



# Partners for Tanzania dairy value chain research and development: A scoping study

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# Abbreviations

ASARECA	Association for Strengthening Agricultural Research in East and Central Africa
AECF	Africa Enterprise Challenge Fund
ASDP	Agricultural Sector Development Programme
ACT	Agricultural Council of Tanzania
BDS	Business Development Services
CGIAR	Consultative Group on International Agricultural Research
CRPs	CGIAR Research Programs
CEFA	Italian NGO
FARA	Forum for Agricultural Research in Africa
GMP	Good Manufacturing Practices
HACCP	Hazard Analysis Critical Control Points
HIT	Heifer International Tanzania
LITA	Livestock Training Authority
MLFD	Ministry of Livestock and Fisheries Development
MVIWATA	<i>Mtandao wa Vikundi vya Wakulima Tanzania</i>
NAIC	National Artificial Insemination Centre
NJOLIFA	Njombe Livestock Farmers Association
PASS	Private Agricultural Sector Support
PMO	Prime Minister's Office
PMO –RALG	Prime Minister's Office – Regional Administration and Local Governments
RLDC	Rural Livelihood Development Company
SNV	Netherlands Development Organisation
SUA	Sokoine University of Agriculture
TALIRI	Tanzania Livestock Research Institute
TAMISEMI	Tawala za Mikoa na Serikali za Mitaa
TAMPA	Tanzania Milk Processors Association
TAMPRODA	Tanzania Milk Producers Association
TFMA	Tanzanian Feed Manufacturers Association
TBC	Tanzania Broadcasting Corporation
TBS	Tanzania Bureau of Standards
TCCIA	Tanzania Chamber of Commerce, Industry and Agriculture
TDB	Tanzania Dairy Board
TFDA	Tanzania Food and Drugs Authority
TFNC	Tanzania Food and Nutrition Centre
TPSF	Tanzania Private Sector Foundation
VC	Value Chains
ZARDI	Zonal Agricultural Research and Development Institute

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# Introduction

As part of the CGIAR Research Program (CRP) on Livestock and Fish, The International Livestock Research Institute (ILRI) (working closely with Sokoine University of Agriculture) is leading a major initiative to consolidate research and development efforts for a pro-poor transformation of the smallholder dairy value chains in Tanzania. The livestock and Fish (LaF) program vision for Tanzania is a more inclusive and sustainable development of the dairy value chain to achieve “More milk by and for the poor”, locally referred to as *Maziwa Zaidi* in Swahili. To achieve this vision the program aims at three principle goals over the next 10-12 years:

- a) Smallholder farmers have reliable and consistent access to quality inputs and services in order to efficiently achieve high milk productivity
- b) Smallholder famers have access to reliable, well-coordinated, and efficient dairy products marketing arrangement with resultant improvement in household income and livelihoods
- c) Poor consumers have improved access to quality, safe, and nutritious dairy products at affordable prices to increase per capita consumption of the dairy products

Interventions under the *Maziwa Zaidi* program are intended to lead to a number long term changes including increase in milk production, increase in household income and asset ownership accruing from more milk production, improved or same status of environment, and improved household nutrition and health status. These long term impacts have been detailed elsewhere along these sub-pathways:

- a) Institutional innovations for value chain transformation
- b) Technology platforms and services for value chain transformation
- c) Systems assessments to support value chain transformation
- d) Innovative strategies to increase consumption of quality dairy products

The purpose of this scoping study is to provide an inventory and assessment of the various institutions and organizations having some type of involvement or interest in the development of the Tanzania dairy value chain. Some of these are already involved in collaborative research and implementation of pilot interventions and capacity development under the program to fulfil the immediate aim of *Maziwa Zaidi* to generate evidence. A SWOT analysis of key national research and development organizations is presented. The study is a first step in assessing relevant innovation capacity to guide initial engagements towards the intended scaling of interventions.

The study is complementary to two other reports that identify entry points for engagement in research and development for the transformation of the value chain. The ***Situational Analysis*** identifies opportunities and challenges along the stallholder dairy value chains while the ***Review of Successes and Failures*** identifies and what has worked or failed in the past.

# Research partners

## National research and training organizations

### ***Tanzania Livestock Research Institute***

Tanzania Livestock Research Institute (TALIRI) is a parastatal research organisation recently formed (in 2012) with a mission to develop, disseminate and promote use of appropriate livestock technologies to improve livestock productivity sustainably. It takes over control of six research stations (previously under the Ministry of Livestock and Fisheries Development (MLFD) that are spread across different agro-ecological zones to address livestock issues unique to those zones on nutrition (management/utilization of feeds, pasture and forage development), breeding (breed development and promotion of high yielding breeds) and animal health and husbandry. The following research centres operate under this institutional set up:

- Mpwapwa Livestock Research Centre – Dodoma – Central zone
- Kongwa Pasture Research Centre – Dodoma – Central Zone
- Uyole Livestock Research Centre – Mbeya – Sothern highlands
- Tanga Livestock Research Centre – Tanga – Coast/Eastern zone
- Naliendele Livestock Research Centre - Mtwara – Southern zone
- Mabuki Livestock Research Centre – Mwanza – Lake
- West Kilimanjaro Livestock Research Centre – Northern zone

These conduct all research on livestock including nutrition, breeding, pastures and animal husbandry of the types of livestock found in the agro – ecological zone in which the centre is located.

### ***Sokoine University of Agriculture (SUA)***

SUA is the premier agricultural research and capacity development organisation in Tanzania with a significant record of research in livestock systems and university-level training in animal nutrition, breeding, animal health and husbandry. Its research objective is to provide national leadership in basic and applied research in order to generate evidence, knowledge and innovations that respond to emerging societal issues.

The history of Sokoine University of Agriculture dates back to 1965 when it started as an Agricultural College offering diploma training in the discipline of agriculture. In July 1970, the College was transformed into a Faculty of Agriculture of the UDSM and thereby started offering Bachelor of Science in Agriculture degree. The Faculty was on the 1st of July 1984 transformed, through a Parliamentary Act, into a full-fledged University<sup>1</sup> and became known as Sokoine University of Agriculture (SUA) with the Faculty of Agriculture, Faculty of Forestry and Faculty of Veterinary Medicine. SUA has several academic units, one of which, the Directorate of Research and Postgraduate Studies (DRPGS), deals with research on various subjects including livestock research.

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<sup>1</sup> Parliamentary Act No. 6 of 1984

### ***Other universities***

Other public Universities such as the University of Dar es Salaam, Mzumbe University and the University of Dodoma and private universities such as Tumaini University and St. Augustine University carry out policy and socio-economics research but are not specialized in agriculture or livestock

## **Regional research organizations**

### ***Association for Strengthening Agricultural Research in Eastern and Central Africa***

The Association for Strengthening Agricultural Research in Eastern and Central Africa (ASARECA) is a sub-regional not-for-profit association. It was established in 1994 by ten member countries represented by their national agricultural research for development institutes. The 10 member countries are: Burundi, Democratic Republic of Congo, Eritrea, Ethiopia, Kenya, Madagascar, Rwanda, Sudan, Tanzania, and Uganda. South Sudan joined the ASARECA family, making the number of members 11<sup>2</sup>

ASARECA's mission is to enhance regional collective action in agricultural research for development, extension and agricultural training and education to promote economic growth, fight poverty, eradicate hunger and enhance sustainable use of resources in Eastern and Central Africa

Central to ASARECA's vision and mission is the recognition of the value of regional collaboration among member countries to overcome poverty and hunger and foster the development aims of broad-based economic growth, poverty eradication and improved livelihood.

ASARECA sees improved delivery and impact of scientific knowledge, policy options and technologies as a powerful instrument to drive the sub-region towards meeting the Comprehensive African Agricultural Development Program (CAADP) which is the agricultural agenda of the African Union's, New Economic Partnership for African Development (AU/NEPAD).

The major objective of ASARECA is to develop policies and programs aimed at deepening co-operation in agricultural research and policy among its member countries for the mutual benefit of all the stakeholders in the agricultural sector. Stakeholders include farmer's associations; national and sub-regional associations that coordinate agricultural research, extension, training and education; associations of processors of agricultural products; associations of agricultural service providers; associations of agricultural businesses and related marketing agents; consumer associations; organised women groups and youth groups working in agriculture; non-governmental associations working in agricultural

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<sup>2</sup> See more at: <http://www.asareca.org/content/about-us-0#sthash.4fAA7emR.dpuf>



research and development; international agricultural research centres; universities and advanced research institutes ; investors and donors /development partners.

### ***The Forum for Agricultural Research in Africa***

FARA is an apex organization bringing together and forming coalitions of major stakeholders in agricultural research and development in Africa. It is a strategic platform that fosters continental and global networking to reinforce the capacities of Africa's agricultural science and innovation community from research, education/training, extension and civil society engaged in agriculture. Established in 2001, the Forum encompasses all stakeholders, African and non-African, who are committed to enabling African agricultural development and the achievement of the former Millennium Development Goals (MDG) that are now being superseded into Sustainable Development Goals (SDG).

FARA's Mission is to create broad-based improvements in agricultural productivity, competitiveness and markets by supporting Africa's sub-regional organizations in strengthening capacity for agricultural innovation, by providing a strategic platform that fosters continental and global networking that reinforces the capacities of Africa's national agricultural research systems and sub-regional organizations<sup>3</sup>.

FARA works with the four primary sub-regional research organizations (SROs) in Africa namely;

- North Africa Research Organization (NARO);
- West and Central African Council for agricultural Development (CORAF/WECARD);
- Centre for Coordination of Agricultural Resources and Development for Southern Africa (CCARDESA) and the;
- Association for Strengthening Agricultural Research in East and Central Africa (ASARECA).

## **International research organizations**

### ***CGIAR research centres***

CGIAR centres with mandates directly relevant to the dairy value chain research for development are ILRI and CIAT. Both organizations are already part of the CGIAR Research Program on **Livestock and Fish** that aims to increase the productivity of small-scale livestock and fish systems in sustainable ways, making meat, milk and fish more available and affordable to poor consumers across the developing world. The Livestock and Fish Programme addresses two main challenges: Poor people in developing countries, especially women and children, eat very little meat, milk and fish. This contributes to nutrient deficiencies, poor physical and cognitive development for children, and poor health and livelihood outcomes for adults. Can their diets be improved, helping them to lead healthy

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<sup>3</sup> [www.fara-africa.org](http://www.fara-africa.org)

and productive lives? The productivity of small and medium-scale livestock and fish producers and marketing systems in developing countries generally lags far behind those in other parts of the world. Can their productivity be sustainably increased to benefit producers and consumers, helping them to food secure futures?

The L&F CRP works closely with the CGIAR Research Program on Agriculture for Nutrition and Health led by IFPRI. Its mission to fill the existing gap between agricultural development and its unfulfilled health and nutritional benefits is relevant. IFPRI also leads another CRP on Policies, Institutions and Markets led by IFPRI that is also relevant. The CRP seeks to establish how challenges and failures can be overcome so that policies, institutions, and markets can be used most effectively to reduce poverty, improve food security, and increase small producers' incomes.

The CGIAR Research Program on Climate Change, Agriculture and Food Security (CCAFS) led by CIAT is also relevant. This CRP seeks to overcome the threats to agriculture and food security in a changing climate, exploring new ways of helping vulnerable rural communities adjust to global changes in climate. CCAFS brings together the world's best researchers in agricultural science, climate science, environmental and social sciences to identify and address the most important interactions, synergies and trade-offs between climate change and agriculture. CCAFS is implementing a uniquely innovative and transformative research program that addresses agriculture in the context of climate variability, climate change and uncertainty about future climate conditions.

### ***Advanced research institutes***

A number of other advanced research institutes (ARI) not directly linked to the CGIAR also operate in Tanzania either in collaboration with projects under CGIAR research programs or directly with national organizations. ARIs that have recently been involved in various research activities include: Freie Universität Berlin, Royal Veterinary College (UK), University of Glasgow, University of Alberta, Scotland's Rural College (SRUC, UK) China Agricultural University (CAU), ND Emory University

## SWOT analysis of key research organizations

Strengths, weaknesses, opportunities and threats (SWOT) analysis was applied to assess what the following key national research organization has to offer in contributing to research for development of the dairy value chain.

### ***Tanzania Livestock Research Institute (TALIRI)***

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>• Consists of many different livestock research stations that are strategically located in each agro-ecological zone of Tanzania</li> <li>• Inherited research stations with long experience such as Mwapwa research station that started its operational since 1930s</li> <li>• Conducts multidisciplinary and collaborative research</li> </ul>	<ul style="list-style-type: none"> <li>• TALIRI's newness may be used to develop a research institution that is more responsive to clients</li> <li>• Renewed commitment to apply modern research methodologies and engagements in collaborative research partnership arrangements with potential to achieve impact at scale</li> </ul>
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> <li>• The reconstitution of previous livestock research centres under the Ministry of Livestock under TALIRI is yet to be tested as a better approach to conducting livestock research</li> <li>• Several senior staff positions are unfilled</li> </ul>	<ul style="list-style-type: none"> <li>• Over dependence on government funding that is limited</li> <li>• Aging scientist due to government recruitment freeze of the 1990s</li> <li>• Aging research equipment</li> </ul>

### ***Sokoine University of Agriculture (SUA)***

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>• Widely respected as the a premier agricultural research and training organization</li> <li>• Long experience in conducting multidisciplinary and collaborative research on dairy systems such as Norwegian Agency for Development (NORAD), Danish International Development Agency (DANIDA), FAO, ILRI and ASARECA.</li> <li>• Highly trained staff</li> </ul>	<ul style="list-style-type: none"> <li>• A wide spectrum of disciplines</li> </ul>
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Many faculty staff are aging given the long gap in recruitment in the 1990s</li> <li>• Dependence on government as main source of funding</li> </ul>

# Development partners

## Public sector

### *Agriculture sector ministries*

*Ministry of Livestock and Fisheries Development.* This is the lead ministry for livestock development in Tanzania. Its main mandates include livestock policy development, livestock regulation through various boards such as the Tanzania Dairy Board (TDB), Research through TALIRI, training through the Livestock Training Authority (LITA) and planning and budgeting  
*Ministry of Agriculture Food and Cooperatives.* This ministry is responsible for cross cutting issues relevant to livestock development like land, water and joint programs such as the Agricultural Sector Support Programme (ASDP).

*Ministry of Trade and Industries.* This ministry is responsible for policies under which industries like milk processing plants operate

*Prime Minister's Office – Regional Administration and Local Government (PMO –RALG)* commonly known as '*Tawala za Mikoa na Serikali za Mitaa*' (TAMISEMI). This "ministry" is responsible for good governance, investment promotion and extension services provided through district councils. The National Empowerment Fund administered by the National Economic Empowerment Council also falls under this ministry. The main objectives of the Fund are: promoting universal equity in ownership of property among Tanzanians; contributing to creation of employment opportunities; providing a link between various institutions and organizations to provide technical and, or facilities that may be necessary for the purpose of advancement and furtherance of their economic activities; and, promoting entrepreneurship. The Fund (also known as *Mwananchi* Empowerment Fund) became operational in January 2008 and is operated through CRDB Bank and SACCOs in fifteen regions; Mtwara, Lindi, Rukwa, Singida, Manyara, Dodoma, Pwani, Ruvuma, Tanga, Shinyanga, Kagera, Dar es Salaam, Mbeya, Mwanza and Morogoro.

*Ministry of Finance.* The Treasury controls the budget and also is the custodian of tax policies and as such is cross cutting over all ministries.

### *Parastatal agencies*

*Tanzania Dairy Board (TDB)*. This is a statutory body established by the Tanzania Dairy Industry Act, 2004. The Act was enacted to achieve the objectives stated in Section 3.2<sup>4</sup> of the National Livestock Policy. TDB's mandate is to regulate, develop and promote the Tanzania Dairy Industry. It promotes production, collection, processing, marketing and consumption of quality milk and milk products by facilitating stakeholder activities. Its mandate therefore includes collaboration with national and international stakeholders in Research and development activities relevant to the dairy industry

*Tanzania Livestock Training Agency (LITA)*. This agency was established in 2011<sup>5</sup> by merging six existing Livestock Training Institutes (LITIs) of Mpwapwa (1939), Morogoro (1948), Tengeru (1952), Temeke (1973), Buhuri (1984) Madaba (1989) and Mabuki (2012). The main activities of LITA are to improve performance of its core activities of training technicians at certificate and diploma levels in veterinary and animal husbandry in diverse agro-ecological zones. It trains livestock extension staff to certificate and diploma levels. Short-term tailor-made training of livestock farmers and other clients are also undertaken on demand.

*Tanzania Food and Drugs Authority (TFDA)*. This agency regulated the quality and safety of food, medicines cosmetics and medical devices marketed in Tanzania purposely to protect and promote public health. Milk and milk products safety and quality control falls under its mandate. In this function it collaborates with TDB to control internal trade, export and import of milk and milk products.

*Tanzania Bureau of Standards (TBS)*. TBS was established in 1976 under the Ministry of Industry and Trade through the Standards Act<sup>6</sup>. It is mandated to undertake measures for quality control of products of all descriptions and to promote standardization in industry and commerce.

*National Artificial Insemination Centre (NAIC)*. This agency deals with bull acquisition, semen collection storage and distribution and liquid nitrogen production. In 2012/2013 the centre produced and distributed 168,000 doses of semen and 98,000 inseminations were carried out. The centre also conducts training of inseminators and currently trains about 100 inseminators annually. The centre operates through zonal centres currently located at Dodoma, Kibaha, Mbeya, Mwanza and Lindi. These zonal centres produce liquid nitrogen and serve as semen storage and distribution centres.

*Tanzania Food and Nutrition Centre (TFNC)*: The main objective of TFNC is to provide expert guidance on food and nutrition to actors at various levels through research, advocacy, education and training on nutrition for the provision of quality nutrition services to the Tanzania community in the prevention and control of all forms of malnutrition. Services

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<sup>4</sup> National Livestock Policy, 2006. MLFD

<sup>5</sup> Government notice No. 355 of 28.10.2011 Executive Agencies Act Cap 245 (R.E. 2009)

<sup>6</sup> Standards Act No.3 of 1975

provided by the Centre are: laboratory analysis of food and related substances; food and nutrition library and documentation; tailor-made short courses on specialized topics on demand; research, advocacy, education and training aimed at prevention and control of all forms of malnutrition.

### *Non-Governmental Organisations*

*Heifer International Tanzania (HIT).* Heifer International is an American international NGO whose mission is to work with communities to end hunger and poverty and care for the Earth. Heifer International has been in Tanzania since 1974 and has pioneered the Heifer in-trust scheme. At the core of their model is an approach that is called 'Passing on the Gift'. This means that families share the training they receive, and pass on the first female offspring of their livestock to another family. This extends the impact of the original gift, allowing a once impoverished family to become donors and full participants in improving their communities. Heifer once covered the whole of Tanzania but has currently scaled down its activities to the Eastern, central southern and southern highlands of Tanzania. HIT started by placing dairy heifers to needy families. They have now expanded to dairy goats, fish farming, local chicken and beekeeping. HIT is currently leading the implementation of EADD2 in Tanzania in a consortium involving TechnoServe, ICRAF and ILRI. African Breeders Services Total Cattle Management Ltd is engaged in the provision of breeding services.

*Land O'Lakes Inc.* Land O'Lakes, Inc. is one of America's premiere member-owned cooperatives. It offers local cooperatives and agricultural producers across the nation an extensive line of agricultural supplies as well as state-of-the-art production and business services. Land O' Lakes has an international development section under which it implements dairy development programs worldwide. It uses its practical experience and in-depth knowledge to facilitate market-driven business solutions that generate economic growth, improve health and nutrition, and alleviate poverty. In Tanzania it recently implemented the Tanzania Dairy Development Program (TDDP) from 2010 – 2013 in Mara, Manyara, Arusha, Kilimanjaro and Tanga regions reaching 18,700 farmers in 55 farmer groups, 30 milk processors, 60 input providers and 60 milk traders.

*SNV Netherlands Development Organisation.* This is a Dutch NGO that started operations in Tanzania in 1971. In alignment with Tanzania's National Strategy for Growth and Reduction of Poverty (NSGRP), SNV works in the Agriculture, Water Sanitation and Hygiene, and Renewable Energy sectors. Within these three sectors, they provide advisory services, broker knowledge and support advocacy. The recipients of these services include public sector, private sector, and civil society organizations. SNV aims to contribute to sustainable impact at scale. To accomplish this, SNV works in partnership with a wide range of public and private partners at the local, national and international level, in association with a growing number of local organisations that provide capacity development services.

*Rural Livelihood Development Company (RLDC)*. This is a Swiss NGO based in Dodoma. Its main activities are development of commodities value chains for oilseeds (sunflower, cotton), local chicken and rice. Up to last year it dealt with dairy value chain development but has so far dropped dairy activities.

*CEFA*. This is an Italian NGO specialized in integrated rural development and urban poverty alleviation. It has operated in Tanzania since 1976 in Njombe, Iringa and Dar es Salaam Regions. Its projects include activities in the following fields: agriculture, agro-processing, rural electrification, water supply, vocational training, economic empowerment and inclusion of people with disabilities in the labour market. In Njombe region it has teamed with the Njombe Livestock Farmers Association (NJOLIFA) to set up and operate a milk processing plant that collects milk, processes and markets the milk for the farmers.

*Faida Market Linkages (Faida MaLi)*. Faida MaLi is a Tanzanian based company limited by guarantee. It was established in 2003 to assist small scale farmers take advantage of the increasing opportunities for entrepreneurial development offered by market liberalization and private agro-industrial investment. Faida MaLi has carried out various consultancies and implemented donor funded projects in providing market linkage services for agricultural commodities. They facilitate contracts between smallholder producers and agricultural companies, bringing together actors from both supply and demand sides to catalyse a specific enterprise development.

#### *Membership organisations*

*Tanzania Milk Processors Association (TAMPA)*. This is an association of Tanzania milk processors. Its main objective is to create better business environment for milk processing in the country. The association was established in 2001 in Dodoma after the initiatives of milk processors. TAMPA has a Board of Directors as the executive body, the decision making body is the Annual general meeting and the day to day work is under a secretariat of two graduates. The required meetings have been meeting regularly.

*Tanzania Milk Producers Association (TAMPRODA)*. This is a newly formed association of Tanzania milk producers and includes dairy farmers and producers of commercial milk from local cattle.

*Mtandao wa Vikundi vya Wakulima Tanzania (MVIWATA)*. Also known as National Network of Small-Scale Farmers Groups in Tanzania, this association was formed to champion economic, social, cultural and political interests of smallholder farmers in Tanzania by strengthening farmers' groups and networks, facilitating communication and learning among farmers.

*Tanzanian Feed Manufacturers Association (TFMA)*. This association was formed in 1990 but it has been largely dormant. Some feed industry stakeholders are currently reviving it. The emerging TFMA aspires to lobby government to reduce tax, provide technical advice, to establish and promote feed industry standards, to develop better lab testing facilities and to develop training opportunities.

*Agricultural Council of Tanzania (ACT)*. ACT is the umbrella association of the agricultural private sector in the country. It aims to unite groups and associations of farmers, livestock keepers, suppliers, processors, transporters and researchers in order to push for improved economical and organizational environment of the sector. The aim is to make ACT the most effective private sector instrument for the whole agricultural sector in Tanzania by emphasizing modernization, commercialization of agriculture, and to lobby for key private sector agricultural issues.

### *Organisations promoting private sector growth*

*Private Agricultural Sector Support (PASS)*. PASS was established by the governments of Tanzania and Denmark in the year 2000 to stimulate and support investments in the primary agricultural sector and agro-businesses. It was introduced as a pilot intervention under the Danish funded Agricultural Sector Programme Support (ASPS) with the objective of promoting and facilitating investments in the primary agricultural sector and agro-businesses in Tanzania; particularly to provide credit guarantees for commercial agriculture to help the access to bank credit and Business Development Services (BDS) to make business plans and feasibility and market studies.

*SME Competitiveness Facility (SCF)*. This is a matching grants opportunity for businesses in Tanzania that wish to develop or increase their ability to trade and export. It assists SMEs to access markets by enabling them to attend trade fairs and other marketing events. In the dairy sector the facility has worked with the Tanzania Milk Processors Association (TAMPA) to strengthen its role

*Tanzania Private Sector Foundation (TPSF)*. This foundation was established to promote private sector-led social and economic development in Tanzania. It co-funded the TDB multi-stakeholder study on multiple regulations on milk and milk products.

*BEST-AC*. This is a grant giving programme striving to improve the private sector business environment in Tanzania. They work with membership, trade and business associations from the private sector. These include National Chambers of Commerce and Agricultural Council of Tanzania. The grants enable associatios to dialogue with government to change unsuitable policies, laws and regulations. They have funded several advocacy initiatives for TAMPA including lobbying for changes in tax policy that resulted in VAT zero rating of milk and milk products and import tax exemption of imported milk harvesting and processing equipment.



*Tanzania Chamber of Commerce Industry and Agriculture (TCCIA)*. This is a government created agency with a mandate to promote business and industry and to facilitate an interface between the private sector and public sector in the country. TCCIA was founded in 1988 and has since then played an important role in the privatization and liberalization of Tanzania's economy. Services provided by TCCIA to the business community include business information, training, advocacy, marketing and trade fairs.

*African Enterprise Challenge Fund (AECF)*. Through its Tanzania Agribusiness Window (TZAW) AECF operates a special competitive fund to promote agribusinesses innovations and investments in Tanzania.

*Global Alliance for Livestock Vaccines (GALV MED)*. This is a not-for-profit global alliance formed to protect livestock, improve human lives by making livestock vaccines, medicines and diagnostics accessible and affordable to the millions in developing countries for whom livestock is a lifeline. It has been active in Tanzania in promoting the ECF ITM vaccine through private sector companies.

## **Private sector**

A striking feature of the involvement of the private sectors in the Tanzania dairy value chain milk is that they are few and have weak or nonexistent links between them. This is because a large number of transactions take place outside of any formal market channels. Formal private sector organizations with a national outreach in the dairy sector are few in Tanzania. Those providing inputs and services beyond specified districts are limited to peri-urban and rural areas with high population of dairy cattle. Notable companies with a regional reach along the value chain are as follows.

**Provision of inputs and services:** The most active companies here are Ronheam International, Alpha Veterinary Services and Vet Agro Limited. These companies are registered as importers and distributor of veterinary medicine and vaccines veterinary pharmaceuticals, equipment, acaricides and agrochemicals. They have been active in the importation and distribution of the East Coast fever Infection and Treatment Method (ITM) vaccine.

**Milk processing:** The biggest company is Tanga Fresh with about 40% share of the locally processed and packaged milk market. The other notable ones are ASAS Dairies, Mara Milk, Tan Dairies and Northern Creameries, each with between 4-8% share of the same market.

A list of smaller private sector and other organizations operating in the pilot districts of Lushoto, Handeni, Mvomero and Kilosa are given in Annex 1.

## Media

Tanzania Broadcasting Corporation (TBC). The TBC under its radio section TBC – Taifa and TBC FM broadcast a livestock farming dedicated program – *Mfugaji wa Kisasa*. In this program they broadcast animal husbandry practices and other policy issues concerning livestock. There are also several FM radios that cover specific local issues where they are located

Print media outlets such as the Guardian and Nipashe newspapers have a special issue once every week covering the Kilimo Kwanza initiative in which they print solicited articles on agriculture and Livestock. Dairy industry stakeholders have in the past used these special issues to publicize the Milk Week and conduct advocacy on various issues.

# SWOT analysis of key development organizations

## *Ministries Livestock and Fisheries Development (MLFD)*

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>• Strong mandate on policy on livestock research and development</li> </ul>	<ul style="list-style-type: none"> <li>• Strong interest in developing livestock value chains</li> </ul>
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> <li>• Research priorities not yet articulated</li> </ul>	<ul style="list-style-type: none"> <li>• The significant contribution of livestock to agricultural development not fully appreciated</li> </ul>

## *Prime Minister's Office – Regional Administration and Local Governments (PMO-RALG)*

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>• Control of agricultural extension services delivery in over 130 district councils</li> </ul>	<ul style="list-style-type: none"> <li>• Animal agriculture is a priority activity across all districts</li> </ul>
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> <li>• Disconnect between extension staff and technical line ministry of livestock. This makes data and information to be scattered in districts and not available at the Ministries where one would expect them to be</li> </ul>	

## *Tanzania Dairy Board (TDB)*

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>• Strong mandate for dairy promotion, regulation and coordination of dairy development</li> <li>• Recently gained a lot of experience in working in collaborative and multidisciplinary projects and therefore has in place structures for project accounting and reporting</li> </ul>	<ul style="list-style-type: none"> <li>• Largely untapped mandate to conduct research which is relevant on tackling dairy development constraints</li> </ul>
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> <li>• Acute staff shortage that has persisted since its establishment in 2005. This is due to the centralized bureaucratic system of recruitment for the Tanzanian public sector which requires institutions to obtain permits before recruitment which takes a long time</li> </ul>	<ul style="list-style-type: none"> <li>• The main threat is that due to staff shortage TDB may be too stretched to undertake many activities under its mandate</li> </ul>

*Tanzania Livestock Training Agency (LITA)*

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>Has inherited institutions with long experience in training for livestock development, especially on animal husbandry</li> </ul>	<ul style="list-style-type: none"> <li>The strategic location of individual training institutes in different agro-ecological zones</li> </ul>
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> <li>The reconstituted agency is still new with several unfilled vacancies that may delay decision making</li> </ul>	

*Tanzania Food and Drugs Authority (TFDA)*

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>A accredited food analysis laboratories for milk testing at its headquarters in Dar es salaam</li> <li>Country wide zonal offices</li> </ul>	<ul style="list-style-type: none"> <li>TFDA membership in the TDB Board facilitates close collaboration</li> </ul>
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> <li>Zonal offices in Mbeya, Mwanza Arusha and Dodoma do not have milk testing laboratories</li> </ul>	<p>Over regulation of the formal dairy sub sector through TFDA has been identified as a constraint to dairy development</p> <p>Some TFDA activities duplicate the TDB mandate, for example, roles of each organization in import and export regulation, internal regulation on trade in milk and milk products, registration of dairies and stakeholders</p>

*Tanzania Bureau of Standards (TBS)*

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>A accredited laboratories in Dar es salaam</li> <li>TDB is a member of the TBS subcommittee on milk and milk products standards thus making standards acceptable to dairy stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>TFDA membership in the TDB Board facilitates close collaboration</li> </ul>
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> <li>A wide mandate therefore spread thin across its activities with milk being only a very small component in its portfolio</li> </ul>	<ul style="list-style-type: none"> <li>Elaborate product registration processes</li> </ul>

*Heifer International Tanzania (HIT)*

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>• Very long experience in Tanzania and is seen as synonymous with small scale dairying in Tanzania</li> <li>• Strong linkages with national and local government and producer groups</li> <li>• Widely known and appreciated for heifer-in-trust schemes</li> <li>• Strong role in productivity enhancement</li> </ul>	<ul style="list-style-type: none"> <li>• Lead role in East African Dairy Development Project phase 2 (EADD 2) that is also aligned to <i>Maziwa Zaidi</i></li> </ul>
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> <li>• Weak capacity in markets development</li> </ul>	<ul style="list-style-type: none"> <li>• Dairy development focus now diluted through widened mandate to embrace dairy goats, fish farming, local chicken and beekeeping</li> </ul>

*Land O'Lakes Inc*

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>• Formal dairy value chain development involving establishment of farmer groups with chilling plants</li> </ul>	
<i>Weaknesses</i>	<i>Threats</i>
	<ul style="list-style-type: none"> <li>• Funding interruptions appear to prematurely interrupt its continued contribution to dairy development in Tanzania</li> </ul>

*SNV - Netherlands Development Organisation*

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>• Long experience in capacity development of agribusinesses in Tanzania</li> </ul>	Bing revitalized through a strategy refresh
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> <li>• Focus across several agribusiness may dilute contributions to dairy development</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>

*Rural Livelihood Development Company (RLDC)*

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>• Has in the past conducted several studies across many value chains including dairy especially in Morogoro, Dodoma, Singida and Shinyanga</li> </ul>	
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> <li>• Has recently closed its dairy VC activities</li> </ul>	

*Agricultural Council of Tanzania (ACT)*

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>• Lobbying experience for government policy reforms</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Close working relationships with the Agriculture sector ministries</li> </ul>
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> <li>• Not very active in the dairy sector</li> </ul>	

*Tanzania Milk Processors Association (TAMPA)*

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>• Robust leadership, a stable and experienced secretariat and experience with working with different organizations</li> <li>• Experience in lobbying</li> </ul>	<ul style="list-style-type: none"> <li>• Linkages to milk processors in the country</li> </ul>
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> <li>• Funding insecurity</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>

*Tanzania Milk Producers Association (TAMPRODA)*

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Ambitious aim to mobilize all milk producers to become its members</li> </ul>
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> <li>• Secretariat needs further strengthening with leadership and staffing capacity</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Currently weak secretariat</li> <li>• Inexperience in engagement with projects</li> </ul>

## **Partners for the initial phase of engagement**

Based on the descriptions and SWOT analysis, the actors who would likely have the most incentive to be directly involved in research and development partnerships and have a significant contribution to make during the first phase of the CGIAR program are: MLFD, TDB, TALIRI, LITA, TAMPA, TAMPRODA, PMO-RALG, Heifer International, FAIDA MALI and SNV. The other organizations would have less incentive but should be kept informed and consulted during the piloting of interventions phase. They could also be invited to participate as tertiary stakeholders in multi-stakeholder forums.

## ANNEX 1: Local actors in the dairy value chain in pilot districts

Institution	Type	Lushoto	Handeni	Mvomero	Kilosa
Daloe Agro-vet	Retail shop			x	
Igiga Agro-vet	Retail shop			x	
Memo Agro-vet	Retail shop			x	
Kasese Agro-vet	Retail shop			x	
Handeni Vet Cen	Retail shop		X		
Yeto Agro-vet	Retail shop		x		
Wakuja Enterpr	Retail shop		x		
Daima Mbele Vet Care	Retail shop		x		
Mbwana Vet shop	Retail shop	x			
Mchina Agro-vet	Retail shop	x			
Frey's Agrovet	Retail shop	x			
Heifer International	NGO			x	x
SNV	NGO	x	x		
Land O'Lakes	NGO	x	x		
TALIRI	Public	x	x	x	x
LITA	Public	x	x	x	x
SUA	Public	x	x	x	x

### A. Production

Institution	Type	Lushoto	Handeni	Mvomero	Kilosa
MLALO	Primary coop	x			
SHUME	Primary coop	x			
Lushoto	Primary coop	x			
Bumbuli	Private	x			
Handeni	Farmer group		x		
Mwajuma Dimwe	Private		x		
Batuli Kaluva	Private		x		
Maimuna Juma	Private		x		
Fatuma Kinyesa	Private		x		
Rukia Omary	Private		x		

**B. Collection/Bulking/Transporting**

Tanga Fresh	Private	x	x	x	x
MLALO	Primary coop	x			
SHUME	Primary coop	x			
LUSHOTO	Primary coop	x			
BUMBULI	Private	x			
HANDENI	Private				
Shambani Milk	Private			x	x
Tandairies Ltd	Private			x	x
Mr. Suareni and colleagues	Private				x
Mr. Emanuel Ibrahim and colleagues	Private			x	
Mr. Yare Tukwa	Private			x	
Mr. Kimambo, Raphael.	Private			x	

**C. Processing**

Tanga Fresh	Private	x	x	x	x
Tandairies Ltd	Private			x	x
Shambani Milk	Private			x	x

**D. Retailing**

Mwajuma Dimwe	Private		x		
Batuli Kaluva	Private		x		
Maimuna Juma	Private		x		
Fatuma Kinyesa	Private		x		
Rukia Omary	Private		x		