Organisation of the Dairy Industry in Zimbabwe
Background

Dairying in Zimbabwe is governed by the Dairy Act (1977);
National milk production:

• Maximum to date – 262 mil litres (1987);
• Current production
  – 51 mil litres (vs demand of 180 mil litres) -
    Production deficit - ±130 litre

Capacity to process 300 mil litres per year (30% capacity utilisation)
National Dairy Herd

- 1987: 115 710
- 2004: 32 837
- 2011: 22 738

Per capita consumption

- currently estimated at 7 litres
- pre-1990 per capita consumption 25 litres;

- Shortage of milk in Zimbabwe
The Dairy Industry

Farmers are categorised into 2: -

• Commercial dairy farmers
  - registered with NADF (CFU);

• Smallholder dairy farmers
  - communal, small-scale and resettlement farmers
  - DDPs;
  - Individual smallholder producers not in DDPs;
Other players: -
  - input suppliers;
  - feed suppliers;
  - veterinary suppliers;
  - equipment suppliers;
  - processors;
    - DZL;
    - Kefalos;
    - Alpha Omega;
    - Nestle, etc
- marketers;
  - importers;
  - policy makers – Parliamentarians and politicians
- Government:
  - Zimbabwe Dairy Services Association;
  - Ministry of Health and Child Welfare;
  - Ministry of Finance
- Commerce – Banks (agribusiness depts);
- Livestock Identification Trust (LIT)
Commercial Dairy Sector

Contributes 98% of national milk production

Comprised of herds registered with the NADF:
- • 559 registered herds in 1987;
- • 165 registered herds in 2012;

Two sub-sectors:
• Registered commercial farmers - deliver to processors;
• Company dairy farmers - Produce and process (17)
Major Dairy Breeds in Zimbabwe

Dairy Breeds

- Holstein;
- Holstein-Friesian;
- Jersey;
- Guernsey
- Ayrshire;

Dual Purpose

- Red Dane;
- Brown Swiss;
- Simmental
- Crossbreeds
Dairy Development Programmes (DDPs)

Initiated in 1983 under DMB - later handed over to ARDA;

Initial funding was from
- NORAD, DANIDA
- Africa Now (UK)
- EU
- GoZ (PSIP)
- Heifer Project International
- FAO-RDDTT – training
Purpose of funding: -

• Construction of milk collection centres;
• Cattle breeding technologies (e.g. AI);
• Purchase of bulls and heifers;
• Purchase of equipment (e.g. bulk tanks, pasteuriser, etc)
• Training;
Conceptual Framework for the DDPs

Objectives of setting-up DDPs were: -

• To improve and consolidate the viability of the established dairy sector;

• To extend milk production base to small scale, communal and resettlement areas and widen the milk catchment areas for milk for the processors and develop communities;
• Increase access to milk and milk products by all sectors of the population and develop export markets;

• Maintain and improve effective and strict statutory control over milk production processing and marketing;
MILK COLLECTION CENTRE

FARMERS
- cattle management;
- cattle breeding
- cattle replacement;

COMMERCIAL FARMERS

GOVERNMENT/NGO EXTENSION SERVICES

INPUT AND SERVICE PROVIDERS

MILK COLLECTION CENTRE

Al services;
Stock feed;
Training;
Vet supplies;
Soft loans

Milk

PROCESSORS AND CONSUMERS

RESEARCH STATIONS

Cattle
Development of DDPs

First phase (pilot) initiated 2 DDPs:

• Marirangwe DDP – small scale
• Chikwaka DDP – communal

Number of functional DDPs increased in subsequent years:

• 1990: 11 DDPs;
• 2006: 23 DDPs
• 2012: 18 DDPs
Numbers of DDPs

<table>
<thead>
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<th>Year</th>
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<tr>
<td>1995</td>
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<td>2008</td>
<td>19</td>
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<td>2012</td>
<td>18</td>
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Production (off-take?) in the DDPs 30

Number of DDPs
prod('00 000 litres)
Daily off-take vs income (2012)
Marketing
MCC buys milk from the producers and sells;

Products are fresh milk and cultured products;

- 13 DDPs bulk and process at local level;
- 3 DDPs deliver to processors

**NB:** Side-marketing
Challenges to small scale dairying

- Poor nutrition of animals
  - Poor quality feeds especially in dry season. No or limited supplementation due to high cost of stockfeeds;
  - Poor feeding strategies;
• Breeding
  - Poor heifer replacement rates (if any) – supply and cost limitations;
  - uncontrolled breeding where there is communal grazing;
  - collapse of AI system. Most DDPs do not have trained technical officer;
MILK COLLECTION CENTRES
TRANSPORTING MILK TO CENTRE
REGIONAL MSc STUDENTS FOR THE DST PROGRAM
THANK YOU, ASANTE!

...think milk
...drink milk

ZIMBABWE DAIRY INDUSTRY TRUST