

MAIN FEATURE



Trends and perspectives for dairying in Africa

by Asaah Ndambi and Torsten Hemme, IFCN Dairy Research Centre, Kiel Germany

Dairying has been envisaged as a means to improve the nutritional status and income generation of African families. This has led to the implementation of many developmental projects in favour of dairying.

Different trends have been noticed in the dairy sectors of different countries over the past years. This article describes the dairy situation in Africa and trends from 1990 to 2004, as well as influential policies in the dairy sector.

In the year 2004, total cow milk production in Africa was 21 244 474 tons produced from a total of 46 million dairy cows, giving an average milk yield of 461 kg milk per cow over the year, which is only one fifth of the world's average yield. The top five African milk producing countries in terms of milk volume are Sudan, Egypt, Kenya, South Africa and Algeria. Geographically, the production volume is higher in countries at the eastern side of Africa and by those in the North.

Between the years 1999 and 2004, remarkable production increases (>5%/year) were noticed in countries like Egypt, Ethiopia, Uganda and Namibia. A considerable decrease in production of more than -2,5% per year was found in Eritrea, while Burundi, Congo, Senegal and Zimbabwe noticed smaller decreases. The other countries either had a small increase or almost constant production.

Between 1990 and 2004, the demand for milk and dairy products in Africa grew at an average rate of 4% *per annum*. Meanwhile production only grew at a rate of 3,1%, showing that the gap between production and demand is widening. Growth in consumption was pushed both by a growth in population (2,8% *per annum*) and a small growth in *per capita* milk consumption (0,8% *per annum*).

Milk imports also increased within the same period at a rate of 2,1% *per annum*. Milk exports, though very small (consisting of only 1,2% of total

production), increased rapidly at a rate of 7,8% *per annum*.

Only about 15% of the total milk produced in Africa is processed to standard products (cheese, yogurt, butter, dry products). More than 70% of total production goes through informal markets or is consumed on the farm. The *per capita* consumption of milk increased from 35 kg ME in 1990, to about 40 in 2004.

While the production of milk powder is very low, its consumption is quite high, since this is the most common form of imported milk. Consumption of milk and milk products in Africa is greatly influenced by traditions and cultures. The countries with the highest *per capita* consumption in sub-Saharan Africa are Sudan, Mauritania, Botswana and Kenya. Dairy trends and production systems can be greatly influenced by policies. The major policy areas of intervention on the African dairy sector are discussed below.

Genetic improvement

Three policy areas for genetic improvement are common. Those that improve on local breeds by selection and management; those that promote crossbreeding; and those that promote the replacement of local breeds with exotic ones.

The introduction of exotic breeds to Africa is usually governed by policies and most countries set control limits for semen or livestock imports, with the aim of preserving local genetic resources.

Promotion and marketing

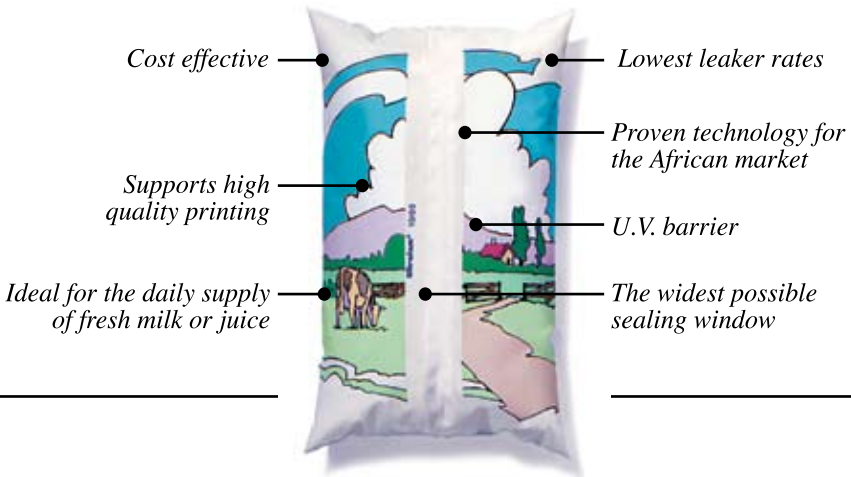
Marketing is a very important aspect of the dairy chain. The presence of nearby markets



Africa's leading milk and juice sachet!

Ultralam[®]

THE AD SHOP 1480 M&J RETAILER



ULTRAPAK Tel: +27 (0)43 745-2233 • Fax: +27 (0)43 745-2218 • ultrapak@iafrica.com

for milk and dairy products, is a key motivating factor for milk producers. Marketing policies are most convenient when they concur with policies that encourage milk consumption, especially in Western and Central African countries, where the *per capita* consumption is still very low.

Promotion of milk consumption through adoption of school milk programmes in southern and eastern Africa, has also led to great changes in the dairy sector. It is seen to improve on the livelihoods of milk producers and also on the nutritional status of benefiting school children.

Veterinary and extension services

In order to produce milk, farmers first of all need knowledge which they can apply in order to intelligently combine all available resources to produce milk of acceptable quality, while optimising profit.

Due to modernisation, technology is changing and more efficient methods of combining resources are evolving. African dairy farmers are mostly of low educational background and need

to acquire this knowledge through a simple and understandable approach.

Credit and farm inputs

The provision of credit to livestock farmers may promote the adoption of improved livestock technologies, especially in rural areas where most farmers lack tools. The formation of farmer groups and dairy cooperatives could be helpful, firstly because a group has better access to formal credits than individual farmers.

Secondly, external support or training from the public and private sectors is easier in groups. Finally, credit schemes could be easily organised within a group.

Milk import policies

In order to promote the local dairy industry, African policy makers tend to discourage the importation of milk and dairy products. The import situation could be aggravated in subsequent years as the WTO globalisation policies are aimed at reducing tariff barriers. Hence imported milk and dairy products will become cheaper.



Institutional support

If policies must be implemented to promote dairy systems, then institutions must be present to determine the most helpful policies and develop the best strategies for their implementation.

In eastern and southern Africa, dairy development is supported by a number of institutes:

- The International Livestock Research Institute (ILRI)
- National and international dairy boards, for example, Esada (Eastern and Southern African Dairy Association)
- The Kenyan Dairy Board
- The Dairy Development Authority (DDA Uganda)
- The Tanzania Dairy Board and Dairy Development Agency (DDA Ethiopia).

Therefore, dairy development must be accomplished through policies that can attract various stakeholders to invest in this sector. The initial step will be seeking the right policies. Nevertheless, this is not enough for dairy development, but also having supportive institutions and services for stakeholders, will go a long way in ensuring development. **DMA**