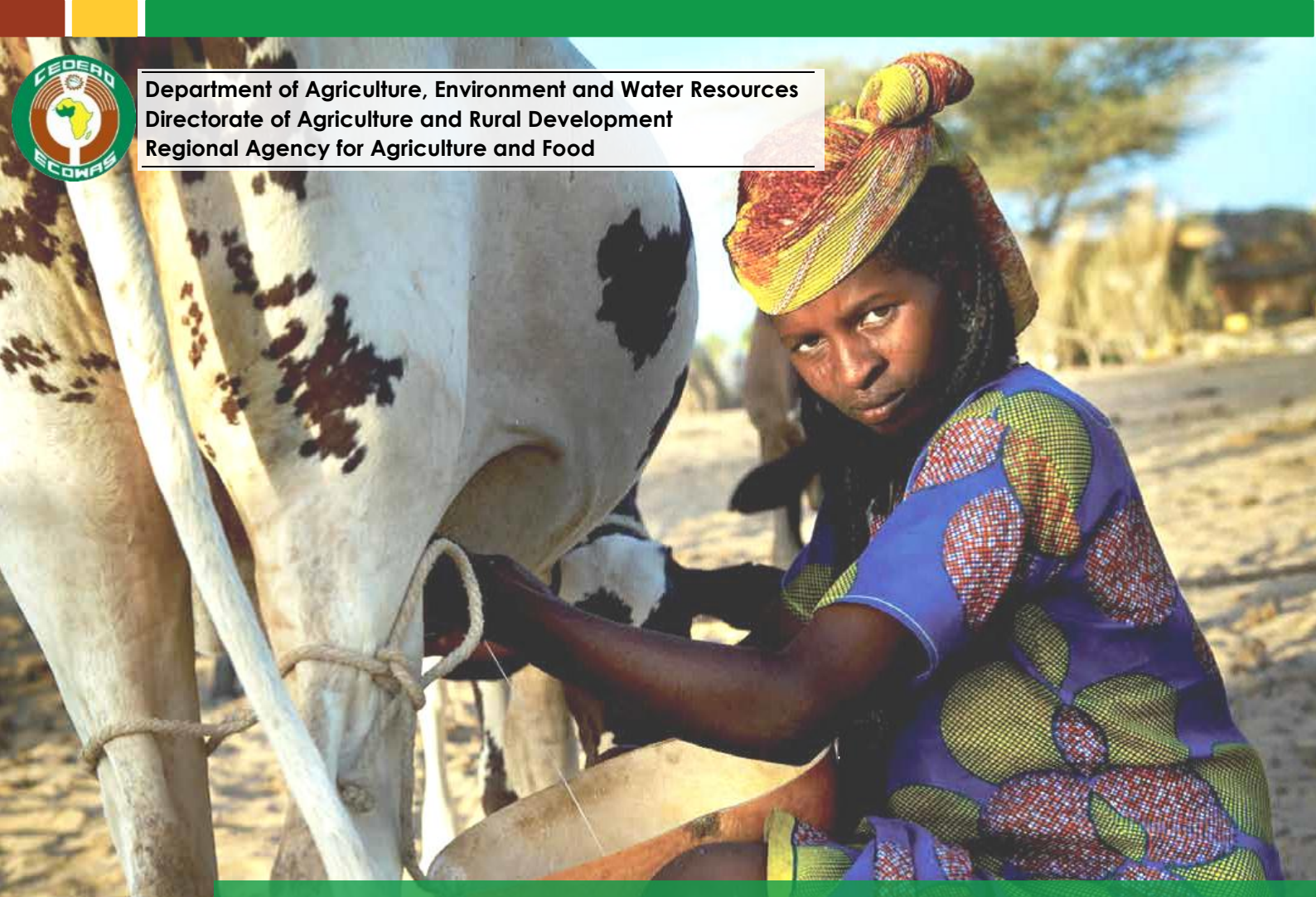




Department of Agriculture, Environment and Water Resources  
Directorate of Agriculture and Rural Development  
Regional Agency for Agriculture and Food



# Regional Offensive for the Promotion of Local Milk Value Chains in West Africa

## Strategy Document

June, 2020



# Strategy Document - Regional Offensive for the Promotion of Local Milk Value Chains in West Africa

June 2020

The formulation of the regional support strategy for the implementation of the ECOWAS Offensive for the promotion of local milk in West Africa was carried out according to an inclusive and participatory process that took place in several stages, under the initiative of the Department of Agriculture, Environment and Water Resources (DAERE) of the ECOWAS Commission and the regional networks of POs (ROPPA, RBM, APSS, CORET) which are particularly concerned about the situation of local dairy sectors.

In January 2016 in Abuja, Federal Republic of Nigeria, the Specialized Ministerial Committee on Agriculture, Environment and Water Resources starts the formulation process by deciding to devote a major initiative to milk, during the validation of the Regional Agricultural Investment Plan for Second Generation Food and Nutritional Security.

The year 2018 was devoted to the formulation of the framework note for the offensive, which made it possible to circumscribe the issue of the development of the local milk value chain in West Africa, by identifying the stakes and challenges, as well as the orientations. This framework note was then validated by a small steering committee. The validation of the note paved the way for the realisation of reference studies: a monograph on the milk sector in the fifteen States of the Community, plus Chad and Mauritania; a global synthesis; an in-depth monograph on the case of Nigeria; a study on the role of local milk in strengthening the resilience of pastoral populations; an analysis of the commercial implications of dairy policies and numerous decision support notes. This phase was marked by a very strong collaboration between ECOWAS, the socio-professional organisations (RBM, APSS, ROPPA, CORET) and international NGOs, notably OXFAM, CARE Denmark and SNV.

The organisation in June and July 2019 of a workshop to capitalise on good practices carried by States, socio-professional organisations and the private sector enabled to review many past and ongoing initiatives on the four dimensions of the value chain that are of concern to stakeholders at different scales: milk production; collection and processing; marketing and distribution and public policies deployed by the Community and States. The workshop also laid the foundations for a priority investment programme for the development of local milk value chains in West Africa. This programme capitalizes on relevant models with potential for rapid return on investment, job creation and strengthening household resilience.

On 29 May 2020, under the chairmanship of the ECOWAS Commissioner for Agriculture, Environment and Water Resources, the priority investment programme, which is the subject of this document, was validated. The regional validation workshop, held by videoconference, was attended by all ECOWAP/CADP stakeholders: the ECOWAS and UEMOA Commissions, the 15 Member States, the 12 PROs (ROPPA, RBM, APSS, AFAO, NANTS, CORET, COFENABVI, ROAC, WILDAF, FEWACCI, UFOA, PANEPAO), civil society (POSCAO, CARE, OXFAM, CARE, Local Milk Regional Campaign), specialised regional institutions (CILSS, SWAC/OECD, CORAF, FAO) and TFPs (SDC, AFD, EU, ADB).

This Strategy has been executed within ECOWAP 2025 implementation framework and the 2020 Annual Work Plan of the ECOWAS Directorate of Agriculture and Rural Development (DADR) and the Regional Agency for Agriculture and Food (RAAF).

The process of formulating the Strategy up to its validation was financially supported by the European Union.

The Rural Hub provided technical support culminating in the validation of this document.

## Financial Partner



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## Partners



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The ECOWAS strategic documents for the implementation of Decision A/DEC.11/01/05 adopting the ECOWAS Agricultural Policy (ECOWAP) in accordance with the Comprehensive Africa Agriculture Development Programme (CAADP) have set out the results of inclusive and iterative works. These are published for reference, information and development purposes for ECOWAS citizens and Member States, public, private, national, regional and international non-state actors.

Comments on this document can be sent to the ECOWAS Directorate of Agriculture and Rural Development, by mail or e-mail: [agric\\_ruraldev@ecowas.int](mailto:agric_ruraldev@ecowas.int)

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### **ECOWAS AGRICULTURE AND RURAL DEVELOPMENT DIRECTORATE (DADR)**

Placed under the supervision of the Commissioner in charge of the ECOWAS Department of Agriculture, Environment and Water Resources, the Agriculture and Rural Development Directorate, based in Abuja (Nigeria) is one of the five (5) constitutive directorates of the Department.

#### **Mission**

In accordance with Article 25 of the revised ECOWAS Treaty on Agricultural Development and Food Security, the mission of the Agriculture and Rural Development Directorate is to "help meet in a sustainable manner the food needs of the West African populations, to contribute to economic and social development and poverty reduction in Member States, as well as inequalities between territories, localities and countries" through the implementation of Decision A/DEC.11. /01/05 adopting the ECOWAS Agricultural Policy (ECOWAP) and all decisions of the ECOWAS management, steering, governance and decision-making bodies in the Agriculture and Food sector.

More specifically, these include:

- a. Defining, harmonizing, adopting and monitoring the implementation of policies, strategies, action plans, initiatives and regulatory mechanisms in the agro-sylvo-pastoral and fisheries sectors (ASPF);
- b. Defining, harmonizing and monitoring the implementation of regional strategies and initiatives in the field of rural development (land and agricultural infrastructure);
- c. Helping to ensure Health and Plant Health Security as well as Food and Nutritional Security;
- d. Ensuring regional coordination of Development and Applied Research in the ASPF sector;
- e. Ensuring the regional structuring of the ASPF sectors and contributing to trade negotiations in the ASPF sectors;
- f. Facilitating the harmonization of ASPF Information Systems and early warning systems;
- g. Negotiating and mobilizing external financial resources for projects, programmes and initiatives implementation in the ASPF industries;
- h. Developing and ensuring regional and international cooperation with technical institutions for agricultural cooperation and technical and financial partners in the ASPF sector.

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### **ECOWAS REGIONAL AGENCY FOR AGRICULTURE AND FOOD (ARAA)**

Placed under the supervision of the Commissioner for Agriculture, Environment and Water Resources, the Regional Agency for Agriculture and Food (ARAA) set up by Regulation C/REG.1/08/11 is a decentralised entity in Lomé (Togo), enjoying administrative and financial autonomy.

#### **Mission**

ARAA's mission is "to ensure the technical implementation of programmes and the regional investment plan and to contribute to the operationalization of the ECOWAS agricultural policy (ECOWAP) by working with regional institutions, agencies and partners".

More specifically, it is a question of:

- a. Implementing and technically executing ECOWAP, ECOWEP & PREAO projects and programmes
- b. Monitoring and Coordinating the implementation (by institutions, NGOs, ECOWAS partner agencies) of ECOWAP, ECOWEP & PREAO projects and programmes;
- c. Writing programme estimates for validation by the Supervisory Committee of the Regional Fund for Agriculture and Food (FRAA);
- d. Contribute to strengthening the capacities of stakeholders in the preparation of dossiers and the implementation of activities;
- e. Organize with ECOWAS Bank for Investment and Development (EBID) the approval and management bodies of FRAA;
- f. Evaluate the implementation of ECOWAP, ECOWEP & PREAO projects and programs;
- g. Ensure the effective and efficient financial and accounting management and administration of projects & programs.

En savoir plus : [www.araa.org](http://www.araa.org)

## Foreword



In 2005, the Economic Community of West African States adopted its agricultural policy, ECOWAP, after a long inclusive and participatory process. This policy is conceived as the reference framework for interventions in the agro-sylvo-pastoral and fisheries sector in West Africa, in line with the orientations of the Comprehensive African Agriculture Development Programme (CAADP). Milk is one of the five strategic products selected by ECOWAP to promote food security and sovereignty in West Africa. Indeed, milk is a major stake in the agri-food and nutritional economy in West Africa and has a strong impact on international and regional policies. Unfortunately, our region is experiencing a low development of this sector, which faces many challenges.

Over the last twenty years, according to ECOWAS statistics, the value of food imports to the region has increased 3.5 times, from US\$4.407 billion in 2001-2003 to US\$15.839 billion in 2012-2014. This increase in food dependency depends on the increase in imports of cereals, the value of which increased fourfold over the period, and those of dairy products, which jumped from US\$371 million in 2001-2003 to

US\$968 million in 2012-2014. Imports of milk and milk products are currently around 2.5 billion litres of milk eq/year in the ECOWAS zone, Chad and Mauritania, with a market value ranging from CFAF 475 to 500 billion.

It is within this framework that, with the support of partners and the commitment of the Community, ECOWAS has taken the initiative to set up an "Offensive for the promotion of local milk value chains", which aims at exploiting the regional potential to reduce the current deficit in the region. The strategy underlying the offensive aims to promote "A West Africa that emerges among the dairy basins of the African continent and gradually increases its contribution to regional trade in dairy products of Community origin". It aims to double the volume of local fresh milk production by 2030 to 10 billion litres per year.

The strategy, proposed by ECOWAS, capitalises on the major experiences developed by States, socio-professional organisations and the private sector in the region. It is part of a holistic approach to promote agri-food value chains to accelerate the transformation of the regional agri-food sector for shared growth and the well-being of the population. It is organised around four areas of intervention and a dozen or so components that make it possible to address, through specific actions, all the links in the local milk value chain in West Africa.

To implement the Strategy, a Priority Investment Programme (PPI Offensive Milk) has been designed in an inclusive and participatory manner with the main stakeholders, capitalising on successful experiences in the region, to select technical and economic models for the development of the different links of the local milk value chain. These economic models will be scaled up as a priority in the cross-border livestock and transhumance areas of the Sahel and West Africa and should contribute to the development of exchanges between Sahelian and coastal countries.

ECOWAS is grateful to the European Union for the support provided to ECOWAS in the elaboration of this strategy and to the Swiss Cooperation for its support in the elaboration of the Priority Investment Programme. These documents were the subject of broad consultations in their elaboration process and were validated by all the actors of the region.

**Sékou SANGARÉ**

**Commissioner**  
**Department of Agriculture, Environment and Water Resources**  
**ECOWAS Commission**

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## Acronyms and abbreviations

<b>Acronyms</b>	<b>Extension</b>
<b>ABD</b>	African Bank for Development
<b>AFAO</b>	West African Women's Association
<b>APESS</b>	Association for the Promotion of Livestock in the Savannah and the Sahel
<b>Care</b>	International Solidarity Association
<b>CILSS</b>	Permanent Inter-State Committee for Drought Control in the Sahel
<b>CIRAD</b>	Centre for International Cooperation in Agricultural Research for Development
<b>COFENABEVI</b>	Confederation of National Livestock and Meat Federations
<b>CORAF</b>	West and Central African Council for Agricultural Research and Development
<b>EBID</b>	ECOWAS Bank for Investment and Development
<b>ECOWADF</b>	Regional Fund for Agriculture and Food
<b>ECOWAP</b>	ECOWAS Regional Agricultural Policy
<b>ECOWAS</b>	Economic Community of West African States
<b>EU</b>	European Union
<b>FAO</b>	Food and Agriculture Organization of the United Nations
<b>FRDA</b>	Regional Agricultural Development Fund
<b>GB</b>	Global Bank
<b>GDP</b>	Gross Domestic Product
<b>IA</b>	Artificial Insemination
<b>NANTS</b>	National Association of Nigerian Traders
<b>OXFAM</b>	International Non-Governmental Organization
<b>PAU</b>	Agricultural Policy of the Union
<b>PCD</b>	Community Solidarity Levy
<b>PDDAA</b>	Comprehensive African Agriculture Development Programme
<b>PNIASAN</b>	National Plan for Agricultural Investment, Food and Nutritional Security
<b>PRIASAN</b>	Regional Plan for Agricultural Investment, Food and Nutritional Security
<b>RBM</b>	Billateral Maroobe Network
<b>ROPPA</b>	Network of Farmers' and Agricultural Producers' Organizations of West Africa
<b>SNV</b>	Netherlands Development Organization
<b>SOLANI</b>	Niger Dairy Society
<b>TEC</b>	Common External Tariff
<b>TS</b>	Statistic Taxes
<b>TVA</b>	Value Added Tax
<b>UP</b>	Pastoral Unit
<b>WADB</b>	West African Development Bank
<b>WAEMU</b>	West African Economic and Monetary Union



## Executive Summary

Milk is one of the five strategic products selected by the regional agricultural policy, ECOWAP, to promote food security and sovereignty in West Africa. The offensive for the promotion of local milk value chains aims to create an environment conducive to the exploitation of regional potential to reduce the level of dependence on imports from the international market. Imports of dairy products amount to more than 500 billion CFA francs per year.

The West African market for manufactured dairy products is dominated by non-African imports, whereas by simply doubling the productivity of local dairy cows, the region could increase the volume of its current production from some 5 billion litres to more than 10 billion litres by 2030. The region's imports have increased over the last fifteen years from 1.2 to 2.5 billion litres Milk Eq/year. These imports are largely favoured by very low taxes on certain products such as milk powder, difficulties in collecting local fresh milk, and an industrial fabric strengthened by the facilities for importing milk powder.

The strategy underlying the offensive is to promote "A West Africa that emerges among the dairy basins of the African continent and gradually increases its contribution to regional trade in dairy products of Community origin". It aims to double the volume of local fresh milk production to 10 billion litres by 2030.

It concentrates assistance, in particular investment and public policy measures, on four main areas: (i) improving the productivity of local dairy breeds; (ii) improving the collection and processing of local milk, (iii) improving market access for local dairy products, (iv) promoting a favourable environment for the development of local milk value chains. These four priorities are structured around a dozen components allowing specific measures to be implemented.

Special attention is given to tax incentives as levers for productive investment and as a guarantee of a secure outlet for local milk products. The strategy advocates the re-categorization of dairy products in the fifth band of the ECOWAS Common External Tariff. This re-categorization of dairy products could be accompanied by trade defence measures.

The strategy is mainly based on three economic models for the development of local dairy value chains: (i) models for securing pastoralism that promote production basins in which viable Pastoral Units allow the production and processing of local milk only; (ii) peri-urban models that promote intensification and a local collection system to supply processing units in urban centres. This model, which is developing in Sahelian countries, is driven by the urban market. The option for these two models stems from the desire to make foreign direct investment, particularly from major international agro-food groups, the levers of the local milk value chains. A set of incentives and regulations should lead the dairy multinationals to evolve in these models.

The implementation of the strategy involves States, regional integration institutions, socio-professional organizations and the local and international private sector. It will be financed mainly by the private sector, States and technical and financial partners.

## 1. Introduction

1. The agro-silvo-pastoral and fisheries sector still occupies a very important place in the economy of West African and Sahelian states. It is credited with contributing about 35% of the regional GDP. Excluding petroleum products, it provides the bulk of the region's exports. It employs more than 50% of the region's workforce, of which more than 60% are women. Similarly, this sector contributes more than 80% to the supply of food goods, more than 90% of which are generated by small family farms.
2. In order better to exploit the potential of this sector and make it a powerful instrument not only for the structural transformation of the region's economy but also for regional economic integration, the Economic Community of West African States (ECOWAS) has adopted an ambitious policy. Indeed, adopted in 2005 following an inclusive and participatory process, the regional agricultural policy, ECOWAP, is conceived as the reference framework for interventions in the agro-forestry-pastoral and fisheries sector in West Africa. It is the regional declination of the Comprehensive African Agricultural Development Programme (CAADP).
3. It is implemented not only through institutions that clearly distinguish between steering, consultation/consultation and technical implementation bodies, as well as innovative consultation mechanisms, but also through two types of five-year investment plans: The National Agricultural Investment, Food and Nutritional Security Plans (PNIASAN) and the Regional Agricultural Investment, Food and Nutritional Security Plan (PRIASAN).
4. The agricultural policy reference document and especially that of the review carried out in 2015, of the first ten years of the operationalization of the agricultural policy have highlighted two major trends in the agro-silvo-pastoral, fisheries, food and nutritional sector of the West African region: (i) a significant improvement in the food security of the populations, marked by a reduction in the frequency and severity of crises, and (ii) an increase in the region's external dependence for the supply of a certain number of foodstuffs.
5. Indeed, over the last twenty years, according to ECOWAS statistics, the value of food import from the region has increased 3.5-fold, from US\$4,407 million in 2001-2003 to US\$15,839 million in 2012-2014. This increase in food dependency is due to the increase in imports of cereals, the value of which increased fourfold over the period, and those of dairy products, which jumped from US\$371 million in 2001-2003 to US\$968 million in 2012-2014. Imports of milk and dairy products currently stand at around 2 500 million litres of Milk Equivalent/year in the ECOWAS zone, Chad and Mauritania, with a market value ranging from CFAF 475 to 500 billion.
6. The region's dependence, which tends to increase over the years in line with population growth, accelerated urbanization and changes in the food habits of a population whose income is improving, is becoming unsustainable for the economy and the food and nutritional security of the region. The situation is all the more difficult to sustain as the region has a significant potential for milk production.
7. It is to reduce this external dependence that ECOWAS, in the context of the implementation of its agricultural policy, has imposed on itself the promotion of five strategic products for the food security and sovereignty of the region: cassava (root); rice and maize (cereals); meat and milk (animal products). For each of these products, the Community is planning a major initiative to exploit the region's productive potential, reduce imports and even position itself as a net exporter on regional and international markets.
8. ECOWAS began in 2018 the process of defining a regional offensive to promote local milk value chains after rice, a cereal for which an offensive was launched in 2015<sup>1</sup>. The process, which is intended

<sup>1</sup> The results obtained by the offensive for the sustainable revival of the West African rice economy are significant. Production is experiencing remarkable growth driven by productivity gains in many countries. According to ECOAGRIS data, the region has been close to 20 million tons of paddy since 2017.

to be inclusive and participatory, consists of several phases:

- a. The Specialized Ministerial Committee on Agriculture, Environment and Water Resources gives the starting point for the formulation by deciding to devote a major initiative to milk, during the validation of the Second Generation Regional Agricultural Investment, Food Security and Nutritional Security Plan in January 2016 in Abuja in the Federal Republic of Nigeria.
- b. The year 2018 was devoted to the formulation of a concept note for the offensive, then to its validation by a restricted steering committee. The validation of the note paved the way for the realization of the reference studies: a monograph on the milk sector of the fifteen States of the Community, plus Chad and Mauritania; an overall synthesis; an in-depth monograph on the case of Nigeria; a study on the role of local milk in strengthening the resilience of pastoral populations; an analysis of the commercial implications of dairy policies and numerous decision support notes. This phase was marked by a very strong collaboration between ECOWAS, socio-professional organizations (RBN, APESS, ROPPA) and international NGOs, notably OXFAM, CARE Denmark and SNV.
- c. The organisation in June and July 2019 of a workshop to capitalise on good practices carried by States, socio-professional organisations and the private sector. This workshop provided an opportunity to review many past and current initiatives on the four dimensions of the value chain that are of concern to stakeholders at different scales: milk production; collection and processing; marketing and distribution; and the public policies deployed by the Community and the States to improve the environment of the dairy sectors. This workshop also helped lay the foundations for a priority investment programme for the development of local milk value chains in West Africa. This programme capitalizes on relevant models with the potential for a rapid return on investment, massive job creation for young people and women, and strengthening household resilience.

## 2. Issues and Challenges of the West African Dairy Sectors

9. Milk plays a very important economic, social and food role in all West African countries. Cow's milk represents between 20 and 40% of the income from livestock for many households in Sahelian countries. The local dairy sector directly provides employment and income to many categories of actors: farmers and dairy employees, collectors of raw milk, dairy product sellers, input and service providers. The sector also helps to combat gender inequalities, as it provides women with income that enables them to live a more dignified life.
10. In recent years, milk has contributed to the densification of the economies of many territories and countries by promoting the emergence of new agri-food value chains. Indeed, one of the highlights in recent years has been the emergence of value chains around local dairy sectors. The phenomenon is marked by the promotion of multiservice collection centres, mini dairies and large processing units in some countries, particularly in the Sahelian countries. This has resulted in territorialized agri-food systems clearly highlighting a model of dairy development structured by collection centres and mini-dairies.
11. However, the West African sectors are increasingly overwhelmed by imports of dairy products, particularly fat-reduced milk powder, as a result of a combination of three factors:
  - a. The shortcomings of local production systems (low productivity, low and high seasonality of domestic supply, collection difficulties, linked to the extreme fragmentation of supply);
  - b. Trade policies laxity which enshrine a broad opening of the regional market, with a very low level of protection, particularly for certain products such as milk powder. This market opening also results in massive imports of products of often dubious quality;

- c. And finally the aggressiveness of multinationals, which in search of a regional market, are setting up processing units and distribution arrangements based on imported milk powder as a raw material.

### 2.1. Low local production, unevenly distributed across seasons and countries

12. West Africa and the Sahel have significant potential in terms of animal resources. The regional livestock population is estimated at some 460.1 million head, including 103.8 million cattle, 144.7 million sheep, 199.6 million goats and 12 million camels in 2017 according to FAO, 2018. This livestock, which is growing at a rate of about 3% per year, is unevenly distributed among the countries of the region.
13. The main cattle numbers are in the Sahelian countries: Chad<sup>3</sup>, Mali, Niger and Burkina Faso. But the largest cattle herd in West Africa is that of Nigeria. Considering their animal numbers (all species combined), it appears that Mali, Chad, Niger and Nigeria are potentially the largest milk producers in the zone. For cow's milk alone, these countries would produce between 300 and 500 million litres of milk per year, each. Senegal, Guinea, Burkina Faso and Benin are in an intermediate situation with a total milk production of between 150 and 200 million litres of cow's milk per year. The other countries each produce less than 100 million litres per year.
14. Regional milk production is estimated at some 6.5 million tonnes annually (FAO Stat, 2017), of which 59.4% is cow's milk, 20.8% goat's milk, 12.1% sheep's milk and 7.7% camel's milk, i.e. an average per capita production of 16 litres for an average per capita consumption estimated at 42.6 litres milk per year, far from the standards recommended by international institutions (150 to 200 litres.). However, per capita consumption is higher in the Sahelian countries, even if most of the demand comes from coastal countries that are home to the largest urban agglomerations in West Africa and the Sahel.
15. The demand for milk and dairy products is constantly growing under the triple effect of the the regional population growth, its increasing urbanization and, above all, changes in the eating habits of a growing fringe of consumers. This demand is only partially satisfied by local supply, which, although it has recorded some performance in recent years, remains low.

#### 2.1.1. Productivity challenges

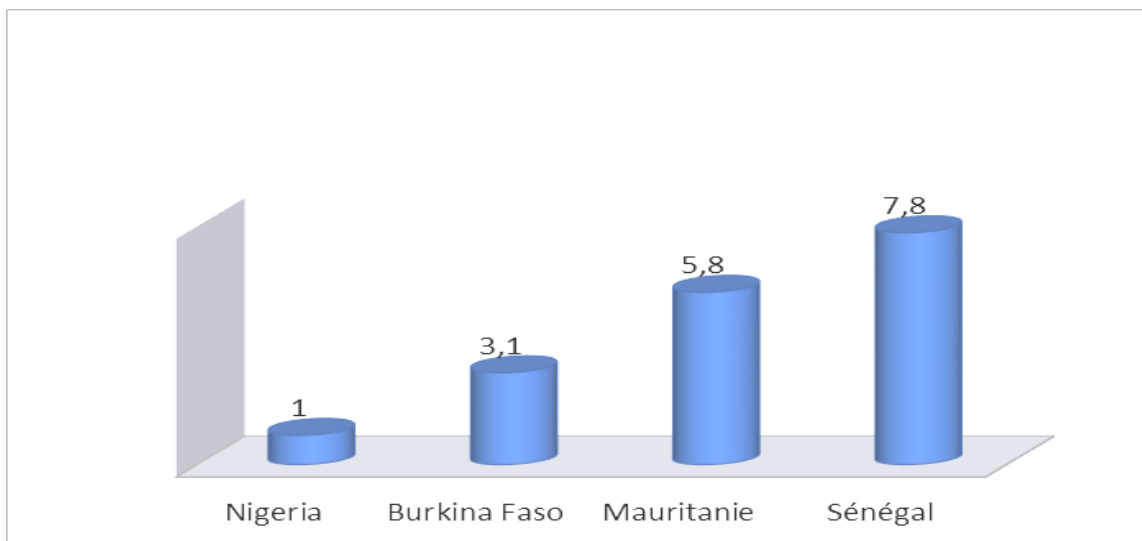
16. The low productivity of livestock and dairy cows. Indeed, some local breeds of cattle and other sheep and goat species have low dairy potential. This situation is due to several factors of a genetic nature. It is also linked to the difficulties of access to quality feed in sufficient quantity at certain times of the year, and to problems of access to adequate veterinary care by the livestock.
17. Access to pasture is becoming increasingly difficult because of strong competition for natural resources. Increasing climate variability and change with its effects on natural resources, the continuous evolution of agricultural fronts contributes to the scarcity of good quality pasture for animals. Access to veterinary health care is also difficult in relation to two major constraints: (i) the sometimes high prices of veterinary products and (ii) the concentration of practitioners in urban areas, to the detriment of rural areas where most of the livestock are located.
18. The result of this double constraint is a low productive capacity of the animals. Local cattle breeds have a productive capacity of only 0.5 to 2 l/cow/day. In Mali, for example, "marketable milk production is estimated at an average of 110 litres per 180-day lactation" (GRET, 2016). In Niger, some breeds such as Zebu Goudali have an average milk production potential that can vary between 1000 and 1100 kg in 230 days. On average, the milk productivity of cows in West Africa is of the order of 2 to 3 litres per day compared to 25 to 35 litres per day in Belgium for example. Similarly, milk production is irregular and strongly marked by a large seasonal variation. While it is at its highest during the wintering periods in connection with the abundance of pasture, it is very low during the dry season (displacement of herds and scarcity of pasture).

19. The contribution of intensive and semi-intensive farming systems to the local supply of fresh milk is still small but promising. Genetic improvement through cross-breeding of local breeds with those sometimes imported from the international market makes it possible, under control of certain animal diseases, to improve productivity significantly. In this context, one of the major challenges and stakes of the region is the significant improvement of the productivity of domestic dairy cows and the milk production of local dairy cows.

### 2.1.2. *Milk Collection Difficulties*

20. The collection of fresh milk is one of the major challenges of the West African dairy sector. Indeed, the extreme atomicity of supply and the weakness of infrastructure and conservation equipment make it particularly difficult to collect and conserve local milk, a highly perishable product. In recent years, socio-professional organizations and private companies have promoted multiservice collection centres, sometimes with the deployment of incentives to encourage the collection of local milk. The results, although interesting, are still far from the expectations of stakeholders. Indeed, the volumes collected, although varying from country to country, are very low, in proportion to the domestic supply displayed. According to available data, the proportion of domestic production that is collected is estimated between 1% in Nigeria, the country with the lowest rate, and 7.8% in Senegal, the country with the best regional performance. At the regional level, less than 3% of some 6 million tonnes of fresh milk produced in the region is collected for processing by mini and large dairies.

**Fig. n°1: Breakdown of local milk collected by dairies**



Source: According to FAOSTAT (2018), Nigerian Dairy Development Programme (2017)

21. The problem of collection is symptomatic of the difficulties of the local dairy sectors, locked in a vicious circle, where the low level of production and its extreme atomicity do not favour large-scale collection for industrial processing, which in turn prevents productivity improvement and facilitates massive milk imports, which ultimately does not favour the development of truly inclusive value chains. Despite the efforts made in recent years, collection is the main bottleneck in local milk value chains. This situation has a two-fold consequence: (i) a weak development of the local industrial fabric, (ii) the operation of an embryo of processing units based on a massive use of powdered milk as raw material. Supplies of milk powder for industrial processing account for the bulk of milk product imports into the Community.

### 2.1.3. A Local Milk Weakly Promoted

22. The promotion of milk is the soft underbelly of the local sectors. In relation to the low volume of quantities collected, the West African dairy industrial fabric is generally weak and poorly structured. It comprises three more or less interconnected segments.
- a. **The artisanal segment**, which provides roughly processed, non-standardized and standardized products, but marketed on local rural and urban markets. It is developed in livestock ponds and is mainly run by women, both pastoralists and women from neighbouring communities. It provides local cheeses, yoghurts sometimes mixed with cereals, DEGUE. This segment uses most of the milk produced locally, but also uses imported milk powder during the dry season.
  - b. **The second segment** is made up of mini dairies that are promoted by private sector associations, cooperatives bringing together various categories of actors and local or foreign investors. This segment of the industrial fabric is growing in importance, in terms of the growing role it plays in the development of local milk, as well as the forms of relationship it is developing with farmers and other service providers. It structures contractual relations with multiservice collection centres, whose promotion it supports and assists in their operation. There are many mini dairies in urban centres and in some farming basins. Most of them operate using milk powder imported from the international market. There is significant potential for the development of this segment if efforts are made to improve the collection of local milk.
  - c. **The large milk processing units**, which are represented by the public enterprises that the States, especially the Sahelian ones, set up in the 1970s and those promoted by the private sector, especially the multinationals. Apart from Nigeria, which has important units installed by the ARLA Cooperative Group, Friesland Campina, etc., it is in Senegal and Mauritania that we find experiences that develop partnerships between producers and industrialists. These are mainly the cases of Laiterie Du Berger (LDB) in the Dagana and Richard Toll basin), in Senegal and the group (Tiviski in the Trarza, Brakna and Gorgol regions in the river valley) in Mauritania, of SOLANI with the collection centres of Hamdalaye and Kollo, in Niger. In recent years, many multinational companies have set up operations in West Africa, mainly in coastal countries with a high concentration of consumers and to some extent in hinterland countries, notably Mali and Burkina Faso.
  - d. The interest of these groups in valorising local milk is still low. For example, with an installed capacity of 1,500,000 litres per day, the Friesland Campina Company in Nigeria collects only about 6,000 litres of local milk. *Malilait* in Mali has a capacity of 60,000 litres per day, but collects only 15,000 litres, i.e. 25% of its daily needs. *Laiterie du Berger* in Senegal has an installed capacity of 15,000 l/d but collects only 3,000 litres, or 20% of its daily needs. The Mauritanian Tiviski group, which records collection peaks of 40,000 l/d, with an annual average of between 15 and 20,000 l/d, is an exception to the rule. Only 2 dairies use exclusively local milk: Fada N'Gourma<sup>2</sup> Dairy in Burkina Faso and Tiviski Dairy in Mauritania. Major efforts must be made to create the necessary conditions for collecting most of the local milk, including major investments in conservation infrastructure to limit the losses that the region is currently experiencing.

<sup>2</sup> The Fada N'Gourma dairy is said to be in the process of being privatized

#### 2.1.4. An Imported Dairy Products Dominated Domestic Market

23. Although it represents a small share of the international market, West Africa represents a major opportunity for the marketing of dairy products: strong population growth, accelerated urbanization, improvement in the incomes of a growing fringe of consumers. However, individual consumption has changed little since independence, ranging between 50 and 100 kg/year in Sahelian countries and less than 20 kg/year in coastal countries (Corniaux et al., 2018). It is, however, driven by population growth, which makes the West African market solvent and which must therefore face a structural deficit in dairy products resulting from low domestic production. The region has recourse to imports from the international market to make up for a deficit that has been growing over the years.
24. Dairy imports have increased over the last fifteen (15) years from 1.2 to 2.5 million tons of milk equivalent (FAO, 2018) for an estimated value between FCFA 475 and 500 billion. Milk powder, increasingly fattened with vegetable fat, constitutes the bulk (nearly 90%) of these imports. Concentrated milk comes in second place, with significant importance in Benin, Burkina Faso, Liberia and Togo. However, the trend in imports of condensed milk is downward, in favour of milk powder. Nigeria alone accounts for almost 50% of the volume and value of imports. With annual expenditure of around FCFA 50 billion, Côte d'Ivoire, Senegal, Ghana and Mauritania appear to be major importers, which is of course facilitated by their port facilities and low customs duties taxation. The landlocked Sahelian countries of Mali, Burkina and Niger also import large quantities of dairy products, especially milk powder.
25. The strong presence of imported products contributes to the segmentation of the regional market. The products introduced by the multinationals benefit from a good quote favoured by advertising on the one hand, and their standardization, even if it is always difficult for consumers to know their real composition, on the other hand. However, local fresh milk is known to a certain extent and would certainly be more popular if its availability were reinforced by a price corresponding to psychological prices (between 375 and 450 F per litre depending on the town targeted). In Senegal, curdled milk associated with cereals has a large market in Dakar. Clarified butter is a niche product because it is rare in urban markets where demand is very strong. This breakthrough shows that there is a real challenge in promoting local products, which for the moment do not benefit from a favourable environment.

#### 2.1.5. A largely Import Friendly Environment

26. Although milk has been identified as a strategic product to be promoted for food security and sovereignty, the sector is far from benefiting from an environment conducive to productive investment. Public policies favour dairy imports over investments to develop local value chains. The Common External Tariff (CET), the single fiscal instrument of the ECOWAS Customs Union, has two shortcomings in this area. It applies not only low rates of customs duty for most dairy products, but also discriminates against milk powder according to the way it is packaged.

**Table 1 : Customs duty rate applied to products by the ECOWAS CET (excluding PCD and TS)**

Product wording	Categories	Applied rate
( Milk and cream powder (sale in pharmacies)	1	5%
Milk and cream powder (packages of more than 25 kg)	1	5%

Condensed milk - 1.5% m.f.	1	5%
Butteroil and industrial butterfats	1	5%
Milk and cream powder (packaging of - 25 kg)*.	2	10%
( Concentrated milk + of 1.5% m.g. (packaging of + of 25 kg)	2	10%
( Concentrated milk + 1.5% m.g. (packaging of - 25 kg)	3	20%
Milk and cream (not concentrated, not containing added sugar)	3	20%
Butter and cheese	3	20%
Yaourts	4	35%

Source: TEC ECOWAS 2017 Revised Sydam World Libelle version (CI Customs website) (\*) whole milk powder and powdered milk powder re-fattened with vegetable fat, cited by Corniaux et al, 2018.

27. This level of customs duties taxation is a godsend for European industrialists to strengthen their presence in West Africa, particularly on the outskirts of the large sprawling urban agglomerations. According to Corniaux et al., more than "80% of these companies use exclusively milk powder and nearly 50% of them are specialized in repackaging this powder from bulk imports, thus ensuring taxation at only 5%". It is on this legislation that European companies and many local mini-dairies are relying on to develop their dairy activities in West Africa. While it is undeniable that these companies generate employment for young people, their strategy does not allow them to promote true inclusive value chains, which are catalysts for the development of this product.
28. All in all, the stakes and challenges of the West African dairy sectors are numerous. They highlight the need to deploy appropriate actions and measures to boost value chains.

### 3. Advantages, Opportunities and lessons learnt from ongoing experiences

#### 3.1. Local dairy industries advantages and opportunities

29. The local dairy sectors have immense assets and opportunities that are still largely under-exploited, among which we can mention
30. Two assets mainly can be focused on among others:
- The importance of the ruminant livestock.** In 2016, West Africa's ruminant livestock was estimated at 73.4 million cattle, 110.3 million sheep, 157.1 million goats and 4.6 million camels (Kagone, 2019). The growth rate of this herd is currently estimated at between 2.5 and 3% per year. An eventual increase of 30-50% in the milk productivity of West African dairy cows would improve the region's self-sufficiency in milk by 90%. This is a potential that requires appropriate policies in terms of investment to improve its yields.
  - Changes in the regional market,** which is credited with 400 million consumers by 2025. In addition to the increase in the population, which is growing at a rate that allows it to double between the ages of 25 and 30, West Africa is undergoing a major change in its population. Urbanization is accelerating, with the development of sprawling cities, which are home to consumers whose purchasing power is constantly improving. As a result, there is an increasingly solvent regional market with the capacity to support the development of local dairy sectors. This market is the first natural outlet for local products, provided that it benefits from appropriate protective measures which guarantee Community preference for domestic products.



## 31. Two opportunities can be mentioned:

- a. The political will of public decision-makers, both at national level and at the level of the regional economic communities, has been a reality for some years. Thus, all the Sahelian countries where livestock farming is an important component of the national economy have at least a strategy and, at best, policies for the development of local dairy sectors. At the regional level, the West African Economic and Monetary Union (WAEMU) has adopted a detailed plan for the development of dairy sectors.
- b. ECOWAS has made it a strategic product within the framework of the operationalization of ECOWAP and its plan for the transformation of livestock systems. Socio-professional organizations and international NGOs operating in West Africa are not only advocating but also investing in the promotion of local milk sectors, one of their priority areas of intervention. However, this declared political will needs to be translated into concrete actions in terms of incentives and substantial investments to ensure a favourable environment for the development of local milk value chains.
- c. The second opportunity is represented by the growing interest of large international firms in the West African dairy market. This interest is currently reflected in the establishment of large processing units and vast distribution networks for dairy products. This race to conquer the West African market is proof of its solvency. However, this opportunity can only be fully exploited by the local dairy sectors if they benefit from special incentive conditions. Indeed, the current level of protection of the regional milk market favours massive imports of milk powder that supplies the various industrial units installed in West Africa. Less than 20% of these units collect local milk. In short, at the present time, the strong rush on the West African market is more of a threat than an opportunity. Relationships between large groups and small local dairy companies, links that should result in win-win partnerships on the one hand and transfer of technology and know-how on the other, are still very loose. States have not yet provided a decisive and adequate framework for this rush by multinationals on the national<sup>3</sup> market.

### 3.2. Local milk value chains promoting ongoing experiences and lessons learned

32. The local dairy sectors have benefited from numerous initiatives by the States, the private sector, socio-professional organizations and other associations that concern the main links: production, collection, processing and marketing. These experiences carry the seeds of change.
  - a. Improving the productivity of West African dairy cows is a constant feature of public policies and the concern of the various actors, particularly States and professionals in the sub-sector. Within this framework, several strategies are deployed in all countries. They range from the experience of the large ranches promoted during the 1970s and 1980s to the creation of state farms and the intensification of peri-urban livestock farming systems. The performance of ranches and state farms as tools for improving production and productivity is mixed. Almost all of them have disappeared from the landscape of livestock intensification systems. In recent years, however, semi-intensive and intensive peri-urban livestock farms promoted by private operators have emerged. While semi-intensive farms still combine the mobile system of proximity and sedentary farming with a minimal supply of feed supplements, intensive farms use more sophisticated methods: importing more efficient breeds of cows, insemination, crossbreeding, all in a context of continuous improvement of livestock feed and veterinary care. This strategy, although still a minority in livestock farming systems, is increasingly developing in the peri-urban areas of Sahelian countries. It makes it possible to significantly improve the productivity and production of local milk and to guarantee to some extent the supply of

<sup>3</sup> Specific measures should be set out as guidelines governing the presence of dairy multinationals on the regional market: local milk collection quota, standard of products placed on the market, preference for local products through VAT exemptions, etc.

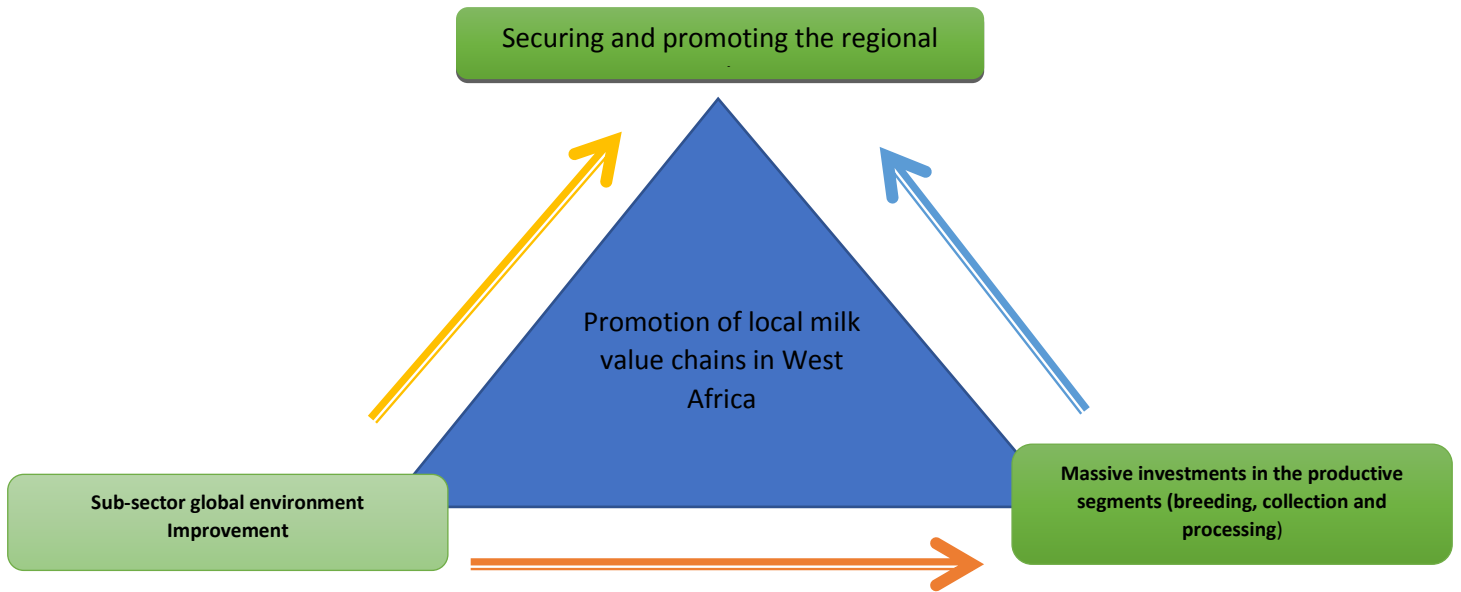
processing units. In many cases, it has made it possible to almost double the milk yields of suckler cows. Peri-urban pilot farms are credible alternatives to improving dairy cow productivity, if arrangements are made to address the main problems they face: land, feed, veterinary care and environmental nuisance.

- b. The development of intensive and semi-intensive systems is increasingly linked to efficient fresh milk collection systems. These systems often take the form of multi-service complexes governed by contractual agreements between the various actors involved: farmers, collectors, promoters of mini-dairies and large-scale industrial units. Multi-service collection centres set up a number of facilities: animal feed and veterinary products in exchange for milk. Some countries, notably Nigeria, are pushing incentives through the development of social services, medical centres, schools and other infrastructure attractive to the families of herders, to "stabilise" a large number of herders and animals in a radius that facilitates milk collection and supply to processing units. The development of these collection centres is often handicapped by the inadequacy, or even non-existence, of structural infrastructures (energy, adequate means of transport, conservation materials). The success of some collection centres such as that of Hamdalaye in Niger, where SOLANI is the main client, was at a time when the centre was obliged to limit the volumes collected. Similarly, the relative success of the Tiwiski group in the Islamic Republic of Mauritania is due to the extent and quality of its milk collection network and the incentives it has developed for collectors.
  - c. The processing component also records many experiences carried by mini and medium dairies established in production basins and peri-urban areas, mainly in the Sahelian countries. Burkina Faso had some 200 mini dairies in 2017; Mali more than 300 of varying size. Some mini-dairies have become highly professionalized to benefit from a common label, such as the "**FaireFaso**" label that professionals in Burkina have adopted to promote dairy products incorporating exclusively local milk. Standardization and standardization are the Achilles' heel of small and medium-sized dairies, segments of the industry largely owned by the private sector or local associations. They undermine the performance of the units, in the absence of a rigorous national and regional policy fully internalized by value chain professionals. At this level, it is important to take up the challenge of interconnection between the large groups setting up in Africa, a phenomenon that cannot be ignored, and small and medium-sized enterprises. How large companies can be credible partners for small businesses without stifling them. Many experiences in Northern Nigeria with ARLA, show that a win-win partnership is possible between local companies and large international groups. It is at this level that public policies must be proactive.
  - d. The last dimension on which there is food for thought concerns the business climate in the livestock and dairy sub-sector. Both at the regional and national levels, the public policy measures implemented seem to be more favourable to consumption than to production. In fact, the Common External Tariff of the ECOWAS Customs Union, which emphasises nutritional and public health concerns, facilitates imports of certain categories of dairy products, particularly milk powder, through a very low customs duties taxation system. Within the countries as a whole, there are very few or no safeguard measures that give preference to local products in general, and to those resulting exclusively from local milk in particular. Worse on health issues, consumers are very poorly informed about the quality of the products offered to them, which incorporate many substances whose harmlessness to human health has not been formally established. Precautionary measures are to be taken in this area.
33. All in all, West African dairy chains can still constitute one of the means of strengthening the resilience of vulnerable groups, improving food and nutritional security, income, job creation and empowerment of young people and women. They can also contribute to the strategic positioning of

the region on the continental scene, while helping to consolidate the regional market and the regional integration process. Indeed, the sectors have enormous potentialities and assets, as well as the opportunities available to them, which, however, can only be clearly enhanced if a consensual and inclusive policy or strategy that helps to remove the bottlenecks that prevent their development is deployed and implemented in the region.

## 4. Regional Local Milk Value Chains Promotion Guidelines known « Milk Offensive »

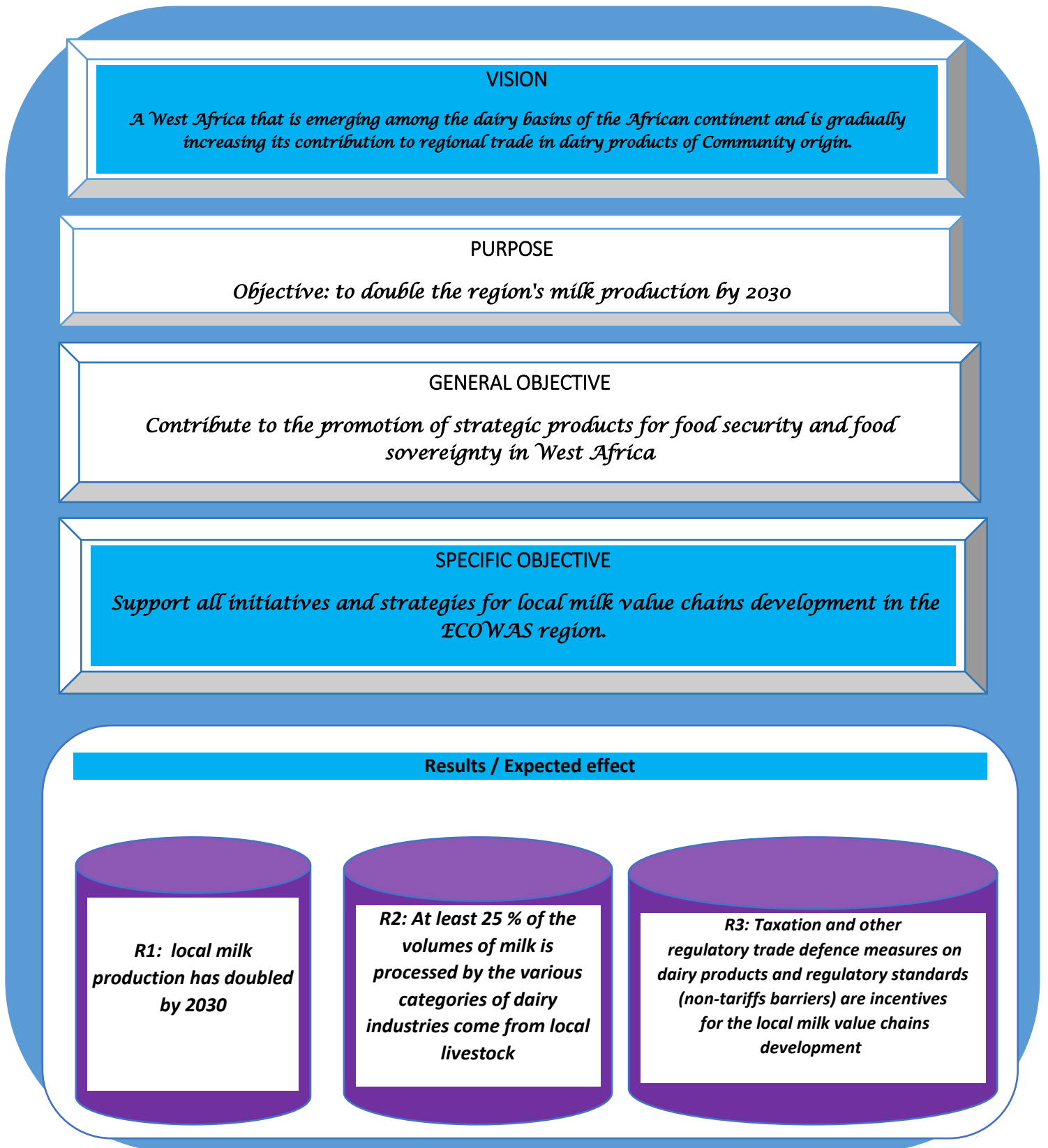
34. The milk offensive is conceived as a regional initiative in support of the implementation of ECOWAP (ECOWAS agricultural policy) and PAU (UEMOA agricultural policy). It is part of a holistic approach to promote agri-food value chains in order to accelerate the transformation of the regional agri-food sector, for shared growth and the well-being of populations. It is organized around four areas of intervention and twelve components.
35. It capitalizes on the major experiences developed by States, socio-professional organizations and the private sector.
36. It is based on the assumption that the major changes expected in the local milk sub-sector or sector depend on strong actions in three areas:
  - a. The overall improvement of the sub-sector environment involving the deployment of commercial incentive policies, as well as productive investments. The sub-sector suffers from a regional trade policy that is not very consistent with the strategic objectives of the agricultural policy (ECOWAP). Decisive and rapid action on fiscal instruments (customs duties taxation and value added tax) is required,
  - b. Heavy investments at the level of the three strategic segments of value chains: (i) production, including a transformation of livestock farming systems accompanied by improved conditions of access to livestock feed and veterinary health care, (ii) collection and processing, based on proven models that facilitate partnership between local private operators and major international groups,
  - c. Promoting and securing the regional market for local products, including the definition of standards, raising consumer awareness and intense communication on the economic, social, nutritional and health impacts of "consuming local milk".



#### 4.1. Vision, Goal/Purpose, General objective, Specific objective, Expected results

37. The strategy is organized around four areas of intervention, a dozen components that address through specific actions, all the links in the value chain of local milk in West Africa.

**Figure n°2: Intervention logic of the Strategy**



Strategic Interventions	Components
<b>A1 Improving the productivity of local breeds</b>	<b>A1.1.</b> Safe feeding and watering of livestock
	<b>A1.2.</b> Improving animal health
	<b>A1.3.</b> Genetic improvement of local breeds
<b>A2 Improving the collection and processing of local milk</b>	<b>A2.1.</b> Promotion of multi-service milk collection and storage centres
	<b>A2.2.</b> Promotion of local milk processing units
	<b>A2.3.</b> Setting up infrastructure and equipment to support collection (access works, energy, multi-service centres, communication equipment)
	<b>A2.4.</b> Promotion of an adapted industrial tool backed by an adequate system and means of transport and distribution
<b>A3: Improving market access for local dairy products</b>	<b>A3.1</b> Improving the competitiveness of local dairy products
	<b>A3.2.</b> Improving the distribution and consumption of local dairy products
<b>A4 Promote an enabling environment for the promotion of local milk value chains.</b>	<b>A4.1.</b> Establishment and application of incentives for the development of the local dairy industry
	<b>A4.2.,</b> Promoting inclusive business models along value chains
	<b>A4.3</b> Capacity building and value chains stakeholders professionalization

## 4.2. Detailed description of axes and component

38. This part describes the actions that the strategy envisages implementing through initiatives taken by states, socio-professional organisations and the private sector. These actions concern investments, policy incentives, advocacy, lobbying and communication. The public action will aim at strengthening the development models of livestock systems on which the promotion of local milk value chains depends to a large extent and for which three categories with several variants can be distinguished:
- Models for securing pastoralism** centred on the creation and support for the operation of viable Pastoral Units for the small-scale production and processing of local milk for local consumption and marketing in local markets. Mini dairies are gradually replacing the artisanal processing that is widespread in these areas, while guaranteeing a comfortable place and role for women. This model offers the advantage of working with groups of herders whose herd size can range from 4 to a few dozen dairy cows,
  - Dairy models of pastoral basins** that integrate large livestock farms, ranches, a network of multi-service collection centres, mini dairies and a large dairy. They make it possible to exploit the potential of livestock basins, but also to create dairy-dominated and territorialized agro-food systems. The resulting dairy agro-food complexes integrate numerous support services in terms of animal feed production, animal health care, infrastructure development, etc. The resulting dairy agro-food complexes integrate numerous support services in terms of animal feed production, animal health care, infrastructure development, etc. The resulting dairy agro-food complexes integrate numerous support services in terms of animal feed production, animal health care, infrastructure development, etc.
  - Peri-urban models that promote* intensification and a local collection system to supply processing units installed in or on the outskirts of urban centres. This model, which is developing in the Sahelian countries, is driven by the urban market. It is the result of several factors: (i) the establishment of farms managed by certain retired senior civil servants, (ii) the influx of herders displaced by climate change or insecurity; (iii) the opportunities offered by urban centres in terms of outlets for products resulting from processing.
39. The last two models are representative of the major trends in the livestock and pastoralism sub-sector in West Africa. The dynamic they impel is compatible with significant investment by the

private sector and likely to promote a transformation of the sub-sector to bring about the emergence of inclusive local milk value chains.

40. All these models are based on forms of contractualization that mainly involve between :
- Livestock farmers and multiservice collection centres, some of which operate as cooperatives and others as Economic Interest Groupings;
  - Multi-service collection centres and mini dairies or large-capacity industrial enterprises;
  - Transformation units and distribution centres (neighbourhood shops and supermarkets in large cities).

### **AXE 1: Improving local breeds productivity**

41. The low productivity of dairy cows is one of the bottlenecks in West African dairy chains. The milk deficit, which is estimated at about 30% of regional needs, is largely due to low production, which itself results from the poor performance of local dairy cows. Community public action will focus on three dimensions which will make it possible to significantly improve the productivity of dairy cows: (i) securing the feeding and watering of livestock, (ii) improving animal health, (iii) genetic improvement of dairy breeds.

#### **Component 1.1: Safe feeding and watering of livestock**

42. The West African livestock farming system, which is based on mobility, leads to specific difficulties in feeding and watering livestock. This situation affects the performance of livestock, particularly dairy cows. Indeed, the vast majority of livestock are forced to make seasonal movements in search of pasture and watering points. This component aims to improve the supply of various feedstuffs to the animals in a sufficient and regular manner, regardless of where the livestock are kept.
43. **Action 1.1.1:** Promote access to fodder and bush hay resources. This action aims to take advantage of the assets and opportunities of natural resources on the one hand, but also to produce fodder to ensure a regular supply of feed for the animals. It includes the following activities:
- Facilitation of fodder seed production and distribution through the establishment of a number of incentives (provision of basic seeds, training of producers, and promotion of distribution centres),
  - Support for the development of other local food resources (silage, bush hay, agricultural by-products and industrial by-products).
44. **Action 1.1.2:** Promote livestock feed banks. The aim of this action is to build up livestock feed reserves, preferably self-managed by breeders' organizations and associations. This action requires:
- Facilitation of access to financial resources by breeders, through the creation of dedicated counters, interest rate subsidies;
  - Support for the definition of the management mechanisms of the livestock feed bank;
  - Support for the establishment of livestock feed storage infrastructures.
45. **Action 1.1.3:** Promote Pastoral Units in large livestock basins. This action is centred on assisting the States of the Community to provide the territories and the actors of the pastoral sub-sector with a minimum of basic infrastructures, especially those of pastoral hydraulics. This action includes:
- The capitalization and dissemination of good practices on existing unit models,
  - Support for the creation of Pastoral Units in the major production basins
  - Support for the densification of pastoral water infrastructures and their management by grassroots communities in the UPs promoted.

#### **Component 1.2: Improving animal health**

46. Animal health is a key concern in boosting livestock productivity in general and dairy cow productivity in particular. The prevalence of animal diseases is a major threat to human health and

food and nutritional security. On the basis of the strategy deployed by the Regional Centre for Animal Health, Community support will focus on:

47. **Action 1.2.1:** Training livestock farmers and veterinary auxiliaries in animal care. The aim is to build up the capacity of livestock farmers and to prepare auxiliaries for the early detection of epidemics and epizootics and the administration of preventive and curative first aid. The training will be carried out for the benefit of peri-urban farmers and stockbreeders in the large breeding basins. This action involves:
  - The harmonization of training curricula;
  - Support for the training of national trainers;
  - Facilitation of the exercise of activities by the trained persons.
48. **Action 1.2.2:** Strengthening the epidemiological surveillance system. The main aim of this action is to combat the occurrence and manifestation of transboundary animal diseases in the Community. It will be translated into three major activities:
  - Improving the operation of alert and prevention systems,
  - The organization of simultaneous vaccination operations,
  - Deployment of an alert system for major cross-border epidemics
49. **Action 1.2.3:** Facilitating access to veterinary products. Veterinary products are essential to ensure animal health. In the Community area, they suffer from at least two shortcomings which require the intervention of the public authorities: (i) the sometimes poor quality of the products and (ii) the difficulties of access experienced by livestock farmers (not available on time and sometimes high prices). Public action will be aimed at:
50. Several countries in the West African region have been engaged for several years "in national Artificial Insemination (AI) programmes and/or the dissemination of exotic dairy breeds". The impacts of these programmes, as well as their potential or actual contribution to improving dairy cow productivity have not yet been objectively evaluated. However, many stakeholders hypothesize that genetic improvement can be a credible alternative to low dairy cow productivity. Some people have ethical reservations and fear above all a dilution of local breeds, and especially the risk of the spread of imported diseases. Four strong actions will have to be taken to achieve the objectives of this component:
51. **Action 1.3.1:** Evaluate the genetic improvement programmes in progress. This action is intended to analyse the results of current genetic improvement programmes, to ensure that these programmes are conducted according to acceptable ethical standards, that they are economically and financially profitable and socially acceptable. This evaluation should make it possible to:
  - The capitalisation of the technical modalities for carrying out inseminations and the importation of dairy cows,
  - Support for genetic improvement and ways of scaling up good practices and proven experience.
  - Popularization of good practices and lessons learned from genetic improvement actions in West Africa.
52. **Action 1.3.2:** Relaunch targeted Artificial Insemination programmes. On the basis of the results of the evaluative study indicated above, the aim is to propose a realistic plan to relaunch the programmes conducted by some countries in the field of artificial insemination. The strategic objectives of this programme will largely take into account operational breeding systems (peri-urban farms, intensification farms located in basins or agro-pastoral areas). In this perspective, public action will aim at:
  - a. Supporting research centres for genetic selection and dissemination,
  - b. Facilitation of exchange visits between selection centres,
  - c. Coordination and monitoring of genetic selection and dissemination



53. **Action 1.3.3. Promoting access to dairy heifers.** This action contributes to increasing the productive capacities of peri-urban farms and those of large basins. For the most part, dairy heifers are imported from the international market. Public action therefore aims to create the incentive conditions to strengthen the dairy heifer herd on farms. It will focus on:

- Total or partial tax exemption measures for heifer imports,
- The establishment of support funds for heifer imports (a food security window of the FRDAA),
- Facilitating access to credit for buying heifers (interest rate subsidies).

## **AXE 2: Improving the collection and processing of local milk**

54. The collection and processing of local milk is considered the soft underbelly of the local milk value chains in West Africa. Many analysts attribute the poor performance of local value chains to the weakness of collection systems and processing units. The large and medium-sized processing units have not made significant efforts to collect and process local milk, supported by the facilities for importing milk powder. This situation is detrimental to the structural transformation of local industries. Action must be taken to reverse this trend in the medium and long term. It is also certain that improving productivity is closely dependent on the performance of collection systems, the industrial fabric and the access of processed products to a predictable and secure market.

### **Component 2.1: Promotion of multi-service milk collection and storage centres**

55. The intensification of collection is the guarantee of performance of West African dairy sectors. In recent years, collection has begun a process of structuring around centres backed by processing units (small and large dairies). The performance of the centres created varies from country to country, but shows the potential for development of the sector that results from those that have benefited from appropriate incentives to develop the loyalty of farmers. It is a matter of relying on high-performance devices to reverse the current trend marked by less than 3% of local milk used by processing companies. This promotion must be supported by three major actions:

56. **Action 2.1.1.** Capitalize on and disseminate good practice in local milk collection arrangements. The main aim of this action is to document not only the process of setting up collection centres but also their operation in order to identify good practices and the conditions for scaling them up. This action includes the following activities

- Production of knowledge on milk collection centres,
- Widespread dissemination of success stories in milk collection systems,

57. **Action 2.1.2:** Facilitate the creation of multi-service collection centres. Milk collection is a complex operation that requires an environment and a minimum of equipment and materials to guarantee the quality of the product during its storage, packaging and transport to the processing plant. Without adequate infrastructure and equipment, large quantities of collected milk lose their quality. In addition, in order to operate at full capacity a collection centre must develop other related activities, which may in some cases appear to be incentives. The ultimate aim is to create mini dairy complexes integrating the collection itself and other activities such as the sale of animal feed and/or veterinary products.

- Tax exemption for the acquisition of materials and equipment for collection centres,
- Facilitation of the establishment of support infrastructures (energy, service roads),
- Facilitation of exchanges of experience between collection centres.

58. **Action 2.1.3:** Facilitate the establishment of partnerships and win-win agreements between the various stakeholders in the operation of the collection centres. The operation of the collection centres involves at least four categories of stakeholders: farmers supplying milk; collecting agents, centre employees and delivery of products to processing units. The action consists of establishing

partnerships between these different actors, building the loyalty of each of them so that they consider themselves an integral part of the collection operation. To do this, incentives must be put in place that are adapted to each category of player:

- Setting up a barter system; milk for animal feed and veterinary products,
- Facilitation of the acquisition of adapted means of transport for collectors and deliverymen,
- Promotion of social infrastructure (schools, health centres, water supply) near collection centres,
- To promote the establishment of partnerships between the different actors,

### Component 2.2: Promotion of local milk processing units

59. Processing is the main lever in the local milk value chain. The West African dairy industrial fabric is gradually being modernized on the initiative of the private sector. In addition to the artisanal sector, it includes mini dairies and large enterprises of international groups. These processing units are mainly concentrated in peri-urban areas. They aim more at exploiting the potential of urban consumers than at enhancing the value of local milk. The aim is to encourage the establishment of industrial processing units that use local milk as a priority.
60. **Action 2.2.1:** Facilitate the collection and processing of local milk by large industrial groups. The establishment of large industrial units is an unavoidable fact, even if it is somewhat feared because of its low propensity to promote local milk. Public action seeks to exploit their presence by putting in place incentives to encourage them to collect and process local milk. In this context, it will be a question of:
- Granting tax incentives to large companies whose operations are based on at least 25% local milk.
  - Study the possibility of exempting from VAT, the products of large companies that incorporate a high level of local milk (50 to 75% for example);
  - Introduce a quota for the quantity of local milk to be collected by large processing units.
61. **Action 2.2.2:** Support the creation of integrated processing units. This action is part of the will of the public authorities to create integrated and territorialized agri-food systems. It involves granting facilities to private promoters to set up, either in peri-urban areas or in agropastoral areas, dairy complexes: dairy cow farms, multiservice collection centres, local milk processing units. Specifically, incentives could focus on:
- Tax exemption for imports of heifers and processing equipment;
  - Simplification of the procedures for setting up processing units;
  - Ease of access to the market for products from these complexes.

### Component 2.3: Setting up infrastructure and equipment to support collection (access works, energy, multi-service centres, communication equipment)

62. This component aims at deploying a set of infrastructures essential to the functioning of the collection centres. While collection centres in peri-urban areas enjoy relatively favourable conditions, those in agropastoral areas suffer from the poor quality of support infrastructure. The supply of energy, which is essential for the conservation of products, is often uncertain. The maintenance of feeder roads linking herders' camps to collection centres is poor, especially during the winter period when milk production peaks. Public action must focus on:
63. **Action 2.3.1:** Servicing the areas where dairy complexes are located. This action is part of the strategy to create favourable conditions for the establishment of centres for the collection and industrial processing of milk. Specifically, it is a question of securing the conditions of access to land and establishing basic structural infrastructures in the areas that are to accommodate the collection units and dairies:
- Facilitation of access to land by setting up predictable procedures,
  - Implementation of basic infrastructures: water, energy in the areas planned for the installation of the units.

## Component 2.4: Promotion of an adapted industrial tool backed by an adequate system and means of transport and distribution

64. This component has a twofold objective, (i) to provide the region with a high-performance industrial fabric which respects the environment and social standards (ii) to make the dairy industrial fabric an instrument for organizing the local or zonal economic area. While aiming to improve the performance of the various links in the local milk value chains, public action also aims to integrate it into the local economic and social fabric;
65. **Action 2.4.1.** Capitalize on and popularize efficient industrial tools. This action aims at accompanying the promoters, in particular those who install mini dairies to make the choice of high-performance industrial tools. To do this, it is a question of proposing a wide range of choices to promoters, based on the results of an evaluation study of a wide range of industrial tools;
- Capitalising on good practices in terms of environmentally friendly dairy product processing tools,
  - To disseminate good practices in terms of environmentally friendly dairy processing tools,
  - Enact rules governing the conditions for setting up dairy industrial units, particularly on the outskirts of urban centres
66. **Action 2.4.2:** Improve transport and distribution infrastructures and means. The operation of processing units is closely linked to the quality of infrastructures and means of transport. It is a question of ensuring the regularity of the two main flows of products that the units are called upon to manage: (i) flows of raw materials (fresh milk coming primarily from collection centres) and (ii) flows of processed products to markets and other distribution centres.
- Ensure suitable means of transportation to collectors and deliverers,
  - Provide training and refreshal course to agents transporting dairy products.

### AXE 3: Improving market access for local dairy products

67. Market access for local dairy products is one of the essential conditions, a major incentive to promote local value chains. The West African market is growing rapidly in line with population growth, urbanization and changes in people's eating habits. However, the conquest of the regional market by domestic dairy products still faces many obstacles and constraints due to several factors: incompleteness and inadequacy of public policies, poor quality of product packaging, and insufficient communication on products to encourage consumers towards Community preference.

## Component 3.1: Improving the competitiveness of local dairy products

68. Despite the efforts made in recent years, the competitiveness of local dairy products on the regional market is not yet optimal. Over and above the quality shortcomings of certain products, linked to problems of energy supply and product packaging, the competitiveness of local products is hampered by questions of standardisation and standardisation. The quality-price competitiveness of certain dairy products is still weak compared with their competitors on local markets. In order to do this, public action and that of the actors, in particular professionals in the sector must be directed towards product standardization and standardization.
69. **Action: 3.1.1** Support the standardization of local dairy products. This action has technical, economic and social, and even political implications that require the involvement of all actors, particularly public decision-makers, professionals and consumers. It is a question of defining quality standards, the forms of presentation of products in relation to (i) the evolution of demand, (ii) health concerns, (iii) preservation of local cultural values, (iv) promotion of community preference and (vi) valorization of local milk.
- Support technical training for professionals in the sector;
  - Accompany the restructuring and upgrading of small and medium-sized dairy enterprises;
  - Define and encourage the adoption by enterprises of health standards for local dairy products.

70. **Action 3.1.2:** Support the standardization and labeling of products. Labelling efforts are currently under way in the countries of the community, particularly in the Sahelian countries. Often modelled on the Western model, they do not yet make it possible to develop the national or community potential. This action has two sub-objectives (i) to standardize national dairy products and (ii) to label them from the point of view of quality as well as local or community specifications. In view of the major role assigned to business projects in these two processes, public action will focus on capacity building and technical and strategic support for both production and packaging. The aim of the action is to arrive at products that are well presented, bear labels and are attractive to consumers.

### Composante 3.2 : Improving distribution and consumption of local dairy products

71. The distribution system and the level of consumption of milk products in the Community are not very clear. Local milk is often mixed with imported products on the shelves of aprons and in large distribution outlets. This situation is detrimental to local milk, which is often packaged in a way that is less attractive to consumers. Some establishments are successfully beginning to specialize in the distribution of camel milk, thus showing the possibility of boosting distribution and consumption.
72. **Action 3.2.1:** Promote the distribution of local products. This action aims to strengthen not only the devices and mechanisms for marketing local dairy products, but above all to develop a real offensive to conquer consumers. It is a question of reinforcing the presence of dairy products on the market:
- Facilitating the establishment of distribution kiosks for local dairy products near major public squares: schools, markets, etc.
  - Facilitate distribution agreements between cooperatives and mini-dairies and supermarkets for the distribution of local dairy products.
73. **Action 3.2.2.** Promote large-scale consumption of local dairy products. The promotion of consumption depends not only on the densification of the distribution network, but also on the quality of communication and advertising to promote the product. In this context, emphasis will have to be placed on the marketing dimensions. It is a question of facilitating, through initiatives, the emergence of a culture that favours consumer preference for local dairy products. To do this, it is a question of:
- Designing and implementing adapted tools and channels of communication on local milk,
  - Facilitate the presence of local dairy products in major events: conferences, fairs, weddings, christenings, school, garrison and hospital canteens.
  - Lobby distributors and other institutions to reserve a place for local dairy products.
  - Highlight the nutritional values of local dairy products.

### Axe 4: Promote an enabling environment for the promotion of local milk value chains

74. The environment for the development of local milk value chains is inseparable from that of all other economic sectors in the countries and the region. This environment is marked by a certain inconsistency between the stated desire to develop dairy value chains and the nature of the policy instruments, particularly those deployed and implemented at both Community and national levels. Indeed, milk, a product classified as strategic for food security and sovereignty, is subject to a trade policy that provides little incentive for structural investments to promote value chains. Border protection of the main product "competing" with or overshadowing local fresh milk; milk powder is very weak. h. Although this policy has made it possible to launch a processing industry providing products that contribute to improving the food and nutritional security of the population, it does not allow for a structural transformation of the national dairy sectors.

### Component 4.1: Setting and applying incentive measures for the local dairy industry development

75. The development that is taking place shows that the promotion of local milk value chains must be based on a predictable policy. All the links in the value chains need incentives to support the projects carried out by organizations and associations of breeders, private promoters and States. These incentives are numerous and range from facilitating access to proven technologies, to credits to make the necessary investments, to the deployment of fiscal instruments and other border safeguards.
76. **Action 4.1.1:** Facilitating access to financial resources for initiative bearers. This action aims at creating the conditions for the mobilization of substantial financial resources, both from local and regional financial institutions and from development partners to ensure investments in the local dairy sectors. In this perspective, the public action could consist of:
- Reforming existing funds at the national and regional levels to create windows dedicated to the promotion of local dairy sectors,
  - Facilitating access to credit for businesses through guarantees set up by dedicated funds,
  - Set up a mechanism to subsidise interest rates on credits granted to project holders along the local milk value chains.
77. **Action 4.1.2:** To set up an adapted fiscal policy, more favourable to the development of local sectors. The fiscal policy currently adopted is the subject of much criticism. It is considered too liberal and not very favourable to the development of the local sector. Without falling into the dogma of protection, which may in the short term have harmful consequences on the food and nutritional security of the populations of the region, it is necessary to realistically envisage a fiscal policy that encourages the promotion of dairy cattle breeding, collection, processing and marketing activities.
- Reconsider Customs duties taxation, including customs duties and appropriate trade defence measures. This action requires a re-categorization of all dairy products in the fifth band at 35% of the ECOWAS Common External Tariff;
  - Adopt domestic tax incentives: (i) lowering or subsidising interest rates on credits allocated to initiative bearers, (ii) lowering or exempting local products from VAT to improve their competitiveness on the regional market.

### Component 4.2: Promoting inclusive business models along value chains,

78. Several economic models aimed at promoting value chains are currently used to structure dairy industries in West Africa. They convey forms of conventions and economic relations between actors that vary according to the country and the production basin. In most cases, the collection centres are the Gordian knot of partnerships between these actors and the keystone of the economic models in progress, for which there are two important variants: (i) models linking collection centres to mini dairies and (ii) the model based on collection centres and large dairies. In either case, the degree of inclusiveness of women begins to pose problems. Many experiences show that the more collection is structured around a processing unit, the more women lose their economic power over milk. The aim is to promote more "social" economic models that promote women's empowerment, create decent jobs for young people (men and women), and guarantee a decent income for all assets in the local milk value chains.
79. **Action 4.2.1:** Boosting emerging economic models: peri-urban dairy cattle intensification farms - multi-service collection centres - mini dairies. This action aims to accompany the structuring of the relations that the stakeholders of this model develop to make it a catalyst instrument of the local milk value chains. The "urban dairy basin" model can indeed contribute to addressing three

important problems: (i) management of displaced livestock farmers (climate change and insecurity) who settle on the outskirts of Sahelian cities, (ii) minimizing the problems posed by the atomicity of supply (iii) judiciously exploiting the consumer potential of urban markets:

- Facilitate contractualization between the actors of the "urban dairy basin" models,
- Facilitate access of the various actors to the incentives put in place by the public authorities (tax incentive scheme, feed banks, epidemiological monitoring and surveillance, processing equipment and materials, etc.)

80. **Action 4.2.2:** Make pastoral models viable in agropastoral areas. This action aims at securing mobile livestock systems by developing services and related economic activities in agropastoral areas. This model, which takes various forms depending on the country, aims to give priority to the territories to benefit from the livestock breeding potential they contain. In all cases, it consists in organizing the mobility of animals in a given area (agro-pastoral zone) over short distances by providing infrastructure: pastoral units, ranches, etc. The aim is to support the diversification of economic activities in the livestock basins by promoting local milk:

- Facilitate the establishment of support services for the improvement of animal husbandry, productivity of dairy cows (feed banks, village hydraulics), milk collection, milk processing (small and medium milk processing units)
- Opening up the area (development of rural tracks and the electricity and water supply network)

### Component 4.3: Capacity building and professionalization of value chain actors

81. Competition in the product market is tough. The creative capacity of the large international groups and the quality/price ratio of the products they offer on the market are out of all proportion to those of local players, who not only use sometimes obsolete technologies but also lack the technical skills to cope with an increasingly demanding market. The ability of local dairy products to gain and maintain local market share depends largely on the level of organization of the professionals in the sector and the technical skills they have.

82. **Action 4.3.1:** Reinforce the professionalism of actors in the local dairy sector. This action aims at providing the assets of the dairy sectors with technical and managerial skills. This action is focused on two important dimensions: (i) the technical upgrading of the agents of the various links of the value chains and (ii) the improvement of the management capacities of small and medium-sized enterprises (cooperatives, collection centres and mini-dairy). The aim is to prepare these actors for changes in their environment.

83. **Action 4.3.2:** Support the structuring of professionals in the dairy sector. This action aims at setting up multi-stakeholder consultation frameworks based essentially on solid grassroots organizations representing professionals from the different links of the sector. The aim is to provide a multi-stakeholder operational framework where problems and other critical functions of local milk value chains will be discussed.

- Support the structuring of milk producer organizations (pastoralists and managers of peri-urban farms), collection centers, processors and distributors.
- Support the emergence and functioning of an inter-professional or regional platform for consultation on local milk value chains.
- Support the conclusion of win-win partnership agreements between national and regional initiative carriers and major international groups.

## 5. Operationalizing the Strategy

### 5.1. The approach to implementing the strategy

84. The strategy for the promotion of local milk value chains is designed as a framework for initiatives that contribute to a profound transformation of West African dairy product chains. Within this framework, it aims to support projects carried out by the various actors, in particular the socio-professional organizations of farmers and pastoralists, the States, the local private sector and foreign investors. In this perspective, it is designed to:
- Create a business environment conducive to the development of local value chains, in particular the removal of fiscal bottlenecks which undermine the competitiveness of local dairy products,
  - Maximize the exploitation of the local milk production potential, working simultaneously on the different segments of the value chains with a view to improving their effectiveness and efficiency in general and their productivity and competitiveness in particular,
  - Strengthen the position and role of the private sector in a partnership that places emphasis on capacity building of local actors and transfer of technology and know-how to regional promoters,
  - Strengthen the organizational and institutional capacities of local actors and promoters to lay the foundations for a profound transformation of the West African dairy sectors,
  - Consider large multinationals investing in the livestock sub-sector, particularly in milk value chains, as opportunities to initiate the acceleration of the transformation of local dairy chains, in the framework of a win-win partnership.
85. The overall implementation approach is based on the promotion of two inclusive economic models that result from the dynamics underway in the region. These are the so-called "peri-urban dairy basin" model and the "agropastoral basin or zone" model. These basins are structured by dairies of varying sizes and multi-service collection centres. The strategy also promotes two kinds of partnership: (i) between local actors with the collection centres as gravity, (ii) between local promoters and multinationals that intervene at the level of the value chain.
86. The strategy will be operationalized through investment plans carried by four categories of actors: ECOWAS, States, socio-professional organizations and the private sector. The first two actors will focus their action on improving the development environment and value chains to enable the private sector to make productive investments at the various levels of the value chain.

### 5.2. Implementation Principles

87. They come under the heading of regional integration policies and relate to:
- Subsidiarity, according to which only that which cannot be better dealt with at the lower, national or local level is dealt with at the regional level. This principle implies, among other things, that national competence is the rule and Community competence the exception;
  - Proportionality, whereby Community action does not go beyond what is necessary to achieve the objectives of the Treaty. Its application must make it possible to avoid rules and actions which are too restrictive or efforts which are too great for a country to make and which would be reasonable and effective;
  - Solidarity whereby the Community guarantees a minimum of cohesion between its members and pools a set of financial, human and institutional resources in order to reduce the disparities between them;
  - Inclusiveness, partnership and consultation which aims at ensuring the permanent involvement

of the actors in the value chains in the implementation, monitoring and evaluation and possible adjustments to the strategy.

- e. Progressiveness, which implies a gradual approach, allowing for national situations and the interests of the stakeholder groups involved to be taken into account.

### 5.3. Stakeholders in the implementation of the strategy

- 88. Four categories of actors are directly involved in implementing, monitoring and evaluating the performance of this strategy:
- 89. Institutions that ensure the ownership of the strategy:
  - a. *The Regional Economic Communities, particularly ECOWAS and UEMOA (WAEMU), which ensure the political steering of the strategy, including the definition of general orientations, formulation and validation of regulatory texts (protocols, directives, etc.);*
  - b. *The fifteen Member States of the Community, which provide a framework of laws and specific rules, promote an environment favourable to the development of local milk value chains. They host the actions that are developed by other stakeholders.*
- 90. Actors who ensure the direct implementation of the strategy:
  - a. *Regional socio-professional organizations (RBM, ROPPA, APSS, AFAO, FEWACI, CORET, COFENABEVI, AFEEX),*
  - b. *The local private sector, with projects of varying scale,*
  - c. *Multinationals operating in the milk value chain*
- 91. Technical support institutions, including CORAF, CILSS, FAO, IFAD, the RURAL HUB;
- 92. Regional and international financial institutions concerned with the livestock and pastoralism sub-sector in general and the development of local milk value chains in particular: WB, ADB, EBID, BOAD.

### 5.4. Strategy funding

- 93. The financing of the actions provided for in the strategy will be ensured by resources coming primarily from:
  - a. *Private investors consisting mainly of multinationals, local promoters, both associations and individual entrepreneurs.*
  - b. *Funds managed by States, Regional Economic Communities (ECOWADF, FRDA), regional financial institutions (EBID, BOAD), commercial and investment banks. These funds will serve as a lever for resources mobilized from international financial institutions.*
  - c. *International financial institutions within the framework of the financing agreements they conclude with the Regional Economic Communities, States and socio-professional associations (World Bank, Agence Française de Développement, African Development Bank).*



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