduced agricultural productivity as a result (Doss and SOFA Team, 2011[9]; Quisumbing et al., 1998[10]). The outmigration of men to urban areas and the increasing feminisation of the agricultural sector will continue to be affected by gender inequalities.

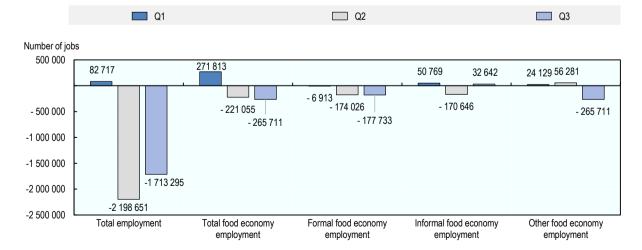
## COVID-19, youth and the food economy: Focus on South Africa

Lockdown policies adopted during the COVID-19 crisis have represented a serious threat to maintaining food security throughout the world, generating a shock to supply and demand in the agri-food market by disrupting agricultural and food supply chains. Such measures have affected the food economy through 1) reduced employment; 2) reduced production of agricultural goods; 3) increased costs along the agri-food supply chain due to sanitation measures; and 4) cash flow issues due to reduced consumer ability to pay for goods.

Restrictive measures adopted during the COVID-19 crisis have also negatively impacted youth employment, with serious implications for the career trajectories of young people in both developed and developing economies. Youth employment is especially vulnerable to shocks and is expected to be most severely affected by the restrictive measures taken by several countries during the COVID-19 crisis (Schoon and Mann, 2020<sub>[11]</sub>). Demand for employment falls during a crisis, and employers refrain from training new labour market entrants and other inexperienced workers, impeding successful school-to-work transitions. Previous shocks, such as the global financial crisis of 2008/09, similarly destroyed employment, with youth bearing the brunt of the losses (Cho and Newhouse, 2011<sub>[12]</sub>).

In South Africa, among food economy workers, youth were the most impacted by the loss of employment in 2020, accounting for more than half of all food economy employment losses. Between Q1 2020 and Q3 2020, 1.7 million net jobs in total employment were lost in South Africa. Of these jobs, 9.2% were held by youth in the food economy, which represented more than half of all overall food economy job losses (15.8%). The majority of youth employment lost between Q3 2019 and Q3 2020 were in agriculture and food services: 50.3% in agricultural production, 1% in manufacturing; 2.6% in trade (retail and wholesale); 16.5% in transport;<sup>1</sup> and 30.7% in food services and food-away-from-home.

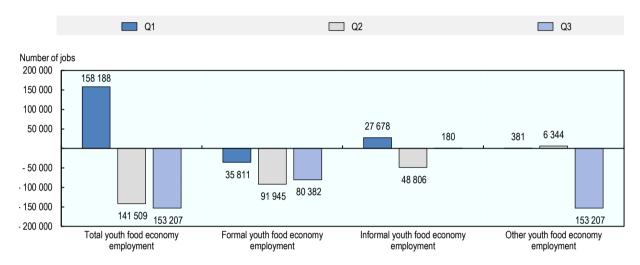
Between Q1 2019 and Q1 2020, just over a quarter of a million new jobs were created in the food economy in South Africa. In Q1 2020, 271 813 more jobs than the previous year (Q1 2019) were registered (Figure 2.16). As the year progressed, the impacts of the COVID-19 pandemic led to the near-total loss of these jobs: between Q2 2019 and Q2 2020, 221 055 net food economy jobs were lost, and between Q3 2019 and Q3 2020, 265 711 food economy jobs were lost. Formal food economy employment represented 2.5% of the jobs created between Q1 2019 and Q1 2020 and 78% and 66% of the jobs lost between Q2 2019 and Q2 2020 and Q3 2019 and Q3 2020, respectively.



## Figure 2.16. Difference in total employment and total food economy employment between quarters 1 through 3 of 2019 to 2020, in South Africa

Source: Authors' calculations based on the (2019[13]) and (2020[14]) South Africa Quarterly Labour Force Surveys, Quarters 1 through 3.

Youth food economy employment represented a significant share of the total jobs lost in South Africa between 2019 and 2020, but formal work was more likely to be lost than informal work. Between Q1 2019 and Q1 2020, youth food economy employment represented 58% of all new jobs created in the food economy; 22.6% were formal and 77% informal (Figure 2.17). Between Q2 2019 and Q2 2020, youth food economy jobs represented 64% of the total food economy jobs lost in South Africa, with 65% of these jobs being formal employment and 34% informal employment.

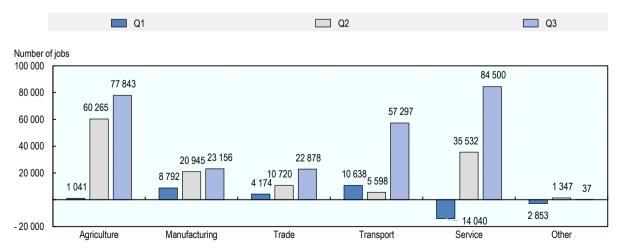


# Figure 2.17. Difference in youth food economy employment by informal status between quarters of 2019 to 2020, in South Africa

Source: Authors' calculations based on the (2019(13)) and (2020(14)) South Africa Quarterly Labour Force Surveys, Quarters 1 through 3.

South African youth in agriculture, transport and services suffered the largest losses in 2020. Figure 2.18 depicts the gradual loss of jobs for the first three quarters of 2020, as compared to 2019. Agricultural, service and transport jobs held by youth were largely lost by the second and third quarters due to lockdown measures.





Source: Authors' calculations based on the (2019[13]) and (2020[14]) South Africa Quarterly Labour Force Surveys, Quarters 1 through 3.

Restrictive measures adopted during the COVID-19 crisis have had a disruptive impact on agri-food system production and employment, with the potential to seriously disrupt food security in developing countries. Restrictive measures have halted the regular movement of people and goods within and between territories and disrupted the rhythm and the conditions under which most work could be conducted. Agricultural production has suffered from such labour shortages, and there have been severe implications for the production and supply of food and food-related goods, as well as for the nutritional value of food baskets consumed by households during COVID.

The extreme loss of jobs due to the measures taken during the crisis has affected the livelihoods and revenue streams of households dependent on the food economy and has likely pushed many of these workers into poverty. The World Bank estimated that 119 to 124 million people were likely pushed into extreme poverty as a result of the crisis in 2020 and that the majority of the new poor live in rural areas (Lakner et al., 2021<sub>[15]</sub>). In addition to poverty, the food security of Africa, notably, is at risk, and the potential to create food supply shortages that will compound the experience of impoverishment will be difficult to handle moving forward (FAO, 2020<sub>[16]</sub>).

The disruption of food systems negatively impacted youth employment in the food economy, destroying most of the jobs held by young persons in 2020. Serious implications exist for the length and success rate of school-to-work transitions, as prior studies show that economic recessions increase the youth unemployment rate compared to the adult employment rate, while earnings tend to decline after a recession.

#### Conclusion

For most countries studied, the food economy represents an important share of economic activity and employment for youth. Despite the heterogeneity of food economy employment across sample countries, the majority of food-related activities are still centred in rural areas and around agricultural jobs. Urban food economy employment is much more diversified than in rural areas. The share of non-farm rural agrifood activity is small but non-negligible.

Currently, the majority of food economy jobs do not provide stable or decent employment. For the vast majority of young workers, a food economy job represents their primary economic activity, and, in general, they are paid much less than their peers working in non-food economy sectors, although there are some exceptions by country in food marketing and processing segments.

Young people in the food economy are largely employed in informal and vulnerable forms of work, which provide little employment and income security. Due to the staggering extent of informality in the food economy, many of these youth do not have any social security through their jobs, which affects their ability to weather economic shocks and smooth consumption. In addition, restrictive measures adopted during the COVID-19 crisis have destroyed many jobs, and youth in the food economy have been disproportionately affected, proving again that youth livelihoods are the most at risk during economic downturns. The pandemic has also clearly increased the vulnerability to and the intensity of child labour including for the age group 15-17.

#### Notes

<sup>1</sup> Not adjusted for food.

## | 37

### References

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