



The 2025 African Agriculture Barometer

The dairy value chain

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Editorial

In the face of climate, geopolitical, and economic upheavals that are weakening global food systems, dairy sovereignty in Africa is emerging as a major strategic issue. Milk, an essential product for nutrition and the local economies, highlights several challenges: **dependence on imports, potential for local production, and aspirations for food system autonomy.**

This barometer is the result of a partnership between FARM, PAFO, and Afdi. It offers a clear and evidence-based and accessible overview of the dynamics of production, consumption, trade, investment, and public policies in African countries. It draws on robust data and cross-analyses to inform the decisions of policymakers, farmers' organizations, and economic actors.

The findings are unequivocal: despite growing demand, local milk production struggles to keep pace, hampered by insufficient infrastructure, low value addition to local products, and competition from imported milk powders. With the appropriate measures and support, family farmers could become the backbone of a

sector capable of sustainably feeding populations, creating jobs, and strengthening rural economies.

Dairy sovereignty cannot be built without coherent public action, responsible investments, and international cooperation based on fair and reciprocal trade. It also requires full recognition of the role of women, cooperatives, and producers' organizations in transforming and structuring the value chains.

This barometer is both a decision-making tool and a call to action. It calls for investment in agricultural and livestock value chains, the promotion of local know-how, and the development of coherent trade and nutrition policies for balanced territorial and population development.

Together, let's make milk a lever for sovereignty, social justice, and prosperity for the African continent.



Ibrahima COULIBALY,
farmer in Mali and
President of PAFO



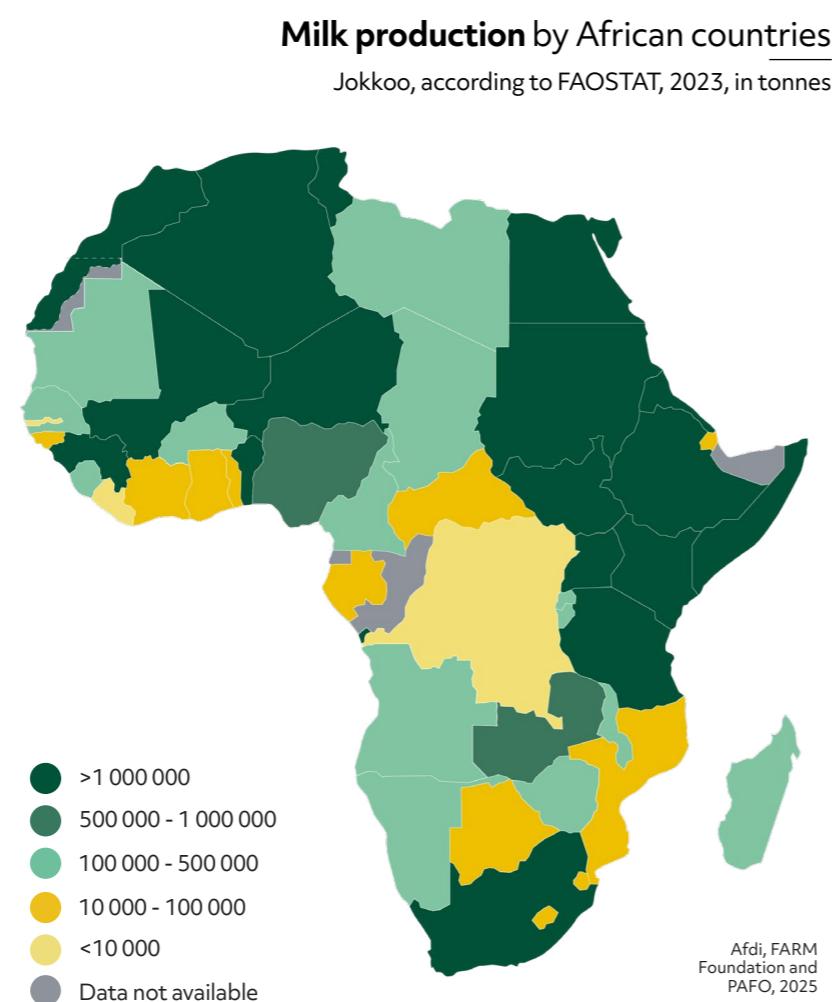
Pascal LHEUREUX,
farmer in France and
President of the FARM
Foundation



Sophie FONQUERNIE,
farmer in France and
President of Afdi

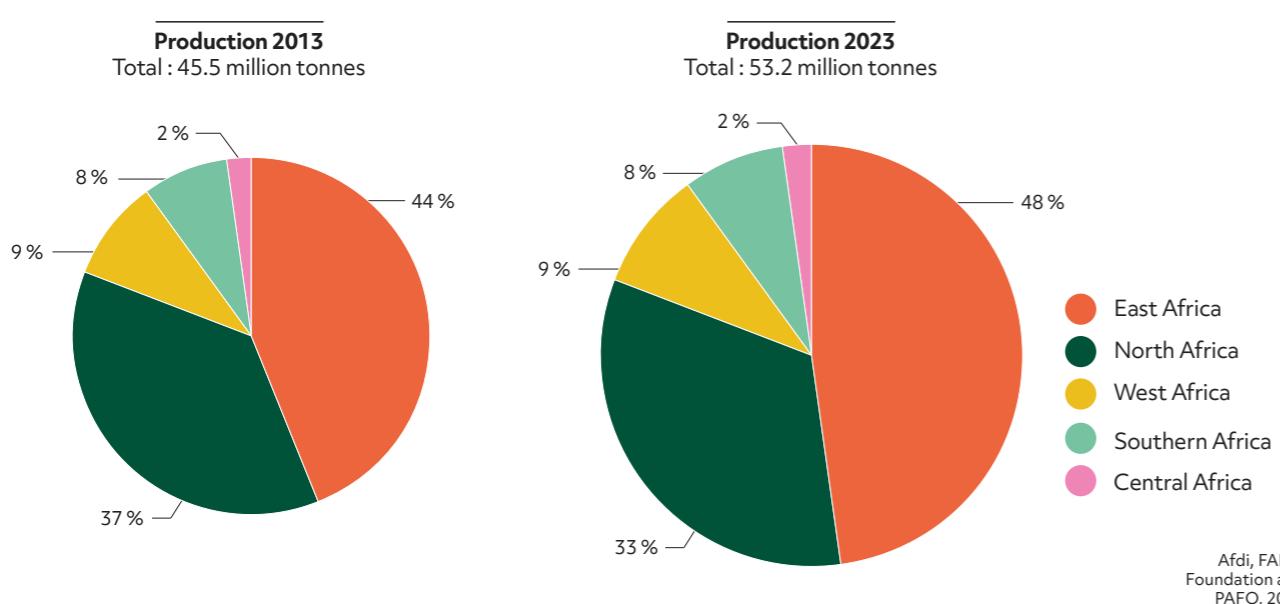
Production

African milk supply has recently experienced significant growth: between 2013 and 2023 it increased by 17%, rising from 45.5 to 53.2 million tonnes. Production comes from a wide variety of species.



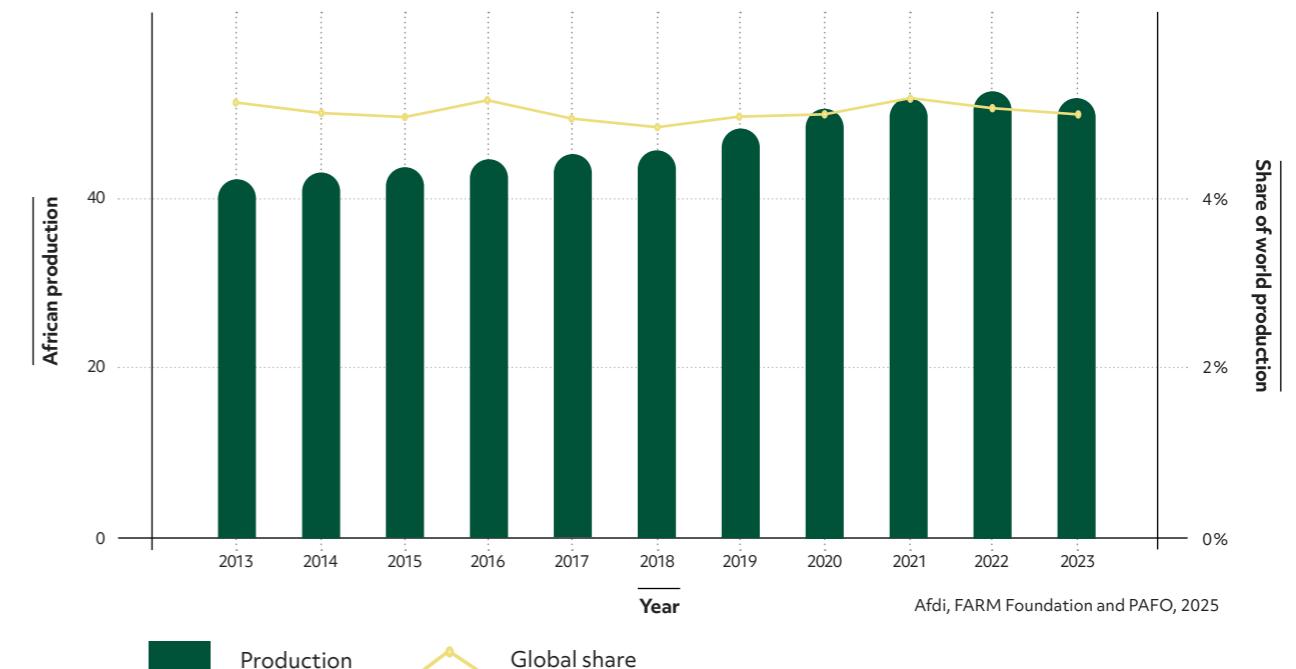
Milk production by subregion

Jokkoo, according to FAOSTAT, 2013-2023, as a percentage of African production



Evolution of African milk production

Jokkoo, according to FAOSTAT, 2013-2023, in million tonnes and percent



While cow's milk dominates African dairy production (79% in 2023), other milks (goat, camel, sheep, and buffalo) represent 21% of total production, reflecting diversified dairy systems.

Despite 17% growth between 2013 and 2023, Africa remains a minor player in the global dairy economy and accounts for 5% of world production in 2023. This share has remained stable over the past 10 years, despite the increase in continental volumes, due to the rapid global production growth (22% between 2013 and 2023).

At the continental level, production levels vary considerably between countries and regions. In 2023, Egypt, Kenya, Ethiopia, Sudan, Tanzania, South Africa, South Sudan, and Algeria produced the most milk, all species combined. These eight countries accounted for 67% of African milk production, illustrating strong geographic concentration.

East Africa accounted for the largest share of production with 25.4 million tonnes in 2023 (48% of continental production) and shows the highest growth (26% between 2013 and 2023). North Africa, the second-largest producing region (33%), recorded more moderate growth of 4%, while West Africa and Central Africa, although representing more modest volumes (9% and 2%, respectively), recorded remarkable growth rates of 28% and 29% over the decade. Southern Africa produced 8% of the continental production and saw a growth rate of 14% over the last decade.

Growth in African production reflects rapidly rising demand, driven by sustained demographic growth: Africa's population rose from 1.15 billion in 2013 to 1.48 billion in 2023, a growth rate of 28%. According to UN projections, Africa will have nearly 2.5 billion inhabitants by 2050, which is 25% of the world population, a proportion that could reach 40% by 2100.

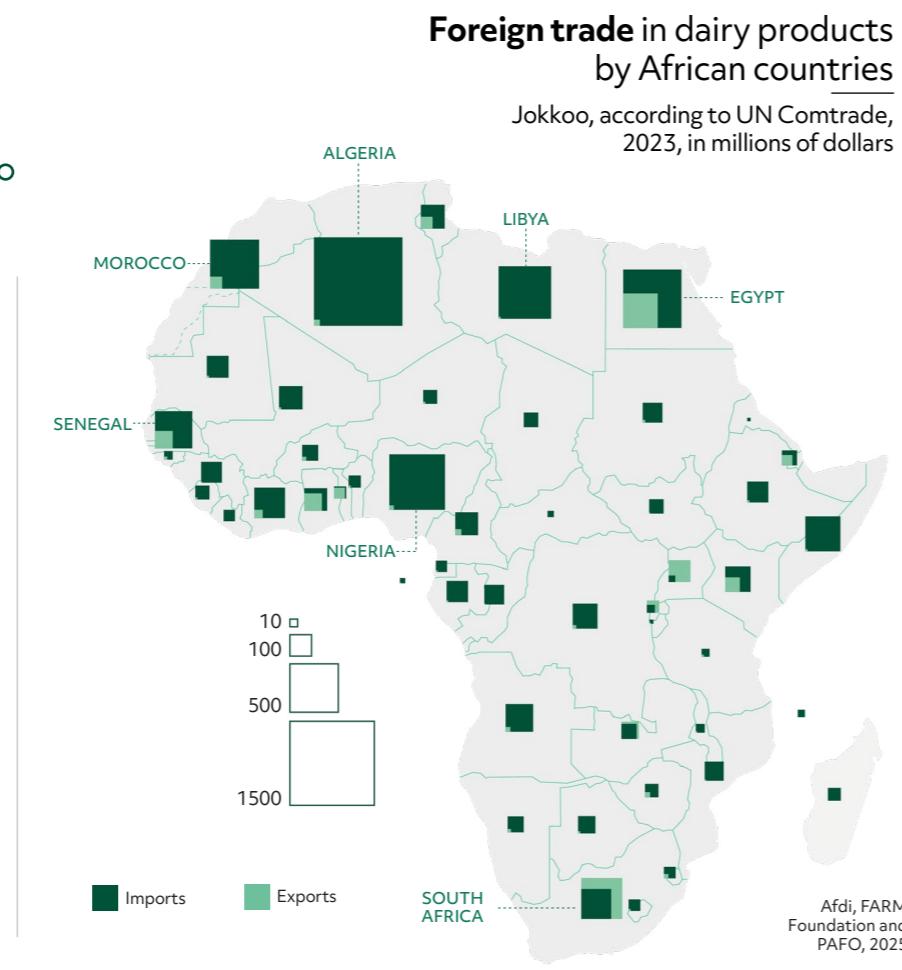
These figures should be interpreted cautiously, as African milk production is difficult to measure precisely. A substantial share is self-consumed by farming households (over 80% of production in West Africa, for example) or sold via informal circuits, which makes statistical estimates difficult.

North African dairy farming under climate stress

The inflation that affected the main input factors for milk production, combined with recurrent droughts, has highlighted the fragilities of dairy value chains in North Africa. This situation has led to herd and production declines. In Morocco, for example, dairy production fell by 20% between 2020 and 2022.

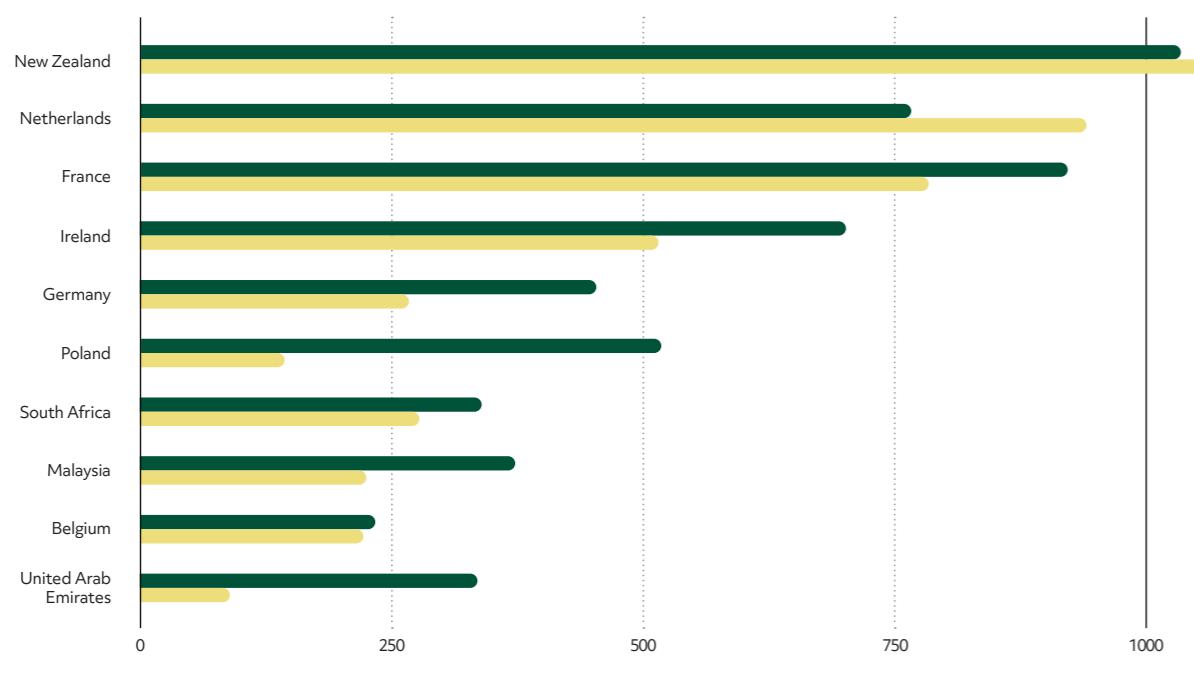
Trade

Africa has a considerable trade deficit in the dairy products sector. In 2023, the continent imported \$7.5 billion of dairy products, compared with \$1.1 billion in exports, generating a trade deficit of \$6.4 billion.



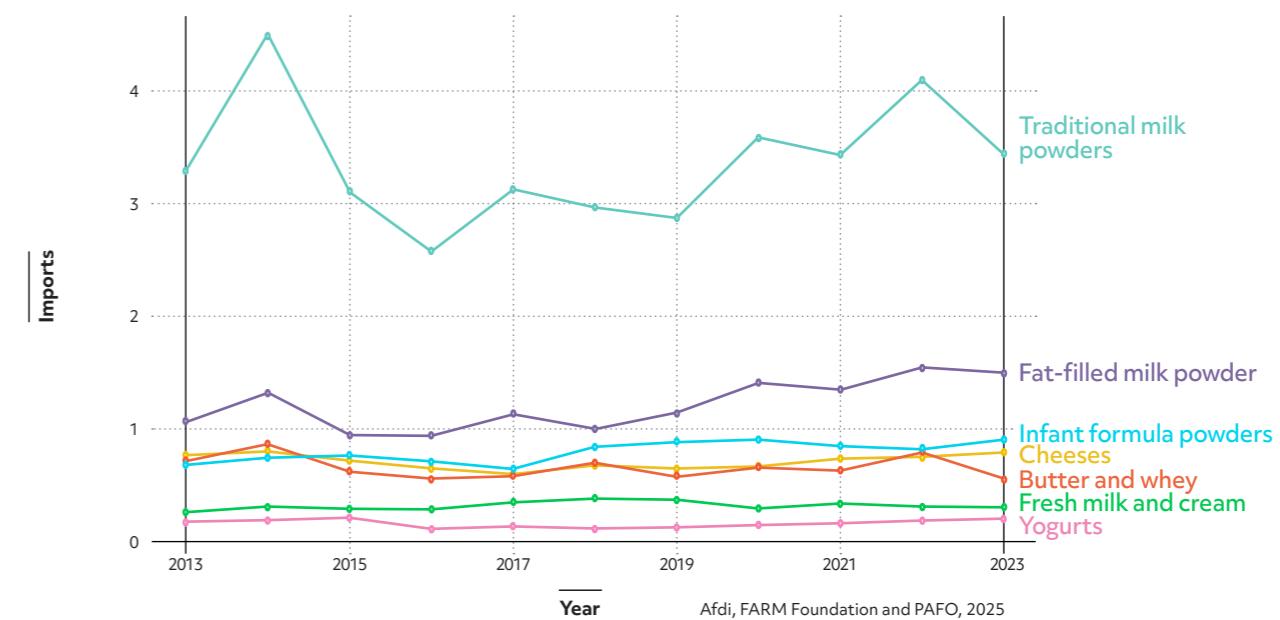
Main supplier countries of dairy products to Africa

Jokkoo according to UN Comtrade, 2013 and 2023, in millions of dollars



Change in African dairy product imports between 2013 and 2023

Jokkoo according to UN Comtrade, 2013, 2018, and 2023, in billions of dollars



Six countries account for 57% of continental imports. Algeria dominates (22% of the continental total), followed by Egypt (10%), Nigeria (9%), Libya (8%), Morocco (6.5%), and Senegal (5%). Whole and skimmed milk powders are the main import category, with \$3.4 billion in 2023. However, their growth has been modest—just +4.5% in value between 2013 and 2023. This relative stability contrasts with the sharp rise in imports of fat-filled milk powder, made by blending vegetable fat with high-quality skimmed milk. These imports have increased by 41% since 2013, with two-thirds destined for West Africa.

Infant milk powder imports have also grown significantly (+33.5%), with North Africa accounting for 46% of these imports, followed by West Africa (22%) and East Africa (17%). Overall, dry dairy products—including milk powder, fat-filled milk powder, and infant formula—

represented 76% of Africa's dairy imports in 2023.

New Zealand is Africa's largest dairy supplier, exporting over \$1 billion worth of products. However, European Union countries remain the continent's main trading partners, thanks to historical ties—particularly with France—and the rising influence of newer players like Ireland (+36% in value over 10 years) and especially Poland (+264%), both major suppliers of fat-filled milk powder.

New strategic suppliers are reshaping traditional trade patterns. Malaysia, with \$372 million in exports (+66% over 10 years), has gained ground in the fat-filled milk powder segment. The United Arab Emirates has seen a dramatic surge in exports to Africa (+277% over 10 years), reaching \$333 million in 2023.

In terms of exports, Africa remains a marginal player. South Africa largely

dominates continental exports with \$355 million (33% of the total), benefiting from strong milk powder production capacity. Egypt ranks second (23%), focusing primarily on cheese. Intra-African dairy trade remains limited and largely depends on the industrial development of the processing sector.

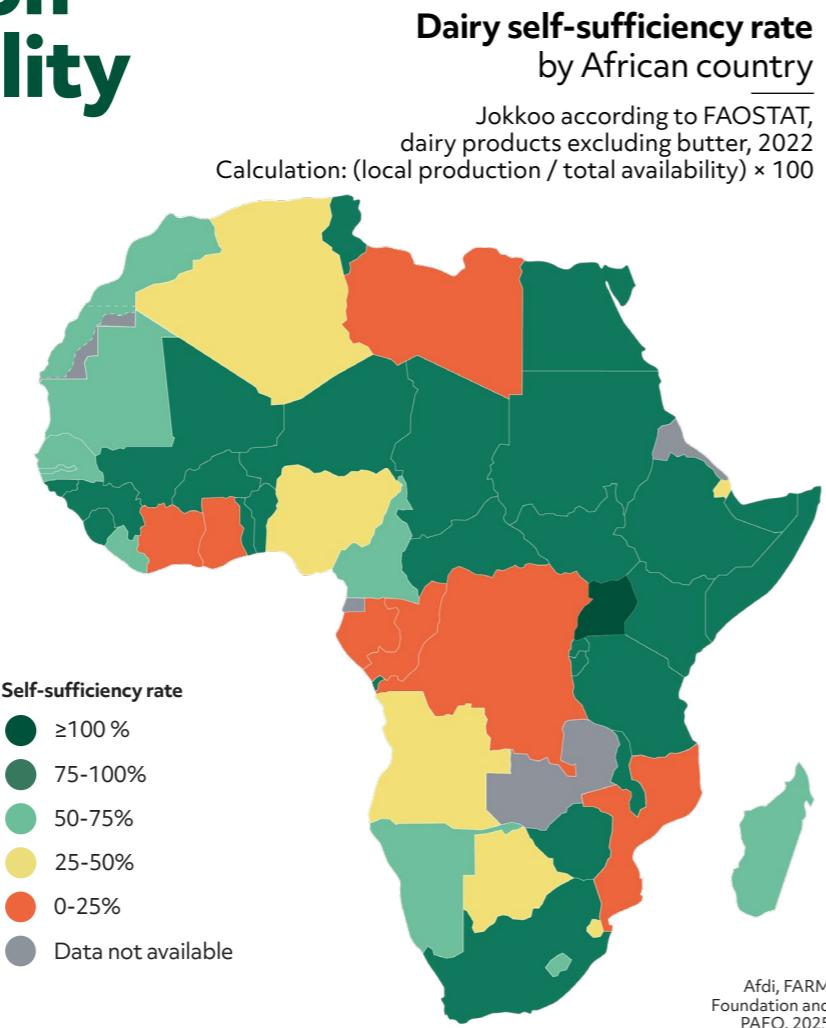
The United Arab Emirates, a dairy export hub

The surge in UAE dairy exports to Africa is largely driven by the growth of Emirati re-exports of whole milk powder, which increased elevenfold between 2013 and 2023. These products are primarily sourced from New Zealand before being re-shipped to the Middle East and African markets.

Main sources: UN Comtrade, Trade Map, INRAE, CIRAD.

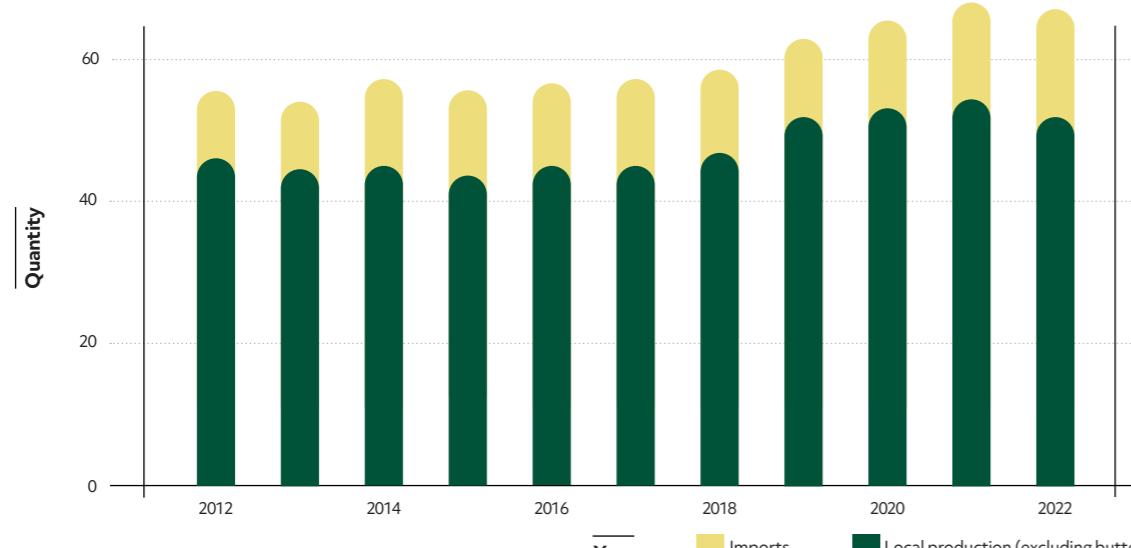
Consumption and availability

In 2022, the average milk availability on the African continent was 45.6 kg per inhabitant per year, a level below WHO-recommended intake levels for individual consumption (70 to 90 kg/inhabitant/year), and far from the world average, which stands at 118 kg/inhabitant/year.



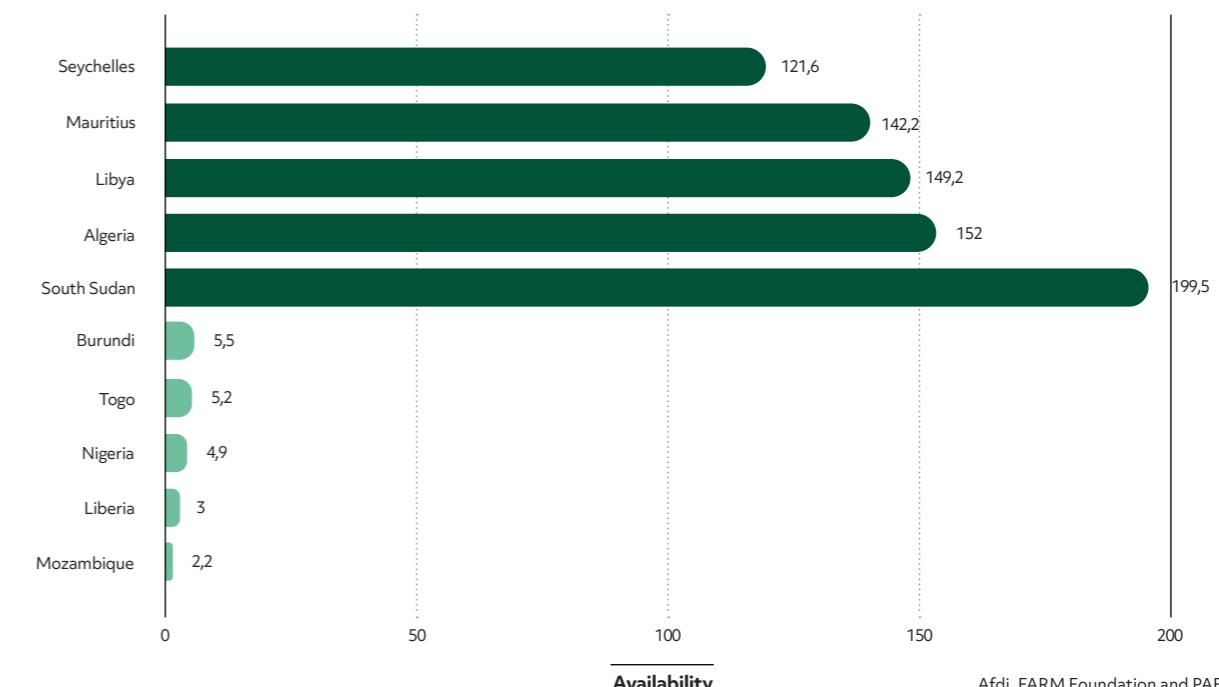
Change in African milk availability: local production and imports

Jokkoo according to FAOSTAT, 2012–2022, in millions of tonnes



The main African countries with high and low per capita milk availability

Jokkoo according to FAOSTAT, 2022, in kg per inhabitant per year



Egypt, Algeria, Kenya, Sudan, and Ethiopia together account for 48% of the available milk volumes (including both production and imports) on the continent, while representing just over 26% of its population. Self-sufficiency rates—defined as the share of national production in total consumption—vary widely across African countries, from near self-sufficiency in Ethiopia (99%) to heavy reliance on imports in the Democratic Republic of Congo (2%). In 2022, Africa's overall dairy self-sufficiency rate stood at 80%, compared to 115% in the European Union. This rate has declined slightly since 2012, when it was 82%, as imports have grown faster than domestic production over the past decade.

However, major disparities remain. East Africa stands out for its level of autonomy, with a regional self-sufficiency rate of 99.5%, based on a high concentration of self-sufficient countries (Ethiopia,

South Sudan, Burundi, Malawi, Kenya) and including Uganda, whose national production shows a surplus (108%). Southern Africa (80%), North Africa (67%) and West Africa (68%) maintain lower levels of regional self-sufficiency, with wide variations depending on the country. Central Africa stands out for a greater dependence on imports, with 53% regional self-sufficiency.

Dependence on imports makes African consumers particularly vulnerable to fluctuations in world prices and disruptions in supply chains. The economic crisis associated with the COVID-19 pandemic showed the direct impact of these shocks on the purchasing power, especially urban ones, who are the primary consumers of imported products. While the FAO price index for milk powders increased by more than 20% at the start of the 2020s, dairy autonomy has become an objective for the

main consuming and import-dependent countries (Algeria, Nigeria, Senegal...).

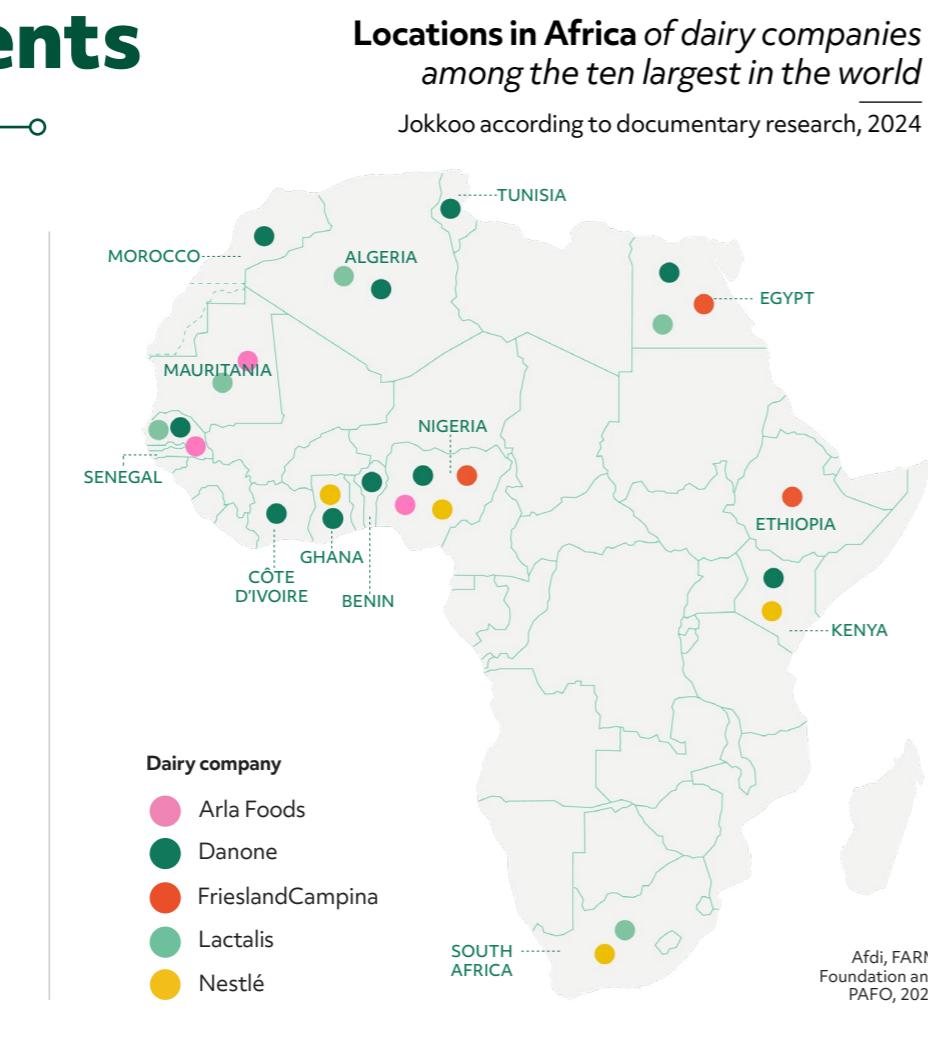
Uganda's export breakthrough

The Ugandan dairy industry has seen remarkable growth over the past decade, progressing at an average rate of 5 to 7% per year. The dairy sector has been a focus of government planning, with an emphasis on investment in agro-industrialization since 2015. Now an exporter—particularly of milk powder—Uganda is focusing on African markets and launched its first intra-African shipments to Algeria in 2025, valued at \$500 million. This represents more than a third of Algeria's milk powder imports in 2024.

Main sources: FAO Food Balance Sheets, UN Comtrade, FARM, OECD, CGIAR, IFAD

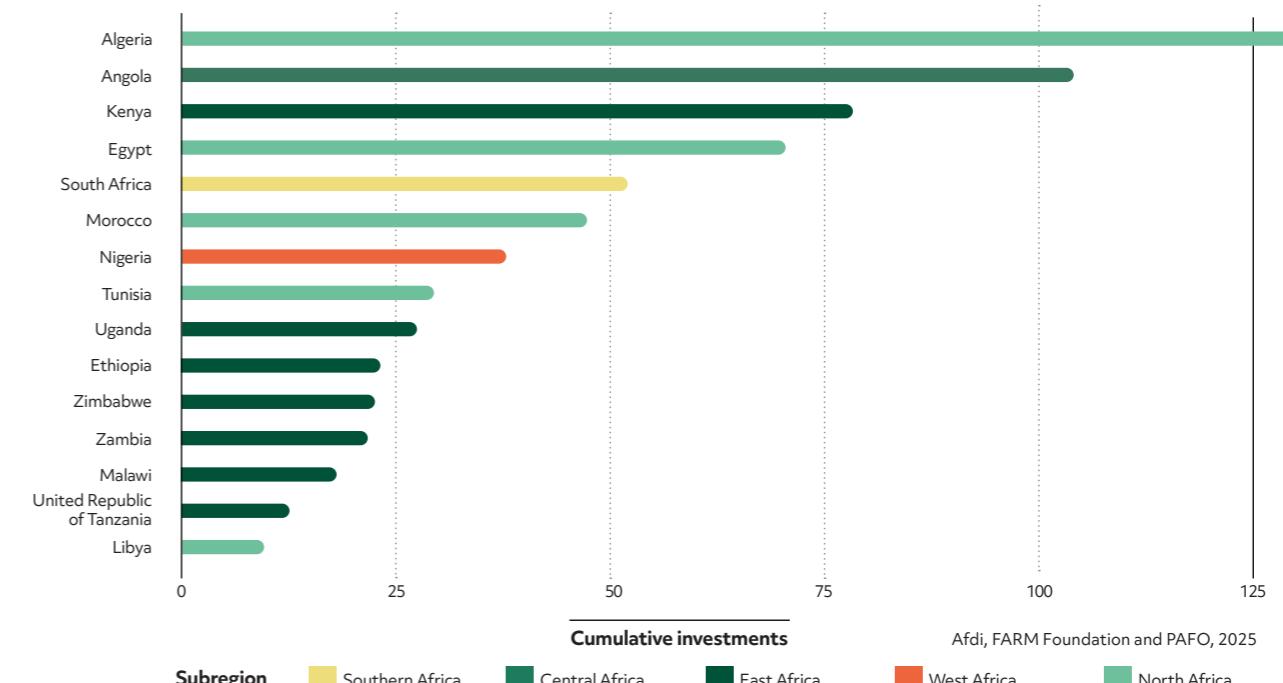
Investments

Given the growing demand for dairy products in Africa, the industrial development of the sector has become a strategic priority, supported in part by multinational investment.



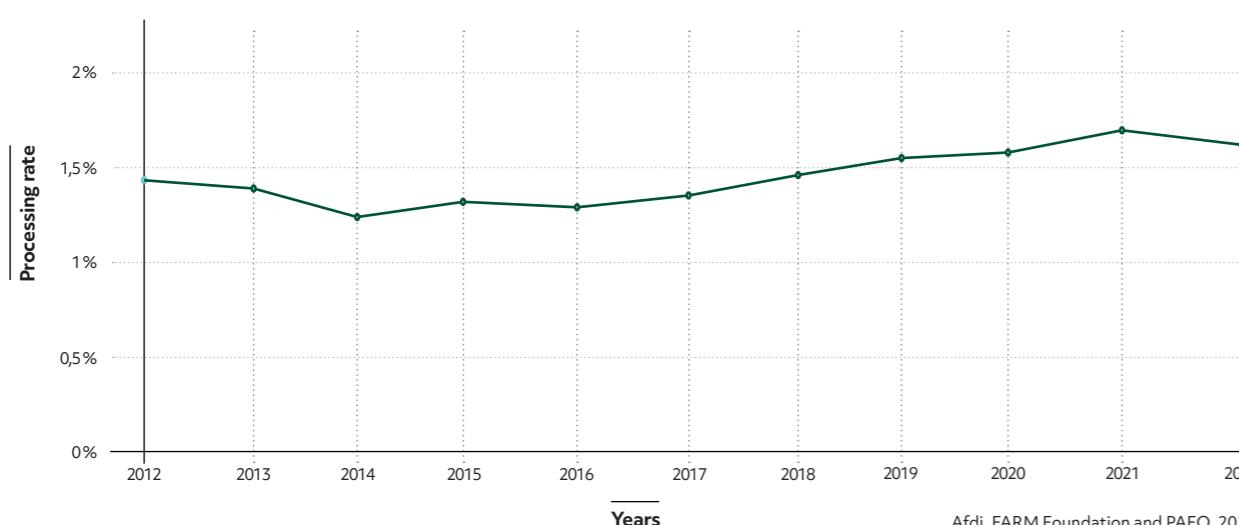
The top 15 African countries importing dairy processing equipment

Jokko according to UN Comtrade (HS 843420), cumulative amounts 2013–2023, in millions of dollars



Dairy products processing rate in Africa

Jokko according to FAOSTAT, 2022, percentage of milk powders, cheeses, and yogurts in total production



The investment analysis reveals a European predominance: among the 20 largest global dairy companies, Danone, Lactalis, Nestlé, FrieslandCampina, and Arla Foods dominate continental operations. At the same time, many African SMEs (artisanal or semi-industrial "mini-dairies") are longstanding operators in local milk processing in peri-urban areas.

To assess investment efforts in the sector, analyzing the importation of dairy processing equipment can provide valuable insights. This indicator reveals geographical disparities. North Africa accounted for 38% of continental imports between 2013 and 2023, followed by East Africa (29%). Central Africa represented 16% of such imports, while West Africa (9%) and Southern Africa (7%) lag behind.

The top five importing countries (Algeria, Angola, Kenya, Egypt, and South Africa) captured 57% of Africa's dairy equipment imports.

Equipment imports do not necessarily lead to increased processing. In 2022 only 1.6% of African milk production was processed into derivatives (powder, cheese, and yogurt), a figure unchanged since 2012.

The proportion of processed products hides another reality: these processed goods are not necessarily made from local milk. In West Africa, industrial units essentially process milk powder (sometimes fat-filled with vegetable oil), maintaining import dependence. As for exports, only a few countries — South Africa, Egypt, Uganda, and Rwanda — have developed the capacity to produce

milk powder from raw milk, a necessary condition for substantial export capacity.

Rwanda's dairy surge: strong investment momentum

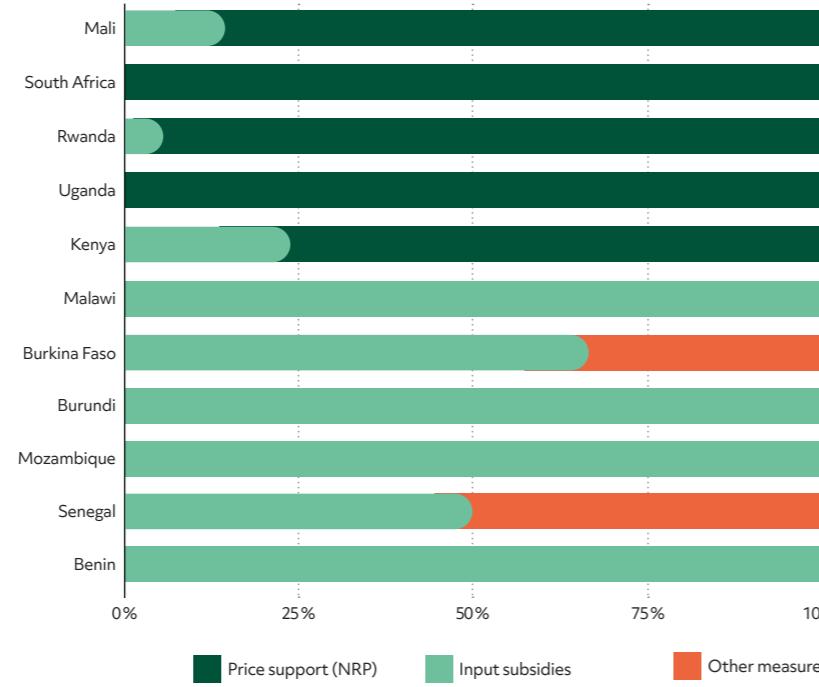
Rwanda has developed milk production through the "Girinka" program ("Give a cow to poor families") since 2006. The country reached a record 1 million tonnes of milk in 2023. A national drive to produce milk powder led to the construction of a plant capable of producing 41 tonnes of powder per day in 2024.

Public policies

The analysis of African dairy policies shows a split between interventionist strategies aimed at food sovereignty and approaches favoring integration into global value chains.

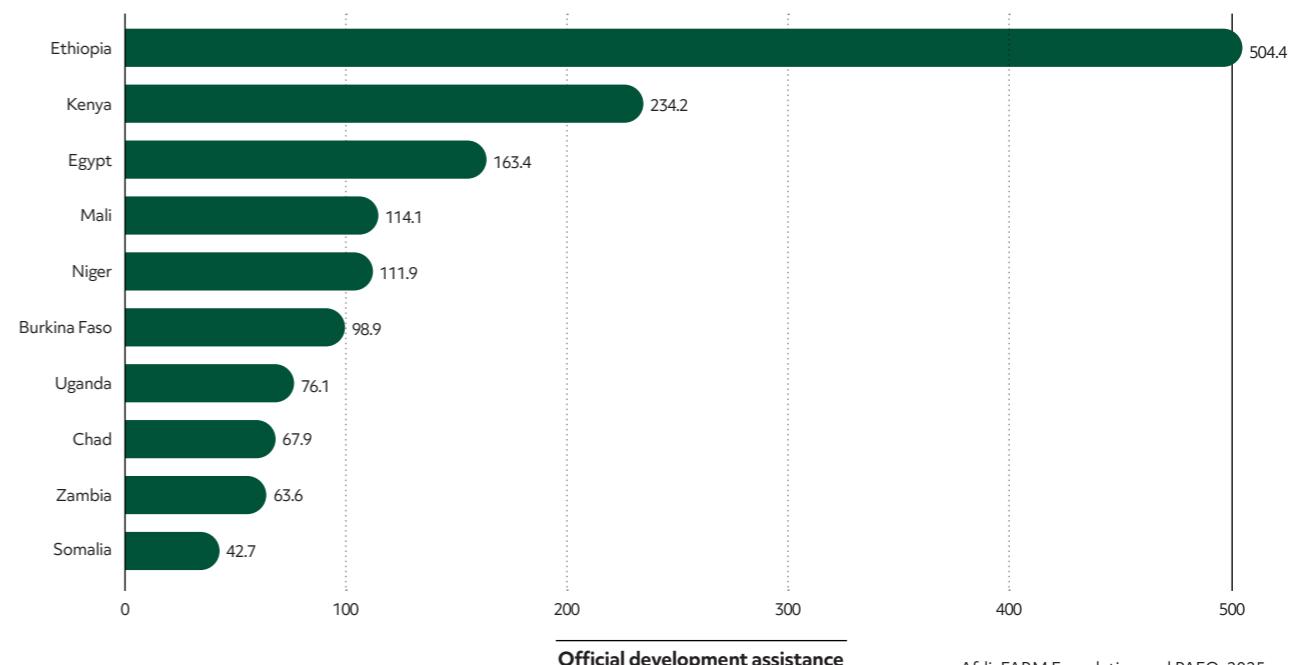
Types of public support to the dairy sector in 11 African countries

Jokko according to AgIncentives, 2023



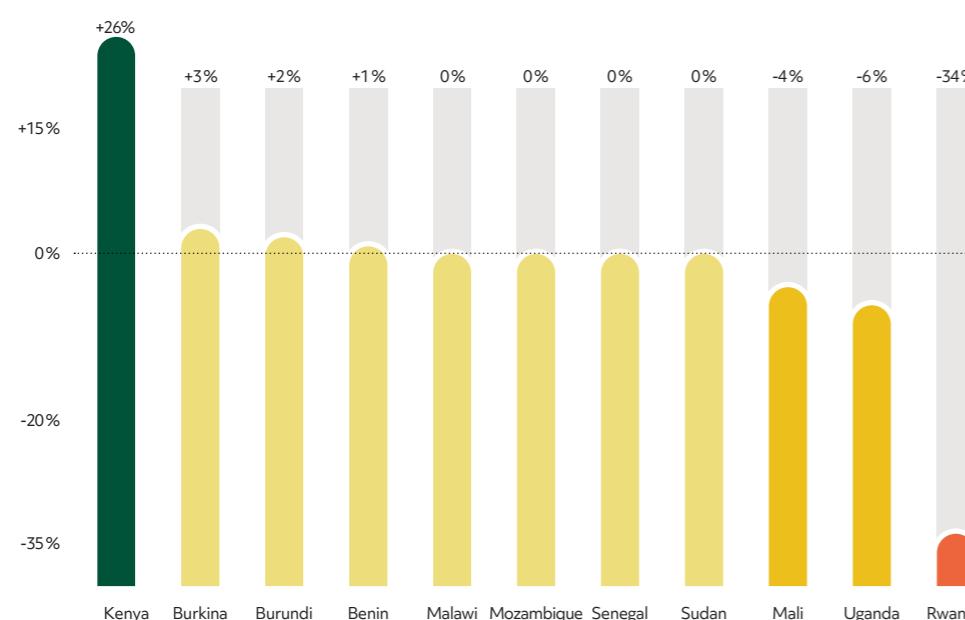
The 10 main African countries that are beneficiaries of official development assistance to the livestock sector

Jokko according to OECD-DAC, 2013–2023, in millions of dollars



Levels of public support to the dairy sector in 11 African countries

Jokko and FARM Foundation from AgIncentives, 2023, nominal rate of assistance*



*The Nominal Rate of Assistance (NRA) indicates, as a percentage of production, the net support given to dairy producers (prices, payments, subsidies). A negative NRA means that current policies indirectly tax producers.

Algeria, the world's second-largest importer of milk powder after China, pursues an interventionist agricultural policy: it provides substantial subsidies to farmers and regulates the retail price of milk. This approach is complemented by imports of heifers and targeted investments in dairy facilities located in desert regions. A similar interventionist strategy is evident in West Africa through the "Regional Offensive for Local Milk," which aims to double production to 10 billion liters by 2030.

Conversely, countries such as Uganda and South Africa prioritize competitiveness. South Africa, in particular, supports export-oriented growth while keeping import barriers for milk powder low so that processors can produce finished products for the continental market.

Kenya represents an intermediate model through its Dairy Industry Sustainability Roadmap 2023–2032, which targets doubling production to 12 billion liters by

2030. The Kenyan government acts primarily as a facilitator, financing cooling infrastructure and quality certification and promoting public-private partnerships to strengthen the sector.

Analysis of public support in 11 countries suggests that these different types of policies also correspond to specific subsidies: interventionist countries (Benin, Burundi, and Malawi) seem to favor subsidies for production factors, whereas more open economies (South Africa, Rwanda, and Uganda) focus exclusively on price support and market mechanisms.

Furthermore, many public policies partly rely on international funding for livestock. In this respect, Ethiopia is the main recipient of official development assistance, having received \$504 million between 2013 and 2023, or 28% of all aid to the livestock sector on the continent. However, such funding may decrease due to a strong tendency for international donors to disengage.

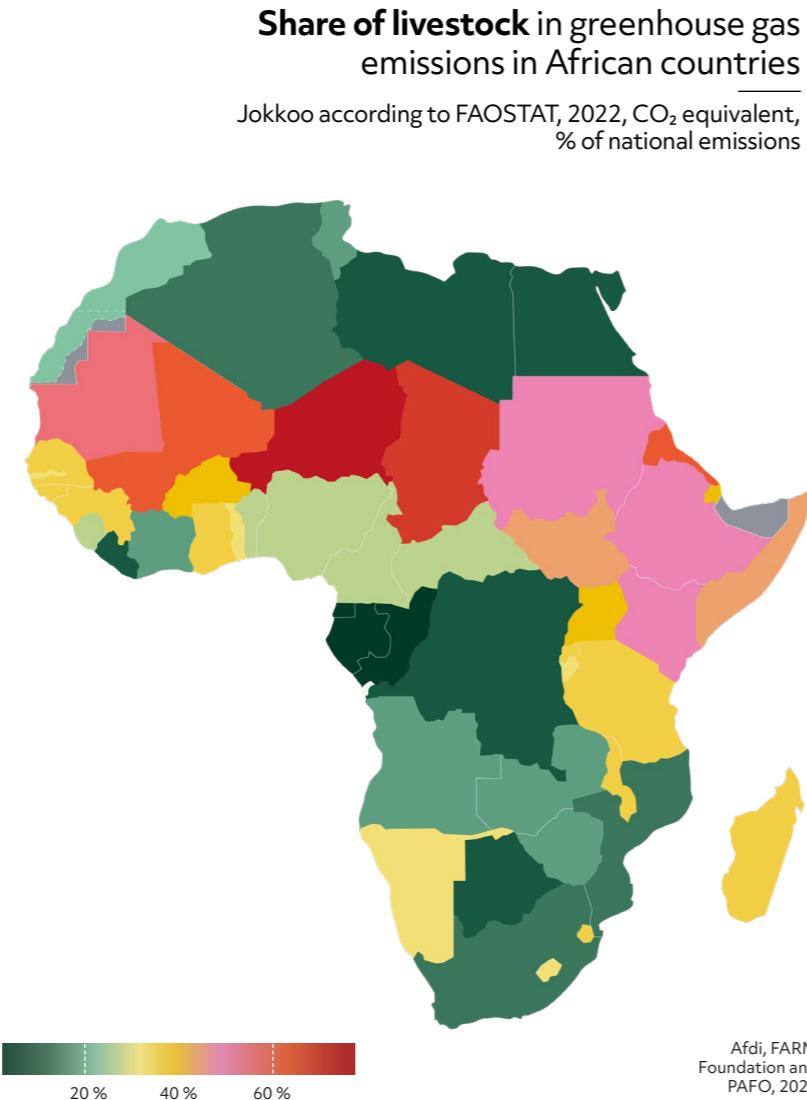
Ethiopia's Dairy Strategy: Inside Africa's Livestock Giant

Ethiopia holds the largest cattle herd in Africa, with an estimated 70 million head, yet dairy productivity remains low at just 1.5 liters per cow per day. To address this gap, the government launched the National Dairy Strategy 2022–2031, with the goal of quadrupling milk production over the next decade. This public initiative integrates genetic improvement, intensified forage cultivation, enhanced animal health services, and the development of structured value chains. To support implementation, the state is placing particular emphasis on public-private partnerships and expanding milk collection infrastructure.

Main sources: FAO, Afdi, FARM, CIRAD, Ecofin, ILRI, IFPRI

Future Challenges

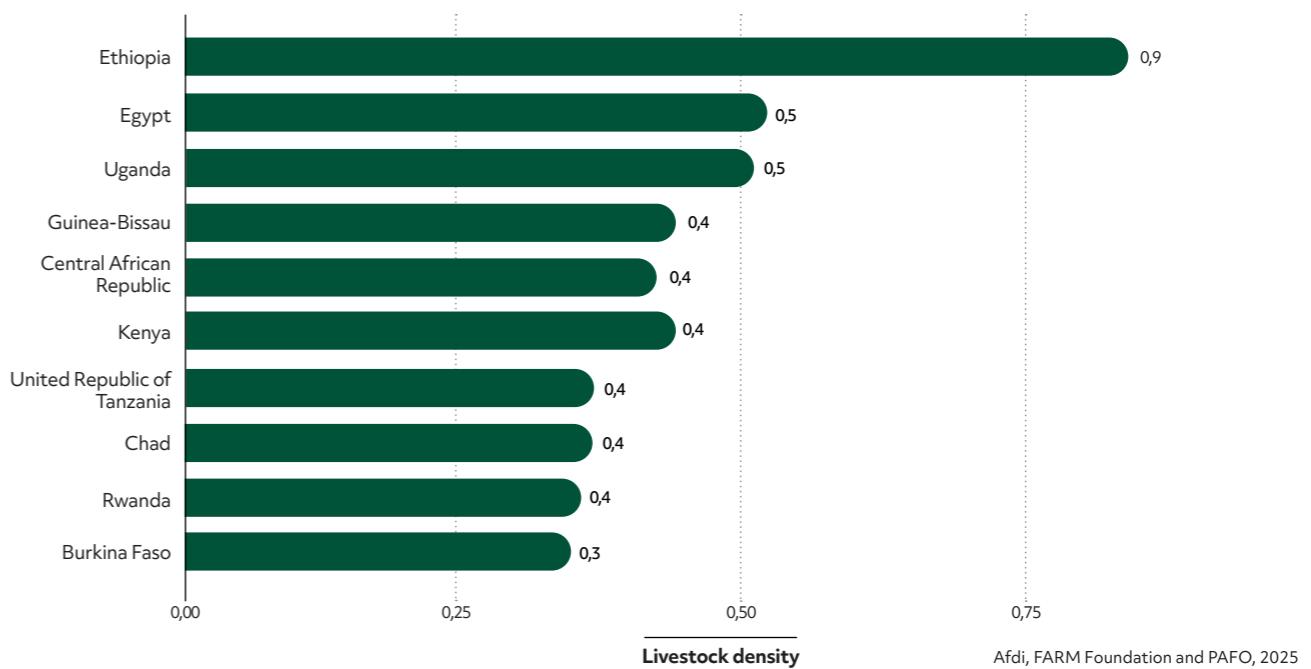
The African continent is experiencing significant impacts from climate change, with projections indicating a temperature rise of up to 4°C by the end of the 21st century. This evolving climate context is a key driver of transformation in livestock systems, necessitating significant changes in dairy production models to adapt to new environmental constraints—at a time when consumer demand continues to grow.



At the global level, Africa accounts for 20% of the world's cattle herd, yet produces only 5% of global milk output.

Top 10 African countries by livestock density

Jokkoo according to FAOSTAT, 2022, livestock pressure on agricultural land in livestock units (LSU) per hectare



Climate change is having a direct impact on herd performance, leading to measurable declines in production. For example, the prolonged drought in Kenya between 2020 and 2023 resulted in the death of 2.6 million livestock animals, causing a substantial drop in per capita milk supply across pastoral areas.

Although Africa contributes just 4% of global greenhouse gas emissions, livestock alone accounts for 17% of the continent's emissions in CO₂ equivalent compared to 8% at the global level. This creates a dual imperative for the sector: adapting to climate impacts while contributing to mitigation efforts.

The combined pressures of climate change and land use change are profoundly reshaping livestock practices. In the Sudano-Sahelian zone, cultivated land has doubled

over the past four decades, now covering 25% of the total area and significantly reducing traditional transhumance corridors. These shifts have intensified tensions, with over 15,000 deaths linked to farmer-herder conflicts recorded in West and Central Africa since 2010 and a marked acceleration since 2018.

The development of dairy value chains faces major infrastructure challenges. In particular, the lack of access to electricity for more than 600 million Africans severely limits the deployment of cold chains—essential for improving the quality and marketability of milk.

Modernizing the dairy sector raises critical social equity questions. Women, who make up 50% of the agricultural workforce in sub-Saharan Africa, play a central role in traditional milk processing. Their inclusion in the modernization of

dairy value chains will be key to ensuring the social acceptability of a transition toward more intensive production systems.

2026, International Year of Pastoralism and Pastures

The United Nations General Assembly has proclaimed 2026 the "International Year of Pastoralism and Pastures." This resolution, supported by 60 member States, recognizes the contribution of pastoral systems to global environmental sustainability, even as ecosystem degradation and increasing climate unpredictability threaten their economic viability.

Conclusions

Africa is home to a substantial share of the world's livestock herd, yet it remains on the margins of the global dairy economy, with limited continental integration. This situation indicates significant — yet underutilized — potential. It is crucial to support the development of the dairy sector, especially considering the continent's projected population doubling by 2050. A major obstacle to progress is the lack of suitable infrastructure, particularly the inadequate road networks and unreliable electricity supplies, which directly hinder milk collection and processing capacity.

Building a resilient and productive African dairy industry depends above all on the ability of stakeholders to work collectively. Producer organizations play a central role, addressing the daily operational challenges faced across the value chain. Strengthening their capacity for representation is essential to ensure full participation in sector development strategies. Their involvement is indispensable for crafting collective solutions to the sector's main challenges: improving consumer access to quality dairy products, fostering intra-African trade, and promoting sustainable, agroecological livestock practices.

Addressing broad and cross-cutting challenges — such as climate change adaptation, empowering youth and women in the sector, and resolving land disputes — calls for a systemic approach rooted in active engagement by farmer organizations and economic stakeholders.

The data highlighted in this barometer illustrate that the future of Africa's dairy value chain will depend on mobilizing all available resources — local, continental, and international — to serve inclusive and sustainable territorial development. Achieving the right balance between economic growth, social inclusion, and environmental sustainability will require public policies, international development partnerships, and targeted investments all guided by inclusive governance and multi-stakeholder dialogue.

Private investment will be just as critical as public intervention and international partnerships. These investments have the potential to catalyze improvements in infrastructure, drive technological innovation, and strengthen sector organization. Ultimately, for these efforts to deliver lasting impact, they must be developed collaboratively with local stakeholders, supporting economic models that are both inclusive and sustainable.

With rapid demographic growth and urbanization expected in Africa, inclusive dialogue among all actors offers the most credible way to turn the continent's dairy challenge into a powerful lever for development — in alignment with the Sustainable Development Goals and the African Union's Agenda 2063.

Methodology

Geographic scope

This report analyzes the dairy sector across 54 African countries, using the United Nations official geographic classification (M49), and groups countries into five distinct regions:

- **North Africa** (6 countries): Algeria, Egypt, Libya, Morocco, Sudan, and Tunisia.
- **East Africa** (18 countries): Burundi, Comoros, Djibouti, Eritrea, Ethiopia, Kenya, Madagascar, Malawi, Mauritius, Mozambique, Rwanda, Seychelles, Somalia, South Sudan, Uganda, United Republic of Tanzania, Zambia, and Zimbabwe.
- **Central Africa** (9 countries): Angola, Cameroon, Central African Republic, Chad, Congo, Democratic Republic of the Congo, Equatorial Guinea, Gabon, and São Tomé and Príncipe.
- **Southern Africa** (5 countries): Botswana, Eswatini, Lesotho, Namibia, and South Africa.
- **West Africa** (16 countries): Benin, Burkina Faso, Cabo Verde, Côte d'Ivoire, Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone, and Togo.

Methodological limitations

Informal production, which accounts for more than 80% of total output in regions like West Africa, is not captured in official statistics, leading to underestimation of true production levels. Delays in international data reporting can also lead to time gaps and occasional incompleteness, particularly for the most recent (2023) figures. In some cases, statistical coverage remains partial, with missing data for production (52 countries) or availabilities (53) in several countries.

Data sources

The barometer is built on robust sectoral databases: FAOSTAT for production and consumption figures and food balance sheets, UN COMTRADE for international commerce, AgIncentives for public policy evaluation, along with an original database on multinational dairy investments curated by the authors. All analytical sources are documented in the respective chapters.

Key methodological choices include:

- **Trade statistics:** A hybrid methodology reconciles national reporting ("declared" flows) with cross-checked "mirror" flows as reported by trading partners. When discrepancies exceed 300%, mirror data are preferred to correct for weaknesses in national statistics.
- **Food availability calculation:** Following FAO standards, availability is defined as domestic production plus imports minus exports. Dairy self-sufficiency rates correspond to the share of production in total availability. Butter is excluded to avoid double counting.
- **Industrial processing:** the processing rate measures the volume of processed products (powdered milk, cheese, yogurt) relative to total milk production.

About

Afdi

Afdi (French Farmers and International Development) is an international solidarity association established by French professional agricultural organizations. Its mission is to support family farmers, helping them secure a dignified livelihood and ensuring the sustainability of their enterprises. Afdi operates in 19 countries across Africa, Asia, and the Eastern Caribbean, partnering with local rural organizations and raising awareness among French professionals — particularly young people — about citizenship and international solidarity.

FARM

FARM (The Foundation for Agriculture and Rural development in the World) is a public-interest nonprofit dedicated for more than two decades to promoting sustainable agriculture, particularly in the Global South. FARM advances new frontiers in research, advocacy, and partnerships to inform both public and private actors about pathways toward balanced agricultural development, integrating economic, social, and environmental priorities.

PAFO

PAFO (The Pan-African Farmers' Organization) is the unified voice of over 80 million African farmers, federating five regional networks and 80 national organizations across 50 countries. Founded in 2010 under the African Union's auspices, PAFO advocates for inclusive and sustainable producer-centered agriculture and brings together cooperatives, federations, and associations to strengthen the farmers' role in shaping agricultural policy across Africa.



Coordinators: FARM and Afdi

Research and statistical analysis: Jokkoo Conseil

Infographics and layout: Creative Corner

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Africa is home to a significant share of the world's livestock farmers, yet it produces only 5% of global milk output. The continent's milk self-sufficiency rate has been declining amid rapid population growth (+28% between 2013 and 2023). This growing imbalance underscores the fragility of Africa's food sovereignty, as dairy imports have increased at a pace 3.5 times faster than domestic production between 2012 and 2022.

In response to these challenges, coherent public action, responsible investment, and international cooperation based on fair and reciprocal exchange are essential. Through the 2025 edition of the African Agriculture Barometer, FARM, PAFO, and Afdi offer a well-documented analysis of the key issues facing African dairy value chains—aimed at informing decision-making and fostering stakeholder engagement.

