

# Sectoral impacts

V1a

Product	Initial lock down (through May 1)	Phase 2 lockdown (1-2 months)	Recovery (6 to 18 months)
Food, healthcare, other non-durable necessities (tissue paper, soap, etc.)	Retail open but lower demand due lower incomes, except for healthcare (sharpest fall in low-income communities)  Growth in delivery services	Same	Depends on global trends and extent of stimulus and how affects consumer incomes  May be permanent shift toward new delivery services esp for food
Recreational and personal services (restaurants, gyms, hairdressing etc.), excluding transport	Closed down	Depends on physical distancing requirements, but very limited or no opening (e.g. only deliveries; limits on crowds; curfew)  Lower incomes limit demand  Increase in digital services, but hard to monetise	Depends on global economic trends and extent of stimulus and how affects consumer incomes  Increase in digital services, but hard to monetise
Consumer durables (electronics, cars, furniture) and housing	Physical retail closed  Consumer uncertainty means sharp fall in demand	Greater opportunities for sale, but lower incomes and higher joblessness limit sales	Depends on global trends and extent of stimulus and how affects consumer incomes
Clothing and other non-essential consumables	Physical retail closed and limits on delivery services  Some capacity open to provide healthcare inputs (so far mostly face masks but theoretically other products also)	Depends on regulations (e.g. opening at all, times, physical distancing requirements)  Lower incomes and uncertainty limit demand	Depends on global trends and extent of stimulus and how affects consumer incomes

<b>Product</b>	<b>Initial lock down (through May 1)</b>	<b>Phase 2 lockdown (1-2 months)</b>	<b>Recovery (6 to 18 months)</b>
Intermediate inputs for industry (heavy chemicals, steel, components, electricity, freight transport, etc.)	Sharp decline with decline in production of goods even where not fully closed down	Depends on increase in production, which in turn depends on (a) domestic and global demand and (b) healthcare regulations by industry and in production process	Depends on recovery in production, which in turn depends on global and regional trends and extent of stimulus
Mining and metals	Initial sharp decline but some recovery as adapt rules	Downturn in global demand and prices  Opening depends on physical distancing requirements in production and transport	Depends on recovery globally and especially in China (which depends in large part on recovery in exports)
Auto and capital goods	Closed down except possibly for production of respirators	Depends on OEM global strategies – plan to open in EU and US mostly from mid to late April	Depends on rate of recovery in main export markets (now in deep recession) and in SA
Education (all levels)	Closed down  Increased demand for digital services	Closed down  Increased demand for digital services	Open but with more physical distancing  Continued increase in demand for digital services  Likely squeeze on budgets and lower demand for fee-paying secondary due lower household incomes; possibly higher for tertiary depending on employment trends