



# **Local Milk Sector in West Africa, Role of RPOs, small and medium farmers in the full growth of its potential**

Workshop held in Bamako on September 15 through 17, 2010





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# Local Milk Sector in West Africa, Role of RPOs, small and medium farmers in the full growth of its potential

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## Introduction

West African livestock has mostly developed in the Sahelo-Sudanian<sup>1</sup> zone where it is in the middle of rural household production systems. Livestock products (milk and meat) are income and protein sources, essential for food security.

Local milk production is confronted with serious difficulties in meeting the demand of individual states, which are importing very large quantities of milk products in order to bridge the structural gap.

West African States hope to implement policies of promotion of local milk in order, among other goals, to strengthen their food sovereignty, develop their economies, create jobs and reduce their trade deficit. In this perspective, attempts have been made at revitalizing the sector through national programs.

Several factors are contributing to the underdevelopment of the local milk sector, including:

- ▶ The lack of inclusion of local realities in developing various programs;
- ▶ The low level of structuring investments in the sector;
- ▶ Eventually trigger the creation of a regional West African network of RPOs which would be able to exercise political influence at the national and regional levels (or trigger this vocation within an existing sub-regional RPO network);
- ▶ The difficult market access by farmers given the lack of structuring of the sector and the strongly perishable nature of dairy products;
- ▶ The inadequate inclusion of family livestock (which accounts for 98% of the production) in the framework of establishing dairy policies, for a minority of big peri-urban livestock farmers.

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<sup>1</sup> The cases developed in the course of the workshop were drawn from the Sahel zone (Niger, Northern Mali and Burkina) and the Sudano-Guinean zone (Southern Senegal and Southern Mali).

## Workshop goals and expected results

The sub-regional workshop deals with the position, role and involvement of small and medium farmers in the development of the milk sector. It should help:

- ▶ Share and promote the capitalization works achieved in Mali and Senegal<sup>2</sup>;
- ▶ Achieve an exchange of experiences between RPO (Rural Professional Organizations) of West Africa and Haiti on relevant solutions in order to lift constraints on the sector;
- ▶ Design a tool box to inform decision making for the setting up of a small milk processing unit, feasibility study models, organization;
- ▶ Propose an advocacy tool enabling RPOs to build a policy incidence vocation message.

The expected results of the workshop are as follows:

- ▶ Sharing the capitalization reports;
- ▶ Setting up a West African network of RPOs which may have a policy incidence at the national and regional levels on the theme of the milk sector is assessed;
- ▶ A tool box informing decision making for setting up a small milk processing unit and the place of farmers is produced based on the inputs of working groups;
- ▶ Development of a policy incidence vocation tool.



<sup>2</sup> Refer to both training memoirs «Capitalization of the rural mini-dairy model in Mali: definition of the success factors and of the position of small dairy units in the national milk sector development», Axel Doufils and «Description and typology of mini-dairy units in Upper Casamance (Senegal) – Analysis of their strengths and weaknesses», Clara Gregoire. These trainings were supervised by those partners who sponsored this workshop.

## ▶▶ Summary of Communications and Discussions



## Summary of Communications

**F**rom the regional policy standpoint, the milk sector, given the stakes which it represents both in terms of potential and demand, is one of the 14 WAEMU priority sectors.

The stakes and challenges to meet for the milk sector at the WAEMU level are the following:

- Increase productivity, which is low nowadays despite the great potential (over 32 million heads of cattle and 77 million heads of sheep and goats, significant grazing area);
- Help increase the level of consumption of animal products (meat, milk, eggs);
- Improve the income levels from animal sectors;
- Reduce the trade balance deficit (in 2007, extra-communal milk imports were 89 billion FCFA, for 80,070 tons).

WAEMU's activities in this sector have not begun yet; a preliminary study will be carried out in January 2011 in order to define activities to implement in the sub-region. This regional level may be an opportunity for regional umbrella organizations of OPRs to voice their expectations in terms of development of the sector. Thus, if it is true that WAEMU gives guidelines to its members, each State remains sovereign in implementing its public policies. On the other hand, WAEMU has provided itself with a regional agricultural development fund (RADF) which may be used by States to finance the development of their local milk sector.

**Many West African countries have implemented or are currently implementing policies aimed at promoting the local milk sector.** These countries are located essentially in the Sahelian strip as this is where the production potential is highest, even though it is not promoted. Generally speaking, these policies rest on the funding of processing units for local marketing. The programs which stem from it promote intensification (fodder production, artificial insemination ...) by neglecting significant production factors such as veterinary service. Mali or Burkina Faso are developing, through national programs, dairy units capable of processing 5,000 liters of milk/day and more. These large programs (several billion FCFA) do not generally take into account exis-

ting mini-dairy units, preferring to focus on great capacity peri-urban dairy units.

**However, this aggressive policy is confronted with various stakes dealing with food security for the communities.** As a matter of fact, local milk production is not accessible to consumers: production is on a seasonal basis, the marketing network is hardly developed, consumer prices are high, etc. In order to guarantee the food needs of urban populations at a low price, Governments can reduce customs tariffs on imported powder milk. Of course these measures also tremendously harm existing dairy units which have difficulty competing against imports. Some of them then turn toward the processing of powder milk and the local production organization which is at its beginning states collapses.

**In addition, it turns out that it is not only acting on the ECT (External Common Tariff) or national customs duties that one can develop the local milk sector.** Other levers must be activated and turn out to be indispensable: animal feed, credit, inputs, market access, technology transfer, infrastructures, etc. Here again, farmers and/or processors' organizations may act at national and sub-regional levels, notably on access to credit with appropriate banking conditions, to technologies and inputs.

**At the level of existing sectors, all the presentations pointed to the fact that small dairy units have an impact, albeit local, but very significant on:**

- Food security: availability of milk throughout the year among farmers, pasteurized milk for consumers;
- The monetarization of the environment;
- The establishment of a regular income for livestock farmers (sometimes much higher than the local minimum wage);
- The creation of durable jobs;
- The creation of value added in rural areas;
- The organization of livestock farmers upstream, or even throughout the sector;
- The improvement of the productivity of milk.

Certain dairy units have developed diversification strategies either in order to meet local demand (gee in Mali, goat cheese in Senegal ...) either in order to carry forward the surplus production of the rainy

season over to the deficit period of the dry season corresponding to a strong demand (sterilized milk in Haiti, cheese).

The small dairy units are profitable given that they do make more or less important profits.

The presentations bring out small dairy units managed by private sector people, livestock farmers' EIG (Economic Interest Group), Service Enterprise for Farmers' Organizations, businesses owned by NGOs, etc. The sharing must be adapted to the capacities of local actors, the duration of support projects, and partners.

**It turns out on the other hand that there are different strategies of commercialization** but the latter (except for the case of Haiti) cannot handle the seasonal gap between supply and demand (the abundance of milk during the rainy season and the strong demand during the dry season). Haiti's experience is enlightening compared with some approaches which have not been exploited to date in West Africa, i.e.: the sterilization of milk with packaging in returnable glass bottles, the contracting with humanitarian partners, a national contracting and commercialization authority whose membership includes dairy units of the Letagogo network ...

**Finally, the need for technical, organizational and advocacy capacity building of livestock farmers' organizations is evident.** In Burkina, small-scale farmers and small dairy units got together in an organization aimed at defining their interests against policies or programs which do not take into account their constraints, or even their existence. This type of organization may be interesting in order to carry out advocacy work with decision making levels. However, it was apparent that there is political will in the States as well as the sub-region. Thus, it appears that a consultation between farmers/processors and policy makers would help make significant breakthroughs in the development of the local milk sector. A recurrent problem remains the funding of national farmers/and/or processors' organizations which are generally lacking the necessary financial resources for national consultations, meetings with other structures or partners and the transmission of information to the grassroots.

**In Mali, the ANSSA (National Food Safety Agency of Mali) reports about quality problems** on analyzed milk samples. Collaboration between, ANSSA, the Central Veterinary Laboratory and veterinary control services, is inadequate. The dairy units have great difficulty achieving self

auditing given the constraints related to shipping samples, the reception of results and the costs of analyses. Some synergy on this aspect and the modes of carrying out systematic bacteriological analyses must therefore be developed in order to guarantee consumers the sanitary quality of local dairy products. This point also comes out of the presentation by REDECOMA.

It turns out from the presentations that there is a strong expectation from different actors for the pooling of actions which would help develop the local milk sector.

From the presentation on the evolution of farmers' organizations in France to the presentations of the West African sectors, there comes out a real stake for farmers' organizations to get organized at the local, national, and sub-regional levels in order to influence public policy making: farmers, processors, research bodies, support agencies (government and NGO), consumers, sanitary control agencies and public authorities.

The opportunity must be seized rapidly as the stopping of quotas imposed by the CAP might have some repercussions on West African markets. However, milk sectors in Sahelian countries are not, to-date, competitive against European sectors, which are older and better organized.

It also turns out that it is necessary to support milk processing units and existing organizations which provide income, employment and food security.

In the perspective of strengthening dialogue and understanding between the different stakeholders, it would be interesting to develop dialogue frameworks as is the case in Burkina. In Senegal, there is an inter-professional at the local and national levels. Some cases do exist but the results are generally not very convincing.

Finally, it is necessary to put together all stakeholders at the same level of information so that they could implement solutions to all the problems of the local milk sector value chain.



## Recommendations of The Group Work

**T**hree groups worked on a set of questions raised by the organizers. The group members freely chose their group according to their center of interest and their skills.

The results of the group work may be found after the presentations. Only recommendations are reported here.

### Recommendations on the theme “Milk sector from upstream to downstream: how to improve production and processing?”:

- ▶ A mini-dairy unit must secure collection throughout the year and ensure outlets with products adapted to the targeted markets;
- ▶ A structuring link of the local milk sector is the small dairy unit: its role is predominant. And the professionalization of all actors involved is necessary in order to achieve improvement, quantity as well as quality wise, of local milk products;
- ▶ To establish and develop a small dairy unit, leadership is essential. When one is ensured, progressive and adapted supports may effectively support local initiatives;
- ▶ Investment in a small dairy unit must depend on the unit considered, the context and its constraints. For the sake of the sustainability of the small dairy unit, it is absolutely necessary not to oversize the investment.

### Recommendations on The Theme of The Market

The recommendations stemming from the group which worked on the market are the following:

- ▶ Conduct consumer surveys; there aren't many;
- ▶ Produce sterilized milk or other long conservation products in order to meet the dry season demand and absorb the large rainy season production;
- ▶ Supply markets in large cities where consumption is significant throughout the year;
- ▶ Improve product quality and presentation; diversify products;
- ▶ Promote products through publicity, tasting, milk day, etc.

## Main Recommendations For Public Policies

Recommendations for better OP participation in defining public policies:

- ▶ Strengthening capacities and skills of regional, national, and local FOs;
- ▶ Information and sensitization on legislation, laws and regulations so that FOs be provided with tools for defending the interests of their members and conduct advocacy;
- ▶ Make consistency and improve legislation, laws and regulations at the national and regional levels (facilitating trade, stopping unjustified taxations, etc.);
- ▶ Improving the level of consultation of FOs among themselves and with the State, through establishment of a regional network specific to the local milk sector from national FOs.

Recommendations for the national level:

- ▶ In order to improve milk productivity: fodder crop incentives with conservation of the fodder in order to make up for the seasonal character of production, supporting the formation of cooperatives for agricultural machinery using. Technological training of farmers. Institutional strengthening of FOs for the provision of services.
- ▶ In order to contribute to milk collection: provision of collection material in order to increase the capacity to collect quality milk and development of strategic paths to open up production basins.
- ▶ For better milk processing: technological training of processors. Access to equipment via a technological support fund.
- ▶ For a context favorable to harmonious development of the milk sector: development and making coherent milk policies; increasing the share of the government budget which is earmarked for livestock. Strengthening the regulatory framework related to the milk sector for the benefit, among other individuals, of small and medium farmers. Application and extension (or development) of pastoral codes. Sensitization of producers about the acquisition of land titles and their representation in dialogue spaces. Creation of a donor orientation agency supporting the local milk sector for a harmonious development of the sector. Improved literacy rate in rural areas.
- ▶ At the consumer's level: promotion of local dairy products, sensitization of public opinion on "consuming local".

Recommendations for the regional level:

- Development of a regional strategy in the area of transboundary transhumance in order to protect transhumant livestock;
- Harmonization of regulatory acts at the regional level;
- Development and implementation of regional programs for controlling priority diseases in cattle;
- Setting up a control program for animals and animal products at the regional and national levels in order to protect consumers against the presence of medical residues; capacity building of control agents; and equipments);
- Animal assurance policies in case of disaster in order to protect investments in milk production;
- Strengthening the Regional Agricultural Information System (RAIS) in order to better direct measures aimed at boosting the local milk sector in the sub-region;
- Definition of short, medium and long term goals according to national levels of consumption;
- Protection within WAEMU's borders through levying protection taxes.

It appears in the course of this workshop that participants have different priorities depending on their level of intervention in the sector. The recommendations show the scope of the task of developing the local sector, and that it will be difficult to fight all battles head-on.

In a first stage, it seems necessary that the different stakeholders<sup>3</sup> get to meet regularly at the local, national and sub-regional level in order to work cross-sectionally and in real synergy. This is the condition we must meet if we want to achieve harmonious development of the local milk sector.

The unifying themes which come out are the following:

- Supporting farmers and processors: technical, administrative and organizational skills; observance of production standards with development of a book of specifications and guides of best practices; establishment of an effective control mode by veterinary services;

<sup>3</sup> Policy makers, supervision structures, producers, processors, consumers, research, control structures, financial partners.

- Access to funding for strengthening the means of production and processing. In a first stage, the funding could be external but it should rapidly emanate from the banking system in order to ensure the sustainability and development of the sector's funding;
- Sub-regional level harmonization of the legislation;
- Cross-sectional thinking carried out in individual countries and at the sub-regional level, with the effective participation of all actors for the definition of national policy integrating all parameters of the value chain.

The work programmed by WAEMU in January 2011 is an interesting entry point for developing consultation frameworks and developing a work plan on the unifying themes.

The setting up of a network of FOs and processors at the sub-regional level, proposed by participants at the end of the workshop, is to be achieved sooner so that WAEMU have an interlocutor to defend producers and processors' interests. At the conclusion of the workshop participants (producers and processors) designated Moumouni Sidibé (Burkina Faso) as focal point. However, this work cannot be done without external funding and no funding source has been identified, except for resorting to financial partners.



# ▶▶ Communications



## Communication I

### ***“WAEMU’s Agricultural Policies and Perspectives of Development of The Milk Sector”***

**Soumana Diallo,**

**UEOMA**

**A**fter a brief background of WAEMU (area, demographic and economic statistics), Mr Diallo has exposed the 5 WAEMU goals, namely:

- ▶ Strengthening economic competitiveness in an open market and a harmonized legal environment;
- ▶ Converging performances and economic policies of Member states;
- ▶ Creation of a common market;
- ▶ Coordination of national sector-based policies and implementation of common sector-based policies;
- ▶ Harmonization of member states' economic legislation.

Then, Mr Diallo explained the UAP (Union Agricultural Policy) through its legislative aspects, its challenges and stakes in the short, medium and longer terms. The major domains of intervention of the UAP are as follows:

- ▶ Domain 1: Adaptation of production systems and improvement of the production environment;
- ▶ Domain 2: Extending the common market in the agricultural sector and management of shared resources;
- ▶ Domain 3: Integrating agriculture into the regional and global market.

The implementation of the UAP has helped define the three year program 2003-2005, the creation of institutional frameworks of dialogue and coordination (harmonization of legislations, international agricultural negotiations), the setting up of a Regional Agricultural Information System (RAIS) over 3 pilot countries, improvement of sector competitiveness,

establishment of a Regional Agricultural Development Fund<sup>4</sup> (RADF).

A study conducted in 2005 helped select 14 agricultural sectors<sup>5</sup> for WAEMU's intervention; the milk sector is included. Of these 14 sectors, 5 have priority status and are part of an initial intervention program the development of which is underway. These sectors are rice, maize, cotton, cattle meat, and poultry.

As far as the milk sector is concerned, a study will be conducted in 2011 in order to define a strategy and a specific action program for its development.

The stakes and challenges to meet for the meat sector at WAEMU's level are as follows:

- ▶ Increase productivity, which is at a low level nowadays despite a significant potential (over 32 million heads of cattle and 77 million sheep and goats, the most important grazing area per capita in Sub-Saharan Africa) but where consumption of animal products is lowest in the world;
- ▶ Enable to raise the consumption level of animal products (meat, milk, eggs);
- ▶ Improve the level of income drawn from animal sectors;
- ▶ Reverse the trend of the trade balance, which is characterized by a large deficit (in 2007, extra-communal imports of milk was 89 billion FCFA for 80,070 tons).

The study of the milk sector will be aimed at identifying the action programs enabling its development in order to durably meet the milk needs of the Union's populations. The study will more specifically:

- ▶ Identify short term measures to face up to the rise of the process of food items within the Union;
- ▶ Determine the master plan of the milk sector in terms of detailed action programs, by defining at the national and regional level the measures and structuring investments to be achieved in the medium and long terms;

<sup>4</sup> The RADF's budget for the year 2010 is 22.3 billion francs CFA (34 million euros).

<sup>5</sup> These 14 sectors are: groundnut, cotton, milk, maize, cassava, millet, eggs, onion, chicken, sugar, sorghum, tomato, cattle meat.

- ▶ Assess the production potential at the level of individual member states, based on their competitive advantages;
- ▶ Propose a funding plan for the measures and investments identified.

As far as the funding is concerned, the WAEMU commission positions itself as facilitator and follower of national development processes of the local milk sector underway. WAEMU must particularly work on promoting national milk sector reforms compatible with the Union goals (creation of a common market).

The process will be set in motion as early as 2011, which denotes a strong political will. This will mean pursuing it while involving all actors concerned by the milk issue. It is also necessary to make a very good communication around such an important issue for the regional level economic and social integration.

### **Questions / Answers**

Questions (10) focused on WAEMU's modes of classification of sectors, WAEMU's taxation levels and their enforcement in member states, the definition of a milk basin, the role of the Malian State in the framework of the strategy of development of the milk sector in Mali, the funds (WAEMU, PRODEVALAIT, FDA-French Development Agency, credit access), the possibility to associate food security policy and sector-based policy.

The answers can be synthesized as follows:

At WAEMU's level, sectors are classified according to 32 criteria. These criteria are studied throughout all member states and the synthesis helps define priority sectors. Then, there is no order in the 14 priority sectors but for a start, given that it was difficult to intervene head-on on the 14 sectors, 5 of them were selected. WAEMU has not worked on milk yet and is certainly lagging behind on this issue over the States. As early as 2011, WAEMU will be able to accompany States and to harmonize.

The heads of states and governments have established the RADF in order to work on these 14 priority sectors; the fund is made of the contributions of States (these are WAEMU's own capital resources) completed by those of donors. It is supplied each year and marked out by the Heads of States; it can be used for States, communes and farmers' organizations in direct investment, guarantee fund or low interest loan. A round table with donors is planned again in order to increase this fund and the procedures

manual is being prepared. Only afterwards will the fund be mobilizable.

WAEMU edits only regulations and the decision of special measures to face up to crises or events (such as the suppression of taxation on powder milk imported during the Ramadan in Senegal) is only taken by the States. No government will agree to a tax increase at the WAEMU or ECOWAS customs barrier because people must have food and local agricultural productions are still low. The States reject WAEMU's proposed addition of a 5th taxation portion, raising taxes 35% (Senegal presently blocks on rice, particularly). It is necessary to develop aggressive policies for local production, as is presently the case with rice (subsidizing inputs, etc.). Prior to increasing customs taxes, one must ensure self-sufficiency for food security of the Union's populations.

WAEMU has set up a system to help major businesses for their standardization in order to make them competitive at the international level. WAEMU will certainly take interest in mini dairy units in 2011 but the question of availability of funds is critical.



## ⊙ Communication 2

### ***“Public Policies and The Milk Sector in West Africa”***

**Christian Corniaux,**  
CIRAD

**C**hristian Corniaux has described the milk policies over three directions which are the history of commercial milk policy in West Africa, national sector-based policies and the risks of incoherence, or even contradiction, in such policies.

On the first point, the evolution of the sub-regional policy on milk is characterized by an import-substitution policy (between 1960 and 1970) and a heavy intervention of the State to support local milk sectors and closing borders. Such policy was relatively unsuccessful given the low quantities of milk collected at the sub-regional level, which is accounted for by a relatively insignificant domestic market. Such protectionist policies have led to the creation of monopoly and created state-owned milk industries which did not promote the development of

a real local milk industry.

The structural adjustment policy (1980-1990) of liberalization and opening markets has resulted in privatization of the milk sector and particularly the government factories. Such policy has also failed as a result of the fact that the factories are operating nowadays with only powdered milk. As a matter of fact, opening up the borders should help acquire lower price inputs ... including powdered milk!

In 2000, WAEMU's CET (Common External Tariff) defines 5 categories of customs taxes in a community framework and with possible national adjustments. Customs taxes for powdered milk are low (5% for the raw materials and essential products) and relatively low for imported processed milk products (20% for end consumer goods). This low level taxation helps make available to urban communities powdered milk at a moderate price but hampers the development of local sectors. Even if a higher tax on powdered milk should not prevent importation nowadays, it is clear that a 5% taxation does not reflect a policy promoting local sector development. The current policy of the States is certainly to meet the demand of urban communities through importation of powdered milk.

National sector-based policies do express a recent will to support local milk production. In various countries in West Africa, they result in supporting the development of small dairy units and intensive peri-urban milk basins/milk belts. However, the impacts of such actions remain limited while urban needs are significant and constantly increasing.

Besides, these sector-based policies are confronted with a difficult choice: achieve food sovereignty through the costly development of a local milk sector or achieve low cost supplies for the urban populations while levying import taxes. In addition, international trade agreements are favorable to imports and run counter to national sector-based policies. At the same time as the sector-based policy trying to develop the local sector, a single government may enforce occasional reductions of customs taxes and facilities for duty-free quotas systems<sup>6</sup> which increase powder milk imports and heavily penalize the local sector and dairy industry. This is evidence of the lack of coherence in the policies of a

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<sup>6</sup> Customs duties were reduced for the period of the Ramadan in order to face up to hunger riots, notably in Senegal. Duty-free restrictions: in Mali and Senegal, entire containers arrive with duty-free powdered milk, for traders who sell it back as is for processing plants. In Senegal, in 2003, an agricultural cooperative tried to establish itself at Saint- in order to manufacture UHT milk from local milk. The then minister tried to support such installation but signed concurrently with an industrialist for the importation of powdered milk. The Spanish cooperative had no other choice than close down!

single government.

In conclusion, it is necessary that farmers' organizations develop arguments to defend local sectors.<sup>7</sup> As a matter of fact, the arguments "increase customs taxes and reduce subsidies to production in countries in the North" are necessary but insufficient measures for developing local sectors. The local productions are expensive to collect, so other factors of the local milk sector value chain would have to be acted upon while improving the coherence between sector-based policies and international trade policies.

## Questions / Answers

### Who decides to lift taxes on powdered milk?

A female student is currently working on the 2008 event in Senegal which led to fully lifting taxes on powdered milk and on the paths to this political decision. The livestock farmer's dairy unit stepped into the breach at that time but to no avail as these decisions largely go beyond the local sectors.

### How to make up for the lack of cattle feed?

Either by increasing fodder production as in Mauritania or by importing concentrates: why not, but then what is the comparative advantage if one replaces one import by another?

### Is it possible to combine both policies (food sovereignty and low cost supplies for consumers)?

Certain countries do it but the question is a very complex one and one should read A.Diarra's thesis on this issue<sup>8</sup>. Some countries have selected national milk production and have imposed high taxes on imports (Maghreb), but Mali does that with rice. In 1990, Abdou Diouf took the decision to develop rice production in Senegal in an effort to achieve food sovereignty. This effort with rice does not exist nowadays with milk.

One participant suggests that people should consider a level of import taxes varying according to seasons, the highest level being imposed during the rainy season in order to promote the commercialization of milk which is abundant in that period.

<sup>7</sup> On that line one may have, on the CD-ROM accompanying with these acts, an advocacy tool which will help FOs build their own arguments.

<sup>8</sup> Refer to bibliographic resources on the CD-ROM accompanying these acts.



## Communication 3

### **“Mali’s Milk Policy”**

**Yaya Konate,**  
PRODEVALAIT

**A**fter giving a background on the stakes in Mali (ensure provision of 40 liters of milk per year and per capital by collecting the total amount of milk available, estimated at 600 million liters per year), Mr Yaya Konaté presented “The Strategy of Enhancement of Local Unpasteurized Milk Production” in Mali. This strategy stems from the dialogue framework and takes into account the local and the international context for sustainable development of the milk sector in Mali. The actors of the sector have participated in defining PRODEVALAIT’s strategy.

This strategy aims at increasing and enhancing local production through:

- Supporting intensification of milk production systems;
- Promoting the structuring of agro-pastoral sectors (producers, processors, professional and inter-professional organizations);
- Ensuring an inciting framework intended to develop private investment in the milk sector.

The overall goal is to set up a milk sector capable of ensuring self-sufficiency in milk and milk products and strengthening the contribution of the milk sector to poverty reduction.

Specifically, there must be more private investment in the milk sector, creating an overall environment which is inciting for the sector, reinforcement of technical, organizational and institutional capacities of milk sector actors, increasing local milk production, ensuring accessibility and the collection of local unpasteurized milk for the processing industries and setting up industries for enhancing local unpasteurized milk.

For that end, the strategy intervenes over 6 factors, namely:

- The development of a viable and controlled artificial insemination system;
- The reinforcement of feed practices (through production of fodder plants and storage of required quality and quantities of feed inputs;

- ▶ The reinforcement of professionals' equipment;
- ▶ The setting up of unpasteurized milk collection centers (3 centers are planned for the 1st phase);
- ▶ Building the capacities of farmer organizations;
- ▶ Promoting a fiscal, financial, and land environment favorable to the development of the milk sector.

In order to meet these goals, the project organized itself into five components:

- ▶ Organization of milk basins<sup>9</sup>: 41 potential milk basins are identified, producers will be organized in those basins and collection infrastructures will be built;
- ▶ Supporting production: genetic and feed improvement, development of pastoral areas, acquisition of equipments for the preparation and storage of hay, development of fodder crops, supporting the installation of cattle feed industries;
- ▶ Creation of milk collection centers: construction and equipment of infrastructures, collection by refrigerator pick-up trucks, farmer equipment, training employees. The collection centers have a collective interest; they are funded 90% by the State but are managed by professionals;
- ▶ The setting up of milk units: the processing units belong to private sector people, and the State facilitates their establishment;
- ▶ Institutional support: technical, organizational, and institutional capacity building activities of the different actors.

The institutional set up for the implementation of this strategy is as follows:

- ▶ The Ministry of Livestock and Fishing will be the Main Contractor;
- ▶ The National Directorate of Animal Production and Industries (DNPIA) will be the representative of the Main Contractor and will handle the technical supervision throughout the territory;
- ▶ The Management Unit, works owner, will handle the day-to-day management;

<sup>9</sup> A milk basin is a production area comprising animals, people, collection centers (a radius of about 20 to 25 km around a collection center). The milk unit is a milk industry which processes at least 2000 l of milk per day. The milk belt was the development of milk production in peri-urban areas; this was the policy in 1985. Nowadays, we have a milk basin approach.

- ▶ Professional milk farmers' organizations and other actors of the sector, gathered in cooperative societies for the handling of the management of collection centers and milk units which will be set up.

The budget necessary for setting up this strategy is estimated at 15.8 billion FCFA (2.4 million euros). The funding plan provides for a participation of the government representing 27.60% of the total, and that of the technical and financial partners representing 40.25% and that of professionals of the sector representing 32.15%. A certain fund planned to serve as guaranty for loans contracted by milk sector actors and for investors.

### Questions / Answers

On account of contributions, a proposal was made to have a common terminology for the sub-region (for example what definition for milk belt, small dairy unit, etc.).

It was suggested that PRODEVALAIT, which is implementing the strategy of development of the milk sector in Mali also supports existing small dairy units.



### ⊙ Communication 4

#### ***“The position of small rural dairy units in the development of the milk sector in Mali”***

**Malick Diallo,**  
ICD

**T**his communication, made by Malick Diallo of the ICD, results from a capitalization work carried out by Axelle Doufils in the course of his training course.

The presentation began with the description of the context of the local milk sector in Mali. The production of milk in Mali is estimated at 600,000 tons (FAO, 2005) for a potential production of 1,11 million tons (DNPIA, 2009). 10% to 20% of the production is processed and marketed (WB, 2009). Consumption is about 30 liters of milk/person/year in nomadic environments, 5 to 6 liters in the south of the country and 10 liters for the rest of the

country. Annual imports represent 10 to 16 billion FCFA of milk products (15 to 24 million euros). It turns out that the local production is little enhanced while importations weigh heavily on Mali's trade balance.

Moreover, there is a strong gap between the urban common market and production areas (98% of the production comes from the extensive pastoral system). Likewise, there is a seasonal gap between supply and demand as the demand is significant in the dry season while the supply is low.

The presentation later on included the position of small dairy industries supported by ICD, CIDR, VSFB, CAB DEMESO, VSF Switzerland, DJOM KOSSAM ...

The small dairy units process about 1,300 tons of milk per year in Mali (2% of the national production), with 272 direct jobs created. Over one thousand producers supply these small dairy units for an annual income ranging from FCFA 165,000 to FCFA 870,000 (250 to 1,325 €/year). Rural dairy units in Mali are confronted with isolation and production dispersion, a shortage of milk in the dry season, slack periods in the rainy season and financial perpetuation difficulties.

Small dairy units are an interface between producers and the market; they provide services to livestock farmers (organization, counseling, provision with cattle feed, animal health service) and they created value added. The small dairy unit helps achieve territorial development and better living conditions (for producers as well as consumers). If it is true that the volumes processed are moderate, the economic and social impact of small dairy units is very important. The small dairy units are therefore an additional tool of the great industrial milk units.

An SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) of Mali's small dairy units brings out the following points:

### SWOT Analyse in minidairy units

STRENGTHS	WEAKNESSES
Short circuit and local rooting: appropriation and local effects	Insufficient skills in management
Acquired know-how	Weak resistance to crisis
Farmers loyalty and markets consolidation	Governance not always efficient
Proved profitability	Low milk volume and limited effect
Local milk much appreciated: Expanding market	Competition in milk powder products
Political will	Lack in infrastructures, equipment, packing ...
OPPORTUNITIES	THREATS

**In conclusion, the minidairy unit, rooted in a territorial dynamic, could be the local link for recovering food sovereignty. These local initiatives must be built on and integrated into a framework of a national vision as they are complementary for the major urban industries.**

Finally, it is necessary to have an aggressive milk policy and targeted supports for these actors, through the development of access to markets, inputs (feed, packaging ...), counseling and equipment.

## **Questions / Answers**

The small dairy units are an interesting model for revitalizing the local sector because they fit into a consultation with sector actors in order to better capture production. They are faced with organizational, accounting, and marketing problems.



## **Communication 5**

### ***“Description of The Local Milk Sector in Senegal”***

**Clara Grégoire,**  
AVSF

**T**his presentation is made by Clara Grégoire who is presenting the work conducted during her practical training. The field work with farmers, collectors and processors was essentially conducted in the Region of Kolda, South Senegal (Upper Casamance) where AVSF has supported milk sector development.

The presentation began with identification of direct actors (producers, collectors, processors, retailers, and consumers) and indirect actors (State, research, NGOs, development society, FOs and Inter-professions) and the links between these different actors.

As far as the policy framework is concerned, there is no true national milk policy, but rather programs and projects for intensifying milk production (PAPEL, PRODELAIT). Moreover, there is little coherence in government policy, which is expressed particularly through a weak protection of the national market, low public funding and difficult access

to credit for direct actors. Moreover, regulatory texts are antiquated.

At the institutional level, socio-professional organizations have weak bargaining power; they are not dynamic and lack consultation; this leads to a dispersal of strengths and resources.

The strengths and weaknesses of small dairy units were presented in terms of 2 typologies met, namely a dairy unit managed by livestock farmers in the context of an EIG (Economic Interest Group) and small dairy industries belonging to private sector people. Differences are observed according to the bearer of the small dairy unit:

	<b>SMALL DAIRY UNIT CARRIED BY AN EIG OF LIVESTOCK FARMERS</b>	<b>SMALL DAIRY UNIT CARRIED BY PRIVATE SECTOR PEOPLE</b>
<b>STRENGTHS</b>	<ul style="list-style-type: none"> <li>• Setting up a market stand for commercialization.</li> <li>• Quota system in the rainy season which motivates producers to deliver more milk in the dry season.</li> <li>• Good gustative quality of the curdled milk and the pasteurized fresh milk produced in dairy units (according to a consumer survey).</li> <li>• Over half the consumers are satisfied with the price.</li> <li>• Existence of several systems for paying producers: cash, end of the month ...</li> </ul>	<ul style="list-style-type: none"> <li>• Diversification of products: yoghurt, cheese.</li> <li>• More aggressive marketing strategy.</li> </ul>
<b>WEAKNESSES</b>	<ul style="list-style-type: none"> <li>• Nonexistent commercial strategy.</li> <li>• No development prospect.</li> <li>• Livestock farmers and delivery men are not sensitized about good hygiene practices.</li> <li>• Inability of the dairy unit to produce the entire rainy season production.</li> <li>• Low equipment level.</li> <li>• Difficulty in selling the processed milk in the rainy season.</li> </ul>	<ul style="list-style-type: none"> <li>• Irregular supply.</li> <li>• Resort to milk by transhuming herders leads to important losses in the course of processing.</li> <li>• Certain dairy units use powdered milk.</li> <li>• Operation below processing capacity.</li> <li>• Late payment of producers.</li> <li>• Problems with input supplies (bags, bacilli used in making yoghurt ...).</li> </ul>

Throughout the dairy units surveyed, one could note a drop in the processing level in the course of the past 3 years.

The commercialization of processed products is mostly done with shopkeepers.

Of these various observations, we can make recommendations to improve simultaneously production, collection, processing and commercialization of local milk:

- ▶ For the livestock farmers, there is need for improving access to animal feed, observe cowshed livestock and build cowsheds. Sensitize farmers delivering milk occasionally, be they transhumant or not, about good hygiene practices;
- ▶ For the collectors, the trade must be professionalized, sensitizing them about hygiene and setting up a cold chain in the course of transport;
- ▶ For the dairy unit managed by the producers' EIG: be more aggressive on the marketing aspect, supply shopkeepers in the suburbs in order to conquer this fresh market, propose packaging in smaller bags with more accessible prices to the consumers (100 FCFA bags) facilitate access to micro-credit for small livestock farmers;
- ▶ For private sector managed dairy units: don't mix local milk with powdered milk (consumers will find out), improve the packaging, pay farmers on a regular basis in order to institute a win-win relationship, sensitize farmers on the waiting times for veterinary drugs, make inputs more accessible to farmers;
- ▶ For dairy units in general: diversify the products, supply shopkeepers more regularly, motivate and sensitize shopkeepers on the quality of local milk products, improve product quality;
- ▶ To the supervision facilities: Facilitate access to training, extend research results, support producers in increasing dry season production, promote trade between actors, improve collection and processing equipments, help with the reflection on label creation, etc.

### **What social, technical and economic impacts of the small dairy units in the Region of Kolda?**

With the expansion of the sector and the increased incomes generated from the sale of milk, the latter has been taken over by men. Women, of whom 90% were commercializing milk before the establishment of

the dairy units, nowadays represent only 60% of the milk sale (fresh or curdled) on the market and from door to door. Thus, women have lost a certain economic independence, they acknowledge however that the income from milk is regular and more important nowadays and that this income is invested for family needs, as was the case in the past (purchasing food commodities, clothing, schooling, health, etc.).

The 7 dairy units surveyed had created 21 direct jobs and 246 farmers supply them with milk on a regular basis or occasionally.

At the technical level, producers have improved the productivity of milking cows (and particularly in the dry season) through improvement of the feed and veterinary prophylaxis.

Economically, a retailer earns about 22,500 FCFA/month and works only 4 and a half months a year (during the rainy season). The shop keepers earn 12,000 to 20,000 FCFA/month. The collectors earn 30,000 to 100,000/month depending on the mode of payment, the seasons and the volumes carried; they earn an average of 60,000 FCFA/month and work throughout the year. The small dairy units provide on the average over one million FCFA in profits per year in 2009 and over 2.5 million Francs CFA in 2010 (a dairy unit is supplied by an average of 35 producers).

The average income of farmers is 35,000 FCFA/month for 5 milkers (annual income of 412,000 FCFA, the minimum wage in Senegal being 540,000 FCFA/year).

Moreover, the availability of milk throughout the year has a positive impact on the food security of farming families.<sup>10</sup>

In conclusion, small dairy units have helped promote local milk, create jobs, ensure regular income for farmers. However, the collection capacity does not reach adequate thresholds; the farmers still rely on projects for the provision of inputs and dairy units operate below their normal capacity. Organizations must be strengthened in order to boost production and defend their interests. Finally, the creation of a territorial label could help develop commercialization.



<sup>10</sup> A farming household consumes on the average 2.5 L of milk per day in the dry season and 6.5 L in the rainy season.



## Communication 6

### **“Presentation of the National Union of Small Dairy Units and Local Milk Producers of Burkina Faso”**

**Moumouni Sidibé,**

**T**he National Union of Small Dairy Units was initially created in 2007 in order to defend the interests of small dairy units in the face of Government programs which were geared only towards modern farms and powdered milk processors, and the fact that the milk sector in Burkina would not take in any members producing less than 200 liters of milk. The union was established in order to:

- Defend the material and moral interests of its members;
- Encourage and work on professionalizing the local milk sector in Burkina Faso;
- Promote development of production and processing of local milk in Burkina Faso;
- Fight against illegal competition with powdered milk;
- Facilitate access by members to funds and zootechnical and veterinary inputs;
- Propose services to its members;
- Promote consultation and cooperation between members and other umbrella, national, and international organizations.

The membership is composed of only those small dairy units utilizing local milk and created or supplied by small milk producers in Burkina.

Nowadays, traditional dairy units are threatened by a major government milk project which is designed to turn our dairy units into milk collectors.

*“We cannot let our government validate as such a program which plans without any hesitation to tear away from women their livelihoods, they and their families: the revenues from the sale of milk. The union is here, and it will always stand here to defend the traditional dairy units and the small farmers.”*

The speaker has pointed out that additional information on the

union is available on the following internet address:  
**<http://burkinaiaif.org>** and **[www.abcburkina.net](http://www.abcburkina.net)**



## ⊙ Communication 7

### **“National Development Program for the Production and Processing of Milk in Haïti”**

**Pierre-Louis Sainfanel,**  
**Lèt Agogo**

**L**ocal milk is not practically processed in Haiti even though this is a staple food, which is less expensive than the imported milk<sup>11</sup> and that the annual national production is estimated at 100,000 T.

The constraints of the sector are the dispersal of the production and supply facilities, the lack of processing facilities, the cutting of the milk with water by producers, the seasonal variation of the production, the poor condition of the roads and means of communication, the lack of electric power and the importation of highly subsidized milk products.

The development of the milk sector is aimed at creating value added in rural areas, incomes for the maximum number of people (youth, women ...), promoting primarily the small farms, encouraging commercial alliances between different categories of economic agents and protecting the environment.

#### **The Lèt Agogo model:**

- Sector-based approach;
- Guaranteed outlet for milk production for small farmers-livestock owners;
- Long term conservation milk products;
- Small processing enterprises;
- Livestock farmers gathered within the National Federation of Haitian Milk Producers (FENAPWOLA).

The name Lèt Agogo is a property of the Haitian NGO VETERIMED:

<sup>11</sup> The price of imported milk is 300 to 350 gourdes per 200g (6 à 7 €); it is 70 to 90 gourdes for local milk (1.5 to 2 €).

non-profit franchise agreement granted to profitable milk ventures (each dairy unit distributes the benefits to producers according to the quantities delivered). Let Agogo is a social economic enterprise, created in 2002. It is a program to support the development of milk production in Haiti and has become the trade name of products available on the market.

The overall goal of Lèt Agogo is to contribute to improving the livelihood conditions of small farmers and environmental protection. More specifically, its goals are to conquer the domestic market, strengthen a network of milk processing businesses (through supporting the setting up of 100 to 150 new businesses in the next 5 to 10 years), increase milk productivity and strengthen organizations of milk producers, create productive and trade alliances between the different actors of the sector.

The intervention strategy rests on institutional reinforcement, community participation and technical capacity building, the choice of appropriate technologies (traditional material) and improved livestock techniques.

In the face of constraints, Lèt Agogo has set up various activities:

CONSTRAINTS	SOLUTIONS
Lack or absence of electric power.	Traditional methods to improve pasteurized milk and yogurts.
Seasonal variations of production.	Sterilisation of milk. Pressure-sealed sterilization is costly but helps sell rainy season production and as a result, remains economically viable.
Lack of qualification.	Continuing training of the staff on technical aspects as well as quality control and management.
Input supplies with items like caps, glass and plastic bottles.	<ul style="list-style-type: none"> <li>• Supply and marketing authority (the dairy units provide milk to the authority, the major marketing contracts are signed by the authority).</li> <li>• Group order for material and equipment.</li> <li>• Sale contract management by the central buying service.</li> <li>• Marketing.</li> </ul> <p>The glass bottles are purchased in Jamaica and the caps in Italy. Items which are difficult to purchase (costly and/or imported) are purchased in group, the rest is purchased individually. The central office recovers the returnable bottles and cleans them.</p>

### The impact of Lèt Agogo:

- Improved availability of high nutritional content food products;
- Reinforced grassroots organizations as development actors of their own community;
- Structuration of a production sector;
- Stimulation of milk production;
- The “Lèt Agogo” program, which enjoys international prestige, is a pioneer and has become a national reference and a model for developing other agricultural sectors both for the Government and donors and for a significant proportion of the society;
- The Haitian State has selected the “milk” sector as a priority sector to be supported;
- Reduced imports of food aid (Let Agogo has signed a provision contract with the World Food Program and the Brazilian Embassy who are henceforth using Haitian local milk for their food aid programs);
- Use of local products in school canteens (contract for supplying);
- In addition, the Lèt Agogo program has incited a very large number of Haitians and foreigners to consume local dairy products.

### The main activities and results of Lèt Agogo are the following:

- Strengthening institutions necessary for developing the sector (the FENAPWOLA is reinforced, a book of specifications and a book of demands for the sector have been developed, the milk network is expanding ...);
- Supporting processing and commercialization of local dairy products;
- Accompanying producers: improved livestock practices, improved animal health, in-kind credit for developing the animal population through the program “manman bèf”, etc.;
- Action research in order to lift the major constraints in the sector.

The Lèt Agogo network comprises 25 dairy units. A model dairy in the network processes about 200 L of milk per day and produces annually 218,000 bottles of milk. 65% of the turnover is found in the form

of cash in the domain.

The processed products are sterilized milk, pasteurized milk, yoghurt, and cheese.



## Communication 8

### ***“Presentation of the AREN (Association for the Revitalization of the Livestock in Niger)”***

**Boubé Hama,**

**A**fter a presentation of the context in Niger, the speaker presented AREN's experiences in the milk sector.

Niger is characterized by a Sahel type climate and comprises four agro-climatic zones (Saharian, Sahelo-Saharan, Sahelo-Sudanic, and Sudanic). The country's economy rests on primary sector potential. Livestock is practiced by 87% of the population as principal or secondary activity.

The value of the animal population in Niger is estimated at FCFA 2,000 billion, with a production of FCFA 191.5 billion and a value added of FCFA 155 billion. Livestock accounts for 12% of the national GDP and 35% of the agricultural GDP. It accounts for 15% of household budgets.

The milk potential was estimated in 2005 at 825 billion liters (annual statistical report 2005, DES/PA/MRA). This would amount to a consumption level of 69 L per year and per inhabitant while the standard recommended by the United Nations is 91 L per year and per person. The mobility of animals is very strong in Niger and the sector has not changed: less than 10% of the milk produced is commercialized.

In 2005, Niger imported over FCFA 9.1 billion worth of dairy products. Based on opportunities and constraints, the AREN got interested in the local milk sector and carried out various activities:

- ▶ Training actors in milk production and processing (hygiene and milk conservation, processing and collection, manufacturing licking stones and urea treatment of straw);
- ▶ Creation of women's milk processing cooperatives at Toukounouss and Ibecetane;

- Program of support to pastoral associations at Bemo;
- Construction of a collection unit at Hamdallaye.

A regional pastoral program has set up 4 dairy units at Kollo, Say, Bellevara, and Abala (the buildings have been constructed but there has not been any follow up).

Nowadays there are in Niger 2 types of dairy units: the major industries set up by the State and privatized in the 1990's and units which settled subsequently and whose capacity exceeds 40,000 L. The small industries have capacities ranging from 1,000 to 2,000 L; they are rather cooperatives, only one of which gathers producers and proposes services to them.



## Communication 9

### ***“Presentation of the ANSSA (National Food Safety Agency)”***

**Fana Coulibaly,**

**T**he ANSSA was established in 2003 following the adoption of the national food safety policy, with the following missions:

- Coordinate actions related to the safety of food items;
- Ensure technical and scientific support for control structures;
- Ensure technical and scientific support necessary for the development of regulation relative to the safety of food items;
- Assess food related sanitary risks;
- Support activities of the surveillance systems and the epidemiological watch networks;
- Handle risk related communication.

The ANSSA coordinates the sanitary analyses of food items and works in close collaboration with the control structures but the collaboration with the central veterinary laboratory and the human health laboratory is not adequate, which is a problem. The results reaching the ANSSA are used to send veterinary services to the field in order to take

measurements. Operators are informed about the results and corrective measures are proposed to them. All evaluation reports are transmitted to veterinary services which must conduct a follow-up: the ANSSA is not a control structure. Should the products come from formal or informal sectors, they should be intended for consumers and information must be available. The ANSSA therefore works on the informal sector, meeting the basic hygiene criteria and accompany the informal actors in that sense.

The ANSSA has audited various dairy units in Mali; a lack of hygiene has generally been noted in milk processing, risks related to the presence of residues of veterinary drugs in the milk and insufficient quality cattle feed.

Subsequent to these observations, a number of solutions were proposed:

SANITARY PROBLEMS	SUGGESTED SOLUTIONS
<p>Insufficient hygiene in the course of processing.</p>	<ul style="list-style-type: none"> <li>• See to it that the cowshed be always clean;</li> <li>• Keep the processing place always clean;</li> <li>• Train the processing personnel in basic hygiene principles;</li> <li>• Identify individually the animals to be milked;</li> <li>• Milk animals without harming them;</li> <li>• Set aside milk from sick animals or animals under treatment;</li> <li>• Store milk in a clean and appropriate container.</li> </ul>
<p>Risks related to the presence of residues of veterinary drugs in milk.</p>	<ul style="list-style-type: none"> <li>• Avoid self-medication;</li> <li>• Resort to the services of a veterinarian for treating animals;</li> <li>• Not milk productive females;</li> <li>• Observe waiting times of veterinarians products.</li> </ul>
<p>Insufficient quality cattle feed.</p>	<ul style="list-style-type: none"> <li>• Cover animals' nutritional needs;</li> <li>• Give potable water in clean drinking troughs;</li> <li>• Hold the instruments used in handling chemical products at a distance from feeding instruments;</li> <li>• Protect stored feed against contamination;</li> <li>• Eliminate musty feed;</li> <li>• Set up a book of specifications for feed suppliers.</li> </ul>

A recommendation for all dairy units is to have a guide of good practices.

Nowadays, in Mali, one needs a MA (Marketing Authorization) before commercializing food commodities. Of the small dairy units and semi-industrial dairies processing fresh milk and powdered milk, none has a MA. Under the PCDA/ANSSA partnership, an accompaniment of these units has helped change hygiene practices and the MA commission is ruling on dairy products. The national food safety commission has given additional time for processors to be up to date. The very first MAs were issued in Mali in 2008.

A table listing the different analyses carried out between 2006 and 2010 on dairy products was presented. The acknowledgement is a strong degradation of the conformity of products with more than 80% of fresh milk samples in 2010 being in compliance and half the dairy products analyzed not in compliance.

## Questions / Answers

### Contribution of the ICD:

The dairy units must control products at their level and must bring samples themselves to the central veterinary laboratory or to the national human health laboratory. Dairy units are 400 km away from Bamako and it is very difficult to carry refrigerated samples. One should pay FCFA 10,000 per sample, and then come pick up the results. The small dairy units do not therefore enforce such controls; it is quite expensive and too complex. This raises the problem of the inadequacy of deconcentrated services. The vet drugs' waiting times are not observed and the consumer is the ultimate victim. The ANSSA must collaborate with technical services in improving this public health aspect. The small dairy units do not have the permits. As long as this problem is not addressed, the small dairy units will not have the necessary analyses taken care of and consumers will be at risk.





## Communication 10

### **“Presentation of the REDECOMA (Consumer Protection Group of Mali)”** **Oumar Traoré,**

This communication is in line with the promotion of the local milk sector and the protection and defense of consumers in this very significant socio-economic sector. As a matter of fact, consumers are the end results of all products and services and everyone is, one way or another, in this position; at times producer or provider, and at times consumer. The bylaws of the REDECOMA restate one of the missions which consist in *“Ensuring the sensitization of producers and distributors of products and services for the taking into account of consumer concerns and observations”*.

Consumers' rights (there are eight of those) adopted by the United Nations in April 1985 through resolution N° 39/248 on the Guiding Principles of Consumer Protection (GPCP) advocate the right to satisfaction of essential needs, and stipulates that the policies in favor of consumers must *“protect consumers against unethical and illicit practices, particularly as far as health care provisions, food, habitat, water, energy and other basic services, employment, education, financial services and investment, are concerned”*.

In this context, how should we address the issue of promoting milk production and consumption in our country? What are urban consumers' expectations about dairy products? In Mali, the REDECOMA has included in its national priorities the issue of food in general. Nowadays, we must objectively analyze the reality of the local milk sector, in order to meet everyone's expectations. Different opinions received from consumers in Bamako point out that a certain number of significant points help us engage a reflection and an analysis on the issue of the local milk sector.

Perceptions on milk production and consumption in Bamako reveal that the quantity of milk production is insufficient for consumption. Such insufficiency is shown through the scarcity of sales points, but also through milk shortages, all this being related to an insignificant number of suppliers. This situation clearly shows that in terms of availability, imported milk products prevail over our local productions.

As far as quality is concerned, it is generally deemed unhealthy

because of the processing and conservation conditions which make well-informed consumers reluctant. The milk produced in rural areas is often poorly packaged and reaches cities in conditions which make its consumption unsure. The hygiene requirements are not met in most cases. As far as the quality is concerned, urban consumers often also stigmatize the unethical adulteration practices through mixtures of local products with imported ones.

As for the price, Mali is a country where the price of local milk is too high for a pastoral country, and prices are deemed unaffordable by the majority of urban consumers. The prices of imported products are deemed relatively more affordable.

For all these reasons, Malians in general and urban consumers in particular consume very little milk. In the analysis of the difficulties encountered by the local milk sector in Mali, there is truly a conjunction of endogenous factors (lack of organization in the production and distribution sector) and exogenous factors (the effect of competition by many massively imported dairy products). The total and uncontrolled invasion of the national market by imported milk, the origin and composition of which are often unknown, is a harmful factor to the promotion of the local milk sector. Thus in a context of deregulated prices, imported products, through a wide range of products and extreme publicity, an incentive effect on the ordinary consumer whose purse no longer withstands the temptation which makes him lose the sense of an informed choice.

Consumers wish to see on the market both quality products and a wide range of dairy products (powdered milk, liquid milk, butter, cheese, etc.). The most pressing consumer expectations are the following ones:

- ▶ Increased production helping meet national demand;
- ▶ Improved quality for the well-being of consumers, through the dedication of a qualified personnel and the construction of adequate infrastructures;
- ▶ Affordable prices: accessible prices for consumer are also one of the conditions of promoting the local milk sector. How to increase local milk consumption in Mali: nearly FCFA 16 billion worth of dairy products are imported every year. Well, Mali's population is 13 million people. There are consumers but the quality of the products is not adequate and the prices are not affordable. More milk must be sold and at a lower price (the quantity will make up for the reduction of

the sale price).

All these expectations subsume that the actors of the local milk sector and the public authorities combine efforts in order to better organize the sector by revitalizing production and distribution structures. As in certain countries, why not think about federating further the efforts towards a label “Dairy Producers of Mali”?

European products are less and less present on the African market but Latin American brands are booming; we must watch out against this new competition at a time when the EU (European Union) becomes aware of its unlawful competition.



## ◉ Communication II

### ***“Review of the evolution of milk production in Europe”***

**Laurent Cartier,**  
AVSF

**A**t the time of my grand-father, a given farm comprised a few cows, some poultry, and no tractors. Nowadays, on our farm, there are cows everywhere and 6 tractors. This is related to the development mechanism the Government has set up. The family farm model is rather disappearing; women often have trades outside the farm and production is done more and more via groupings of individuals. An average milk farm will be about 50 to 60 ha in size, with 200 to 550,000 liters of milk.

The evolution of milk production in France is marked by:

- ▶ An evolution of production structures and production modes (use of fertilizer and pesticides to increase production per hectare);
- ▶ Development of counseling support and research;
- ▶ Development of mechanization (conservation of fodder for carrying forward feed to the period where fodder production is nonexistent);
- ▶ Development of banking credit (loan with reduced interest by the Government, then by the UE);
- ▶ Development of the CAP (Common Agricultural Policy) system;

- The evolution of modes of commercialization (with a move from local markets to hypermarkets with European or even world level distribution).

This has resulted in a strong increase of productivity (per animal but particularly per producer), a very heavy reliance on many factors (the researcher, the inseminator, the milk controller, the agricultural adviser, the bank, the oil, the veterinary service), a deterioration of environmental conditions and a rapid decrease of the number of producers. Without oil today in Europe, there wouldn't be any milk!

The CAP is a mechanism of intervention (storage and guaranteed prices). Its main tools are the import taxes and export subsidies. This has helped stabilize prices and promoted a very rapid development of the production, to such extent that a quota system was set up as early as 1983. In 2003, the decision was made to suppress these quotas by the year 2015, and since 2003, the market has been erratic particularly in terms of prices (refer to the recent crises and milk producers demonstrations). Moreover, the quotas are unfair as those who had developed their production to a small extent were forced to lower it. In the face of this, livestock farmers have various means of defending themselves as for example with cooperatives and trade-unions.

The producer cooperatives have changed considerably: the small cooperatives have grouped themselves to give birth to large cooperatives (Yoplait, 3A ...) and those who did not want to participate in this grouping have disappeared (except for cooperatives selling very specific regional products to a territory). The major cooperatives do not better pay milk than private industrial groups. One can note presently a reorganization of production around commercialization (direct selling, producer stores, contracts between a consumer group and one or several milk producers: AMAP -association for the nearby agriculture maintaining).

The trade-unions have another method of defending producers. One can meet in France three major organizations:

- The national federation of milk producers, which is part of the FNSEA. The FNSEA too easily lets many producers stop so that the sector may remain competitive;
- The farmers' confederation, linked to Via Campesina Europe and international, rather supportive of market regulation and regulation between humans with a production more rooted into the territory;

- ▶ The association of independent milk producers, which initiated the milk strike in France, which requires regulation but without questioning the production model.

**GMOs:** European consumers succeeded in imposing their choice not to consume GMOs. GMOs are not cultivated but they are imported for cattle feed (notably GMO soy). But the consumer doesn't know it because the label "No GMO" concerns only the product which has not undergone any transformation and therefore the milk will not carry the label "contains GMOs" even if the cows have been fed with them.

**Subsidy:** The income of French farmers is lower to the sum of all subsidies paid to agriculture. If the subsidies are suppressed, farmers will not make it. 2/3 of my income comes from subsidies. If subsidies are suppressed, prices must increase. The average production cost is in the order of 360 euros/ton of milk.

In international negotiations (WTO and EPA), the farmers' confederation defends 3 trade-union rules:

- ▶ Obligation not to require subsidies before exporting;
- ▶ The produces which will be traded should not damage the environment in those places where they are produced;
- ▶ Not to jeopardize local farming communities and therefore be entitled to protect oneself (right to food sovereignty).

## Questions and general comments

Milk is a difficult sector for which a lot of things remain to be done. First of all the quality of the milk needs to be improved. Import taxes certainly have their importance but should not be adequate alone to develop the local milk sector:

- ▶ We need to build production capacities;
- ▶ Acquire the necessary equipment such as the tanks which can preserve milk for 72 hours;
- ▶ Find alternative to hand milking which limits the quantity of milk produced per farm and raises health issues.

To be balanced, 1/3 of the human diet must include dairy products;

we need to sensitize people about consuming dairy products.

In general, the small dairy units practice pasteurizing then subsequently process the pasteurized milk into yoghurt, sour milk ... or pack the pasteurized milk and sell it as such. Pasteurization helps obtain a healthy product and helps assure processing in good conditions but would not help keep the milk for a relatively long period of time and does not clear the cold chain downstream.

There are small dairy units which process milk from other species than cattle (goat milk sells very well on the market in Senegal).

The viability of a small dairy unit depends on the context, the production costs and the inputs, volumes produced and sold ... However, numerous dairy units are viable, as shown by the presentations.

In the development strategies in West Africa, the value of the FCFA is important and accounts for much in the composition of the costs (input importations, notably).



## ▶▶ Group Proceedings



## Summary Presentation of The Proceedings of The Market Group

This group work built on the concrete experiences of participants and a summary was developed for each question.

### Can the productive capacity fill the market?

Two types of markets were identified: the local community market and the urban market.

- ▶ The productive capacity can fill the community market needs throughout the year (weekly fairs, close villages) and the local market (site of the dairy unit), but constraints do exist for ranges of high value products the sale of which is difficult.
- ▶ For the urban market, the major constraints are the following: remoteness, difficult conservation, reduction of quantities collected in the dry season and product quality for a demanding market.

### What position for powdered milk?

- ▶ Currently, the powdered milk and local milk are found on the different markets. The general trend right now is the heavy consumption of powdered milk.
- ▶ The quantities of imported powdered milk can considerably fall off in the long run if accompaniment measures and public policies more favorable to local milk are established, and particularly the heavier taxes on imported powdered milk.
- ▶ The enhancement of the sector study WAEMU 2011 (Organization of the market and definition of the evolution strategy) may be an answer to the questionings.

### How do we ensure continued supply in periods of low production or transhumance?

Supply dairy units in the dry season would take place through:

- ▶ Securing cattle feed: securing fodder resources cultivated or range, government support to subsidize cattle feed;
- ▶ Evolution of the livestock mode: stalling, sedentarisation;
- ▶ Sensitize producers in maintaining a milk nucleus particularly in the dry season (period of low production against high demand).

Particular case of Niger: supply is possible throughout the year by farms in the suburbs of Niamey.

### **Sanitary quality is a market requirement, how can it be guaranteed?**

#### **What accompaniments, services for small farmers to produce quality milk acceptable by industrialists?**

The local production is confronted with import products which are better presented (packaging, conditioning, consumption period ...).

To meet the market requirements, the preliminaries are the following:

- ▶ With farmers: observe the sanitary calendar; sanitary monitoring of animals by veterinarians on the farms; health feeding of animals; milking good practices;
- ▶ With the dairy units: small quality control equipments; ensure minimum quality at the dairy unit and requiring industrialists to develop a book of specifications for the dairy units; accompaniment and producer and processor training;
- ▶ With the State: cost reduction in order to incite dairy units to do regular quality control, guide of good hygiene practices for all countries to be developed and disseminated among actors, develop local expertise (milk technicians who can support dairy units and systematize control tests); update standards and regulation; support dairy units on marketing authorization and label creation.

### **Do the products proposed meet the market demand?**

#### **What are consumers' expectations?**

Generally, products meet market demand. Local markets require traditional products: fresh and sour milk, yoghurt, thiacy<sup>12</sup> ... Urban

<sup>12</sup> Sour milk with sugar mixed with millet flour and pieces of fresh fruits.

markets request products with high value added (cheese, flavored milk, ghee ...) available in certain small dairies but in small quantities.

As far as consumers are concerned, expectations are of several kinds:

- Product packaging must be adapted to buying power (small, medium and large packages);
- Attractive and solid labeling and packaging (information in order to reassure consumers, expiry date, composition, etc.);
- Good gustative and sanitary quality;
- Community market (well-stocked neighborhood sales points);
- Regular year long supply.

In the course of the discussions, collaborative initiatives with the industrial units were evoked:

- Senegal: new initiative of industrialists working with producers on setting up a supply chain with local dairy products;
- Burkina: the Government conducted a study on consumer expectations and nearly 150 farms around major cities will be supported to supply existing industries;
- Mali: the dairy unit at Kassel (in the peri-urban area of Bamako) provides Mali Lait with 1600 liters of milk every day.

## Recommendations

The recommendations (from group proceedings) to meet the market demands are the following:

- Conduct consumer surveys; they are necessary;
- Produce sterilized milk and other long conservation products to meet the dry season demand and absorb rainy season production;
- Invent a seasonal product adapted to the consumption mode in order to promote significant consumption of cheese in the rainy season ...;
- Supply the markets of major cities where consumption is significant in any season;
- Improve product quality and presentation;
- Get products to be known through publicity, tasting tests, milk days, etc.



## ○ Summary Presentation of Group Work on The “Milk Sector from Upstream to Downstream: how to improve production and processing?”

### The discussions have helped:

- ▶ Discuss about practices relative to the collection, transport, conservation and processing of milk in various units based on their capacity, location or the targeted market;
- ▶ Identify the prerequisites to improved milk production and defining the ways and means to increase the volume of local milk processed and sold by small dairy units;
- ▶ Analyze the different small dairy units represented and their history in order to determine those factors which have made possible their creation then their growth in a highly competitive and unstable environment (fluctuating imports, powdered milk based products ...);
- ▶ Ask the question of the minimal capacity required by a small dairy unit at its creation or for its development.

### The conclusions are as follows:

- ▶ Despite the diversity of situations, the small dairy units set up convergent strategies from collection to processing. In general, the collection is entrusted to farmers or private collectors. The period between milking and reception at the dairy unit must be minimized as transport does not follow the cold chain and is done without any preliminary cooling of the milk. At reception and after the tests, the milk is rarely stored; but pasteurization is systematic and certain finished products are stored in a refrigerator. The most frequent finished products are pasteurized milk, sour milk with or without sugar, the fene and yoghurt. Long conservation products are rarer and the products involved are generally the ghee or cheese;
- ▶ The assurance of a regular outlet for producers is the best way to see milk production increase in a small dairy unit. The small dairy unit may provide services to farmers (credit, care, cattle feed) and extend its collection sphere to build up producer loyalty and increased the processed amount. On the other hand, farmers may

improve the productivity of their herd through a better food and adequate watering, prophylaxis and adapted veterinary care and genetic improvement;

- ▶ Be it in terms of creation or growth, there is no ideal model of small dairy unit. However, 3 elements are essential: the existence of a commercializable milk production, a nearby market and above all a committed and motivated leadership. The potential supports are not determining and they must be adapted. It is essential not to size up too large support, a phenomenon which has been regularly observed to cause failure. The market studies and collection potentials must be confirmed by tests. The accompaniment must be progressive and over a sufficient period of time. Finally, in order to survive and develop, a dairy unit must build up producer loyalty and the loyalty of its staff by motivating them and by building trust with them;
- ▶ There is no minimum size for a dairy unit but there is rather a size adapted to a context, a market, a collection volume, charges and returns. It is quite conceivable to begin with a daily volume of 30 L and move up to 3000 L, as was the case with the dairy unit at Kassela.

### **Recommendations:**

- ▶ A small dairy unit must set up an organization helping secure the collection (quantitatively and qualitatively) throughout the year and to assure its outlets with products adapted to the targeted markets (in terms of price and type);
- ▶ The structuring link of the local milk sector is the small dairy unit. Its role is predominant. However, the professionalization of all stakeholders involved in the small dairy unit is necessary in order to achieve (quantitative and qualitative) improvement of the local milk sector;
- ▶ To create and develop a small dairy unit, a committed leadership is essential. With this essential condition, progressive and adapted supports may sustain local initiatives;
- ▶ The investment in a small dairy unit must depend on the unit considered, the context and the constraints. For the sustainability of the small dairy unit, it is essential not to oversize the investment.



## ○ Summary Presentation of The Group Proceedings on Public Policies

The questions raised were formulated by the group in the following manner:

- ▶ What public policies for a local milk sector which is profitable for small and medium farmers?
- ▶ How can FO's influence these policies?

In order to answer these questions, the group chose to list the major constraints to development of the local milk sector in West Africa and to provide detailed solutions to these constraints at different scales: regional, national, and the Pos. We are directly presenting here the constraints and their solutions, at the 3 selected action scales.

### **Constraints and Solutions at FO Level**

#### **FO level constraints:**

- ▶ Lack of communication and dialogue between actors (Farmers, FOs, Governments, Support Agencies) and lack of consultation between State and Pos in policy development;
- ▶ No vision of certain Pos which are therefore not empowered;
- ▶ Inadequate representativeness of RPOs with a low level organization, structuring and empowerment, and lack of a consultation framework of umbrella Pos;
- ▶ Multiplicity of laws and regulations and lack of sensitization/information on these laws;
- ▶ Low lobbying and advocacy capacity.

#### **Solutions proposed:**

- ▶ Capacity and skills building at all levels (regional, national, and local FOs) through training, accompaniment and support/counseling in leadership, strategic and operational planning and responsibility management;
- ▶ Information and sensitization on texts, laws and regulations so that the FO's get the necessary tools to defend the interests of their mem-

bers (access to land, pastoral charters, sanitary quality standards of products, importations, etc.) and the elements necessary for the construction of advocacy messages (taxation at borders, local subsidies, etc.);

- Updating and improving texts, laws and regulations at the national level (in order to avoid notably conflicting policies which purport to sustain the local milk sector but still provide overly advantageous conditions to imports) and at the regional level (facilitation of trade, stop to unjustified taxations on cattle at borders, etc.);
- Improved level of consultation of the Pos themselves (strategy construction) and with the Government (FO participation in policy development): creation of a regional network specific to the local milk sector from national FOs, existing or to be created.

The actors involved in the enforcement of the points proposed above are: the FOs, the Governments and development partners, the sub-regional and regional agencies, and Government technical services.

The creation of a regional network specific to the milk sector meets all the constraints identified at the FO level because it will help reinforce its member FOs (improved representativeness of FOs, their structuring, identification of their medium term strategy), to create national and regional consultation frameworks, to provide a regional vision, to impose FOs in the definition of public policies and to be a proposal force, to disseminate information to the regional and national levels and to build advocacy capacity.

Such networks exist nowadays on sectors such as maize, rice, cotton; but not on local milk.

## **Constraints and Solutions at The National Level**

### **Concerning milk productivity:**

- The seasonal variability of production does not allow uninterrupted supply of milk processing units and the lack of equipment for the conservation and storage of fodder limits milk production beyond the rainy season,
  - Equipping producers for the establishment of fodder crops and conservation of fodder could help resolve this constraint. Cooperative using of agricultural equipment could be an interes-

ting solution for sharing expensive agricultural equipment. Fodder crops must be promoted by the Government (seed distribution);

- ▶ The near absence of endogenous genetic selection limits animals' productive capacity (farmers do not choose the breeders according to the milk production capacity of their mother),
  - ▶ The enhancement of capitalized knowledge on this theme and their dissemination to farmers may bring them to improve their practices in the area of reproduction, and ultimately, improve the productive capacity of the herds;
- ▶ The lack of technological development for milk conservation/processing and for the producer's equipment does not permit any milk production in ideal conditions (mechanical milking, cooling system/ on the spot milk storage, etc.); the milk produced is found to be in inadequate quantity and the quality becomes mediocre as long as it is not rapidly consumed,
  - ▶ This involves training producers and processors of daily products and helping them equip themselves, creating a technological support fund;
- ▶ The defective character of services to producers (counseling, veterinary service, input supply, etc.) subsequent to the structural adjustment policies of the 90s has not helped, nor is it still helping the local milk sector develop as a professional and solid sector,
  - ▶ The institutional strengthening of FOs must enable them to provide a portion of these services and to get Governments to record in their policies, the portion of services which they cannot handle. The roles of the different actors must be defined by a process of consultation.

#### **As far as collection and processing are concerned:**

- ▶ The lack of collection equipment (cans, vehicles, cooling tanks, refrigerated truck, etc.) and the inadequacy of road infrastructures hamper or even make impossible the commercialization of unpasteurized milk and processed dairy products. To this should be added the isolated nature of production areas,
  - ▶ The provision of collection equipment may help remove this constraint. As a matter of fact, the small and medium producers cannot afford this costly equipment (cooling tank, cans,). The laying out of strategic paths in milk production areas will help open up production basins and forward unpasteurized milk

toward processing and conservation centers.

**For the creation of a favorable global environment (political, institutional, legal ...):**

- The low general level of literacy training makes difficult any training activity and, as a result, any technological improvement,
  - Improvement of the rate of schooling in rural areas is an essential condition for the development of rural areas; the Governments must take the measure of the education gap and build schools, propose school kits, etc. The establishment of a literacy fund should help finance children's schooling (infrastructures and operation) more easily;
- The local milk sector, in general, lacks political will to develop it; lack of a long term vision (no development plan with quantified goals to be reached according to a given timeline); a low level commitment of Governments in funding the milk sector and inadequate implementation of existing milk policies. The lack, or even absence of sector based policy in certain countries and particularly the inconsistency in the development strategies of the sector (conflicting measures between importations and local production, choice by Governments to provide the urban population with low cost imported dairy products adjoining development policies of the local milk sector) must be underscored,
  - Governments must develop milk policies and make them coherent with the entire set of measures taken otherwise; they must increase the share of the budget allocated to livestock (particularly as livestock often contributes a significant proportion of the GDP's of West African countries). The means of implementation of these coherent policies must be up to the level of ambitions. The regulatory framework related to the sector must be strengthened for the benefit of small and medium farmers, among others;
- There is no recognition of the agriculturalist trade: the African farmer is very often considered as not having any trade !
  - Statutes for farmers (social contribution);
- Land insecurity hampers the establishment of fodder crops and harms the design of rangelands,
  - The pastoral codes developed must be enforced and extended; they must be established in those countries where they do not exist. The producers must be sensitized on acquiring land titles

and they must be better represented in decision making and consultation spheres;

- ▶ Field level activities are not harmonized by the Governments, hence the implementation of uncoordinated or even conflicting programs,
  - ▶ The creation of an orientation agency for donors in supporting the local milk sector is an essential tool for the harmonious development of the sector;
- ▶ Statistical data helping build realistic development plans of the local milk sector are lacking,
  - ▶ Data collection tools must be developed and utilized; the general agriculture census must take into account the activities of the milk sector. Structures of collection, management and dissemination of information on the sector must be created and then supported.

#### Concerning consumers:

- ▶ The urban consumer is not sensitized about local products and the impact of its consumption while he is subject to massive publicity of imported dairy products by powerful agro-industrial firms. He has little trust in local dairy products,
  - ▶ The promotion of local dairy products through fairs, publicities, must be taken into account. The definition and regulation of labels may be a path to be explored.

#### Regional Level Constraint and Solutions

- ▶ The mobility of animal is endlessly questioned because of a strong pressure on land and because it generates conflicts about access to resources. But this mobility is the very survival of the pastoral livestock system, the only sustainable mode of exploitation of numerous areas of the Sahelo-Saharan strip. Jeopardizing the mobility of animals might therefore reduce local milk production,
  - ▶ In order to protect transhumant livestock, it is necessary to develop a regional strategy in the field of transboundary transhumance, by identifying the host areas, transhumance paths, grazing areas, etc. for member states in the framework of land security.
- ▶ Sanitary impacts have a heavy impact on animal productivity because of mortality and the drop of the milk production. In addition, they put public health at risk as soon as zoonoses are involved. The use of veterinary inputs also constitutes a threat to public health

to the extent that numerous herders do not know and/do not apply observance of vet drugs' waiting time, thus possibly putting on the market products containing drug residues,

- The question is to develop and implement regional programs to control priority cattle diseases with farmer indemnification in case of stamping out.

A program to control animals and animal products must be set up at the regional level and represented at the national level in order to protect consumers. This, program, in addition to building the capacities of control agents and equipments, should report on progress achieved and effective veterinary control in order to make consumers trustful of the local sector.

These programs should strongly integrate national veterinary services and provide for a substantial budget for which donor assistance should be called for.

- The fact that there are no animal insurance services heavily hampers any significant investment in animal productions and prevents development of significant milk production by any small or medium farmer,
  - Contemplate having animal insurance policies in case of disasters.
- Baseline statistical data do not exist; however they are a minimum requirement for building real development plans for the local milk sector given the urban demand,
  - Strengthen the Regional Agricultural Information System (RAIS) and bringing actors to provide data on protection and commercialization would help better direct measures to boost the local milk sector at the sub-regional level.
- There is no long term policy vision in the sub-region (no development plan with quantified long term goals according to a set timeline) and the poor implementation of milk policies must be deplored,
  - Short, medium and long term goals must be defined according to national consumption levels (for example achieve a 50% "self-sufficiency by the year 2010").
- Lack of protection of the sector, notably through taxation at the borders,
  - Protection at WAEMU borders, through institution of protective taxes, should help the local sector better develop itself.
- Obsolete regulatory texts,
  - Harmonization of necessary legislation at the regional level. ■



## Conclusion

Constraints to the development of the local milk sector are numerous and varied. From isolation of production areas coupled with a deficit of services to producers (leading to sanitary and public health problems), to the dire need for a political will in a lack of market protection (be it fiscal or promotional), through an overly inadequate structuring and representativeness of the FOs, there are many corrective measures to bring.

The major recommendations of the working group include establishment of a regional FO network specific to the local milk sector, defining and implementing realistic policies with quantified objectives to be achieved in a given period, together with regional protective measures, the securing of pastoral livestock systems, the reinforcement of services to farmers and notably veterinary services, consumer sensitization, investment in infrastructures (roads, collection and processing/conservation equipment, schools, etc.) the extension and dissemination of legislations, etc.

One can perceive here the scope of the work to be accomplished and the necessity of a specific coordinating body for the milk sector to harmonize interventions. Donor requests will be essential. But the effects of the development of the local milk sector in West Africa will have an unprecedented impact on food sovereignty and food security, job creation and rural level incomes, the development of extensive milk production zones.



# ▶▶ Annexes



## Workshop Reference Terms



Atelier de Capitalisation

Filière Lait Local en Afrique de l'Ouest

Programme Provisoire



In the Sahelian and Soudanic sub-region, livestock is in the heart of the production systems of rural households. Livestock products (milk, meat) are income and protein sources, essential to food security.

Local milk production is facing serious difficulties linked to the demand of States which resort to massive importations of dairy products to bridge the structural gap. The situation is worsened by the leap of milk prices, resulting from the milk crisis of the past two years.

West African countries wish to implement policies to enhance local milk in order to strengthen their food sovereignty, develop their economy, create jobs and reduce their commercial deficit, among other things. In this perspective, attempts have been made at revitalizing the sector through national programs.

Several factors contribute to the under-development of the local milk sector, including the following:

- ▶ The poor inclusion of local realities in developing different programs;
- ▶ The weakness of structuring investments in the sector;
- ▶ The very difficult access by farmers to the market given the lack of structuring of the sector and the highly perishable nature of dairy products;
- ▶ The poor taking account of family livestock (which accounts for 98% of the production) under the establishment of milk policies, for the benefit of a minority of major peri-urban farmers.

**A sub-regional workshop will bring together the different actors of the local milk sector of the West African sub-region** around constraints referred to, in order to determine ways and means of **revitalization and development and trigger a massive reaction for the benefit of the local milk sector.**

## Goals

The sub-regional workshop addresses the position, role and involvement of small and medium farmers in the development of the milk sector. It should help:

- ▶ Share and exchange the capitalization works underway in Mali and Senegal;
- ▶ Exchange experiences between Pos in West Africa and Haiti on per-

tinent solutions to lift obstacles in the sector;

- ▶ Trigger establishment of a regional West African network of RPOs which would exert a political incidence at the national and regional levels (or trigger this vocation within a pre-existing sub-regional RPO network);
- ▶ Design a tool box (decision making aid for establishing a small dairy, feasibility study model, management, organization);
- ▶ Build a political incidence message.

### **Expected results**

- ▶ Sharing capitalization reports;
- ▶ Assessing the necessity to set up a West African network of RPOs which can exert a policy incidence at the national and regional levels on the subject of the milk sector;
- ▶ A tool box should be available on establishing a small dairy unit and the position of the producers;
- ▶ Developing policy incidence arguments.

### **Coverage of expenses**

The costs of transport and accommodation in Bamako throughout the duration of the workshop are:

- ▶ To be covered by the project for participants who are to be supported;
- ▶ To be covered by themselves for other participants;
- ▶ Food: Coffee-breaks and lunches are provided for all participants, in collaboration with the catering service of the CRES.

### **Duration, date and venue**

The workshop will take place on September 14, 15 and 16, 2010 at the CRES of Bamako, Mali.

The working language is French.

This capitalization project is funded by the French Development Agency via Inter-Networks.



## ⊙ Workshop Programme

### Day 1 – Tuesday September 14, 2010

#### Opening

- Address by the Chairman of the Steering Committee, AOPP Mali.
- Inter-Network Address.
- Address by the Executive Director of AVSF, Jean Jacques Boutrou.
- Address by Mali's woman Minister of Livestock and Fishing, Mrs Diallo Madeleine Ba.

#### Presentations

- Presentation of WAEMU's agricultural policies: Soumana Diallo, WAEMU.
- Presentation of sub-regional and national public policies about milk in West Africa: Christian Corniaux, CIRAD.
- Presentation of Mali's milk policy: Ministry of Livestock and Fishing, Yaya KONATE, PRODEVALAIT.
- Questions and answers on public policies.
- Capitalisation milk sector, Mali: Malick Diallo, ICD.
- Capitalisation milk sector, Sénégal: Clara Grégoire, trainee.
- Presentation of the National Union of Small Dairy Units and local milk producers of Burkina Faso: Moumouni Sidibé.
- Questions Answers on the presentations.

### Day 2 – Wednesday, September 15, 2010

#### Presentations

- AREN.
- Milk sector, Haiti: Sainfanel PIERRE-LOUIS: how could the Létagogo network help reverse the trend in the area of imported milk/local

milk? technical solutions, difficulties and success factors.

- Presentation of consumer expectations: REDECOMA (Consumer Defense Group of Mali).
- History of milk trade-unionism in France; macro-economic aspects of the milk sector: Laurent Cartier, AVSF director.

### Questions and answers on the testimonies of actors of the sector.

### Working groups aimed at developing tools are organized according to a division of the milk sector:

- Group A: The market
  - Can the productive capacity meet the market requirements? What position for powdered milk? How to ensure the continuity of provisions in times of low production and transhumance?
  - The sanitary quality is a market requirement, how to meet it? What accompaniment/service so that small farmers produce quality milk acceptable to industrialists?
  - Do the proposed products meet the market demand? What are the consumers' expectations?
- Group B: Production, from upstream to downstream
  - Techniques of processing, conservation, transport and storage.
  - How to start a small dairy unit, from the market study until the capacity of investment and farmers' involvement?
  - What minimal capacity for small dairies to survive? To grow?
  - How to improve the local milk production capacity (genetics, inputs, reproduction)?
- Group C: Policy
  - How to develop a policy incidence capacity in countries by the FOs? Who must be present in what space?
  - One of the public policy components is to establish peri-urban dairy units. This policy does not work because the dairies are far from production places. What solution to the short collection ranges for fresh milk and/or commercialization ranges?

### Day 3 – Thursday September 16, 2010

### Summary presentation of group proceedings, Questions and discussions.

Closing (address delivered by participants' representative, closing speech of the Minister of livestock and fishing).



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In addition to these individuals, there is the occasional participation of journalists of the written press and the national television of Mali.





## List of Abbreviations

ACDP: Agricultural Competitiveness and Diversification Program (Mali).

AFD (*Agence Française pour le Développement*): French Development Agency.

AMAP (*Association pour le Maintien de l'Agriculture de Proximité*): Association for the Nearby Agriculture Maintaining.

ANSSA (*Agence Nationale pour la Sécurité Sanitaire des Aliments*): National Food Safety Agency (Mali).

AOPP (*Association des Organisations Professionnelles Paysannes*): Association of Farmers' Professional Organizations (Mali).

AVSF (*Agronomes et Vétérinaires Sans Frontières*): Agronomists and Veterinary Without Borders, French NGO.

CAP: Common Agricultural Policy (of the EU).

CIDR (*Centre International de Développement et de Recherche*): International Center for Development and Research.

CIRAD (*Centre International de Recherche Agricole pour le Développement*): International Center of Agricultural Research for the Development.

DNPIA (*Division Nationale des Productions et Industries Animales*): National Division of Animal Productions and Industries (Mali).

ECT: External Common Tariff.

EIG: Economic Interest Group.

EPA: Economic Partnership Agreements.

EU: European Union.

FAO: Food and Agriculture Organisation.

FFCA (*Frans de la Communauté Financière Africaine*): Francs of the African Financial Community.

FDA: French Development Agency.

FENAPWOLA (*Fédération Nationale des Producteurs de Lait Haïtiens*): National Federation of Haitian Milk Producers.

FMI (*Fonds Monétaire International*): International Monetary Fund.

FNSEA (*Fédération Nationale des Syndicats d'Exploitants Agricoles*): National Federation of Agricultural Farmers' Unions.

FO: Farmers' Organization.

GDP: Gross Domestic Product.

GMO: Genetically Modified Organism.

GPCP: Guiding Principles for Consumer Protection.

GRET (*Groupe de Recherche et d'Echanges Technologiques*): Group of Technological Research and Exchange, French NGO.

ICD (*Initiative, Conseil, Développement*): Council, Development, Initiative, Malian NGO.

NGO: Non-Governmental Organization.

PDCA (*Programme pour la Diversification et la Compétitivité Agricoles*): Agricultural Competitiveness and Diversification Program (Mali).

RADF: Regional Agriculture Development Fund.

RAIS: Regional Agriculture Information System.

RPO: Rural Professional Organization.

UAP: Union Agricultural Policy (WAEMU).

VSF-B (*Vétérinaires Sans Frontières - Belgique*): Veterinary Without Borders - Belgium NGO.

WAEMU: West African Economic and Monetary Union.

WB: World Bank.

WTO: World Trade Organization.

Conversion rate is about 50 Haitian gourdes for 1 euro.

Conversion rate is 655.957 FCFA (XOF) for 1 euro.



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