A member of a women producers' group in Gnangdin, Burkina Faso, feeds her cows. Photo: Aristide Ouédraogo/Oxfam

TAKING A FRESH APPROACH

Enabling local producers to meet rising demand in West Africa's dairy sector

Poverty is widespread among the small-scale farmers and workers who produce and process our food, in an industry worth billions of dollars. Oxfam's new campaign highlights the systemic inequality and human suffering in food supply chains – and shows how action by supermarkets, governments, small-scale farmers and workers could lead to a decent and dignified standard of living for millions of people.

This case study describes the challenges facing small-scale milk producers across West Africa. Despite growth in demand for dairy products, they face significant inequalities in accessing their markets, including lack of government investment and competition from cheap imports of powdered milk from Europe. However, there are opportunities for change in the dairy sector, which could see small-scale producers gain a greater share of revenue from milk production. This paper offers recommendations for government and market interventions to support the development of local markets and help smallholders earn a decent living.

This is one of a series of case studies to supplement the global campaign report, *Ripe for Change*, drawing attention to the plight of specific groups of small-scale farmers and workers in international food value chains and/or promoting successful alternative approaches.

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1 INTRODUCTION

Across West Africa, milk production is essential for livelihoods and the development of rural economies. Women are very involved in the informal dairy sector, particularly in production, collection and processing – activities which are essential to their household income and the wellbeing of their families.

In recent years, there has been a marked increase in demand for milk and dairy products in the region,[1] linked to rapid demographic growth, urbanization and dietary changes. Instead of supporting local production, which could in time meet the demand if invested in properly, West African governments have increasingly imported cheaper powdered milk in order to meet the deficit. Major dairy groups in Europe have started capitalizing on this growth in demand[2] and are capturing a share of the profits by processing the powdered milk locally, thereby avoiding tariffs on imported dairy products.

However, this has led to competition between vastly unequal partners, as the dairy industry is only just developing in many West African countries and faces many challenges. Policy changes in Europe have led to increased milk surpluses and have driven down global prices. Cheap imported powdered milk from Europe is sold at much lower prices in West Africa than locally produced milk. Governments see the powdered milk as a cost-effective way to meet the needs of growing urban populations, but its availability reduces the incentive for governments to invest in their own producers.

While importing powdered milk fills the gap between demand and production in the short term, it does not benefit smallholders, or the wider economy, in the long term. Instead, it increases regional food dependence – where food imports exceed food exports – leading to an outflow of money to foreign countries. It also poses a challenge to food security – both for small-scale dairy farmers who struggle to make ends meet, and at national/regional level, as countries are exposed to the volatility of global commodity markets and fluctuating prices.

This paper highlights the challenges facing West Africa's small-scale dairy farmers, and argues that investing in local dairy producers is essential to improving livelihoods, growing the rural economy, empowering women producers, creating jobs for young people, and increasing the region's food security. It shows the impact that the practices of multinational companies can have, particularly on a region that has low levels of regulation. It puts forward recommendations and market interventions to help governments address the challenges and meet the needs of small-scale farmers, and discusses positive business models that could be built upon.

2 A GROWING DEMAND FOR DAIRY – BUT SMALL-SCALE FARMERS AREN'T THE WINNERS

A profound demographic and rural transformation is taking place in West Africa. Its population is set to increase from 390 million in 2016 to 800 million by 2050.[3] Around 50% of the population lives in urban areas, and this proportion could rise to 62% by 2030, which will significantly impact both food distribution methods and dietary habits. In terms of buying habits, urban consumers are increasingly purchasing processed products.

Across West Africa, milk is mostly produced by small-scale farmers, both pastoralists and agro-pastoralists. Over 50% of the region's population keep animals, and in some Sahelian countries (for instance Niger, Mali and Burkina Faso) up to 30% of the population depend on livestock for their living.[4] Recent research reveals the predominant role of the domestic market and local products as drivers of agricultural development in West Africa.[5] Smallholder dairy production that helps numerous rural families to live in dignity is an important part of building a flourishing domestic market, as well as being key for food security and nutrition. The dairy sector in West Africa is also important for women's economic empowerment. Women have a key role in informal markets, often participating directly in the production, collection, processing and marketing of milk.[6]

However, the huge disparities between the informal and formal dairy value chains – including inequalities in accessing investments and infrastructure, as well as unfair trade rules that favour large dairy companies – mean it is difficult for small-scale farmers to supply fresh milk to processing units, or move to value-added products such as yoghurt or butter to increase their income. As the value chain develops and becomes more formalized, women also risk being marginalized, with one of the reasons being that they are rarely able to raise loans to modernize their equipment. Lack of access to resources (e.g. land, water, feed and veterinary services) and low investment in things like collection, processing and storage facilities (discussed below) mean West African farmers cannot currently produce enough milk to meet demand locally. This could change if governments give local milk production the necessary support.

CHEAP IMPORTS ARE MEETING THE RISING DEMAND

Across the Economic Community of West African States (ECOWAS), milk production covers only 26% of estimated demand,[7] and despite local production increasing to an estimated four billion litres per year – which in theory would cover the needs of the region if the collection, processing and distribution system worked – the deficit is growing.[8] Alongside this, imports of powdered milk from Europe and elsewhere are on the rise throughout the region. The amount of milk imported varies considerably between countries. The predominantly agricultural Sahelian countries (Burkina Faso, Mali, Niger, Chad, Mauritania) do not import much milk powder, while the coastal countries with the biggest milk deficits, including Nigeria, Ghana, Senegal and Côte d'Ivoire, import 75% of the total milk consumed. Despite the different levels of production in countries across the region, there is little formal trade in dairy within West Africa.[9]

Why small farmers face unfair competition

Across the region, there are effectively two dairy systems operating in parallel. In rural areas, smallholder farmers produce milk for their own consumption and sell any surplus to informal and local markets. In informal markets, up to half the produce is sold directly to consumers as fresh milk.[10] In the formal market system, an industrialized commercial system mainly supplies urban areas, alongside some small processing units. A few larger-scale farmers and networks of small-scale producers deliver their milk to these commercial dairies for pasteurising or turning into products such as butter and yoghurt. However, these dairies largely use cheap imported powdered milk for the bulk of their supplies. Inequalities and lack of investment, infrastructure and interest from businesses mean most local producers struggle to gain access to this more formalized value chain or to develop a competitive local milk industry. This leaves smallholder farmers unable to improve their incomes and keeps them struggling in poverty.

Due to there being a generally cheap supply of milk powder, government investment in agriculture across many countries in West Africa has been low, despite commitments to increase funding for this area of the economy. For instance, in Burkina Faso, government investment in agriculture reduced from 30% of GDP from 1990–2000, to only 10% from 2000–2010.[11] Burkina Faso is one of the few countries in the region that is meeting the agreed Maputo and Malabo commitments, meaning that the situation is worse in many other countries. Across the region, only a small portion of agricultural investment (10% on average) is directed to the livestock sector. In addition, the vast majority of public investment in agriculture across the region has come from international development assistance, which has not previously prioritized livestock.[12] As a result, small-scale farmers have inadequate access to veterinary services, grazing land or even water for their animals, reducing their productivity. Women farmers in particular often lack access to finance to invest in improving their stock. Without such support, many women are unable to gain access to more lucrative markets and improve their incomes and living conditions.

In addition, a lack of rural infrastructure such as roads makes it difficult for farmers to get their produce to market. This is especially critical during the rainy season, when production is at its highest.[13] There are also few facilities for milk collection, milk treatment or refrigeration in rural areas. Because milk does not stay fresh for long, and because farmers do not have the means to store, manage and process milk before it reaches the market, they cannot make the most of the market potential to increase production.

It is also a huge organizational challenge to collect milk from large numbers of small producers; farmers need additional skills, support and access to market information in order to establish producer organizations and build their capacity to coordinate along the value chain. It is a further challenge for small-scale producers to add value to their product and ensure that they get their fair share of the profits.

Despite the huge potential, such extreme logistical and climatic constraints mean that for many countries in the region, local milk can, at the moment, only meet a small share of demand compared with powdered milk, which is not only cheap but can also easily be stored and transported.[14]

Box 1: Scraping a living from dairy

Hassan is a small-scale dairy producer in Niger. He is 49 and has two wives and nine children. He owns five cows, and the milk is vital for the family's nutrition and income. After the family has taken what they need, Hassan sells the surplus: he usually has three litres of milk a day to sell in the dry season and six litres in the rainy season. He usually gets 250 CFA Francs (€0.40) per litre, but he has to pay 50 FCFA (€0.08) to the local collector who takes the milk to the collection centre, which is 10km from Hassan's home. The price Hassan can sell for will be largely determined by the market, which is heavily influenced by cheap imports, meaning prices paid to small-scale producers are low. The income he makes is barely enough to get by and feed his family. 'Our biggest problem is to feed the family and the animals,' he says.[15]

Source: CARE DK and Billital Maroobé. (2013). While We Wait for Equal Trade: How the EU can Support Rather than Undermine Local Dairy Producers in Niger. Retrieved from: http://www.care.dk/wp-content/uploads/2012/11/While-We-Wait-for-Equal-Trade_ENG_web.pdf

The risk for women in the dairy sector

In West Africa, women play a key role in the local milk sector, collecting, producing and processing milk at small processing units. However, women face particular challenges and inequalities. Even where they own livestock and are involved in the production and collection of milk, it is often their husbands or other male family members who sell to the formal market, leaving them with little power over the decisions made and income received. Increasingly, women only have control over the evening milking, which produces less in terms of volume and can often only be sold if there is a surplus after the household has used what it needs. There is a real risk that modernization and industrialization of the sector will lead to women being further marginalized. In addition, women generally only own a small number of livestock, and if the men take the main herd to better grazing areas, women can be left with insufficient income to cover household needs, leaving them facing food insecurity and malnutrition for large parts of the year.[16] It is therefore essential to strengthen women's role in decision making processes and to ensure that efforts to achieve women's economic empowerment are central to the development of the dairy sector.

A milk producer in Burkina Faso, 2016. Photo: Tineke D'haese/Oxfam.

Box 2: The challenges faced by women dairy farmers

Fatou[17] lives in Nigeria, and runs a small dairy farm with her extended family. She owns two cows, but her fresh milk is marketed by Issaka, the eldest son of her husband's second wife, rather than her. She therefore has no control over how much of her milk gets sold or the price that it is sold at. The son often uses the profits to buy food for the livestock and then keeps the rest for himself.

Unfair trade rules benefit large importers

In 2015, the EU ended milk quotas (which limited the amount of milk a farmer could produce), leading to an increase in its surpluses of milk powder[18] and keeping its global prices low.[19] For several years, large multinational dairy companies like Lactalis, Arla, Danone, Sodiaal, FrieslandCampina, Nestlé, Glanbia, etc. have been interested in the West African market[20] as an outlet for these European surpluses.

Faced with high levels of urban poverty, the governments of West Africa have favoured imports of low-cost powdered milk (around three times cheaper than fresh), and have set a very low common external tariff (CET)[21] of 5%. Today, urban populations are used to having milk reconstituted from this imported powder. As a result, West African dairy farmers are losing out. Not only can they not compete on price, but the availability of cheap imported milk powder reduces the incentive for governments to invest in local milk production, perpetuating the imbalance.

West African governments have set higher tariffs on imported processed dairy products such as yoghurt and butter. However, multinational companies circumvent this by investing in local production facilities and producing their value-added products locally, using the imported milk powder. This makes it possible for them to label products made with cheap imported powder as local dairy products, undermining and jeopardizing local production. Milk powders filled with vegetable fat (like palm oil, which has questionable nutritional value) are further distorting the market due to their even lower prices (30% lower than full-fat powdered milk). In addition, many companies reduce the tax paid on their powdered milk imports by importing in bulk and then repackaging within the region and selling in smaller quantities. The European Commission admits:

> *'The EU is the main supplier of the African market: Fat Filled Milk Powders (FFMP) are exported in bulk and then packed into small portions. Several EU dairy companies invested in re-packing facilities, especially in West Africa.'*[22]

Dairy companies from the Global North entering the West African market are not only exporting their milk powder, they are also exporting the production model that made them their fortune – but often to the detriment of local producers and small-scale farmers. In Belgium, for instance, the number of milk producers fell from 40,000 in 1984 to 7,000 in 2016 (an 82% decrease) as large companies consolidated their supply bases, putting many small dairy farms out of business.[23] If West Africa adopts a similar model, small farmers' share of the revenue in the milk sector will remain minimal.[24]

Many multinational companies have bought up or purchased stakes of varying sizes in local West African dairies – but this has, so far, mostly increased the risks for local farmers and brought few or no opportunities. Unfortunately, distributing and repackaging powdered-milk-based dairy products is more attractive for multinationals than investing in local production.

Looking to the future, the EU is aiming to further expand its dairy exports globally, which are expected to grow on average by around 500,000 tonnes of milk equivalent per year, mainly in cheese and skimmed milk powder.[25] This will mainly benefit the multinational dairy industry and large distributors.

3 OPPORTUNITIES FOR CHANGE

The West African dairy sector is undergoing a transformation. Despite the challenges facing smallholders, there are opportunities for them to benefit from these changes – but to do so, they must have the right support from governments and partnerships with national and international investors.

How can the West African dairy sector keep up with the strong growth in demand, while also enabling producers to make a decent living? A thriving local dairy sector which benefits local producers can exist alongside and complement large foreign companies, bearing in mind that local small-scale dairy production does not currently meet demand throughout the year, due to inadequate investment and regulation.

Despite the power relationships that place them in an unequal position, West African producers, encouraged by national and regional dairy development programmes, are keen to profit from the growing market. They are well placed to take advantage of the tastes of a growing middle class, which is increasingly turning towards locally produced milk. This benefits small-scale producers, because in shorter, local value chains, the producers' share is generally higher.

Box 3: 'We have huge production potential – we just need a good policy'

As in other West African countries, Burkina Faso has seen a rise in demand for fresh milk and dairy produce, particularly from the growing cohort of middle-class consumers. Despite the fall in the price of powdered milk linked to overproduction in the EU, small local dairies are managing to hold their own. The National Union of Small Dairies and Milk Producers (UMPLB)[26] provides technical support to 42 small processing units and promotes local production. Members are 80% women, reflecting women's crucial role in the value chain and the need to provide them with the right support.

'Here [in Burkina Faso], women farmers are paid on a daily basis, depending on the quantity of milk, because they need the money each day to support their families. It is therefore a problem to access the credit needed to buy vaccinations or food for the animals. Banks do not trust this kind of system. In addition, the work of women is not recognized officially as a profession.'

'Here, the women can defend themselves. They are not slaves to anyone. If we are able to produce well, we can live better.'

Former UMPLB president and owner of a small dairy processing unit

UMPLB promotes a business model that is set up to tackle some of these issues and ensure that even farmers working on a very small scale can supply the formal commercial market, alongside larger producer groups.

UMPLB President, Ibrahim Diallo, explains: *' […] Burkinabès know that fresh milk can be made into yoghurt, and prefer yoghurt made from local milk to that made from powdered milk… Powdered milk is dead milk, while local milk is alive… We have huge production potential – we just need a good policy.'*

THE VITAL ROLE OF GOVERNMENT POLICY INITIATIVES

In the face of rapidly growing demand for dairy, the governments of West African countries know that local milk production is an important development asset. Indeed, ECOWAS has launched a 'Milk Offensive – Outlook to 2025', which aims to:

- Achieve food security in the region and remove the dependence on imports.
- Improve rural incomes.
- Tackle poverty and strengthen the resilience of vulnerable populations.

It will help achieve this by:

- Increasing local production of fresh milk by improving livestock productivity.
- Improving supply from the regional dairy industry via the collection of the substantial amount of dairy theoretically available from local livestock by 2025.
- Promoting the environment and incentives needed for the development of local milk value chains.

Change is possible

Despite the trade, infrastructure, agro-climatic and other constraints they face, it is clear that – with the support of their governments, partnerships with companies and the involvement of farmers' organizations – there are opportunities for smallholder farmers to make a decent living from their production (see Box 4). This is particularly the case when they are in step with the large dairy companies' need to act in a socially responsible manner. In the face of pressure from African farmers' organizations, NGOs and West African governments, some companies are now investing in local milk collection. For example, Wamco, a local dairy in Nigeria that is now controlled by the Dutch dairy company FrieslandCampina, buys local milk, although the percentage it buys was still low as of 2015.[27]

Furthermore, the increasing volatility of global prices may, at some point, lead to a high price of milk powder (like in 2008 and 2013), which might prompt companies to invest more in local milk production. Even if this potential price rise is not sufficient to achieve this, it may create a space where complementarities can develop between local small-scale production and the interests of large companies.

The 'Milky Way to Development'[28] is proof that dialogue between all stakeholders is possible. The initiative brings together the regional network of Sahelian pastoralists called Reséau Bilital Marrobé (RBM), Danish actors from the dairy industry (including Swedish-Danish Food Group, Arla Foods), government and a development NGO.[29] Its ambition, as stated in its 'final declaration' in March 2015, is to 'develop a socially, environmentally and economically sustainable market for milk in West Africa that allows both small farmers and large companies to produce and deliver their products to the market.' Results on the ground are limited at this stage, as the promises have not been followed up with concrete actions in most of the countries. In Nigeria, where the biggest impact has been seen, the project has resulted in a very high percentage of dairy being sourced locally, but only because the local authorities pushed Arla to respect its commitment. This illustrates that public monitoring and regulation are key factors of success for a collaboration between big companies and local famers.

Box 4: Successful local business models and initiatives

Increased demand for milk products has prompted growth in local milk collection centres and small dairies using local milk, powdered milk or a combination of both.

- In **Burkina Faso**, the Banfora Dairy Sector Innovation Platform,[30] created in 2015, is a good example of an initiative by farmers to take their sector in hand, improve their production techniques and establish shared governance between men and women. The initiative is based on consultation and mutual support between farmers, producers of inputs (fodder, veterinary inputs, etc.), collectors and producers.
- In **Niger**, the Kollo and Hamdalaye cooperatives supply 5,000 litres a day to Solani, while in Mali, the Kassela, Korokoro and Markacongo cooperatives collect 10,000 litres a day for Mali Lait. This has provided farmers with a stable, regular income and access to resources such as training and livestock feed.
- In **Mauritania**, Laiterie Tiviski,[31] produces almost 40,000 litres of milk a day, around 90% of which is local milk from camels, cows and goats. It buys the milk from local nomadic pastoralists for a higher than average price of €0.51/litre.[32]
- In **Burkina Faso**, in May 2016, the National Union of Small Dairies and Milk Producers (UMPLB), in collaboration with Belgian milk producers' organization MIG,[33] launched a fair trade milk project called 'Fairefaso' where the supplement paid by the consumer is passed on to the producer and the brand is owned by the producers, as it is in FaireBel and FaireFrance.

Such initiatives are attracting investment from European dairy companies looking to diversify their supply base. For instance:

- In Nigeria, Dutch dairy company FrieslandCampina has built collection centres, with refrigeration, and provided equipment and training to ensure that the milk it collects from local producers meets required hygiene standards.[34] This opens up access to urban markets for rural producers, enabling them to participate in the urban value chain.

4 CONCLUSION

Milk is a locally available, nutritious product, which is important to West Africa's rural economy and to the health of the region's growing number of children. It has the potential to lift smallholder dairy producers – many of whom are women – out of poverty. Development of the dairy sector is vital to meet the growing demand for milk and other dairy products, but must not result in producers being deprived of their fair share of the value. More particularly, measures must be taken to ensure that growth in local dairy production and women's economic empowerment go hand in hand.

To support local milk producers, Oxfam in West Africa recommends that the region's governments:

- Invest in infrastructure that will benefit the smallholder dairy sector, in particular to connect milk producers with growing domestic consumer demand, through improved market spaces and better production, collection and processing infrastructure.
- Promote small dairies and local milk producers' organizations and support them in collection, processing and commercial activities, including through public procurement.
- Encourage organization and training schemes for women smallholder producers and young people, or collective action groups to enable women to improve their share of value in the dairy industry.
- Secure pastureland for small-scale farmers, particularly in peri-urban areas where their livelihoods are threatened by urban sprawl and larger factory dairy farms.
- Strengthen regulations on the importation of powdered milk, including restricting what can be classified and sold as a 'local' product, and setting a quota for local milk processing.
- Use policy incentives to encourage companies looking to expand into the region to invest in local milk production rather than using powdered milk.
- Introduce barriers, such as higher rates of VAT, for powder-based dairy products, and/or require companies to use a minimum percentage of local milk in such products.
- Encourage transparent labelling to ensure that consumers understand where their dairy products have come from to help increase the consumption of local milk.
- Develop initiatives that provide small-scale farmers with access to key resources such as livestock feed and equipment.

Through its new campaign, Oxfam is calling for an end to human suffering in food supply chains, and promoting alternative business models that give the people behind the products a fair share of the value. To find out more about the campaign, and to read the full set of recommendations, see *Ripe for Change*.

NOTES

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