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Positive prospects for sub-Saharan Africa

by Pieter Uys, chief operating officer, Clover Fonterra Ingredients

Often people outside Africa – and more specifically sub-Saharan Africa – conjure up less positive images of the region. People mostly hear negative reports that mould their views and actions. This also influences their risk assessment of the African continent. Issues such as the Aids pandemic, corruption, wars and instability, crime, unstable governments, low educational standards and unemployment are seen as some of these influencing factors.

Obviously, these perceptions are also applied to the dairy industry. However, the picture is not all doom and gloom. As residents of the African continent, we should start seeing the bigger picture and concentrate on the more positive aspects and tendencies that are prevalent in the sub-Saharan mindset. This will have a profound effect on the dairy industry in the future.

The first positive development was the formation of Nepad (New Partnership for African Development). Nepad created a new spirit of expectation for Africa and a mental framework of hope. Supported by Nepad, is the willingness to end wars. The peace process is clearly gaining momentum and is resulting in the establishment of political stability. This stability is, in turn, conducive to investment – also in the dairy industry.

Some sources estimate growth in the sub-Saharan region for 2004 at an eight-year high of 5%, compared to 4,1% in 2003. In 2004 the growth for non-oil producing countries was 4,4% and 7% for oil producing countries. Obviously this will have a positive effect on consumer spending, which in turn will drive the growth in dairy consumption.

Throughout Africa a new generation of highly skilled and educated people are entering the management ranks of companies. Coupled with the older leaders in the industry, this also bodes well for the dairy industry. Another positive factor is the recently announced debt relief for the poorest nations. If managed correctly, the debt relief will spiral down to consumers, resulting in increased consumption of foodstuffs, including dairy products.

Throughout the region, well-equipped dairy production units with the capacity to produce

the whole spectrum of dairy products are either operational or mothballed. It may soon become necessary to reactivate some of these factories to meet the growing demand. Fact is, the production infrastructure is available to utilise.

It is estimated that Africa produces 13 billion litres of raw milk. Most of this milk is produced by small-scale farmers and consumed traditionally. The fact is that the milk is available and, if properly organised, can be a source of supply to formalised factories. India – now the largest milk producing country in the world – has built its entire industry on small-scale farmers with one to three cows per farmer.

As income levels and living standards rise, consumption patterns also change. The cycle starts with traditional products such as raw and sour milk. As income increases, consumption of milk powder products escalates and fresh milk and long-life milk follow. The next step is cheese and cultured products such as yoghurts and yoghurt drinks. The value-added products have higher margins and these higher margins fuel investment in advertising and distribution ability. This, in turn, creates more demand.

All the positive factors overshadow the negative perceptions of the region. If managed properly, this will have a growth effect on the dairy industry to the benefit of all involved in this health food industry. *DMA*





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Focus on dairy processors in Kenya

by Isabel Basson

The dairy industry in Kenya plays an important role in many lives, employing almost two million people. With the change in the Kenyan dairy market, due to the liberalisation of 1992, the role of the dairy processor has changed significantly. The new market is still developing, and the future role of the milk processor in Kenya might look significantly different than it does at this stage. The Kenyan dairy industry has the potential to still grow vastly and that can also play a significant role in the part the processors play.

The dairy sector is the second largest contributor to agricultural GDP of Kenya. Beef is the largest contributor. The Kenyan dairy industry is one of the largest in Africa, and is dominated by small-scale farmers on the producer side and the informal sector traders and hawkers in the marketing side.

According to Moses Nyabila, dairy trade specialist, Rates, dairy production in Kenya lies predominantly in smallholdings. Market-orientated dairy farming based on exotic cattle, dates back to the first decade of the 20th century, when European settlers introduced dairy cattle breeds and other exotic forms of agriculture.

Nyabila notes that Kenya's dairy herd of almost three million strong, constituting approximately 70% of the total African dairy herd, is equal to that of New Zealand. Kenya, however, only produces approximately three billion litres of milk per year, compared to the 15 billion litres produced by New Zealand. It is obvious that the Kenyan dairy industry has huge potential that needs to be developed.

Small-scale producers dominate dairy production, owning over 80% of the 3,3 million dairy cattle, producing 56% of the total milk production and contributing 80% of the marketed milk. On-farm consumption (non-marketed milk) accounts for about 45% of total milk production, while the remaining 55% is marketed through various channels. Only about 15% of marketed milk flows through milk processors that include Brookside, Spin Knit, Premier, Kenya Cooperative Creameries (KCC) and other smaller private processors.

Nyabila also states that several factors, including the presence of significant dairy cattle

populations, the historical importance of milk in the diets of most Kenyan communities, a suitable climate for dairy cattle and a conducive, policy and institutional environment, have contributed to the success of dairy production by smallholders in Kenya.

The milk traders and cooperatives that constitute 55% of the market, serve both the formal and informal market, with lower milk prices than the milk processors. This is due to the fact that the processors have to rely on technology since they pasteurise and package the milk themselves. The milk traders often buy and sell raw milk. The smaller milk traders include mobile traders, and milk bars, as well as shops and kiosks.

Only about 15% of marketed milk flows through milk processors that include Brookside, Spin Knit, Premier, Kenya Cooperative Creameries (KCC)

The smaller milk processors in Kenya mostly process and sell pasteurised milk, with a few who also focus on the processing of yoghurt and cheese. One of the problems dairy processors face in Kenya, is that processing is a specialised job that needs formal training. Due to a lack of training programmes, most employees receive on-the-job training and most of them are still male.

There are approximately 29 licensed processors who process approximately 600 000 litres of milk a day. The key to success in the Kenyan processing industry seems to be that they might not pay very high prices, but they pay regularly and on time, providing enough incentive for suppliers to provide them with a regular supply of milk. *DMA*

Milk processors thrive in Kenya

by Isabel Basson



Brookside Dairy Ltd is currently the biggest milk processor in Kenya and neighbouring regions

The Kenyan milk processing scene has changed dramatically since the liberalisation of the dairy market in 1992 when new dairy processors were allowed to enter the market. Suddenly a whole new generation of dairy processors came onto the playing field. Some of the major roleplayers include Brookside Dairy Ltd, Spin Knit Dairy Ltd and the Kenya Cooperative Creameries (KCC).

Brookside Dairy Ltd

Brookside Dairy Limited was founded in Kenya in 1993 after the liberalisation process. The owners of Brookside have, however, been active in the Kenyan dairy industry since the 1960's, when they had excelled in large-scale dairy farming. Brookside Dairy Limited has grown to become the biggest milk processor in Kenya and neighbouring regions.

Brookside has a vast range of products available to the consumer. Their product range includes liquid whole, skimmed, flavoured, UHT full cream milk and UHT low fat milk. They also have yoghurt, maziwa lala (fermented milk), butter, whipping and whole cream, as well as ghee.

The company's vision for the future is to become the market leader in processing and distribution of dairy products in East and Central Africa, and to be the benchmark company in the industry.

Spin Knit Dairy Ltd

Spin Knit Dairy Ltd was founded in 1996. The company started as a mini-processing plant in Nakuru with a distribution fleet of three vehicles. Today it has grown into a major company with more than 65 vehicles and a production site in Nairobi's industrial area. The company currently directly and indirectly provides work for more than 50 000 people.



The Kenya Cooperative Creameries (KCC) is the largest dairy organisation in Africa and the oldest cooperative in Kenya

Spin Knit has a wide range of products ranging from fresh milk, long-life milk, butter, fermented milk, yoghurt, ghee, flavoured milk, and fruit juices (smoothies). The Spin Knit brand names include Lea, Everfresh, Flava and Tuzo.

Tuzo

Tuzo is a well-known Spin Knit Dairies brand name in Kenya. The Tuzo product range includes whole milk, lala (fermented milk), fresh, semi-skimmed and skimmed milk as well as value-added products, such as yoghurt and butter. Tuzo long-life milk is one of the leading long-life brands in Kenya. The Tuzo product range has recently undergone a transformation to answer trade and consumer concerns. The brand also repositioned its product ranges to gain a competitive edge in the Kenyan dairy market.

Kenya Cooperative Creameries (KCC)

The KCC is the largest dairy organisation in Africa and the oldest cooperative in Kenya. It was founded by European farmers in the early 1920's. The milk delivered to the KCC is mainly consumed in the urban areas. The KCC has authorised the establishment of milk collection centres throughout the country, and processing factories have been improved to accommodate the milk supply.

The creameries process liquid milk, UHT, powdered milk, butter, ghee and cheese. The KCC went through a period of difficulty with the liberalisation of the dairy market and the introduction of alternative processors in the early nineties, but they have survived to become one of the strong competitors in the market. *DMA*



Spin Knit Dairy Ltd was founded in 1996



The Tuzo trucks are a familiar sight in Kenya. Tuzo is one of the Spin Knit brand names

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Proudly African

Dr Pieter de Villiers from Bruboer and Ahmed Tukur from Daddo Group in Nigeria with South African All Seasons UHT milk destined for Nigeria. The packaging will boast the "Proudly African" logo

A "Proudly African" logo was developed to stimulate trade between African countries and to inspire trust in the quality of products originating in Africa. It is the result of a joint venture between Bruboer, a farm management company working in Africa, a company Intshona Milk Products in the Western Cape initiated by a group of dairy farmers and the Daddo Group in Nigeria.

“African imports tend to be frowned upon because people believe it to be of a lower quality than imports from the Western world. We hope that with the ‘Proudly African’ logo, that perception will start to change for the better,” said Ahmed Tukur of the Daddo Group.

“It is my belief that the logo may significantly change the face of trading in Africa by creating markets for African products in Africa,” Tukur said.

Before any African products will be allowed to display the “Proudly African” logo, they must meet stringent quality standards. “The ‘Proudly African’ logo will only be used by companies that produce quality products that improve the image of Africa,” Tukur said.

The first product to display the “Proudly African” logo will be All Seasons UHT milk. All

Seasons UHT milk is produced by a South African company specifically for export to Nigeria. As a result of its climate, Nigeria cannot produce enough milk for the urbanized customers, while South Africa produce quality milk that is ideal for export purposes.

According to Dr Pieter de Villiers of Bruboer, the company responsible for brokering the trade deal between the South African group and Nigeria, the key to successful trading in Africa is bilateral.

“It must never be a case of simply exporting products to one country without a reciprocal agreement to in turn import products from such a country. It is impossible to produce all products in all places and through bilateral trade a successful future awaits Africa,” he said.

The first assignment of All Season UHT milk displaying the “Proudly African” logo is set to arrive in Nigeria in November.

For more information about the “Proudly African” concept, e-mail tukur@daddogroup.com. *DMA*



Nairobi Agricultural Trade Fair supports fair trade

by Karien Slabbert

The 2005 Nairobi Agricultural Trade Fair that took place from 26-31 September, attracted 310 local and 79 international exhibitors. The number of exhibitors has almost doubled from last year. With the theme, "Building an agricultural and industrial working nation," the fair is the largest exhibition in East Africa and the only surviving agricultural show in the region. The fair boasted its own "Milky Way" where visitors could taste a wide array of dairy products from local dairies.

The trade fair aimed to encourage greater participation by international exhibitors as well as to cultivate dialogue between farmers and entrepreneurs in order to sustain primary producers. Kenyan President, Mwai Kibaki, who

officially opened the fair, mentioned that the Nairobi International Trade Fair is an important event that promotes products and services and enhances domestic, regional and international trade. *DMA*



The dairy stands at the Nairobi Agricultural Trade Fair attracted a lot of interest. Here visitors flock to the Nyota Dairies, Limuru Milk Processors LTD and Spin Knit LTD stalls to taste the various dairy products



Old and young gather at the Spin Knit LTD dairy stand to see what treats they have to offer



Milk helps develop brains and brawn! Visitors stare in awe as a local "strong man" flexes his muscles



Kenyan lacto-enthusiasts make their way to the Coolfresh flavoured yoghurt and Farmers' Milk Processors stands



A friendly Nyota Dairies promotions lady hands out free milk samples to visitors



A group of school children lounges around in front of the Kenya National Federation of Agricultural Producers



All play and no work. The Nairobi Agricultural Trade Fair attracted a huge amount of interest. On Saturday, 31 September, hundreds of school children visited the fair to join in the excitement



The Nairobi Agricultural Fair was characterised by quality Jersey cattle classes. Here Jersey cows await their turn to strut their stuff in the show ring



Ayrshire cows on show



Delicious, nutritious milk

World Dairy Expo 2005 focuses on technology exchange

by Izak Hofmeyr



One of several tents used to provide temporary housing for the cows during the course of the World Dairy Expo

The World Dairy Expo, annually presented early in October in Madison, Wisconsin, in the USA, is without a doubt the leading dairy show in the world. This is where the world dairy industry comes together to interact and interchange information and technology, while looking at the top dairy animals in the USA. Also woven into the week-long programme are virtual farm visits and seminars on topical issues in the dairy industry.

The World Dairy Expo, according to general manager Tom McKittrick, has been around for 39 years. Its sole purpose is to provide an event and a forum for the world dairy industry can interact and share information and the latest technology.

“Our goal with the World Dairy Expo is to make dairy producers more profitable,” he told *Dairy Mail Africa*.

The Expo consists of four segments, namely the commercial expo, where input providers in the industry display the latest technology and developments, the show, where seven dairy breeds compete for top honours, virtual farm visits, where selected dairy farms from across the USA get the opportunity to share their secrets with the Expo attendees and fourthly a programme of seminars where leading professionals discuss some pressing issues in the industry.

Some of these issues were

- ▶ Phosphorus management to improve profit and ensure environmental sustainability
- ▶ Transition cow management success
- ▶ Hormone tools to increase pregnancy rates
- ▶ Transition cows – what’s working and what’s not
- ▶ Benchmarking calf and heifer programmes
- ▶ Business analysis: what financial statements or tools are appropriate
- ▶ Fundamentals of organic dairy production, and
- ▶ Holistic veterinary techniques.

“With companies from 25 different countries participating in the Expo,” said McKittrick, “this can truly be called a world expo. We have companies here from Europe, South America as well as Asia, all coming to show the world what



The huge size of show Holsteins in America was quite evident. This man is of medium length, he just looks so small next to his cow



A group of Dairy Swiss cows in the show ring

technologies they have to offer the world dairy industry."

The reason why Madison in the state of Wisconsin was chosen for the venue for the Expo, explained McKittrick, is because it hosts a large basis of the USA dairy industry.

"Apart from the large number of dairy producers in Wisconsin, we also have a number of companies specialising in the dairy industry in the state, making it a very good area to host such a major event. Furthermore it is relatively centrally situated in the USA, taken from East to West, and Madison boasts the infrastructure necessary to host such a large event."

Although it seems as if the dairy industry in America is getting smaller, said McKittrick, the number of cows at the Expo is going up. What exactly this means for the industry, he was not sure.

"We find the number of dairy cows in the country getting smaller and smaller, but they produce more and more milk. The reason for this is increasing input costs, which dictates that milk has to be produced more effectively. A logical conclusion would be that we should experience a decline in the number of animals on show here. The opposite is, in fact, true. An explanation for this could be that dairy farmers realise the value of stud breeding and consider this show as the one where they have to display their animals." DMA

To demonstrate just how large the World Dairy Expo is, here are some figures:

Total attendance: 65 015
(Last year's attendance was 65 400)

International guests: 2 513
from 81 countries

Top five countries of international attendance: Canada (272), Mexico (267), Japan (226), Germany (194), Brazil (108)

Commercial exhibitors:
681 companies representing
22 countries and 43 USA states

Number of dairy breeds exhibited: 7
Total number of dairy cattle lots: 2 212

Breakdown of cattle represented:

Ayrshire	221
Brown Swiss	396
Guernsey	222
Holstein	611
Jersey	330
Milking Shorthorn	198
Red & White	234

Total number of dairy cattle exhibitors:
825 exhibitors from 39 states

Total numbers of sale lots: 149
(Guernsey – 24, Jersey – 29, Brown Swiss – 36, Ayrshire – 18, Holstein - 42)



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Basketball stars and Hoops4Africa launch Aids campaign in Kenya

“Play safe, live long. Drink milk, live strong” is the message ten basketball stars from the National Basketball Association (NBA) and Women’s National Basketball Association (WNBA) promoted during a visit to Kenya earlier this year. During the week-long visit, Hoops4Africa and the team of American basketball players and coaches visited primary and secondary schools in Nairobi, Naku and Mombassa to educate adolescents about HIV/Aids and to encourage healthy living.

The Hoops4Africa/Jump4Life Basketball Tour is the largest basketball clinic in Kenya thus far. “Our main focus is to get the information out on Aids and how deadly the virus is, and our means of doing that is through basketball,” said Washington Wizards forward Michael Ruffin, one of the ten athletes. HIV/Aids has deeply affected sub-Saharan Africa, where more than half the world’s HIV-infected people live. The highest incidence of Aids is between the ages of 15 and 26. Hopefully, by reaching the children, they will go home and tell their parents about it.”

The visit was not all sober talk and no play, though. Basketball clinics taught the children how to shoot, dribble and manoeuvre on court. The squad held their first players’ clinic and coaches’ sessions at the United States International University. During the coaches’ sessions, players talked to the children about HIV/Aids and other topical issues.

The Nakuru Clinic took place at the Menegai High School Basketball Court. This was a special event for the Rift Valley basketball fans, who rarely get to see serious basketball action. At the Kasarani Clinic, hundreds of basketball fans, players and coaches descended on the Kasarani Gymnasium to watch the WNBA players in action during the exhibition games. The Hoops4Africa squad ended their Jump4Life tour at the Hope Centre in Nairobi, where the final basketball clinic took place.

Land O’Lakes joins forces

Hoops4Africa has partnered up with Land O’Lakes, a leading United States food and agricultural co-operative that works with

farmers in sub-Saharan Africa. According to Tom Verdoorn, Land O’Lakes vice-president, international operations and dairy proteins, the Land O’Lakes partnership with Hoops4Africa is a natural fit. “Hoops4Africa will mobilise basketball stars to bring renewed attention to HIV/Aids in Africa, while Land O’Lakes will bring decades of experience in getting nutrition to people already afflicted with the disease.”

Land O’Lakes supplemented Hoops4Africa’s message with information on the importance of good nutrition, including milk and other dairy products. To help Hoops4Africa achieve its goal of reaching two million Africans about HIV prevention and nutrition Land O’Lakes organised basketball games and exhibitions at schools, which attracted large audiences. Local Kenyan basketball players also participated in the exhibition games. “Land O’Lakes wants to contribute to ending hunger and alleviating poverty through working with the food industries in African countries and forming unique partnerships with organisations such as Hoops4Africa,” said Kristin Penn, Land O’Lakes director of international development division.

Hoops4Africa and Land O’Lakes are considering long-term strategies to spread the message of good health and nutrition. The NBA players’ trip to Kenya was just a start. “We are very interested in getting corporate Kenya and their professional teams to pick up where we leave off and to reach as many schools as possible to spread these messages in the classroom,” said Penn.

For more information, go to www.hoops4africa.org. *DMA*



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Because of employees' high expertise levels, our unique approach to dairy industry farmers is programme-based and solution-orientated. This approach method helps farmers to better manage their dairies. Professional sales representatives are trained to help producers identify diseases quickly, as well as improve milk quality and reproduction on farms.

Programmes such as the PAH Dairy Wellness Plan were designed to assist dairy farmers and veterinarians to optimise reproduction management and find biological solutions. This programme highlights three other programmes: the *100-Day-Contract Manager*, *Q-MAX* and *ScheduVac* which, respectively, helps optimise early pregnancies in dairy cows, addresses milk quality issues and outlines essential vaccine protocols for dairies.

For more information contact Obed Lukhele, export manager: sub-Saharan Africa at +27 11 320 6107 or fax +27 11 895 1507.



Well-known companies feature big at the World Dairy Expo in Madison

A total of 681 companies representing 22 countries and 43 USA states exhibited at the World Dairy Expo held in Madison, the USA, in October this year. More than 65 000 visitors streamed through the gates to get up to date with the latest dairy technology on offer at the Expo.



Pfizer Animal Health is a well-known company in Africa and is one of the large exhibitors at the World Dairy Expo



Animal health is an important aspect of successful dairying. Animal health company Intervet claims their spot at the World Dairy Expo



Yet another animal health company known in Africa to display their products and expertise at the World Dairy Expo, is Merial



DeLaval's outdoor display consists of an enormous truck containing a complete milking parlour. DeLaval's indoor exhibition is equally impressive