

Rwanda National Dairy Consumer Survey Analysis & Marketing Strategy Recommendations Workshop 30th-31st May, 2012

Workshop Report

Republic of Rwanda



Ministry of Trade & Industry



East African Dairy Development Project

Acronyms and Abbreviations

EADD	East African Dairy Development Project
GOR	Government of Rwanda
HI	Heifer International
HPI	Heifer Project International
ILRI	International Livestock Research Institute
LISP	Livestock Infrastructure Support Project
MCC	Milk Collection Centre
MINAGRI	Ministry of Agriculture and Animal Resources
MINEDUC	Ministry of Education
MINICOM	Ministry of Trade and Industry
MININFRA	Ministry of Infrastructure
PSF	Private Sector Federation
RAB	Rwanda Agriculture Board
RBS	Rwanda Bureau of Standards
RDB	Rwanda Development Board
RDCP	Rwanda Dairy Competitiveness Project
RMSA	Rwanda Milk Sellers Association
RNDB	Rwanda National Dairy Board
SNV	Netherlands Development Organization
TNS	TechnoServe

The organizing team (MINICOM and EADD) would like to thank participants from Government of Rwanda ministries and institutions and dairy sector stakeholders from NGOs and the private sector for their valuable contributions to this workshop.

Introduction

The Rwanda National Dairy Consumer Survey & Marketing Strategy Recommendations Workshop was a result of an initiative by MINICOM to provide a forum where stakeholders in the dairy sector would discuss the findings of the consumer survey sponsored by EADD and also propose recommendations that would inform the dairy processing and marketing strategy that is being written by MINICOM. The workshop helped identify key issues facing the dairy sector and proposed recommendations for MINICOM's dairy processing and marketing strategy.

The workshop was jointly and expertly facilitated by Dennis Karamuzi of RDCP II and Amos Omoro of EADD/ILRI.

Opening Address by the Permanent Secretary, MINICOM

In his opening remarks, the PS, MINICOM welcomed participants and thanked the various stakeholders of the Dairy Sector for making the time to actively participate and contribute to the deliberations of the workshop. He especially commended the team members of EADD for the work that had been put into the consumer survey and in the workshop that was jointly organized by MINICOM and EADD.

The PS pointed out that dairy is a critical sector in Rwanda, as agriculture has the biggest share of the economy aside from services, and therefore the importance of the deliberations from the workshop could not be emphasized enough. He noted that lot of work had already gone into the dairy sector but there was still a lot to be done, and it was important that the dynamics of the dairy sector be well understood, to ensure more effective planning.

The PS discussed the fact that a great deal of effort has been put towards dairy production, via programs like "One Cow Per Poor Family," transforming it from a traditional dairy industry into a more robust dairy sector. While much work is to be done along the full value chain, the emphasis of the workshop was on addressing the marketing portion of it, and the PS noted that expectations for the workshop were high.

The PS explained that MINICOM is very concerned with elements of trade and industry in the dairy sub-sector, including transport logistics, processing, and marketing; however, today, the focus is on the fact that MINICOM is urgently required to produce a dairy processing and marketing strategy to present to the Cabinet. The PS believes a great deal has been done on production, though there is still more to be done in areas like inputs, quality assurance, and logistics. However, the question has emerged on whether supply is exceeding demand; the PS believes this is the case, but notes that processors have also discussed challenges in getting quality supply. While ideally the sector will move to a point where consumption is of processed milk, he realizes that this will take time. Regardless, a robust processing and marketing strategy is needed for the sector, since one cannot discuss marketing without addressing processing.

The consumer survey provided a starting point and the recommendations from the workshop would constitute a great input in elaboration of the marketing strategy. The PS communicated his expectations that rich views would come from the workshop due to the diversity of stakeholders in attendance. The recommendations of the workshop, he said, would be input into the dairy processing and marketing strategy which is to be presented before the Cabinet, and therefore the quality of the work expected, again, could not be overemphasized.

Background & Introduction to the Consumer Survey by Dr. Charles KAYUMBA, EADD/HPI

Dr. KAYUMBA welcomed participants and reiterated the fact that the entire dairy sector has worked very hard to get the industry to the point it is at today; right after the war, he noted, there was not an issue of milk marketing but an issue of milk. He took time to explain that the Government of Rwanda initially invested in livestock as an effort to move productive assets to rural areas and involve youth and women in production. This, he said, led to responsive interventions by many players including Send a Cow, LWF, and Heifer International. This time also marked the conception of PADEBL, which dealt with production, MCCs, and milk marketing. The quality question and milk standards, he said, had to be addressed as milk volumes increased. Only then, Dr. Kayumba noted, did issues of a potential surplus come about.

The Consumer Survey revealed that Rwanda's per capita milk consumption was the lowest in the region. Dr. Kayumba noted that the issue is thus not one of over-production but one of under-consumption. He concluded by stressing that the main aim of the workshop was to come up with strategies of how to increase consumption of milk and dairy demand.

Presentation of the Analysis of the Consumer Survey by Lindsay Hagan, EADD/TNS

Please note that the full presentation given by Ms. Hagan is included in the attached PowerPoint.

Ms. Hagan began by reiterating what the Permanent Secretary and Dr. Kayumba discussed: many terrific efforts have been made on production in the dairy sector, and the Rwanda National Dairy Consumer Survey is an effort to better understand the demand side and answer the question of whether supply truly is exceeding demand. She noted that the focus of the Consumer Survey was on domestic consumers and drivers and barriers of demand; while understanding of other elements of the value chain, such as cost of production, transport logistics, and processing, and an analysis of export markets and consumers in other countries are extremely important, they were unfortunately outside of the already extensive scope of the Consumer Survey. EADD encourages other stakeholders to take up these elements, and Ms. Hagan invited stakeholders to take note during the workshop of what additional research would be valuable in the dairy sector and to the immediate need for a dairy processing and marketing strategy.

The Consumer Survey, combined with production data from the Rwanda Dairy Master Plan, identifies a supply-demand gap. Milk production already exceeds demand, and the gap will grow, unless efforts are made to grow the market. Thus, a marketing strategy is critical at this juncture in the dairy industry. Ms. Hagan pointed out the way the Rwanda Dairy Master Plan has projected supply will grow, the result of all the terrific efforts discussed. However, unless per capita consumption grows, demand will not keep pace with supply. Today an over-supply of 52M liters exists, which is not that significant, but if no efforts are made, by 2020 the Consumer Survey projects an over-supply of approximately 375M liters. Even when adjusting consumption for expected income growth, which is projected to allow some non-users to start consuming and to cause a shift to the higher-income segments like the Urban Elites, and projecting the School Milk Program to continue at the same level to 2020, there is still expected to be an over-supply of approximately 335M liters.

The supply-demand gap has a number of implications throughout the value chain that ultimately limit the ability of farmers to sell milk at a good price, lower incentives to enter the Rwandan dairy industry, and create challenges for absorbing off-take from the existing MCCs and new ones being constructed. However, all stakeholders recognize the benefits of cow ownership to farmers and of increasing milk production, thus the solution must be to find ways for demand to keep pace with supply. As Dennis Karamuzi from RDCP II said so well, no one in the dairy sector would ever want to slow milk production. Thus, preventative measures must be taken before the supply-demand gap grows. The goal of a marketing strategy will be to ensure that the Rwandan dairy industry keeps the momentum going and that demand keeps pace with the supply we have all worked so hard to generate.

Ms. Hagan then stressed the fact that the supply-demand gap will continue to grow, *unless efforts are made to grow the market*. When EADD launched the survey in 2011, a two-pronged approach was recommended: more consumers and more consumption per consumer. This means converting non-users to dairy consumers and getting current dairy consumers to increase their usage. Another idea has been put forward by the dairy stakeholders, which is to find new markets of consumers; while the export market was not a focus of the Consumer Survey, it is an opportunity to expand the market that should be considered.

Looking at the levers of more consumers and more consumption per consumer, hypothetically, you could close the supply-demand gap by converting 40% of non-users to dairy consumers and by getting current dairy consumers to consume 40% more dairy. There are many other ways to close the gap based on a combination of these two levers and potential export markets. However, Ms. Hagan then pointed out that absorbing supply, while important, is not the only issue in the market. There is also a nutrition issue, since Rwanda is falling short of the WHO recommendation of 200 liters of milk per person per year, and Rwanda is behind the region in consumption. John Haguma of EADD later pointed out in Q&A that, given how young the dairy industry in Rwanda is relative to neighbours, how close the consumption is to that of Uganda and Tanzania should be seen as an accomplishment. Ms. Hagan acknowledged this is very true, and credit for this fact is owed to the efforts of the entire dairy sector. That said, from a nutritional standpoint, the low per capita consumption means that most Rwandans are not getting all the important nutrient benefits from dairy, such as Calcium and protein. Most concerning is the fact that 33% or 1/3 of the population does not consume dairy, and even

for those that do consume, per capita consumption is still only 60 liters per capita per year. This puts Rwanda at an overall average of 40 liters per capita per year vs. as high as 111 liters per capita per year in Kenya.

Therefore, Ms. Hagan noted, the goal should not just be to meet production but to reach the WHO recommendation or at least match Kenya's per capita consumption. If this were the case, then supply could even be increased further, resulting in many positive effects on the dairy sector and nutrition for the people of Rwanda.

The Consumer Survey is considered the first step in developing a marketing strategy to increase demand and solve the supply-demand gap. The goal of the Consumer Survey was to identify the drivers and barriers of demand and determine how the drivers could be enhanced and the barriers overcome. Ms. Hagan remarked that the sector should be excited that there are many drivers of demand for milk, noting that she will often discuss milk specifically, since it really is the vast majority of the dairy industry in Rwanda. This means there is a need to increase demand for value-add products in particular. In the focus group discussions conducted by the Rwandan research team, dairy consumers talked about a range of both functional and emotional benefits. Functional benefits included things like nutrients, strong bones, protection from disease, and good skin. Emotional benefits included pleasure of consumption and associations with childhood and family. Consumers made statements like, "Growing up, we felt milk was the most delicious thing in life" and "Milk is very nutritious. It is a source of power. It can help you live longer." Clearly, there is a love of milk in this country.

At the same time, the Consumer Survey identified four key issues limiting demand, which the dairy processing and marketing strategy should seek to address. The first is the fact that competition with other beverages and consumer perceptions that milk is not for them threaten milk and dairy's share of throat and wallet. In particular, growth of soft drinks (Fanta) and the access that wealthier, more urban consumers have to a variety of beverage options means that milk has to do more to compete. In Rwanda, there is not the exciting array of dairy options found in other markets in the region, such as Kenya and South Africa. There, flavoured milk, varieties of flavoured cheese options, and even fruit and juice mixes create opportunities to compete on flavour with soda and to convert non-users who don't like the taste of milk. Ms. Hagan noted that in the US, they even have milk with an enzyme to allow lactose intolerant consumers to drink it. In focus groups, consumers were presented with the ideas of milk and juice mixed or a pre-mixed African tea, and they seemed receptive to new-product innovations, if they have the opportunity to sample first of course. Thus, there is an opportunity to encourage greater dairy product variety.

There are also some perceptions to overcome. Non-users said things like, "Milk?! We're not babies," indicating that they believe milk is a product for children, not themselves. Even consumers of dairy felt that preference for milk should go to children and the sick. While true that children and the sick can benefit from dairy, Ms. Hagan emphasized the fact that we need to remind consumers of the importance and relevance of milk and dairy to adults. Women, for instance, start to lose bone mass as early as age 30, which can lead to osteoporosis, so there is a particular need for Calcium. Therefore, there is an opportunity for a national campaign to remind dairy consumers of the importance of dairy and encourage them to increase consumption for nutritional value and to educate non-users in order to get them to start consuming dairy. Advertising on the radio and TV are

not the only way to reach consumers, however; Rwandans take the opinions of authority and friends and family seriously, creating an opportunity to utilize word-of-mouth / social marketing, events, and key influencers in addition.

The second key issue is the fact that cost and availability limit consumption of milk and dairy overall, as well as conversion to processed products. The main reason non-users claimed they didn't consume milk is because they can't afford it / it's too expensive (38%). For those who don't own a cow or have access to cheap raw milk, such as from a neighbour's cow, milk overall is considered too expensive. Those that live in urban areas (22% of non-users) or areas without high milk production, buying raw milk at a kiosk or market might be expensive. In focus group discussions, consumers also discussed money as a key constraint to consuming more milk; many consumers wanted to consume more but felt limited by cash available. The issue of cost is even more pronounced when it comes to processed milk: 74% of those dairy consumers who do not consume processed milk claim they don't because they can't afford it / it's too expensive. Therefore, there is an opportunity to grow dairy consumption by making it more affordable, and the main way to do this is to examine ways to reduce costs throughout the value chain, including production, transport, and processing.

Availability is also an issue limiting dairy consumption. The Consumer Survey asked consumers what they would do if they intended to buy fresh milk and milk was not available. While some said they would walk a longer distance (24%), many didn't know (28%) and, unfortunately, 23% would avoid taking milk and 22% would get a substitute. Thus, approximately 45% of sales are lost when milk is not available in an outlet. This points to the opportunity to ensure milk is widely available, which means both throughout the country, particularly in areas with lower milk production, and at all outlets, including restaurants and hotels.

The third issue Ms. Hagan discussed was framed as a question; what EADD has labelled the "Alternative Milk Sector" is really the majority of the market. When excluding powdered milk, since it is primarily imported, the AMS makes up 75% of milk consumed in liquid milk equivalent. Liquid milk equivalent means that some products, e.g., cheese, take more than a liter of milk to make a kilogram. While there are quality concerns with the AMS, including the potential for diseases and the fact that milk may be adulterated in transit, e.g., if a trader adds water, most consumers cannot afford to or choose not to switch to processed milk. Instead, they cope by boiling milk (70%). Today, the dairy industry is trust-based in Rwanda, and consumers are also able to rely on trust they place in the neighbour or kiosk from which they always buy. However, consumers discussed the fact that when they travel or for those living in the city, they can no longer rely on this trust. Therefore, there is the potential that quality concerns will grow as Rwanda moves to a more urban society. Since the AMS is such a heated issue in the dairy sector, EADD wanted to put the question to stakeholders: How do we manage the AMS, given it is 75% of the dairy market?

Finally, the fourth key issue raised was that, despite the over-supply, Rwanda is still a net importer of dairy products. Based on the data available from the ITC Trade Map, which covers formally recorded imports, Rwanda has a negative US \$3.4M trade balance in dairy. This means that Rwanda imported 1.6M liters of dairy in 2010 and only exported about 10K liters. Ms. Hagan noted that she was only able to obtain data for formal imports, and there is likely an opportunity to better understand the amount of dairy

products brought in via the AMS. The majority of formal imports have Uganda as the country of origination (72%), which means that Uganda is recorded as the source of the product. Given Rwanda has an abundance of its own milk, it begs the question as to why the country is importing dairy products, and one hypothesis offered by EADD is the fact that imported processed products are priced at parity or cheaper than domestic processed products. For example, in a spot check, KCC from Kenya and Fresh Dairy from Uganda were cheaper than Inyange, and the EADD team has often observed Highland from Uganda as cheaper. This reiterates the need to examine costs that are driving the price of processed products. There is also an opportunity to explore the export market to increase that side of the equation; however, research would need to be done on the potential, such as consumer surveys or market analyses of the DRC and Burundi. It also may be a challenge to compete in export markets without becoming more cost-competitive.

To create a dairy processing and marketing strategy, it will be important to address these issues, as well as build upon the appreciation consumers already have for dairy. In addition, it will be important to keep in mind the different segments of consumers and the best approach to targeting each segment. Please note that an overview of the approach to each segment is included on slide 26, but detailed segment portraits can be found in the appendix of the presentation. Overall, the Urban Elite and Dynamic Familial segments are higher-income and tend to spend more on dairy and have higher consumption respectively; they are good targets to try to trade up to processed dairy, since it is still only a small proportion of their usage. Conservative Masses, Older Introverts, and Non-Users should be targeted for increased usage (or conversion to usage overall in the case of Non-Users) via both processed products and for dairy overall. Opportunities for processed usage are occasions like travel or when these groups are able to increase their income. Finally, the two lowest-income groups, Male Traditionalists and Price-Sensitive Socializers, often do not have the means to afford the milk they desire. They will benefit from efforts to lower the cost of milk and ensure quality in the AMS. Ms. Hagan encouraged participants to keep the segments in mind when developing their small group topic recommendations.

Comments of the Permanent Secretary on the Consumer Survey Findings

The PS expressed his regrets that he would not be able to remain for the afternoon discussions, as other key meetings required his presence. He also regretted the fact that few processor representatives were present to hear the Consumer Survey results and expressed desire that the information is circulated to the processors.

The PS opened his comments on the Consumer Survey thanking the presenters and stating that what was presented was the "hard facts" and in some cases the "bitter truth," making it very valuable information. He was concerned to hear that 33% of the population is not consuming milk, since we all know the importance of milk to nutrition and in the fight against malnutrition. Another hard fact he noted was that 74% of those not consuming processed milk are not able to afford it; the PS viewed this as a serious message to processors and to the government. The fact that many people were comfortable just boiling milk or "processing" it themselves confirmed what he imagined most in the room know from experience of Rwandan culture.

In addition, the PS reacted to the fact that foreign products are often cheaper, such as Fresh Dairy from Uganda; he expressed the need to ensure Rwandan products can compete domestically before tapping into foreign markets. He also added some information on the fact that there are cultural issues behind substitutes for dairy. For example, the PS described the fact that most citizens believe you must talk business over a beer and that there would be reluctance to give that habit up. However, the PS also pointed out the fact that substitutes like soda are often more expensive and less beneficial; he suggested there may be a potential campaign idea around milk's cost-benefit advantage.

The PS also offered advice to the stakeholders and thoughts for going forward in the workshop. He reiterated the value of the work that would be done over the next day and a half and recognized the challenges before the groups. He recommended that the working groups look at the drivers behind increased consumption and, equally important, the barriers to consumption and to propose actions that address both. The groups should look at the three strategic orientations, (1) increased consumers, (2) increased consumption of existing consumers, and (3) new markets for dairy outside Rwanda, and to suggest actions that need to be implemented to achieve those three objectives. The PS also asked groups to explore short-term actions, or quick wins, as well as medium-term and long-term actions. The PS also noted that the Consumer Survey unfortunately did not cover three key areas for the processing and marketing strategy: (1) other aspects of processing, such as capacity and costs, (2) transport logistics, and (3) markets beyond Rwanda. He hoped there would also be recommendations around how to address these issues.

Dairy Break

Following the comments of the PS, the group took a "dairy break," a term the stakeholders are encouraging everyone to use for their meetings to ensure that coffee and tea are taken with dairy or that dairy is taken on its own during meeting breaks.

It should be noted that the organizations represented also identified an opportunity to increase dairy usage at functions such as this workshop. Most participants noticed that milk was not available as a lunch beverage option, while soda and juice were offered, and that this is a common occurrence at such events. Further, the group discussed the fact that the majority of money spent on soda leaves the country, while that on domestic brands of milk would contribute back to the Rwandan economy. Heifer, Land O' Lakes, SNV, and TechnoServe all pledged to request that milk is offered for lunch at any functions they host and requested to do so as well.

Question & Answer on the Consumer Survey

The Consumer Survey presentation was followed by a question and answer session. Beyond the questions incorporated into the above, three key follow-ups on the consumer survey were discussed:

1. Place of purchase: what percent of consumers are obtaining milk from their own cow or from a neighbour?
2. Penetration, frequency, and volume per purchase: The volume of each dairy product purchased could be the result of very different dynamics, e.g., small

proportion of the population buying great quantities, majority of dairy users buying infrequently, etc.; can we better understand these dynamics to improve targeting decisions?

3. Imports by product type: What types of dairy products make up the majority of imports?

Follow-ups on all three of these questions are included in the attached PowerPoint. Additional questions on the Consumer Survey data can be posed to Lindsay Hagan (lhagan@tns.org). For the third follow-up, it should be reiterated that only data for recorded imports is captured; thus, there is the potential that significant trade of raw milk, for example, exists and is not captured in the data available. As discussed, this may be an opportunity for further research to understand trade in the Alternative Milk Sector.

Additional questions addressed the jump in production based on productivity increases per cow from 2016 to 2017 and the reasons why costs of processing are so high. The productivity question was addressed by Dr. RUTAGWENDA, Theogene, Director General of the Ministry of Agriculture and Dr. Kayumba and the decision was made to concentrate on marketing, the task at hand, vs. questions of production. Discussions on the costs of processing were initiated with the Inyange representatives, and this conversation was deferred to the small group discussions, as it was central to one of the topics.

Introduction of the Small Group Topics by Lindsay Hagan, EADD/TNS

Ms. Hagan introduced the topics for the small working groups and explained why the topics were chosen. The topics were selected to address the three key levers for increasing demand, (1) more consumers, (2) more consumption per consumer, and (3) new markets of consumers, as well as to overcome each of the key issues identified in the consumer survey.

Topic #1 was: "National dairy campaign: If there were to be a nationwide, advertising effort, what would it look like?" This topic is an opportunity to address the first issue identified in the consumer survey, competition with other beverages and the fact the perception of some non-users that milk is not relevant for them and of some users that milk is less relevant for healthy adults vs. children and the sick. A national campaign provides the opportunity to remind consumers of the importance and benefits, both functional and emotional, of dairy and of the proper amount to consume, as well as to convince non-users of dairy's value.

Measured media such as TV and radio is not the only way to influence consumers, particularly in Rwanda. The Rwandan consumers in focus group discussions expressed the fact that they are influenced by authority and by friends and family. Thus, Topic #2 was: "Other methods of encouraging dairy consumption: Beyond advertising, what other ways can we encourage dairy usage?" This topic intended to address the same two issues as a national campaign but using word-of-mouth/social marketing and events.

Cost and availability were also identified as key issues, and each one was given its own topic. Topic #6 was: "Ways to lower costs of production, transportation, and processing: How can we help reduce costs along the value chain?" and Topic #5 was: "Ways to ensure

widespread availability of dairy, both processed and the Alternative Milk Sector (dairy that is not processed): How can we ensure dairy is accessible to all citizens?" Decreasing costs and increasing availability both have the opportunity to make dairy more accessible to non-users who can't afford or obtain it and to ensure that dairy consumers are able to consume as much as they desire without being limited by means or access. In addition, decreasing costs and increasing availability of processed milk specifically will certainly increase processed dairy usage and potentially increase usage of dairy overall. Finally, ensuring cost competitiveness of Rwandan dairy has the potential to open new markets by allowing Rwandan dairy to compete abroad and to address the issue that Rwanda is currently a net importer of dairy.

Topic #3 cuts across several issues, including competition with other beverages, consumer attitudes, cost, availability, and net importation of dairy: "Ways to grow the processed dairy market: How can we increase consumption of Rwandan processed dairy?" Ms. Hagan noted that this topic should address not only processed milk products but the full range of processed dairy, reminding the group of the limited variety observed in domestic processed products vs. those in other markets. Processed dairy has the potential to increase usage occasions by consumers and to convert non-users who are not using for reasons of taste and lactose intolerance in particular.

At the same time, the question was put to the group on how to manage the Alternative Milk Sector, and therefore Topic #4 was designed to address this issue: "Evaluating the role of the Alternative Milk Sector (dairy that is not processed): How do we manage the Alternative Milk Sector, which is 75% of the dairy market?" Given the AMS is the majority of the market and currently the least expensive portion, consumers of the AMS are a large proportion of those whose usage stakeholders seek to increase and the AMS may have the greatest potential as a gateway for those who currently cannot afford dairy. Last, given the potential discussed above for there to be trade in the AMS that is not recorded, understanding and addressing that trade may help in market expansion.

Finally, two topics were meant to cut across all the issues. Topic #7 intended to address the dairy sector business environment in Rwanda: "Encouraging additional investment in dairy processing / marketing: How can we ensure the environment is optimal for investors to set up operations in Rwanda, buying Rwandan supply of milk?" Topic #8 was: "Additional market research support to the industry: What other consumer / market research would be helpful as we continue to develop marketing strategies?" Ms. Hagan reminded the group that there were many other valuable topics of research that the already-extensive scope of the Consumer Survey could not cover, and thus there was a need to identify key pieces of research needed to inform a marketing and processing strategy.

Presentations of Recommendations of the 8 Small Working Groups

Eight working groups presented recommendations on their assigned topics to the plenary on Day 1. All participants had an opportunity to add their ideas and ask questions. Teams then regrouped to make revisions to their presentations that evening and the following morning; thus, additions from the plenary to the group presentations have been incorporated. In the morning of Day 2, teams then presented again to the Director General, MINICOM. Those presentations are included in the attached PowerPoint.

Closing by the Director General of the Ministry of Trade & Industry

In closing, the Director General of MINICOM once again thanked the participants for contributing richly to the marketing strategy and pointed out that the results of the workshop were indeed reflective of the profound and diverse capacity of the dairy players attending the workshop.

The DG reiterated the fact that MINICOM would incorporate the results of the workshop into the comprehensive dairy processing and marketing strategy they were developing to share with the Cabinet. He concurred with the majority of recommendations presented, joking that the only one he questioned was the milk-beer, which he would need to be educated on how to develop. Overall, he completely agreed that something was needed to reinforce the milk-drinking mindset in Rwanda and agreed with the idea of an awareness campaign of the benefits of milk. He also heard and appreciated the request to mobilize social-political leaders and events like *umuganda* as vehicles for increasing milk consumption, particularly to address the fact that Rwanda is trailing neighbouring markets in consumption.

The DG also recorded the request for infrastructure to be upgraded, as well as the ideas around additional research needed in the sector, the desire for continuation and expansion of the School Milk Program, the need for a national media campaign, and the call-to-action for processors to diversify in terms of product sizes and varieties. The DG noted the opening of the Inyange kiosk at Kisiment that day and discussed the idea of encouraging processors to avail dispensers throughout the country to increase accessibility.

Finally, the DG noted that there were many ideas revolving throughout the groups, such as ideas around infrastructure, taxes and investment, and campaigns; he expressed the need for the ideas to be narrowed and packaged and requested the help of stakeholders in doing so. He noted the timeline of MINICOM to prepare a draft for the Minister of Trade & Industry of the dairy processing and marketing strategy by the 15th of June.

In response to the DG's request, the plenary concluded by constituting a work group that would refine the results of the workshop. The workgroup is to consist of a member from: EADD, SNV, RBS, RDCP, and RNDB, led by MINICOM. The MINICOM team will follow up with an invite, but tentative date and time proposed were: Tuesday, 2/6 9am at MINICOM.

Annex 1: Participants Details

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