



CLEAN  
COOKING  
ALLIANCE

# COVID-19 Impacts on Clean Cooking

Results from a Sector Survey

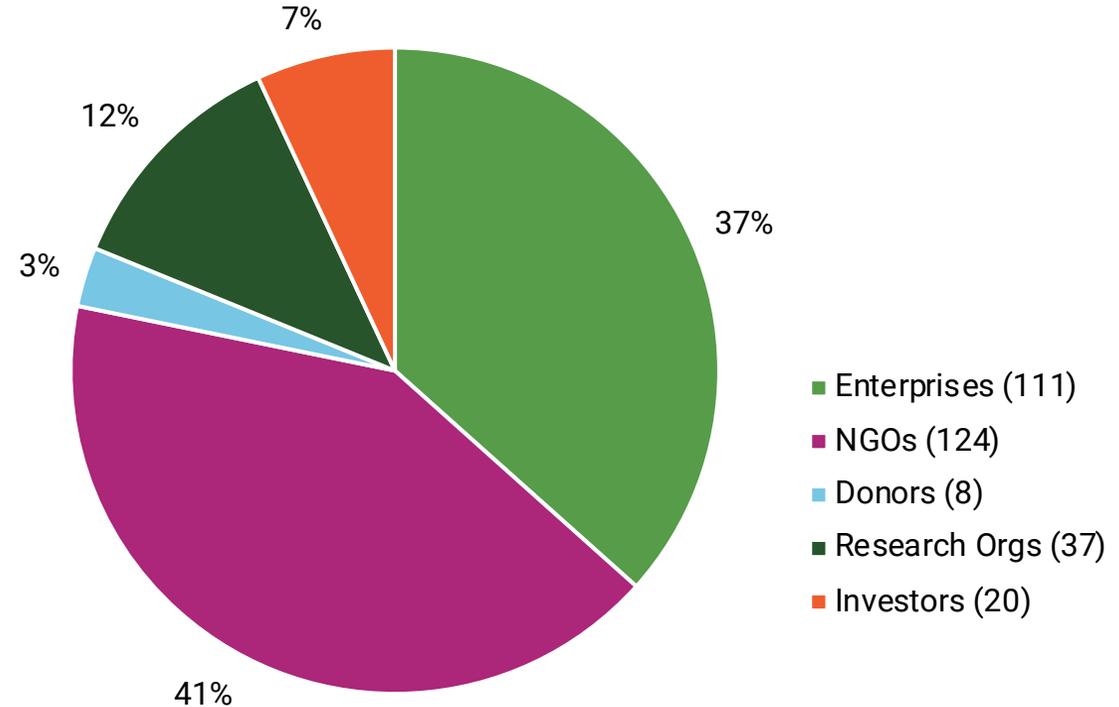


# 2020 COVID-19 Survey Responses

In light of the ongoing coronavirus pandemic, the Alliance surveyed stakeholders across the clean cooking ecosystem to better understand how the crisis is affecting their organizations, their work, and the broader clean cooking sector. Responses were received April 6-13 from organizations working in more than 100 countries.

300  
respondents

### Respondent Organization Types

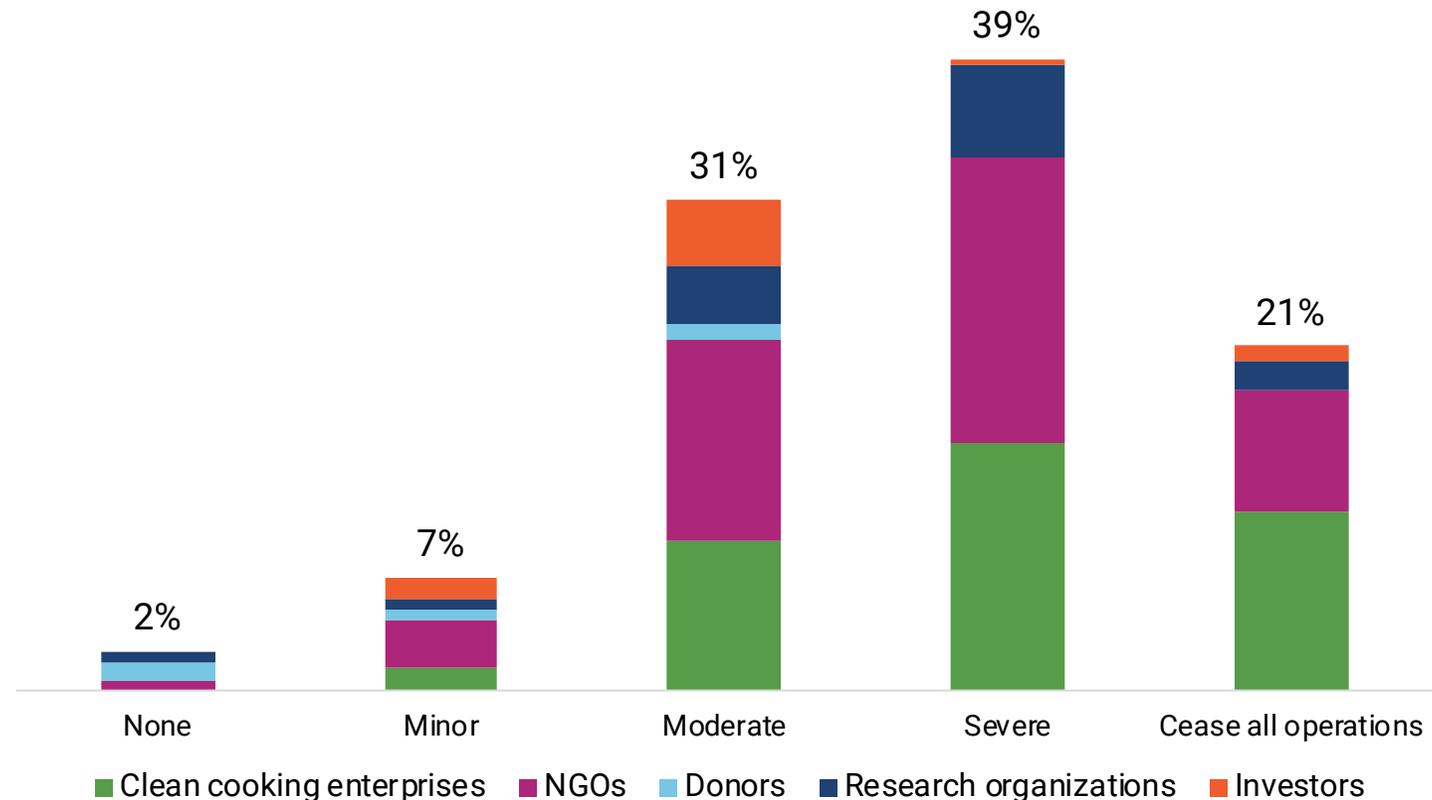




# Across all types of organizations in the sector, there is a high level of disruption

- Almost three-quarters of respondents report moderate or severe disruption to operations, with an additional 21% needing to cease operations.
- Both enterprises and NGOs are the hardest hit in the sector.

Disruption due to COVID-19 for all respondents





# Enterprises: Main Findings (1/2)

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One hundred and eleven enterprises responded to the survey, which included cooking energy producers and distributors, cookstove manufacturers, and others across the supply chain. These responses ranged from small enterprises producing just a few stoves a year to larger enterprises with thousands of customers.

- COVID-19 is impacting clean cooking enterprises, with close to two-thirds of enterprises facing moderate to severe disruptions and another 30% having to cease all operations.
- Fewer than 10% of enterprises have the financial capacity to withstand more than 5 months of COVID-19 impacts, and 44% need relief funds.
- More than two-thirds of enterprises said they have less than three months of operational capital, with half already considering layoffs.



# Enterprises: Main Findings (2/2)

- The pandemic could also have longer-term market implications: 63% of enterprises reported significant concerns about reduced customer ability to pay, and 46% are worried about reduced demand.

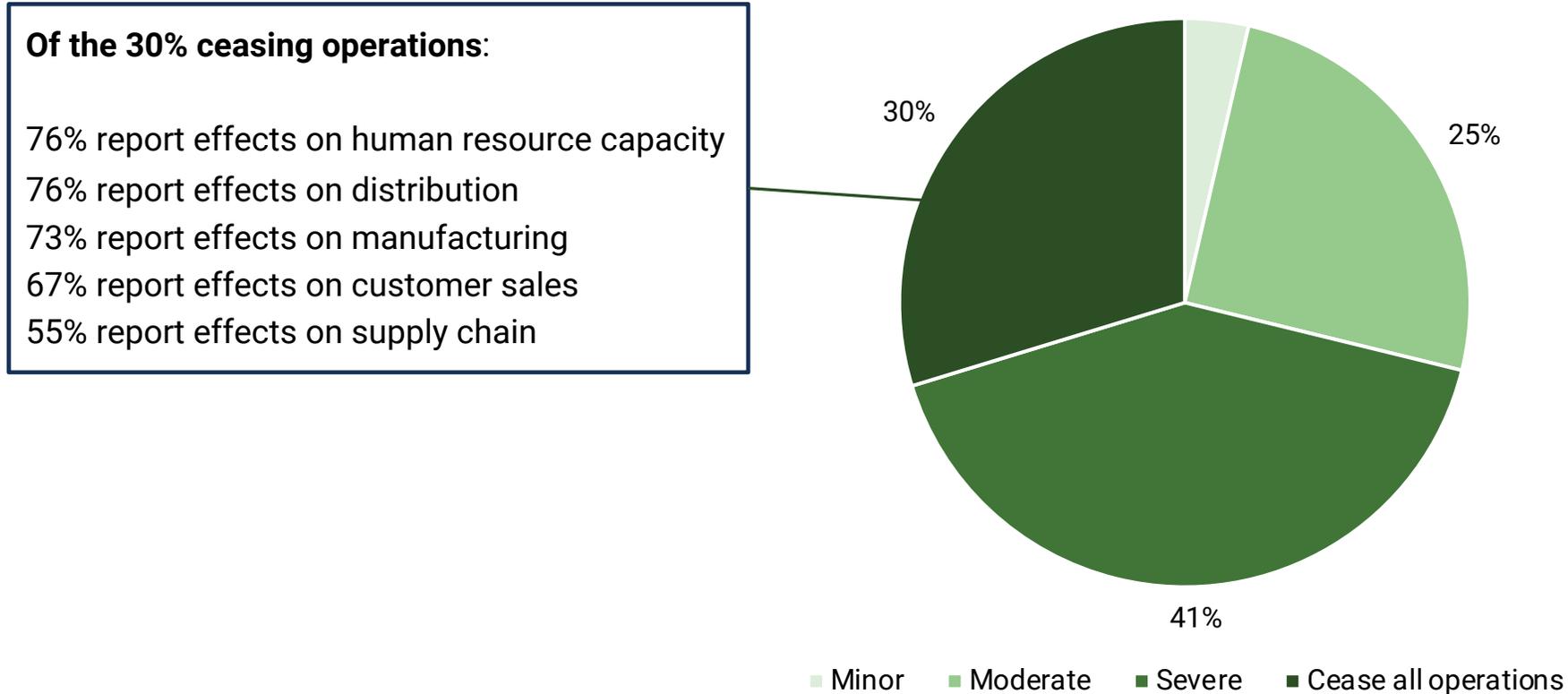
## Quotes from survey respondents:

*"Due to the lockdown in most states, it is difficult getting to the rural areas."*

*"Momentum created prior to the pandemic slowed down. We are yet to know how much financing for clean cooking may have been impacted by the pandemic."*

# 96% of enterprises are experiencing a significant disruption

Enterprise-reported level of disruption in the next 1-3 months

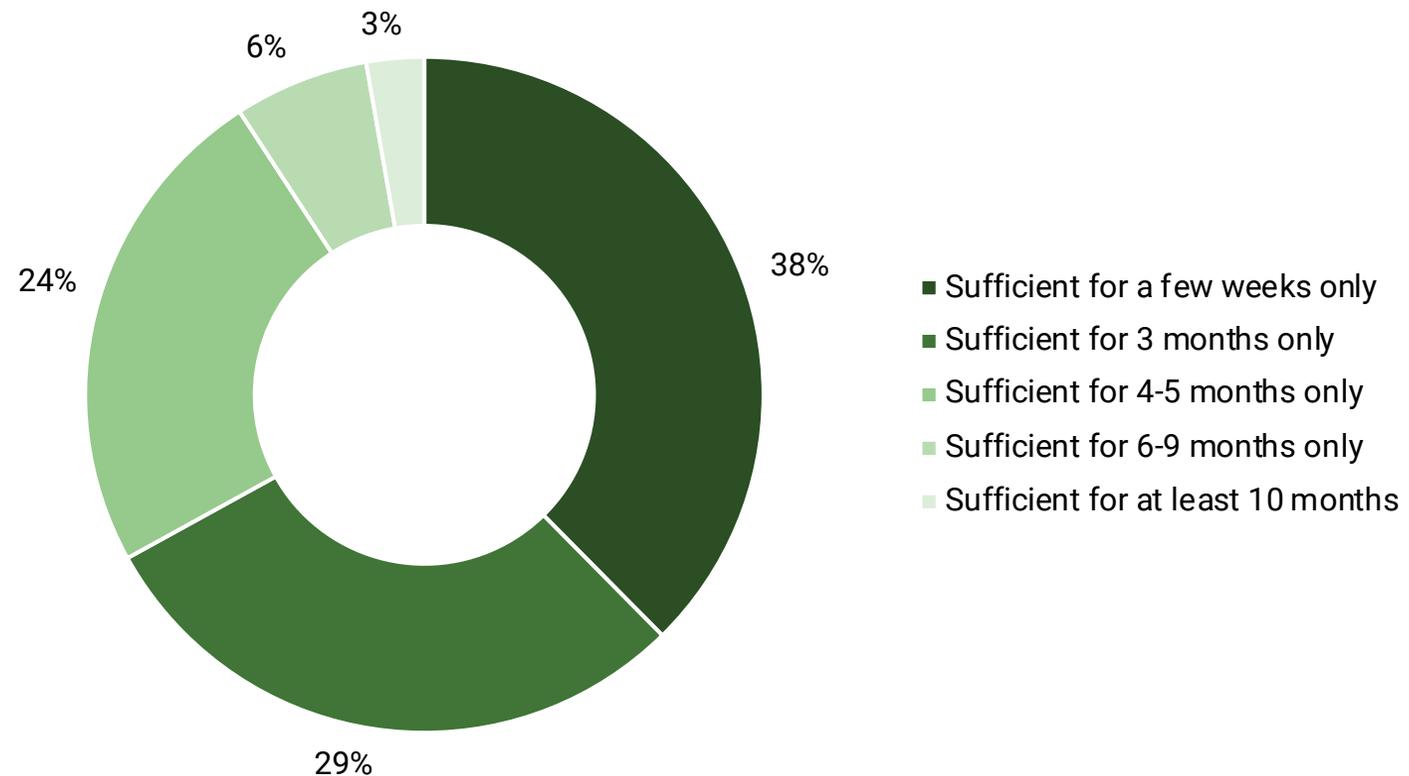




# Few enterprises can withstand COVID-19 impacts for more than 5 months

- Close to 40% of enterprises said they have sufficient financial capacity for a few weeks only.
- The vast majority of enterprises reported having five months or less of operational capital.
- 50% of enterprises reported considering layoffs.

Enterprise-reported financial capacity to withstand impacts of COVID-19

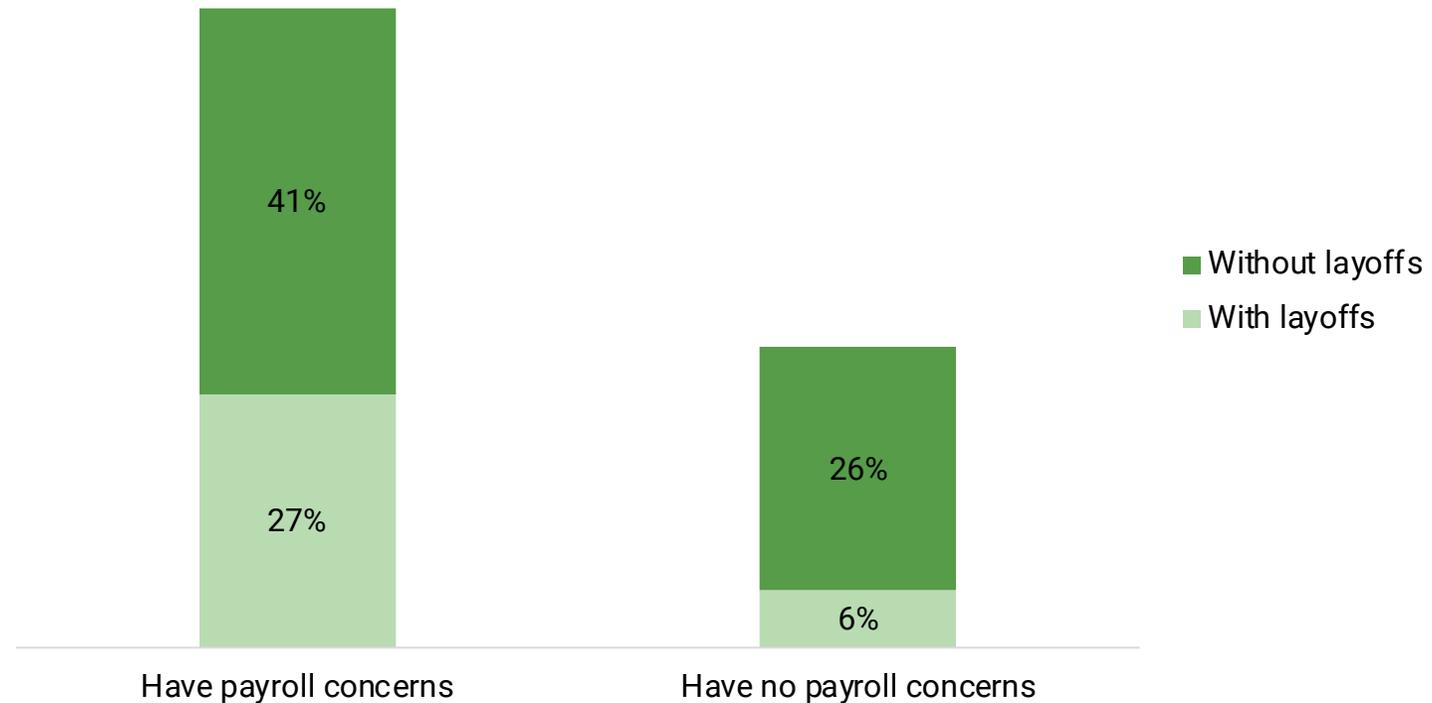




# Enterprises report concerns over making payroll

- Over two-thirds of enterprises report concern over making payroll in the next three months.
- Just over a quarter of enterprises report concern with making payroll, even with layoffs.

Enterprise-reported concerns about making payroll in the next 3 months

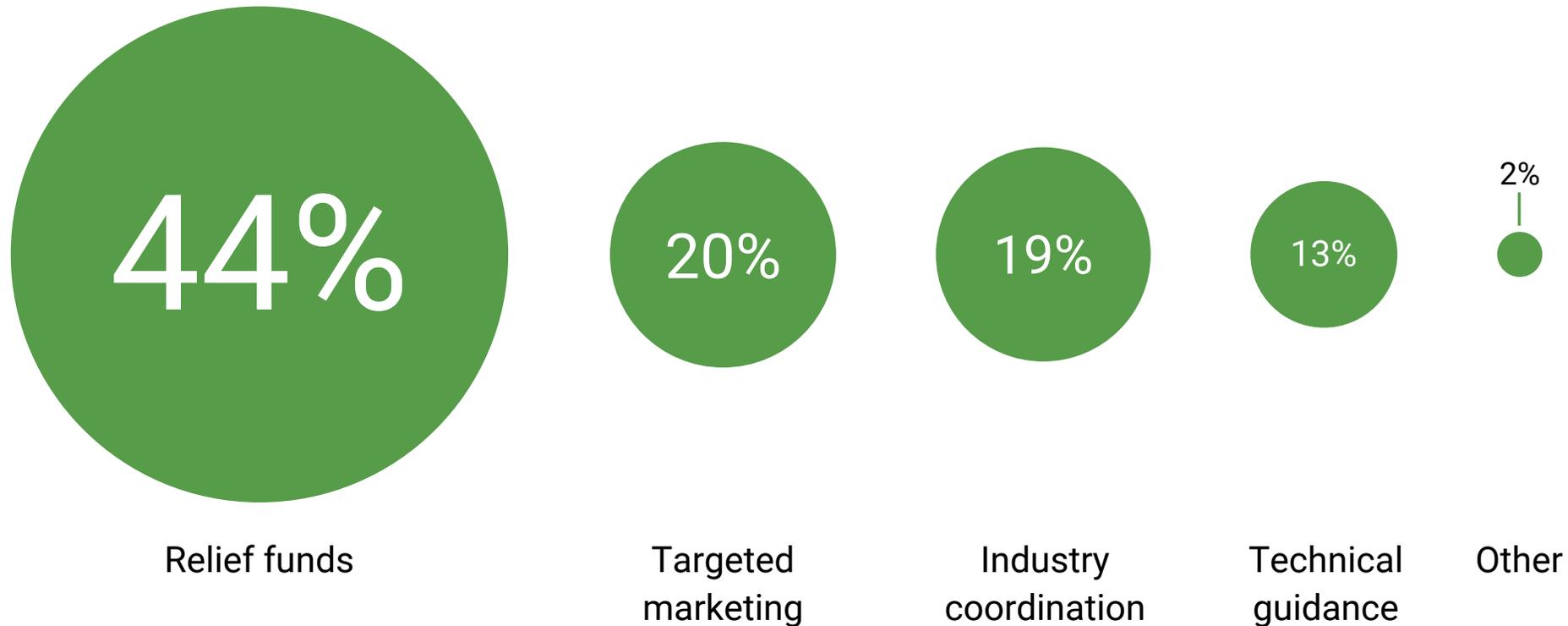




# Nearly half of enterprises need relief funds

Enterprise-reported need for support over the next 3 months,  
% of respondents

*Note: Respondents could choose more than one option.*





# NGOs: Main Findings

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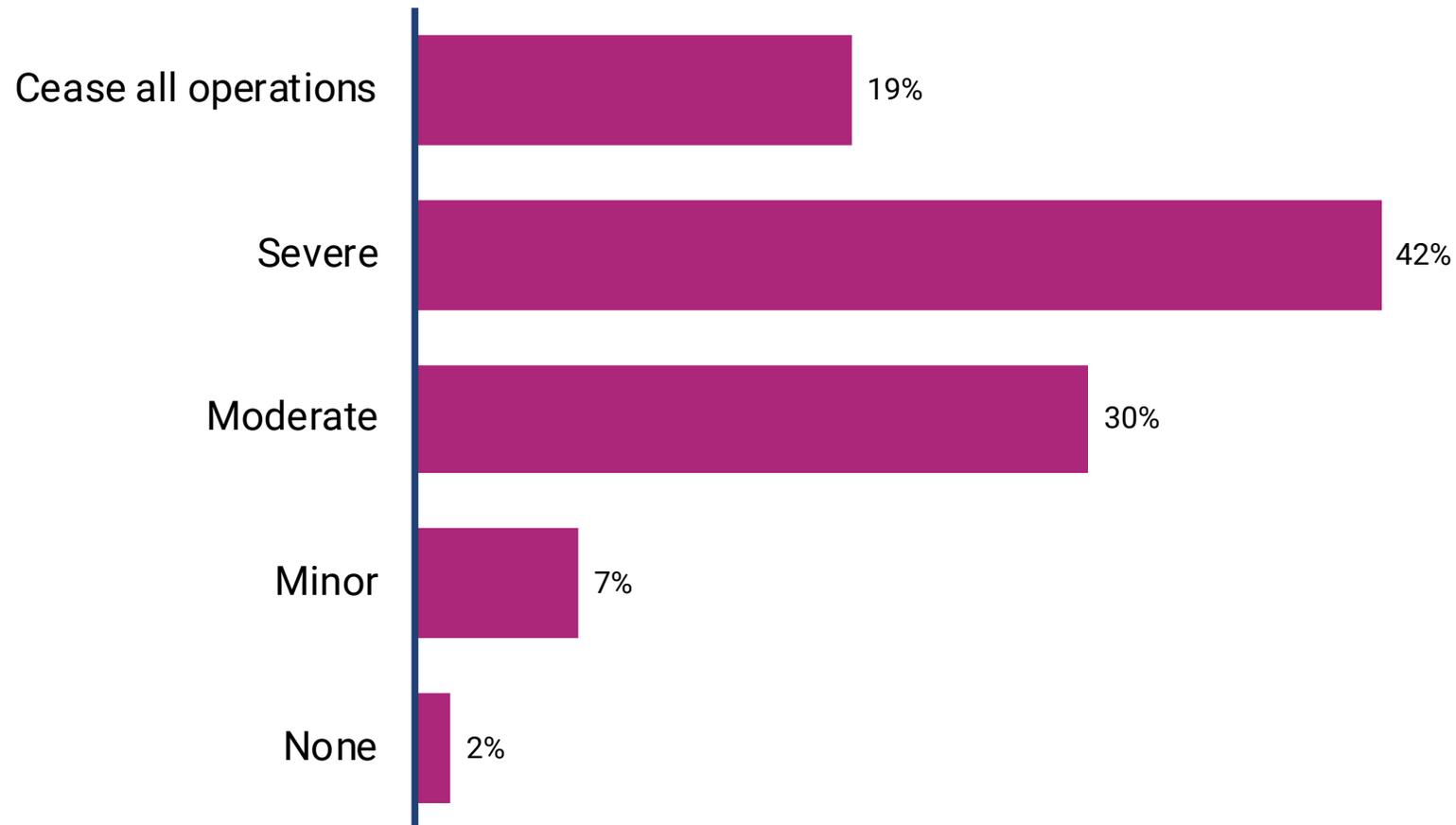
- 72% of NGOs surveyed reported facing moderate to severe disruptions, with 19% ceasing operations in the next 1-3 months.
- Almost half of all NGOs reported wanting technical guidance on risk management, deferment of operational costs, and relief funding to help them continue operations.
- 47% of NGOs reported difficulty securing future funding.

## Quote from survey respondent:

*“We have moved most of our operations online but are struggling to reach customers with products, considering the travel restrictions and self-isolation mandates in place. In addition, we are struggling to retain our funding.”*

# 72% of NGOs reported facing moderate to severe disruptions, with 19% ceasing operations

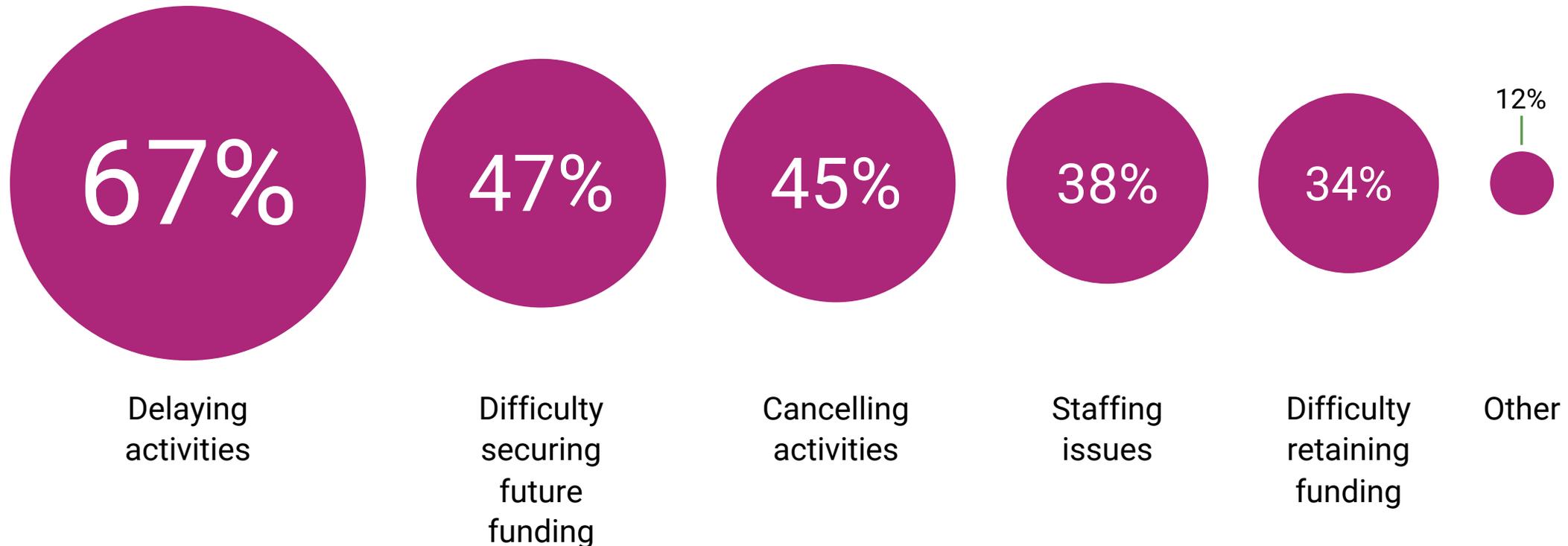
NGO-reported level of disruption in the next 1-3 months



# More than two thirds of NGOs reported having to delay activities

NGO-reported challenges due to COVID-19, % of respondents

*Note: Respondents can choose more than one option.*





# Donors: Main Findings

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- COVID-19 has dramatically impacted donor operations, with 63% of donors reporting delaying new funding decisions.
- 75% of donors reported adding new or enhanced funding mechanisms as extra support to existing projects.
- Addressing information gaps could further bolster donor confidence.

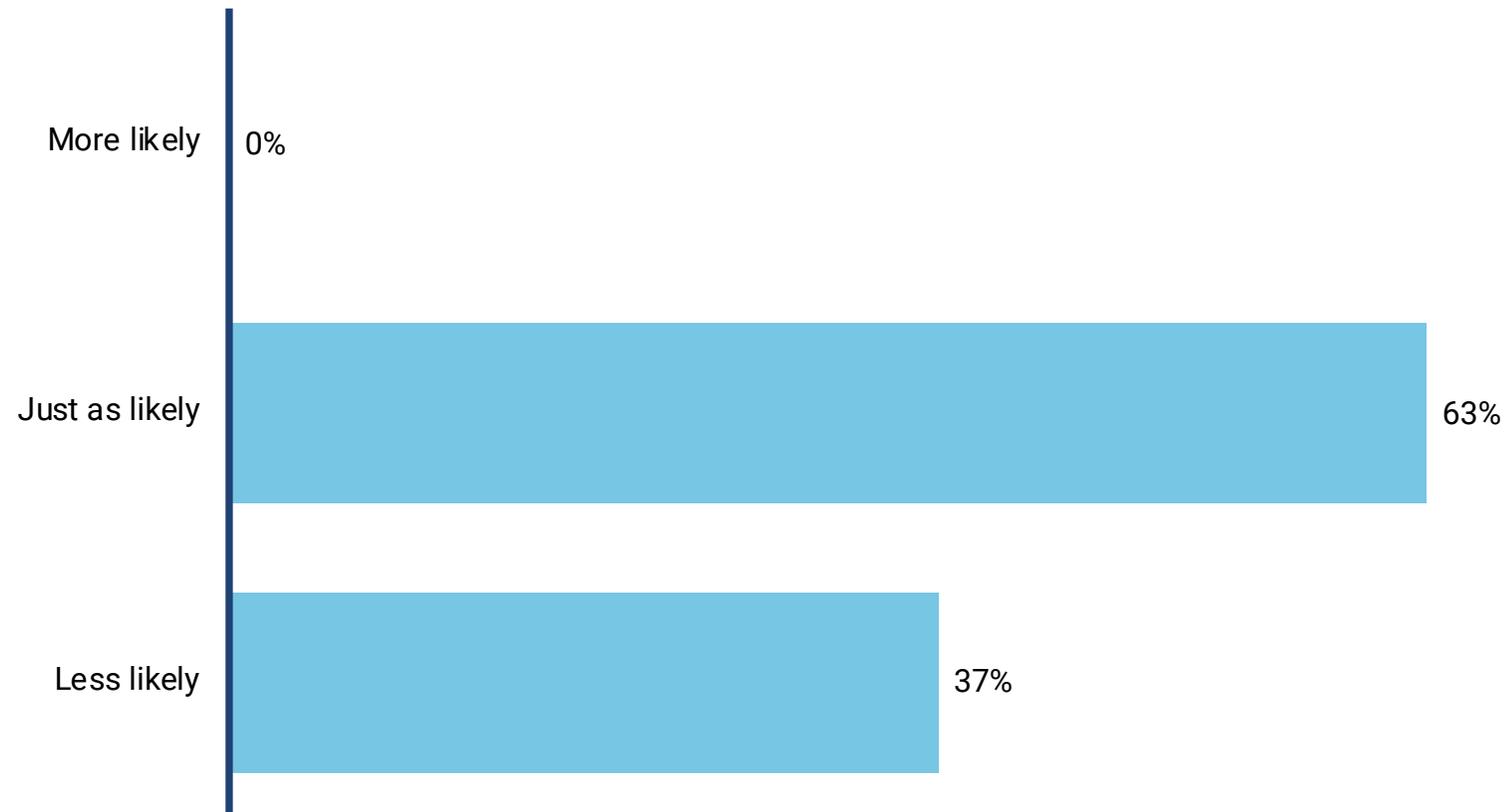
## Quote from survey respondent:

*“Our new incubation work is on hold as we are quite involved in emergency funding mechanisms for our existing portfolio companies.”*



# Donor support remains relatively strong

Donor-reported change in likelihood of funding clean cooking due to COVID-19





# Donors would benefit from additional information

Donor-reported desired support over the next 6 months

*Note: Respondents can choose more than one option.*

75%

Information-sharing initiatives, including among peers and with sector companies or networks

75%

Information about evolving market dynamics in the clean cooking sector

63%

Information about the risk management plans of current or potential projects



# Research Organizations: Main Findings (1/2)

- 54% of research organization respondents stated that they will require deadline extensions.
- 35% of research organizations stated that they need relief funding, and another 22% stated that they would like deferment of operational costs.

## Quote from survey respondent:

*“All field trials are currently suspended; work has been rescheduled so that desk studies, work planning, networking, and stakeholder analysis have been moved forward whilst field studies and trials have been put back. We have delayed the start of some new contracts. [For the long-term,] we [may] have to take more profound measures if the lockdown continues.”*



# Research Organizations: Main Findings (2/2)

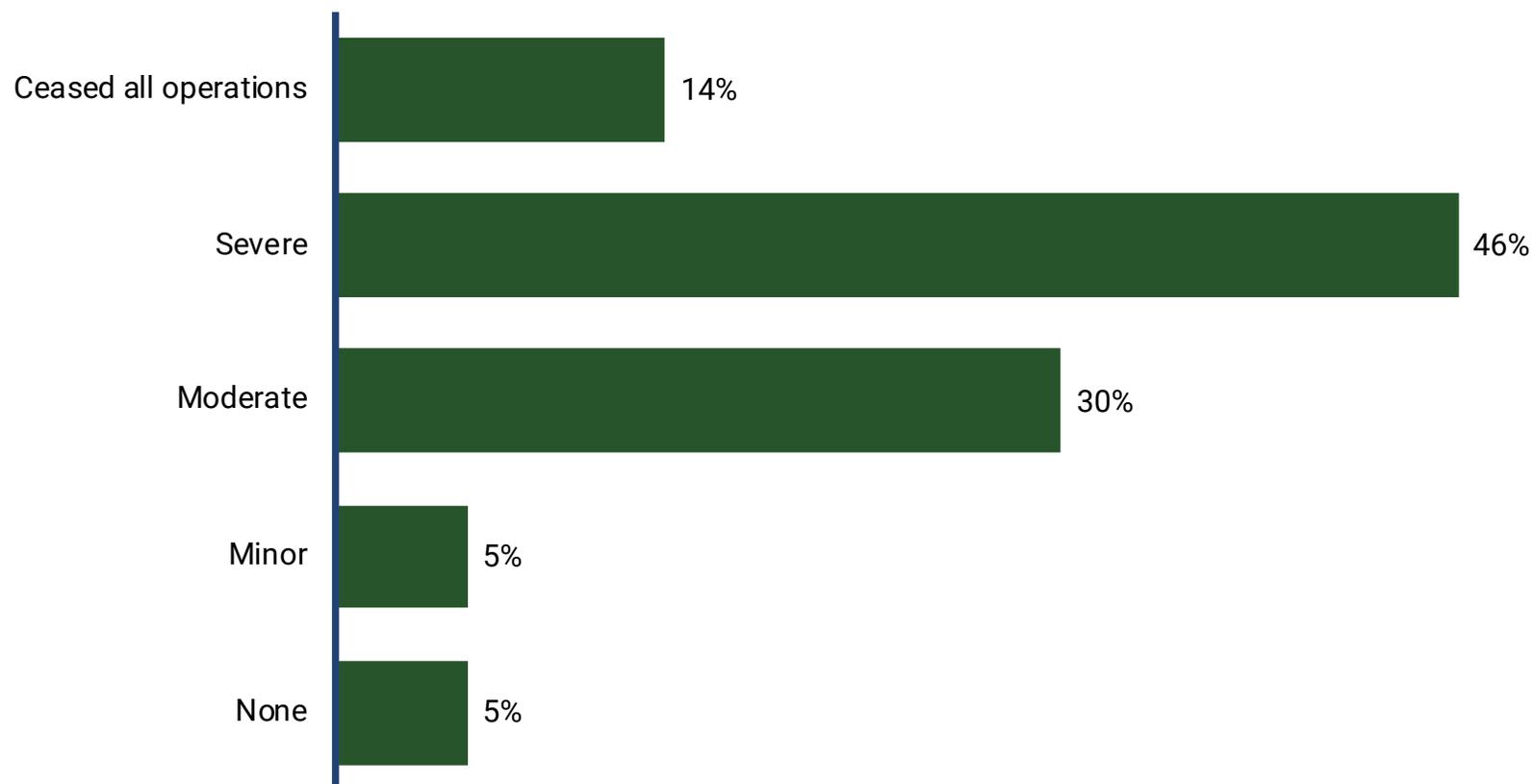
- 35% of research organizations stated that they would benefit from peer-to-peer knowledge sharing.
- 30% of research organizations reported an impact on their ability to collect time-sensitive data.

## Quote from survey respondent:

*“We are trying to understand how the energy poor are being affected by this pandemic, as that is important contextual information for proper interpretation of intervention outcomes. [We] have not yet considered health interactions between household air pollution and COVID, but [we are] considering it. There are physiological and behavioral channels (e.g., if people stay home in smoky environments for more hours).”*

# 76% of research organizations reported facing moderate to severe disruptions in their projects

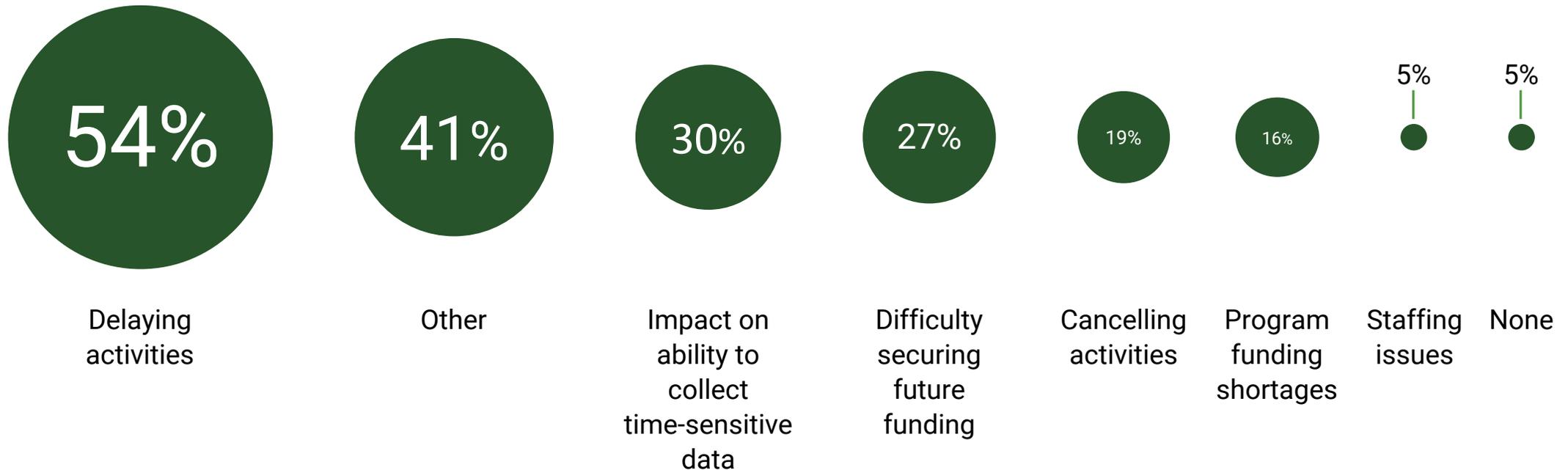
Research organization-reported level of disruption in the next 1-3 months



# More than half of all research organizations reported having to delay activities

## Research organization-reported challenges, % of respondents

*Note: Respondents could choose more than one option.*





# Investors: Main Findings (1/2)

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- The clean cooking sector has historically been underfunded, receiving less than 1% of the estimated finance needed to reach universal clean cooking access by 2030. COVID-19 is likely to exacerbate this challenge by further deterring private investors, most of whom report now being less likely to invest in clean cooking.
- 80% of investors said they have delayed financing decisions.
- However, closing information gaps could help address this funding disparity. 85% of investors reported that information about consumer ability to pay and other evolving market dynamics would be helpful.



## Investors: Main Findings (2/2)

- 65% of investors reported that information about the risk management plans of potential investees would be helpful.
- 55% of investors reported that information-sharing initiatives, including among peers and with sector enterprises or networks, would be helpful.

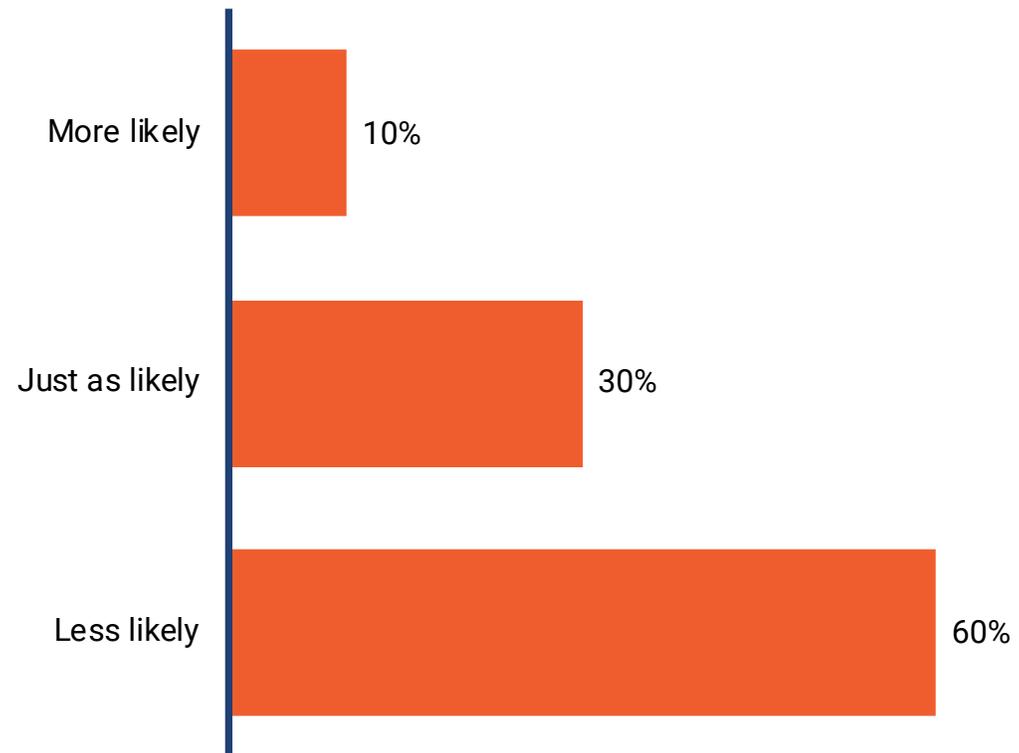
### Quote from survey respondent:

*“Some processes of loan requests for financing by customers have been changed to accommodate the group methodology, as clients can’t have group meetings during this pandemic period. Also, we are encouraging our clients to use our digital banking platforms to access their accounts, borrow, save in their accounts, as well as repay their loans.”*

# Most investors are now less likely to invest in clean cooking activities

- 80% of investors reported delaying financing decisions.
- 70% of investors reported significant impacts on portfolio companies.

Investor-reported change in likelihood of funding clean cooking due to COVID-19





# Contact Us

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For more information, please visit our COVID-19 Resource Page:

[www.CleanCookingAlliance.org/covid19.html](http://www.CleanCookingAlliance.org/covid19.html)



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