Eastern African dairy value chains: what prospects for women in trade?

Gender policy developments for inclusive dairy markets and trade in Ethiopia, Kenya and Rwanda
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<td>African Continental Free Trade Area</td>
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<td>CET</td>
<td>common external tariff</td>
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<td>COMESA</td>
<td>Common Market for Eastern and Southern Africa</td>
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<td>EAC</td>
<td>East African Community</td>
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<td>ECOWAS</td>
<td>Economic Community of West African States</td>
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<td>FAO</td>
<td>Food and Agriculture Organization of the United Nations</td>
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<td>GSVC</td>
<td>gender-sensitive value chain framework</td>
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<td>GTAs</td>
<td>gender-transformative approaches</td>
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<td>ICBT</td>
<td>informal cross-border trade</td>
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<td>LDCs</td>
<td>least developed countries</td>
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<td>RECs</td>
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Executive summary

Expanding trade in dairy products holds immense potential for boosting inclusive economic growth in Eastern Africa. The dairy sector is key to achieving poverty reduction and food security objectives in many countries in the region, where dairy value chains generate income and employment opportunities for millions of smallholders. In recent years, intra-regional trade in dairy products has been rising, spurred by population and income growth, urbanization, technological improvements, and trade policy reforms. Many countries are investing in the modernization of their dairy farming systems to boost productivity and commercialization. Yet, the majority of trade in dairy products remains a domestic business that runs in informal markets, and small-scale value chain operators, of whom many are women, remain the backbone of the dairy sector. Prospects for trade growth exist, conditional on the development of efficient supply chains, adequate trade-related infrastructures, robust normative and policy frameworks, and transparent market information systems, at regional and national levels.

Market-driven dairy value chain development has had significant gender implications. Women are largely employed in the Eastern African dairy sector, and they could greatly benefit from increased market participation. Despite women’s important contribution to the sector, however, gender-based barriers and inequalities constrain their capacity to fully engage in dairy value chains, especially in the downstream nodes. Dairy value chains are biased by gendered dynamics rooted in context-specific socio-cultural practices and norms. Under liberalized markets, intensifying commercial dairy farming has produced a number of changes in traditional dairy systems, with uneven outcomes for women and men. In some cases, dairy commercialization had positive impacts on women and girls, empowering them socioeconomically. In other cases, however, increased market participation contributed to magnifying pre-existing gender inequities and social asymmetries.

Gender mainstreaming in agricultural and trade policies is increasing, but more efforts are needed. Regional Economic Communities (RECs), such as the Common Market for Eastern and Southern Africa (COMESA), are striving to foster women’s economic empowerment through facilitated access to markets and more gender-responsive business, policy and trade environments. In recent years, several countries in Eastern Africa, such as Ethiopia, Kenya and Rwanda, have made some progress, to different extents, in promoting gender equality and women’s empowerment in dairy marketing and trade in their sectoral policies, as evidenced by the increased number of gender-sensitive policy measures and greater gender institutionalization. However, the pathway is still long for ensuring that women and men benefit equally from agrifood trade. Despite the gender mainstreaming improvement made at both the national and regional level, gender initiatives are overall scattered, and their impacts are still limited.

Strengthening gender policy responsiveness is necessary for closing gender gaps. Gender-responsive policy interventions for the development of the dairy sector require adequate financial, operational and technical capacities if they are to address the complexities of gender issues in agrifood systems and markets. Moreover, they need to be aligned across relevant sectors to effectively protect
women, girls and the most vulnerable people from socioeconomic shocks and trade-related adversities, especially in fragile countries and during crises. In order to avoid the gender policy evaporation, it is important to strengthen the responsiveness and robustness of women-supportive measures via more solid and coherent gender policy institutionalization, gender-responsive investments, synergic partnerships, and gender research to inform decision-making processes. Policies that address the deep-rooted gender norms can provide stimulus for changing the way individuals and institutions reinforce rigid gender roles, unequal power dynamics and discriminatory social structures within households, communities and organizations to improve the position of women in society in evolving market scenarios.
Introduction

Globally, the dairy sector is one of the most rapidly growing agricultural subsectors. World milk production is estimated at 950 million tonnes (in milk equivalents) in 2023 and is projected to increase by 17 percent over the next decade, fuelled by an increase in inventory and yields in low- and middle-income countries, and by yield improvements in high-income countries (FAO, 2023a, 2023b; OECD and FAO, 2023). The dairy sector showed significant resilience in the face of the COVID-19-pandemic and related lockdowns and containment measures which challenged supply chains, market stability, and export and import growth worldwide (FAO, 2021a; OECD and FAO, 2021). Total trade in dairy products only accounts for about 7 percent of global milk production since, due to its perishability and high-water content (more than 85 percent), only processed products such as milk powders, ultra-high temperature (UHT) milk, and cheese are traded internationally (OECD and FAO, 2023). World trade in dairy products is estimated at 84 million tonnes (in milk equivalents) in 2023, following a contraction by 1 percent from 2022 occurred after nearly two decades of expansion, mainly due to anticipated declines in imports by Asia (FAO, 2023a, 2023b).

In Africa, dairy production is projected to rise in the next decade mainly due to larger herds and strong demand increase, especially for fresh dairy products, driven by income and population growth. A 33 percent growth in milk production is expected in Sub-Saharan Africa over the next decade due to an increase in the number of milk-producing animals (OECD and FAO, 2023). Eastern Africa is the leading milk-producing region in Africa, accounting for 46 percent of milk output, estimated at 23.3 million tonnes (in milk equivalents) in 2022 (FAO, 2024). Intra-regional trade in dairy products has been steadily rising in the region, for instance within the East African Community (EAC), showing huge potentials for growth (Absulsamad and Gereffi, 2017; Bingi and Tondel, 2015). Yet, dairy trade remains a smallholder-driven business mostly run in informal markets, with growth hampered by long-standing and emerging issues – from infrastructural inadequacies and supply chain bottlenecks to policy weaknesses and outbreak-related disruptions – at both domestic and regional levels.

The dairy sector is gaining relevance for economic growth, poverty alleviation and food security strategies in many Eastern African countries, where dairy value chains provide important sources of income and nutrition to smallholders. Dairy farming is vital for women, who provide an essential contribution to the sector growth. As agricultural economies gradually move from a subsistence-oriented dairying to a commercial dairy farming, the market-oriented dairy value chain development is having significant gender implications (FAO, 2020a). In the last decades, dairy production intensification and commercialization have contributed to produce a number of changes in dairy farming systems, altering traditional (gendered) socioeconomic patterns, with diversified outcomes.
on women and men. Governments are increasingly adopting gender mainstreaming strategies to tackle the negative externalities of trade on women’s livelihoods and to mitigate the detrimental effects of gender inequalities on value chain performance.

What are the impacts of increasing dairy commercialization on women dairy farmers, traders and entrepreneurs in Eastern Africa, and the key issues and opportunities arising from trade and smallholders’ milk market participation? What gender-responsive policy initiatives are being promoted, at the national and regional levels, to tackle gender inequalities in dairy value chains and develop more gender-responsive trade environments, amid the complex challenges posed by global markets, trade openness and regional integration processes?

This report reviews gender issues in the Eastern Africa dairy sector, with a focus on markets and trade, in the context of broader regional policy frameworks and evolving market scenarios. In particular, gender policy developments in agricultural and trade policies relevant for the dairy sector are assessed for Ethiopia, Kenya and Rwanda, where efforts are increasingly being made in policymaking, albeit to different degrees, to promote women’s empowerment in agrifood markets. First, key gender dynamics in dairy value chains are illustrated for each country with the goal to highlight essential features related to women’s participation in milk markets. Second, a gender policy analysis is conducted to assess the gender responsiveness of trade- and market-related policy interventions in the dairy sector. By attempting to bridge ground-level value chain issues into the enabling policy dimension, this study overall aims to contribute to ongoing debates on the prospects of women’s participation in agrifood trade through more gender-responsive policymaking.

The report is structured as follows. Chapter 1 offers a glance at regional dairy market dynamics and trade policy frameworks, particularly under the Common Market for Eastern and Southern Africa (COMESA), from a gender perspective. Chapter 2 showcases gender dynamics in dairy value chains, with focus on markets and trade, in Ethiopia, Kenya and Rwanda, as well as gender policy developments in relevant national agricultural and trade policies. Prospects and policy options for promoting women’s empowerment in dairy trade are proposed in Chapter 3.

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1 Gender mainstreaming was established as a major global strategy for the promotion of gender equality in the Beijing Platform in 1995. It can be defined as “the process of assessing the implications for women and men of any planned action, including legislation, policies or programmes, in all areas and at all levels” (UN Women, 2000; United Nations, 1995).

2 Gender inequality refers to the legal, social and cultural situation in which sex and/or gender determine different rights and dignity for women and men, which are reflected in their unequal access to or enjoyment of rights, as well as the assumption of stereotyped social and cultural roles (EIGE, 2023).
Methodological note

This study expands upon the FAO Gender-sensitive value chain (GSVC) framework which views gender equality as an essential dimension of sustainability across multiple levels: individuals and households; core and extended value chains; and national and global enabling environments (FAO, 2016). The present analysis addresses only selected features of this complex interplay, namely: i) women’s agency in dairy marketing activities (individual level); ii) gendered dynamics in dairy farms (household level); and iii) dairy markets and policies at regional and national levels (enabling environments).

The review of domestic value chains sourced from the FAO gender-sensitive value chain assessments conducted in Ethiopia, Kenya and Rwanda (FAO 2017a, 2017b, 2017c). No cultural reductionism was intended in this study when reviewing gender dynamics in dairy value chains, which remain contextual to the countries and locations where the above assessments were conducted. Notwithstanding local specificities, though, some commonly recurrent gender patterns could be synthetized in this report. A cross-sectoral gender-sensitive approach was adopted for the gender policy analysis which assessed, broadly, the gender coherence and responsiveness of the reviewed policy and programmatic documents. The gender review was conducted in the period 2021–2022 and covered a selection of national policies in force as of 2022. The ministry denominations cited in the text refer to the same period.

The gender data gap in trade remains a major limitation of this study. Currently, international trade is not included in the main global gender inequality indices (Barnat, MacFeely and Peltola, 2019). The gender-differentiated outcomes of trade and trade policies in the dairy sector, as well as the impacts of gender inequalities on dairy markets and trade, are still largely under-assessed in Eastern Africa, also because of the paucity of gender-disaggregated data in national statistics. Nevertheless, gender-sensitive value chain studies have offered valuable entry points for analysing gender dynamics in markets and trade at local and national levels.

From a broader viewpoint, the linkages between gender equality, trade and trade policies are not easy to disentangle, especially in contexts where informality is the dominant feature of market, labour and trade relations and practices (Cağatay, 2001; UNCTAD, 2017, 2019a; Fontana 2013). Literature suggests a two-way relationship between trade and gender. Agricultural trade can lead to outcomes that can vary by gender, by affecting employment and incomes through changes in food prices, labour demand and wages (UNCTAD, 2019a; FAO, 2018a; van Heck and Kobuta, 2023). On the other side, gender inequalities can bias trade performance and export competitiveness (UNCTAD, 2004, 2019b; Fontana, 2003). Evidence is mixed on the distributional effects of trade on gender equality: it can contribute to either a decrease or increase gender inequalities, depending on underlying societal, economic, legal and policy conditions (van Staveren, 2003; Von Hagen, 2014; World Bank and WTO, 2020; Women Watch, 2011). Innovative research tools and methods are currently being developed to overcome data and analytical challenges in the trade and gender research area (UNCTAD, 2018).
Chapter 1

Eastern African dairy trade: a gender perspective

– Regional focus
1.1 The rise of intra-regional dairy trade: challenges and prospects for inclusive growth

Strong milk production growth is projected in Africa over the next decade, reflecting anticipated increases in dairy herd size and demand. The continent is expected to host about one third of the global cattle population and to account for approximately 6 percent of world milk output by 2032 (OECD and FAO, 2023). Milk production in 2023 is estimated at 52 million tonnes, down 0.7 percent from 2022, due to output decreases in Kenya, Ethiopia, and other African countries, mainly due to poor pasture conditions and limited fodder supply brought on by drought and rain deficits (FAO, 2023a, 2023b). Cheese and whole milk powder (WMP) account for the majority of processed dairy products consumed. Dairy consumption is projected to grow faster than production, leading to an anticipated increase in dairy imports, such as in milk powders (OECD and FAO, 2020, 2022).

Eastern Africa is the top milk-producing3 region in Africa. In 2022, milk output reached an estimated 23.3 million tonnes from 23.2 million tonnes in 2021, accounting for about 46 percent of total milk production in the continent (Figure 1). In Eastern Africa, milk production largely derives from cattle which was estimated at 18.6 million tonnes in 2022 or about 80 percent of total milk produce in the region (FAO, 2024).

**Figure 1.** Milk production in Eastern Africa and Africa, 2012–2022, million tonnes (in milk equivalents)


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3 Milk production includes raw milk from cattle, sheep, goats and cattle.
Dairy production systems, varying across and within countries, include rural smallholder dairying, pastoral and agropastoral dairying, landless peri-urban dairying, and commercial and large-scale production systems (FAO, 2021b). Small-scale farming dominates milk production in the region, with an estimated 80 to 90 percent of total milk output. Informal markets handle over 90 percent of marketed milk, while the remaining share is sold through formal value chains – however variations can be huge between countries (Makoni et al., 2014). In 2021, milk consumption in Eastern Africa was estimated at about 36.7 kg/capita, above the African average of 35.2 kg/capita (Figure 2). The consumption of higher-quality milk and processed products is increasing in those domestic markets where value product diversification and demand-oriented nutritional initiatives are promoted (Makoni et al., 2014).

**Figure 2.** Annual per capita milk supply in Eastern Africa and Africa, 2010–2021

Eastern Africa has a negative dairy trade balance. Over the period 2012–2022, imports have strongly increased, reaching a value of about USD 713.3 million in 2022 from nearly USD 378 million in 2012 (Figure 3). The export value of dairy products was estimated at USD 162.1 million in 2022, growing from USD 38.7 million in 2012 (Figure 3). The quantity of dairy products exported reached 152.4 thousand tonnes in 2022, increasing from 25.7 thousand tonnes in 2012 (Figure 4).

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4 The market informality/formality is not a polarized scenario but a continuous spectrum of realities, from small-scale milk businesses operating without any licence to processors complying with market regulations and food safety standards (Blackmore et al., 2020).
Figure 3. Import and export value of dairy products in Eastern Africa in 2012–2022, USD million

![Graph showing import and export value of dairy products in Eastern Africa from 2012 to 2022 in USD million.]


Figure 4. Import and export quantity of dairy products in Eastern Africa in 2012–2022, thousand tonnes (in milk equivalents)

![Graph showing import and export quantity of dairy products in Eastern Africa from 2012 to 2022 in thousand tonnes.]

The growth of intra-regional dairy trade is the result of major structural reforms, investments, and technological improvements, among other factors, spurred by urbanization, population growth, rising incomes, and policy reforms. Over the past years, several Eastern African countries have undergone a substantive process of modernization of their dairy production, processing and marketing systems in order to improve productivity and boost commercialization to ensure sufficient domestic supply and create new export market opportunities (Bingi and Tondel, 2015). Trade-related goals for the dairy sector have been increasingly prioritized in national policies and dairy development programmes that strive to develop a competitive export-oriented dairy industry and foster greater market integration.

The rise of intra-regional trade in Eastern Africa is also the outcome of policy reforms, particularly in terms of harmonization of standards and regulations. Joint regional efforts for the harmonization of standards for dairy products have been made by the Common Market for Eastern and Southern Africa (COMESA), the Economic Community of West African States (ECOWAS), the East African Community (EAC) and the Southern African Development Community (SADC), among others. The Eastern African dairy sector benefitted from regional trade policy processes that promoted greater intra-trade facilitation, particularly from measures like the Single Customs Territory (SCT) in the East African Community (EAC), the East Africa Payment System (EAPS), the COMESA Regional Payment and Settlement System, the COMESA Simplified Trade Regime and the COMESA Yellow Card Insurance scheme (Bingi and Tondel, 2015). Such efforts have resulted in significant economic returns along dairy value chains, also through attracting foreign investments, public-private partnerships, and the entrance of international large-scale processors – like Kenyan Brookside, Danone and Nestlé – in regional dairy markets (Bingi and Tondel, 2015; Makoni et al., 2014). Yet, despite the promising growth, the path is still long for tapping the regional dairy trade potential. The perishability of milk, the high temperatures in tropical areas and the poor cold chain infrastructures are some major constraints to dairy trade, which is mainly limited to products with long shelf life such as milk powder and UHT milk (Bingi and Tondel, 2015).

Despite the efforts undertaken in the region towards the development of the Eastern African dairy sector, the latter is still hampered by a number of perduring and emerging issues. Across the region, these commonly include, among others: i) inadequate trade-related infrastructures and facilities; ii) low export competitiveness of dairy firms with limited capacity to comply with international trade regulations and standards; iii) insufficient policy coherence and weak institutional coordination both at national and regional levels; iv) scarce enforcement of trade regulations; and v) competing public-private interests.

An enabling trade policy environment is key to ensure the proper functioning of markets, mitigate the adversities induced by trade, and promote more resilient agrifood systems. In order to create well-functioning dairy market and trade systems, it is essential to establish or strengthen regional mechanisms for monitoring trade regimes and transparent market information systems, and to promote regional interventions in support of innovative dairy production and business models (Bingi and Tondel, 2015). Efficient and smooth supply chains are essential for dairy firms to access markets (OECD and FAO, 2020). However, dairy value chains in Eastern Africa are affected by a number of issues both upstream and downstream. While gender-specific issues will be discussed in the next paragraphs, widespread common challenges along the value chain nodes in the region include: i) low quality breeding cows and low quality fodder and feed (production); ii) milk spoilage,
spillage, and inadequate cold chain facilities (collection and transportation); and iii) low quantity and quality milk unsuitable for processing (processing). In the marketing node, issues include: i) poor market linkages and lack of market information, especially affecting smallholders from remote rural areas; ii) low and/or seasonal demand and price fluctuations due to environmental conditions, consumer preferences and cultural habits (e.g. in Ethiopia dairy consumption is not allowed during fasting periods); and iii) scarce product diversification and commercialization of value-added dairy products (Bingi and Tondel, 2015; Makoni et al., 2014).

Natural hazards, climate change, conflicts, political uncertainties and economic crises create major disruptive effects on dairy supply chains. Amid the COVID-19 pandemic in 2020, Ethiopia faced production constraints due to dry weather, and also Kenya, one of the top milk-producing countries in Africa, has experienced decreases in milk output due to deteriorated pasture and limited animal feed availability caused by drought and rainfall deficits (FAO, 2021a, 2023a). Globally, the dairy sector showed significant resilience in the face of the COVID-19-pandemic and related lockdowns and containment measures which in 2020 challenged supply chains, market stability, and trade growth, with potential long-term effects on consumption patterns and supply chains (OECD and FAO, 2021). During the first wave of the COVID-19 pandemic in 2020, market disruptions and labour shortages in labour-intensive production and processing food systems affected the informal economy, including in the dairy sector where women are largely employed (FAO, 2020b, 2021c). Women are exposed to heightened socioeconomic risks, compared to men, when faced with trade-related adversities, economic downturns, food crises and disease outbreaks (World Bank and WTO, 2020; UNCTAD, 2017). Lockdowns and containment measures disrupting rural-urban market linkages were especially detrimental for rural women, compounding pre-existing mobility constraints. COVID-related restrictions have often increased women's workload with impacts on the time devoted to productive activities, enhancing in many cases the levels of gender-based violence (WTO, 2020; FAO, 2020c).

Other major policy concerns regard the formal versus informal sector competition and the formalization of small-scale dairy value chains in which most often women participate. Informal markets, prevailing in Eastern Africa, are usually characterized by poor quality and safety standards. Informal arrangements are generally preferred by both smallholders and consumers for the attractive revenues and the low prices respectively. Milk and dairy products are a vital source of nutrition for millions of people, including children and vulnerable groups, and offer reliable revenues to farmers and other stakeholders in the dairy value chain. With the continued growth of demand for dairy products, it is important to increase the robustness of dairy production and processing systems – including by developing sustainable and resilient dairy farming –, promote food safety standards and address potential trade-offs between intensified production and animal and human welfare and health. Dairy commercialization, in the medium- and long-term run, can put pressure on small-scale dairy producers who are not able to comply with the quality standards required by modern formal markets from which they risk being marginalized. Improved technologies for dairy feeding, management and marketing are important factors to succeed in market competition, but they are hardly accessible and affordable for small-scale producers and entrepreneurs (Gerosa and Skoet, 2012). To this end, governmental incentives in support of technological upgrading and capacity building could facilitate smallholders’ access to technologies and market opportunities.
1.2 Women’s participation in dairy markets and trade

1.2.1 Gender roles in the value chain

Across dairy production systems and locations, women play an important role in dairy farming, which provides multiple resources to poor families, such as food, fertilizer, fuel, cash and savings. In many communities, women traditionally are involved in milk production – especially in milking and feeding –, collection, processing and marketing of dairy products. Despite their significant contribution, however, women remain overwhelmingly represented in the informal sector and in the low-skilled, low-paid nodes of the dairy value chain – their involvement generally declines in downstream value chain segments such as marketing.

Dairy value chain systems are biased by gendered dynamics often rooted in long-standing sociocultural practices and norms, influencing women’s agency. Inequalities in resources and power between men and women have an impact on how value chains operate at every level, undermining their opportunities to compete in growing markets (Safa, 2019). Rural women face various gender-related constraints such as illiteracy, excessive work burden and time poverty, limited control over livestock assets and income on family welfare, as well as limited voice in relevant institutions and organizations, all factors which prevent them from engaging profitably in, and benefitting equally from, dairy schemes development. Consequently, women usually do not benefit from dairy value chains in the same way that men do (Safa, 2019).

In Eastern Africa, gender dynamics in dairy value chains are highly contextual, varying on the basis of a number of factors, such as household typology, production system, agroecological zone, connectivity, cultural practices, social norms and other site-specific conditions. Notwithstanding local variability, a few recurrent gender patterns in dairy value chains can be found across and within national landscapes, some of which are illustrated in this section.

The gendered division of labour among dairy farm households is widely reported in the literature (FAO, 2017a, 2017b, 2017c). Women and girls typically engage in upstream activities, compared to men, carrying out labour-intensive tasks such as feeding, milking, and cleaning, while their participation in downstream segments is limited. In many places, women can own low quality breeding cows as these are cheaper and smaller, which makes them easier to acquire and manage. Women are often in charge of milking; however, they lack proper equipment, using big plastic containers that increase the losses, and compromise the food safety of the product. Sometimes women are the decision-makers for household food and nutrition choices; this explains the importance of the modest but regular cash incomes they receive from dairying. Although much of their labour is non-monetized, women often decide the amount of milk to be sold and how to use the revenues generated from milk sales. The woman of the household generally uses milk money to buy food items, clothing and other necessities and to pay for children’s education and basic health care (Safa, 2019).
Marketing activities in Eastern Africa are often culturally perceived as men’s domain. When engaging in trade, women are usually unlicensed traders operating at local level and poorly linked to profitable markets (FAO, 2023c). Often, women channel the dairy products through informal value chains, as these have no regulations and provide immediate cash payment for everyday living, addressing basic family needs. Women have mobility restrictions, so they rely on middlemen, sometimes waiting for collectors on a main road under the sun, which results in high levels of spoilage; or they sell at collection points without having information about markets or current prices. While investments in transport infrastructures would certainly contribute to reduce milk waste and facilitate entrepreneurship, pervasive gendered customary norms still prevent many women from accessing market information and networks, and unless gender inequalities are addressed, women will not likely benefit from these investments (FAO, 2017a, 2017b, 2017c). The disproportionate burden of domestic unpaid work contributes to women’s heavy workloads and lack of time to engage fully in productive activities constraining their agency. The primary role of caregivers and household keepers which is traditionally assigned to women is well rooted in long-established customary norms.

With respect to value chain governance, women are generally poorly represented in dairy cooperatives and stakeholder organizations, rarely holding decision-making positions (FAO, 2017a, 2017b, 2017c). As entrepreneurs, women often need to rely on informal networks to get credit for investing in their firms, as they lack the collaterals to obtain loans because of discriminatory customary norms on heritage and property rights which de facto supersede formal laws (FAO, 2018b; Doss, Summerfield and Tskikata, 2014; Ikhdahl et al., 2005; Slavechevska et al., 2016). Women farmers may not be allowed to own cattle or other assets, even if this right is formally granted.

**1.2.2 Gender impacts of dairy commercialization**

The impacts of dairy commercialization on women smallholders are still under-assessed in Eastern Africa. Mixed evidence exists on the gender-differentiated outcomes of dairy farms’ increased market participation. Dairy production intensification and commercialization have some positive effects on productivity and income in small-scale dairy farm households, on household consumption of milk and dairy products and nutritional welfare outcomes in small-scale dairy farm households. Slight improvements in women’s economic empowerment and voice have been reported in some contexts under conditions of intensified commercial dairying (FAO, 2017a, 2017b, 2017c). In households engaging in commercial dairying, women’s control over sales decisions can increase with positive effects on their economic status and bargaining power (Lenjiso, Smits and Ruben, 2016). Under liberalized markets, however, the uneven effects of trade openness can enhance women’s socioeconomic risks and marginalization, eventually widening gender gaps and inequalities (FAO, 2006). Milk market participation implies changes in production strategies (new cattle breeds, improved technology and management systems, etc.), which have gender impacts in multiple dimensions, such as time allocation, income control, workload, and power relationships (Lenjiso, Smits, and Ruben, 2015).

Increased domestic milk market competition can put pressure on farm households, altering labour patterns and decision-making processes, exacerbating intra-household conflicts over resources (FAO, 2006). In dairy farm households engaging in marketing activities, women’s livelihoods may not improve even when income increased: on the contrary, women’s dependent status and workload...
can increase, as well as intra-household conflicts over income control (Beuchelt, 2016; Lenjiso, Smits and Ruben, 2016; Ruben, Bekele and Lenjiso, 2017; Tavenner et al., 2019). The engagement in marketing activities can enhance women’s workload while decreasing their control over dairy income (Lenjiso, Smits and Ruben, 2016). A survey conducted among 2,859 households in Ethiopia, Kenya and Tanzania investigated gendered patterns in control over decisions related to the sale and consumption of livestock and crop products. The findings showed that, as sales increase, women have in general greater control over decisions related to consumption than over decisions related to sales, although this is less pronounced for cow’s milk and lower-value livestock products.

Gendered institutional mechanisms can also dampen the positive effects of women’s market involvement. In Ethiopia, women can lose control over cash incomes because mostly men, in their role as household heads, are entitled to register and collect payments from the concerned institutions i.e., the Dairy Development Enterprises (Kinati and Mulema, 2018; Tangka, Emerson and Jabbar, 2002).

### 1.2.3 Trade participation

Accessing markets requires fulfilling stringent requirements which are especially burdensome for small and medium-sized enterprises that often face multiple issues both upstream (e.g. low capacity utilization and inadequate cold chain) and further downstream (limited value addition, lack of quality control tests, etc.). While these issues do affect both men- and women-run companies, women entrepreneurs tend to have competitive disadvantages because of their limited access to key productive resources, financial capacity and technology, compared to male competitors. Gender-discriminatory statutory or customary laws on inheritance and property can constrain women’s financial capacity and investment opportunities. The weak financial capacity makes it more difficult for them to bear the transaction costs of import-export procedures, as well as to upgrade their firms’ processing capacity to produce high-quality products needed to meet international safety and quality standards. Compliance with quality requirements and non-tariff measures (NTMs), such as the sanitary and phytosanitary (SPS) measures and technical barriers to trade (TBTs), is therefore a major issue for small-scale dairy firms, particularly women-owned ones (Henson, 2018). Women entrepreneurs tend to struggle more than men in dealing with customs and administrative procedures, as they are on average less skilled and literate (Lesser and Moisė-Leeman, 2009). Beside the bureaucratic hurdles discouraging formalization, women informal cross-border traders are often victims of abusive practices at borders, including bribes and harassment (FAO, 2017d; UNCTAD, 2019c). As such, women traders tend to avoid – compared to men – using the available formal systems and structures, as reported for instance in a case study on the Kenya/Uganda and Rwanda/Burundi borders (Masinjila, 2009).

Enabling a safe and fair business and policy environment is important to ensure that women and men benefit equally from trade. Trade policies can play a role in promoting a fair and equitable trade environment conducive to gender equality and women’s economic empowerment (World Bank and WTO, 2020; UNCTAD, 2019b; WTO, 2017). Trade and trade policies have gender-differentiated redistributive effects both across sectors and among individuals, such as on wages and employment, contributing to either reduce or enhance existing gender gaps in market participation, employment
and entrepreneurship depending on underpinning gender inequalities and socioeconomic asymmetries in the context considered (OECD, 2021; UNCTAD, 2004). In the last years, the debate on the role of trade policies in advancing the global gender equality agenda has been revamped, and nowadays gender considerations – mostly non-binding provisions – can be found in some national trade policies and regional trade agreements (WTO, 2017; Monteiro, 2018; UNCTAD, 2016a).

In the next section, the gender policy framework of the Common Market for Eastern and Southern Africa (COMESA) will be presented as an example of current regional efforts for promoting gender equality and women’s empowerment in trade.

1.3 Regional initiatives for the promotion of gender equality under COMESA

COMESA aims to attain sustainable economic growth and prosperity for its Member States, by enabling policy and business environments favourable to trade, investments and market integration as established in its Treaty (COMESA, 1993). COMESA has policy and institutional mechanisms for coordinating gender equality initiatives in trade and trade facilitation in the region. Gender equality and women’s empowerment goals are institutionalized in the COMESA’s gender policy architecture which comprises, among others, the COMESA Treaty, the COMESA Gender Policy, the Gender Mainstreaming Strategic Action Plan, and the Medium Term Strategic Plan (MTSP). The COMESA Gender and Social Affairs Division facilitates, guides and monitors the gender agenda in Member States and at the COMESA Secretariat.

The COMESA Treaty notably contains a chapter devoted to gender issues (Chapter 24, Women in Development and Business) where “the importance of women as a vital economic link within the chain of agriculture, industry and trade” is fully acknowledged (art. 155) (COMESA, 1993). Member States agree that “it is impossible to implement effective programmes for rural transformation and improvements in the informal sector without the full participation of women” (art. 154) (COMESA,
To this end, the Treaty fosters the adoption of appropriate measures to eliminate gender-discriminatory laws and regulations and promote the effective participation of women in society and in the COMESA trade and development activities for instance through the introduction of special programmes in support of small and medium-sized enterprises and training schemes (art. 155). Further to the Treaty, COMESA Members adopted the COMESA Gender Policy (CGP) and endorsed the Addis Ababa Declaration on Gender at the 7th COMESA Summit of Heads of State and Government in Addis Ababa in 2002. The Gender Policy, revised in 2015, advocates for equal and full participation of women in the COMESA programmes, systems and structures (COMESA, 2016).

Increased strategic focus on the promotion of gender equality and women’s empowerment is put forward in the COMESA Medium Term Strategic Plan (MTSP) for the period 2021–2025 (COMESA, 2022). The strategic pillar “Gender and Social Integration” aims to foster gender equality and women’s empowerment, facilitate social and cultural development, and support youth empowerment and innovation. The main objectives of this Pillar are, among others, to enhance the institutionalization of gender, promote gender research and statistics, support initiatives for youth and women traders, such as small-scale cross border trade initiatives and capacity building, and promote multistakeholder coordination and networks. Overall, COMESA’s gender strategic goals are to coordinate and strengthen institutional and policy mechanisms for more effective gender mainstreaming initiatives, including through the provision of technical support to COMESA Members and improved programmatic reporting and accountability at the regional and national levels. Since 2009, several gender initiatives have been promoted in the region, including through multi-stakeholder partnerships and international cooperation. However, a study conducted by the European Centre for Development Policy Management (ECDPM) reported that gender initiatives were constrained, among others, by the limited funds allocated to gender, the weak institutional cooperation among stakeholders, the lack of technical capacity, and the scarce gender mainstreaming (Woolfrey, 2016). Insufficient accountability on gender components in investment plans under the Comprehensive African Agricultural Development Programme (CAADP) was also noted.

Efforts for strengthening the robustness and effectiveness of gender mainstreaming strategies are visible in a number of initiatives carried out in the region and in inter-regional cooperation (COMESA, 2021). The COMESA Women Economic Empowerment Fund (WEEF) was for instance established in 2014 at the Heads of State and Government Summit in Kinshasa, Democratic Republic of the Congo. In 2016, the COMESA Secretariat signed a Memorandum of Understanding (MoU) with EAC and ECOWAS to jointly implement the project “50 Million African Women Speak” that created a digital networking platform for peer-to-peer learning, mentoring, and knowledge sharing among women entrepreneurs across 36 countries.

The Framework for the comprehensive support for women and youth cross-border traders in the COMESA Region was formulated in 2018 to ensure equitable participation in economic development programmes and increase women’s and youth’s competitiveness (COMESA, 2018). Specific objectives for women small-scale cross-border traders are, among others, to: i) increase market competitiveness through capacity building and facilitated access to finance, market information, technology, and business technology services; ii) improve access to cross-border markets and networks at national and regional levels; iii) strengthen trade facilitation systems and
services by increasing the use of simplified Trade Regime (STR) by COMESA Members; iv) develop gender-sensitive cross-border facilities and improve access to hygiene and health care at border posts; v) gender sensitization campaigns and trainings to customs officials to eliminate harassment, gender-based violence and safety issues in custom-related processes; vi) conduct gender research e.g. on the gender impacts of COMESA policies and regulations and improve an effective management of national databases on gender in cross-border trade within COMESA, to inform regional trade policymaking (COMESA, 2018).

In the midst of the COVID-19-pandemic, COMESA continued to advocate for gender equality and women’s empowerment. As reported in the COMESA Annual Report, a number of initiatives, tools, trainings and stakeholder engagement activities were implemented at regional and national level (COMESA, 2021). Initiatives included virtual launches, in a few Member States, of the 50 Million African Women Speak Digital Platform that enables women’s access to financial and non-financial services; as well as the continued implementation of the 50 Million Women Speak Programme jointly with EAC and ECOWAS, with support from the African Development Bank (AfDB), providing business information and networking opportunities for women entrepreneurs. Specifically in agriculture, COMESA developed training resources on market access and trade integration for women in the context of the African Continental Free Trade Area (AfCFTA), in cooperation with the COMESA Federation of Women in Business (COMFWB) (COMESA, 2021).

Recent policy developments at the continental level could contribute to further stimulate the prioritization of the gender agenda in Eastern Africa, where gender initiatives are still scattered. The Agreement Establishing the Continental Free Trade Area (AfCFTA), which entered into force in 2019, states that State Parties, in collaboration with development partners, shall mobilize resources and implement measures with a view inter alia to “improve the export capacity of both formal and informal service suppliers, with particular attention to micro, small and medium size; women and youth service suppliers” (art. 27) (African Union, 2018). The impacts of AfCFTA are expected to be significant for African economies. In terms of distributional impacts on poverty and employment, AfCFTA would contribute to lift an additional 30 million people from extreme poverty and increase real decent job opportunities and income gains by USD 450 billion (UNCTAD, 2016b; World Bank, 2020). According to some estimates, wages for unskilled workers would increase by 10 percent by 2025, with higher increase than for skilled workers, growing at a faster pace for agricultural jobs and for women workers employed in labour-intensive industries (World Bank, 2020). Furthermore, women’s wages are estimated to raise more compared to men’s wages (10.5 percent increase and 9.9 percent respectively) (Simola et al., 2021). AfCFTA has therefore the potential to revamp collaborative action among public and private actors to stimulate the creation of new and better opportunities for women in formal and informal agricultural trade (UN Women, 2019; Bayat, 2019, 2020). Coordinated gender-sensitive initiatives under AfCFTA could step up efforts on trade facilitation and informal cross-border trade (ICBT), representing a significant portion of regional cross-border trade in sub-Saharan Africa (Lesser and Moïsed-Leeman, 2009). Establishing effective gender-sensitive ICBT measures would be critical to guarantee safe and facilitated access to markets for women informal cross-border traders, who constitute about 70 percent of ICBTs in Africa (FAO, 2017d).
Chapter 2

Gender policy developments in dairy markets and trade
– Country cases
2.1 Introduction

In Ethiopia, Kenya and Rwanda, dairy farming provides rural households with important resources to secure income and diversified diets. Dairy value chain landscapes, and gender dynamics therein, vary across and within the three countries, having unique natural endowments, histories, socioeconomic, cultural, legal and policy environments. In the last decades, the three countries have implemented various programmes and investments aimed at boosting the development of their dairy sector, given its strategic relevance for economic growth. In Kenya, which has a mature domestic dairy market, priority objectives are to upgrade the dairy industry by increasing productivity, diversification and export competitiveness. In Rwanda and Ethiopia, strategies are oriented to improve production while stimulating consumer demand. National programmes for the dairy sector are moreover pursued in the context of overarching regional policy frameworks, by virtue of the countries’ participation in RECs, such as COMESA.\(^5\)

Regarding gender equality, Ethiopia, Kenya and Rwanda have made some progress, to different extents, in mainstreaming gender in agricultural and trade policies to ensure that the planned interventions also reach women and girls. In this chapter, a review of national policy and programmatic documents, preceded by an overview of dairy value chains, is provided for each country through a gender lens.

2.2 Ethiopia

2.2.1 Overview of the dairy sector

Ethiopia has the largest cattle population in Africa, estimated at 66 million in 2021 and mainly composed of local breeds, dairy and beef cattle, as well as natural endowments suitable for dairying (Ethiopian Statistics Service, 2022; USAID, 2013; Galmessa and Fita, 2019). However, in spite of the favourable environmental conditions and the significant livestock inventory, dairy farming mainly remains a non-commercial activity. Most dairy products in Ethiopia are retained for home consumption, while some of them are processed into butter and the traditional cheese ayib, and sold in local markets. Milk consumption in the country is generally low, due to scarce supply, demand fluctuations during fasting periods and other factors such as the cultural perception of milk as food for children or sick people only (FAO, 2017a, 2013). Nevertheless, after a downward trend in the period 2010–2017, milk consumption increased significantly to reach 37.7 kg per person in 2020 (an increase of 10 percent from 2018), slightly higher than the regional average estimated at 37 kg per person in the same year. In 2021, milk consumption dropped by 6.2 percent to reach an estimated 31.3 kg per person (Figure 5).

\(^5\) Ethiopia is a COMESA non-free trade zone member; its accession to the free trade area (FTA) is underway. Non-FTA members of COMESA apply reduced import duty rates on goods from other Member States on a reciprocal basis.
The Ethiopian smallholder farming system (pastoral, agropastoral and mixed crop-livestock) accounts for about 97 percent of total annual milk output. In 2021, raw cattle milk production was estimated at 3.9 billion litres, decreasing from 4.7 billion litres in 2020, due to the decline of herd sizes and distress sales during the drought (FAO, 2023d; Getabalew, Alemneh and Akeberegn, 2019). Milk and dairy products were marketed mainly through informal channels via short supply chains: fresh whole milk, and to a lesser extent processed products, are delivered to consumers directly by producers in proximity areas or by itinerant traders. In the last decade, following the increasing demand for pasteurized milk and processed products in the cities, the urban and peri-urban dairy production has expanded. New processors for dairy products, especially drinking milk and yoghurt, have entered the market. Ethiopia has about 30 dairy processing firms, mostly located in Addis Ababa and peri-urban areas where milk is mainly supplied (Farrell, 2021). Over the past years, public and private interventions have been made to scale up and scale out Ethiopian dairy systems, especially in milk-shed urban areas. The Ethiopian market-oriented urban and peri-urban dairy production systems are rising in number and relevance. As of 2018, the urban milk system in Addis Ababa comprised over 5 000 small, medium and large dairy farms producing about 35 million litres of milk annually (Gezu and Zalalem, 2018).

Figure 5. Annual per capita milk supply in Ethiopia, 2010–2021

Source: Author’s own calculation based on FAO. 2024. FAOSTAT: Food Balances. [Accessed on 28 February 2024].

Note: Milk includes fresh and processed products (excluding butter) derived from milk of cattle, buffalo, goats, camel, sheep (full variable description can be found in the Food Balance Sheets (FBS) classification list available at FAO. 2024. FAOSTAT: Food Balances. [Accessed on 28 February 2024]. https://www.fao.org/faostat/en/#data. Licence: CC-BY-4.0.

The Ethiopian dairy sector is constrained by several challenges, including the low productivity of local dairy cattle, the lack of milk chilling facilities and infrastructure, the low consumer demand, and poor market linkages. Marketability over long distances is an issue for rural farmers coming from
remote areas. Many small-scale producers struggle to access the most profitable markets, especially the urban and peri-urban networks, due to poor roads and connectivity issues. Also, they are unable to supply the required milk quality and quantity to processors. Frequent milk spoilage and loss are causes of revenue loss, while poor hygiene and handling practices contribute to waste up to 30 percent of unsuitable milk rejected at collection centres (Makoni et al., 2014). Dairy cooperatives, village milk marketing groups and farmers’ organizations provide, in many cases, a range of support services to facilitate farmers’ integration in the supply chain and promote milk marketing (FAO, 2017a).

Ethiopia is a net importer of dairy products. The value of imports doubled from 2012 to 2022 to reach USD 20.7 million (Figure 6). The growth of an export-oriented dairy sector is limited by the low performance of the dairy industry, the inadequate trade-related infrastructures, and the scarce compliance with international trade standards and requirements (Bezie, 2019). The country’s export potentials are conditional on the upgrading capacity of dairy firms, on the establishment of quality control mechanisms and infrastructure, and the streamlining of trade procedures and standards. Quality standards in the country are set by the Ethiopian Quality and Standards Authority (QSAE), however there is no mandatory certification for dairy products and only a few agro-industry firms are certified for international quality standards (ITC, 2014; UNCTAD, 2016c). Investments in the formalization of dairy markets are expected to enhance trade opportunities for dairy firms (Felleke, Woldearegay and Halle, 2009; Minten et al., 2020; Zijlstra et al., 2015).

Figure 6. Import and export value of dairy products in Ethiopia, 2012–2022, USD million

<table>
<thead>
<tr>
<th>Year</th>
<th>Import</th>
<th>Export</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>10.0</td>
<td>0.37</td>
</tr>
<tr>
<td>2013</td>
<td>10.9</td>
<td>0.57</td>
</tr>
<tr>
<td>2014</td>
<td>14.9</td>
<td>0.45</td>
</tr>
<tr>
<td>2015</td>
<td>17.8</td>
<td>0.51</td>
</tr>
<tr>
<td>2016</td>
<td>11.8</td>
<td>0.95</td>
</tr>
<tr>
<td>2017</td>
<td>14.8</td>
<td>0.89</td>
</tr>
<tr>
<td>2018</td>
<td>14.3</td>
<td>0.62</td>
</tr>
<tr>
<td>2019</td>
<td>15.0</td>
<td>0.13</td>
</tr>
<tr>
<td>2020</td>
<td>30.4</td>
<td>0.11</td>
</tr>
<tr>
<td>2021</td>
<td>25.5</td>
<td>0.20</td>
</tr>
<tr>
<td>2022</td>
<td>20.7</td>
<td>0.14</td>
</tr>
</tbody>
</table>


2.2.2 Women’s participation in the dairy value chain

In Ethiopia, women largely contribute to the management of dairy cattle and small ruminants, with levels of engagement that vary by location, production systems, cultural patterns and other site-specific factors. In the urban and peri-urban dairy production systems, for instance, milking is handled by women in about 80 percent of cases (Tegegne et al., 2013). Women are primarily responsible for day-to-day dairy cattle management and milk home-processing, as reported in an
FAO study and other case studies (Aregu et al., 2010; Beyene, 2015; Lenjiso, Smits and Ruben, 2015; USAID, 2013). Women are typically involved in labour-intensive activities like feeding, watering, milking calves, with the exception of breeding and artificial insemination, usually considered a male-dominated activity (Makoni et al., 2014). Both men and women can be decision-makers on small animals like poultry, while control over livestock is generally on men as household heads, irrespective of ownership. In female-headed households, women’s control over assets is usually greater than in male-headed households (Kinati and Mulema, 2018; Fafchamps, Kebede and Quisumbing, 2009). In some contexts, women can get the benefits from livestock’s secondary products such as milk and milk products and hold control over income from dairy sales. Women, more than men, lack the adequate quality control tools and technology for milk preservation due to the limited access to credit and extension services.

Literature is relatively scant on gender dynamics in dairy marketing activities. In rural areas, deep-rooted gender norms limit women’s agency in taking roles and responsibilities beyond the socially ascribed ones (WFP, 2020). Usually, women engage more in sales of dairy products close to homestead, in informal local markets. Case studies indicate that control over income and sale of dairy products can differ by market location: female control over sales and income from butter would prevail in rural areas, while control over milk income is predominant in peri-urban and urban areas (Beyene, 2015; Yilma, Emmanuelle and Ameha, 2011). Female control over sales and income is also related to business timing and market location: women tend to have greater control over evening milk and from milk sold to neighbours and in local markets (FAO, 2017a). Men are more likely than women to scale up livestock production for running their businesses, while women more in general are limitedly involved in formal processing, input supply, and retail. On average, women tend to participate less than men in formal marketing institutions like dairy cooperatives.

Dairy commercialization can potentially contribute to gender equality achievements in relation to food security and nutrition. Intensified dairying seems to enhance, in some cases, women’s ability to purchase more and diversified food. In the Ethiopian highlands, commercial dairying contributed to increased incomes for both women and men, even if increases were more pronounced for men. In households using improved crossbred cows for market-oriented dairying, women continued to hold income allocated to food purchases (Tangka, Emerson and Jabbar, 2002; Hebo, 2014). In other cases, increased milk sales can have negative implications for household food security in relation to gender dynamics. The impacts of the increased milk and dairy production on household nutrition outcomes also depend on intra-household decisions over resource allocation (Ahmed et al., 2003).

Among the Arsii Omoro people, milk and milk products are major components of the local diet and traditionally under women’s domain. A case study conducted on a local milk-selling cooperative showed that gender roles within the households changed when villagers’ interactions with markets became more intense. As women started to engage more in milk marketing activities, men began to step into decisions over milk income which were under women’s control. Increasing competition

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6 The FAO study was conducted in several Ethiopian study sites/woreda (location of dairy producers) in different regional states: Degem (Oromia Region), Dejen woreda (Amhara region), Arba Minch Zuria (South Nations, Nationalities and Peoples) (FAO, 2017a).
between husbands and wives over the allocation of money earned from milk sales raised concerns, in some cases, about the possible negative implications for households’ food security and consumption patterns. Indeed, women tend to spend a higher proportion of income for their families’ food and nutritional needs and less on not-essential items, contrarily to men (Hebo, 2014). With rising levels of agricultural commercialization, men often take greater control of income and tend to invest less than women on quality diets, factors that may influence household nutritional outcomes (Qaim, 2016; Fischer and Quaim, 2012).

Among commercial farm households, slight improvements were found with respect to women’s bargaining position (Lenjiso, Smits and Ruben, 2016). However, commercial dairying can also have detrimental effects for women, for instance on intra-household time allocation (Ruben, Bekele and Lenjiso, 2017). According to a study conducted on 156 Ethiopian milk market households, women’s dairying and domestic work time increased more than men’s dairying and wage work time, while women’s control over milk income tended to shift to men (Lenjiso, Smits and Ruben, 2015). Where cattle management is a female responsibility, even under conditions of production intensification, the excessive workload turns to be a major issue for women as they are also primary caregivers. The shift of control over cattle and dairy products from women to men, likely to occur in commercial dairy farms, can intensify intra-household conflicts (Kinati and Mulema, 2018). Changing gender patterns in intra-household time allocation and resource distribution can also reduce incentives for investing in firms’ quality upgrading (Ruben, Bekele and Lenjiso, 2017).

2.2.3 Gender policy developments in the dairy sector

The Government of Ethiopia (GoE) has prioritized the transformation of the agriculture sector to fill long-standing gaps at the root of the dairy sector underdevelopment. After the end of the socialist period (1974–1991), macro-economic reforms and programmes were developed to tackle structural issues and bottlenecks hindering the development of commercial-scale dairy farming (Felleke, Woldearegay and Halle, 2009; Galmessa and Fita, 2019). Recently, gender equality policy initiatives have been promoted in the agricultural sector, where major gender gaps persist despite significant improvements in equal access to credit, services and education. For instance, between 2000 and 2016 the gender parity index, or ratio of female to male primary school attendance, increased from 73 to 99 percent (IMF, 2018; AfDB, 2016; World Bank, 2019).

The Gender Equality Strategy for Ethiopia’s Agriculture Sector (GESAS) was adopted in 2017 to strengthen the gender responsiveness of the sectoral policy framework (Drucza and Rodriguez, 2018). Building on the National Action Plan for Gender Equality (NAP-GE) 2006–2010, GESAS is the outcome of a wide multi-stakeholder consultation process which identified critical gender issues in crop and livestock value chains. GESAS aims at creating equitable opportunities for women and men and increase food security through supply- and demand-side interventions. Policy emphasis is placed on improving the delivery of gender-sensitive agricultural services, increasing women’s participation in business activities, and on building effective partnerships between the Ministry of Agriculture and Livestock Resources (MoALR) and relevant stakeholders (AKLDP, 2018).
The Ethiopia 2030: the Pathway to Prosperity Ten Years Perspective Development Plan (2021–2030) is the ten-year plan for long-term development outcomes that aims to achieve economic growth, prosperity and welfare for all citizens. The main objectives of the agricultural development plan are to raise the incomes and livelihoods of farmers and pastoralists making agriculture more productive and competitive; contribute to the structural transformation of the country; supply raw material inputs for the industry and added value agricultural products for export; and create job opportunities in rural area. Targets for the livestock sector over the period 2020–2030 are to increase livestock quantity, variety and productivity. The agricultural development plan does not mainstream gender in the specific objectives for the dairy sub-sector, which are to increase dairy milk yields and the number of improved breeds from 2.7 percent to 17 percent for the benefit of farmers and pastoralists.

Gender equality is addressed as cross-cutting theme in the Growth and Transformation Plan II (GTP II) 2015/16–2019/20, the national agricultural development-led industrialization strategy. Key goals of GPT II for the agriculture sector are to raise production of high value crops, increase productivity and capacity utilization of smallholder farms and large-commercial farms, improve diversification (also for dairy products) and attract foreign direct investments (FDI). As regards agricultural trade, GTP II prioritizes export competitiveness of the agroprocessing industry and trade facilitation promotion (UNCTAD, 2016c). Strategies for boosting agricultural trade include the establishment of reliable trade information system and supporting services, and greater participation of the country in international trade fora and regional trade negotiations. In the market area, gender initiatives regard the provision of credit schemes, support to women entrepreneurs and women’s organizations, gender awareness campaigns and resource mobilization, initiatives also based on past efforts carried out under GTP I (Makoni et al., 2014).

The Ethiopian Agricultural Sector Policy and Investment Framework (PIF) 2010–2020 is the strategy for priority investments for agricultural growth. Gender equality is mainstreamed in PIF very limitedly as gender-sensitive targets, monitoring and evaluation frameworks are lacking (Drucza and Rodriguez, 2018). The programmatic document points to the generalized lack of policy attention to livestock development issues; such policy gap is filled by the Livestock Master Plan and few other plans which include the Livestock Development Policy, National Veterinary Policy, Animal Disease Act, Cattle Breeding Policy, Dairy Industry Act, and more (Gezu and Zelalem, 2018).

Dairy matters are specifically addressed in the Cow Dairy Development Roadmap (2015/16–2019/20), included in the Livestock Master Plan (LMP). The Dairy Roadmap reviews the status of the dairy sector and its potentials, identifying priority investment options to alleviate poverty and boost economic growth. The Dairy Roadmap aims to improve dairy product diversification and value addition (such as for powdered milk and long-shelf life products), and to promote consumer-oriented campaigns. The roadmap is centred as well on trade with the following objectives: i) raise milk production to exceed domestic demand; ii) decrease reliance on imports; and iii) use the surplus value-added milk produce for industrial uses or export. Challenges for the dairy sector growth identified by the Dairy Roadmap in the trade policy area regard the pricing policies causing disincentives to dairy producers and potential exporters. Domest dian support and protectionist measures like import tariffs and bans are also foreseen as measures to enable domestic competition with dairy imports.
The **Nutrition Sensitive Agriculture Strategy (NSAS)**, endorsed in 2016, highlights the lack of gender sensitivity in livestock programmes which contributed to hinder the achievement of nutrition outcomes. NSAS strategic objective 3, covering dairy marketing matters under *Initiative 3.1.3*, aims at increasing milk production, value addition, and planning better market strategies. With respect to dairy and gender equality, NSAS strategic objective 5 facilitates the creation of women farmers’ groups to improve dairy production, processing and marketing performance, support business development services, and ease access to finance and markets through microfinance institutions.

### 2.2.4 Conclusions

The adoption of a gender strategy in agriculture represented a positive development in Ethiopia, as it filled a long-standing policy gap, although gender equality mainstreaming in sectoral policies is not yet a solid practice (Drucza and Rodriguez, 2018). Ethiopian livestock policies and strategies tend to prioritize trade, while they do not substantially mainstream gender equality. Gender matters in dairy value chains are not covered in any dairy or livestock programmes, but integrated in agricultural policy interventions especially targeting production and productivity objectives where gender gaps are most frequently found. Markets and gender equality issues are addressed in agricultural policies mainly in form of measures to: i) increase women’s participation in markets and business; ii) facilitate access to credit; and iii) promote women’s organizations.

Investing in women’s empowerment in dairy trade may be a policy goal to integrate in future trade policy formulation which, to the date of the present review, is lacking. Measures could include gender-sensitive capacity building on dairy marketing, trainings on safety and quality standards and trade facilitation, and other interventions aligned with national trade policy priorities which currently are to boost domestic dairy production, decrease country’s reliance on dairy imports, and facilitate access to export markets.

Consolidating gender-responsive programming and harmonizing gender policy formulation across livestock, agricultural and trade policies would be important for strengthening the effectiveness of coordinated action and achieve the intended outcomes for women’s and men’s beneficiaries. In addition to developing capacities through training and access to information, it would be also relevant to enhance measures facilitating women’s access to key resources, assets and (extension-advisory) services whilst empowering their capacity to take advantage of these resources – which also requires challenging rigid gender roles and discriminatory practices. Furthermore, it is important to raise awareness among governmental institutions and key stakeholders on the significance of gender equality for promoting long lasting and effective initiatives, as well as to reinforce institutional capacities to implement gender-sensitive policies. This implies changes in informal, implicit cultural norms and social values deeply biasing socio-institutional processes and structures (Njuki *et al.*, 2021).
2.3 Kenya

2.3.1 Overview of the dairy sector

Kenya has the largest dairy subsector in Eastern and Southern Africa, significantly contributing to rural employment generation with about 1.8 million employed farmers of which 80 percent smallholder farmers (Okello et al., 2021). Total milk production reached 5.8 million tonnes (in milk equivalent) in 2022 decreasing from 6 million tonnes in 2021, reflecting disruptions in milk production and marketing due to deteriorated pasture conditions and rain deficits, among other factors (FAO, 2023b). Per capita milk consumption is high in the country – at about 88 litres per person in 2021 – and is increasing, driven by expanding urbanization, rising middle class, and foreign investments (Bebe et al., 2017; FAO, 2017b) (Figure 7).

![Figure 7. Annual per capita milk supply in Kenya, 2010–2021](https://www.fao.org/faostat/en/#data)

Note: Milk includes fresh and processed products (excluding butter) derived from milk of cattle, buffalo, goats, camel, sheep (full variable description can be found in the Food Balance Sheets (FBS) classification list available at FAO, 2024. FAOSTAT: Food Balances. [Accessed on 28 February 2024]. https://www.fao.org/faostat/en/#data. Licence: CC-BY-4.0.

Dairy production systems in Kenya are extensive grazing, zero grazing, and semi-zero grazing – the latter two prevailing in the Rift Valley and Central Kenya milksheds (Makoni et al., 2014). Dairy value chains in the country rely on a well-established market structure supported by a network of supporting services and institutions. Supply chains, either cold or pasteurized (formal) and warm or unpasteurized (informal), can differ by structural complexity, degree of formality, market channels, destination, size, geographical distribution. Over 80 percent of Kenya’s milk output is handled by small-scale dairy value chain operators, many of whom are women smallholders involved in production and retail (FAO, 2017b; Makoni et al., 2014). More than 75 percent of national milk
output is marketed via informal supply chains. Informal markets are preferred by farmers and consumers, respectively for the high revenues and the low-end prices compared to the formal market price. Smallholder dairy farmers usually transport raw milk to milk collection centres (MCCs), or to intermediate cooling centres, or to roadside collection points. Direct sales to consumers are common practice, however, intermediate operators, like milk transporters and traders, are often necessary to link rural farmers with bulking and chilling centres. Cooperative societies and unions serve as collection points offering also a range of supporting services to rural dairy farmers. The informal sector is affected by safety and quality issues. Dairy standards are developed by the Kenya Bureau of Standards (KEBS) (Kang’ethe et al., 2018). A major policy concern is how to guarantee compliance with food and safety standards, avoiding public health risks, while facilitating the transition of smallholder farmers in the formal sector.

Kenya is a net importer of dairy products. Following a downward trend from 2014, exports reached a value of USD 3.6 million in 2022, from USD 2.7 million in 2021 (Figure 8). New trade opportunities may come from value addition to fill market niches in neighbouring countries where demand from the emerging urban middle class is rising. However, a series of challenges affect the domestic dairy market, constraining cross-border trade. These include processing and productivity gaps, limited value addition, poor hygiene and milk handling practices, weak trade infrastructures, bottlenecks in the devolution of agricultural services to counties, and poor stakeholder coordination.

![Figure 8. Import and export value of dairy products in Kenya, 2012–2022, USD million](https://www.fao.org/faostat/en/#data)

Source: Author’s own elaboration based on FAO. 2024. FAOSTAT: Trade. [Accessed on 28 February 2024].

2.3.2 Women’s participation in the dairy value chain

In Kenya, women’s ownership and control over dairy cattle and dairy products differ by location, household characteristics, production systems, socio-cultural factors and other site-specific conditions (Gallina, 2016; FAO, 2017b). In many sites of Kenya, women can own cattle and have control over dairy products, generating regular income; in other cases, women can manage cows but cannot own cattle due to societal norms. The gender division of labour in dairy farm households
varies according to a number of factors, including the intensity of commercialization. While in small-scale traditional systems women are usually involved in labour-intensive tasks, under conditions of commercial intensive dairy farming such duties can be assigned to hired workers (Gallina, 2016). In the Kenyan sites researched by FAO, women usually carry out a variety of dairying activities, especially in daily tasks close to the homestead, like milking, feeding and watering, while men are mostly involved in seasonal tasks such as deworming, spraying, planting forage, harvesting (FAO, 2017b).

Women’s participation in the dairy value chain tends to decrease as vertical integration increases (Rubin and Manfre, 2014). Although women’s involvement in milk marketing is increasing in some contexts, marketing remains predominantly a male activity, as cultural biases on cattle as “male domain” persist in spite of the important role played by women in dairy production and marketing (Gallina, 2016). Women traders mostly operate in local markets, poorly linked to profitable networks, and struggle more than men with benefitting from the derived gains. Mobility represents a major issue, especially for rural women trading from remote areas, not just because of the poor road infrastructure (FAO, 2023c). In many places, gendered social norms do not allow women to drive cars, ride bicycles, motorcycles, or donkeys, with the result that they cannot reach more distant markets nor afford the costs of hiring transporters. Household responsibilities are another barrier for women willing to engage in dairy marketing, because core business hours (usually morning and evenings) often overlap with women’s domestic chores (FAO, 2017b).

In some Kenyan contexts, women are able to manage income from milk sales and use it for household needs (FAO, 2017b). In other cases, women can have decision-making power over dairy selling and income but conditional on timing and location, that is, they can hold control over income from evening milk only, or from milk sold in local markets (Kristjanson et al., 2010). Intra-household milk management decisions are often biased by gendered dynamics. Research among mobile pastoralists in Northern Kenya showed that, when conflicts over marketing objectives arise between spouses, men’s power to decide over market location can de facto constrain women’s agency (McPeak and Doss, 2006).

Women are usually disadvantaged in selling high quality value-added milk products due to their limited business skills and financial capacity (FAO, 2017b). However, accessing formal credit is not easy for female entrepreneurs. Informal savings and credit groups represent important sources of capital for rural women as often they cannot apply for loans due to the lack of secure titles to property and assets (Kristjanson et al., 2010; Gallina, 2016).

A study conducted among 108 women-led milk micro enterprises in Nakuru, Nairobi and Kiambu districts showed that women’s use of basic value addition technologies and limited marketing skills negatively affected business performance (Odero-Wanga, Mulu-Mutuku and Ali-Obandwa, 2009). Almost half of the surveyed women had problems in marketing their products for a number of reasons, including low productivity and limited value addition. Financial constraints are reported

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7 Kiambu County, located in the central highlands of Kenya; Nandi County, part of the former Rift Valley Province of Kenya; and Bungoma County in the western region of Kenya at the borders with Uganda.
as a major factor hindering women’s capacity to upgrade their milk value addition equipment which is needed to remain competitive in the market. The large majority (92 percent) of surveyed women reported to have issues in accessing credit facilities (lack of collaterals and high interest rates) for acquiring the necessary technology. Moreover, about 30 percent of them did not use any quality control test and another 30 percent reported insufficient or inexistent cooling or preservation facilities. Furthermore, only about 20 percent of women entrepreneurs received formal trainings before starting their business (Odero-Wanga, Mulu-Mutuku, and Ali-Okubandwa, 2009). Trainings for upgrading dairy processing and marketing capacities rarely target women, who normally have little time for extra-domestic activities and/or cannot afford their costs.

Producer organizations (Pos) are very important players in Kenya, as they provide important market linkages and facilitate smallholders’ access to inputs, markets and services. Women’s participation in dairy Pos is very high in some parts of Kenya. However, this data is not per se a proxy for gender equality and women’s empowerment, considering the average low rate of female representation in value chain governance (FAO, 2017b). Decision-making processes, moreover, need to be observed also at the intra-household level, since women’s membership in dairy organizations may be decided by men as part of a household economic strategy (Omondi et al., 2014 in FAO, 2017b).

The market-oriented development of the dairy sector can have positive impacts on women’s economic empowerment, especially where a value for milk market exists. Women’s socioeconomic status can improve when the household focus shifts from production to marketing (Kristjanson et al., 2010). However, evidence from case studies also suggests that production intensification and commercialization tend to increase female workload, compared to non-commercial conditions, and that different levels of intensification can produce diversified impacts on the household labour division. As women’s work burden increases, intra-household conflicts over work distribution can exacerbate (Gallina, 2016). An exploratory study on Kenyan rural dairy farming found that household farms’ shift towards intensification could not likely happen without increases in women’s workload, especially among poor remote households (Njuku et al., 2016). In Bunguma and Nandi Counties, dairy producers reported that commercial-oriented production transformed household business patterns into more complex forms (for instance with the hiring of external paid workers) aggravating women’s work burden, rather than easing it. One of the reasons was that women had to take a supervisory role over hired workers in addition to the existing chores (FAO, 2017b).

Under intensifying commercialization, women may have greater control over sales decisions – at least on evening milk sales – but overall men tend to take over the control of income derived from dairy (Njuki et al., 2016; Gallina, 2016). A case study on low-emissions development in the dairy sector in Western Kenya found that direct payments to women, combined with non-financial incentives like increased access to veterinary services, helped offset the impacts of loss of control over milk incomes by women caused by dairy farming intensification (Tavenner and Crane, 2018).

A growing body of studies is exploring the trade-offs between commercialization, gender, nutrition and food security in Kenya. Sustainable intensification of dairy farming is associated with improved nutritional outcomes for rural households (van Dijk, Tennigkeit and Wilkes, 2015). Household surveys conducted among rural dairy farmers in the Kilifi district showed positive relations between commercialization, milk consumption and nutritional status of children, independent from
household income, energy intake and level of education (Hoorweg, Leegwater and Veerman, 2010). If dairy intensification has the potential to improve food security and nutrition, it can also negatively affect infant and child feeding practices due to increased maternal stress and demand on maternal time (Njuki et al., 2016). Also, men’s enhanced control over milk can have negative implications on the household nutritional and health status (Gallina, 2016). More studies would be needed to assess the gender impacts of intensifying commercial dairying and its economic and social risks, including on nutrition and food security.

2.3.3 Gender policy developments in the dairy sector

In Kenya, gender equality policy goals are covered by comprehensive policy and normative frameworks. Pursuant to the Constitution of Kenya (2010), institutional mechanisms were established to promote gender equality, such as the case of the National Gender and Equality Commission (NGEC) coordinating and monitoring gender mainstreaming initiatives in national development programmes.

The National Policy on Gender and Development (NPGD), launched in 2019, is the outcome of a multistakeholder consultative review process which updated the previous Gender Policy (2011). NPGD aims to tackle perduring gender inequalities in the “patriarchal social order supported by statutory, religious and customary laws and practices”. NPGD fosters the integration of gender equality and women’s empowerment in sectoral policies and programmes to guarantee equitable access to land, land rights security and the elimination of gender discrimination. NPDG interventions gear towards the elimination of gender barriers to productive resources, markets and extension services, among others. A crucial area to target regards gender iniquities in control and ownership of productive resources, still widespread in rural contexts. Gender discrimination in land property originating from customary norms persist despite the introduction of gender-aware provisions in national laws, e.g. the National Land Policy (2009).

Vision 2030, the national development programme for 2008–2030, envisions a Kenyan commercial and modern agricultural sector with facilitated access for smallholders to local and international markets through better supply chain management. The Social Pillar supports gender-sensitive interventions to increase financial assistance for women, such as voucher systems. Gender equality and women’s empowerment goals are addressed in several agricultural, dairy and trade policies and programmes. The Agricultural Sector Gender Policy (AGSP) (2013) strives to improve gender-responsive programming and to strengthen institutional capacity and accountability on gender equality progress. AGSP acknowledges the perdurance of gender issues in agrifood marketing and trade (not specifically referred to the dairy sector), namely: women’s time poverty, low productivity and commercialization, limited voice. Priority interventions are to build women’s capacity in business and facilitate access to market information, addressing market failures.

The Agricultural Sector Development Support Programme Phase II (ASDSP II) 2017–2022, developed by the Ministry of Agriculture, Livestock, Fisheries and Co-operatives jointly with County governments, has adopted a value chain development approach focused on four results areas: productivity, entrepreneurial skills, market access, and institutional and structural capacity. In the
market area, interventions include the promotion of facilitated access to markets, financial services, infrastructural improvements, and quality and safety standards. Commitments for increasing gender-responsive planning for inclusive agribusiness were taken also based on lessons learned from the first programme phase (Chipeta et al., 2015).

Agricultural trade is vital for Kenya’s economic growth, and trade-related objectives are included in various sectoral policies and strategies, including the dairy subsector. The National Agricultural Investment Plan (NAIP) 2019–2024 views dairy value chain as one of the highest-potential value chains for food security and agricultural transformation. The Agricultural Sector Transformation and Growth Strategy (ASTGS) 2019–2029 stresses the dairy sector’s relevance for GDP growth and its positive impacts on poverty reduction, food security and nutrition. The National Dairy Development Plan (NDDP) aims to improve the production and processing capacity of smallholder and large-scale dairy farming systems. NDDP targets the informal milk sector to support the formalization of small-scale firms, through trainings on safe milk handling and incentives to informal milk traders. Gender equality is not mainstreamed in NDDP, exception made for a reference to women’s limited access to productive resources, which is an issue to be tackled, according to the policy document, through the strengthening of gender-sensitive extension services and modern technology. On the trade side, priority goals are to transform the dairy industry into a net exporter and increase dairy exports in regional and international markets. Emphasis is placed on improving high-quality dairy production, export promotion and competitiveness. Priority measures include, among others, greater involvement in regional and international trade negotiations; analysis and dissemination of up-to-date market information; strengthened enforcement of rules for domestic and imported products to meet international export standards, in order to eliminate trade of sub-standard milk products in the domestic market.

NDDP’s trade goals complement those of the National Trade Policy (NTP). Launched in 2017 and grounded in Vision 2030, NTP promotes an inclusive trade growth and strives to facilitate the creation of an efficient market economy and a favourable business environment. Strategic objectives for the dairy sector are to boost product diversification and strengthen commercialization, to overcome productivity and competitiveness gaps. Interventions include investments in technology, trainings on safe milk handling practices, and incentives to encourage dairy firms to adopt trade standards. On trade facilitation, the policy seeks to improve customs procedures, establish an enquiry point for trade-related information, strengthen the trade single window, and modernize trade entry and exit points (WTO, 2019). NTP has an inclusive vision of trade development, that is, it acknowledges that trade and investment programmes should not overlook gender and social inclusion issues. In Chapter 6.11, devoted to gender equity and youth, NTP envisions the effective participation of women in trade, still predominantly engaged in small-scale and informal trading, and the elimination of barriers to trade, mainly legal and financial ones. The trade policy stresses the need to remove barriers to credit, strengthen capacity building in national and regional associations of women in business, and promote educational awareness programmes.
2.3.4 Conclusions

Kenya has a comprehensive policy and legal framework for gender equality matters, including in the agricultural sector where a gender strategy was recently adopted. Gender equality objectives for markets and trade are incorporated in few agricultural plans targeting smallholders’ inclusion in formal markets and agricultural export programmes. Key policy priorities for gender equality in agricultural trade regard increased women’s inclusion in markets and value chains, improved voice and representation. The National Dairy Development Plan (NDDP) is centred on commercialization objectives, in line with the National Trade Policy (NTP), and it does not integrate a gender mainstreaming strategy. Both dairy and trade policies foresee market interventions addressing major gaps in the dairy sector – for instance capacity building on safety and quality issues, financial incentives and support services – in order to create more and better marketing opportunities.

The National Trade Policy incorporates an inclusive, gender-sensitive approach to trade, although it lacks specific indicators and measures for operationalizing gender objectives, which overall stand as general recommendations. Continued efforts for implementing gender-responsive programmes, tools and investments are essential to enhance gender responsiveness in trade and dairy programmes, in parallel with effective governance mechanisms needed to address bottlenecks in policy implementation at national, county and field level. The gender-sensitive review of Kenyan dairy value chains highlighted a tension between women’s workload (domestic and care tasks) and the opportunities to intensify dairy production, initiate dairy businesses and/or reach markets. Even if there are programmes that promote women’s access to resources and services, this tension would need to be better reflected and addressed at the policy level. The promotion of inclusive markets and trade implies addressing gender inequalities, however, gender transformation (or reducing gender inequalities and improving women’s involvement and benefits from dairy) will not happen unless rigid social and gender norms that distribute roles and responsibilities as well as resources and rights are changed or challenged. To address some of these questions, it is relevant to consider the development and adoption of technology that reduces women’s work burden while increasing productivity. More equitable distribution of domestic and care tasks among family members and generating support services are also relevant. It is noted the emphasis of the policies and programmes in facilitating access to resources, with some initiatives referring to enhancing women’s agency, which would need to be included in a more consistent and systematic manner. This also includes addressing gender bias affecting the ways institutions operate.

2.4 Rwanda

2.4.1 Overview of the dairy sector

Rwanda is a small landlocked country with natural resources’ constraints. The agriculture sector accounts for about 26 percent of Rwanda’s gross domestic product absorbing a large share of the working population (63 percent) (FAO, 2020d). The dairy subsector is a fast-growing agricultural subsector and the largest segment of the livestock sector, accounting for 10.5 percent of agricultural GDP. In 2022, milk production totalled nearly 234 million litres, decreasing from 245 million
litres in 2021 (FAOSTAT, 2024). The growth of the dairy sector has been spurred by public and private investments and initiatives to develop the dairy sector, still largely non-mechanized (Abdulsamad and Gereffi, 2017). Relevant initiatives include government incentives to shift from extensive grazing to zero-grazing to boost small-scale dairy farming; state-subsidized artificial insemination campaigns and introduction of improved dairy breeds; the GIRINKA program or “One Cow per Family Program”, established in 2006 by the Ministry of Agriculture and Animal Resources (MINAGRI); the “One Cup of Milk per Child Program”, started in 2010 to address child malnutrition; the Dairy Cattle Development Support Project supporting the construction of milk collection centres (MCCs); and private investments to improve dairy processing capacities, like the Tetra Pack packaging developed by Inyange Industries (Makoni et al., 2014).

Dairy production systems in Rwanda are semi-intensive (semi-grazing), extensive (grazing), and zero-grazing intensive. Dairy value chains mostly engage small-scale producers that supply milk to informal or formal aggregators, processors and buyers. Milk aggregation is done at milk collection centres (MCCs) and satellite points. Variations include direct milk supply to processing plants or to consumers, including through informal transporters and traders. Only about 20 percent of total milk produce is delivered to the formal industry; the remaining share is sold directly to customers in form of raw milk (Makoni et al., 2014). Governmental programmes have also incentivized the commercialization of MCCs to develop safe markets, reinforcing production/processing linkages (IFAD, 2016; TRAIDE, 2019).

The dairy industry in Rwanda is made up of six large-scale processing plants – with the biggest one, Inyange Industries, absorbing over 75 percent of marketed dairy products (TRAIDE, 2019). The development of the dairy industry is constrained by a number of issues. First, the competition between the formal and informal sector is very high, because of the low price of raw milk sold through informal channels. Price competition with dairy imports is also a serious concern for producers due to the high production costs they face, especially for packaging after the introduction of the plastic ban (Abdulsamad and Gereffi, 2017). Dairy processors usually operate below installed capacity (about 35 to 40 percent of total capacity). One of the main reasons is that many producers are not able to supply the required quality and quantity of milk to MCCs, nor they are incentivized to do so, eventually turning to more lucrative informal markets (TRAIDE, 2019).

Compliance with regulations for milk handing and trading is an issue not only in the informal sector but also in the formal one, where traders should sell certified milk only. A study by the Rwanda Standard Boards found that only 30 percent of milk zones in the city of Kigali meet all market requirements, where the others lack adequate storage and hygiene facilities, and some practice adulteration (Mushimiyiama, 2018). The government has established a mechanism to regulate dairy market competition affected by overproduction of substandard dairy products. In 2015, a Ministerial Order was issued to regulate milk collection, transportation and sales, obliging MCCs to have a qualified milk technician for quality control and a mandatory certificate of origin (Agritrade, 2016).

On the demand side, consumer-oriented strategies, such as school milk programs, have been adopted to boost milk consumption which is very low, estimated at about 14 litres per person in 2021 (Figure 9). The Rwandan largest dairy processor has piloted a franchise model where milk is sold in “Milk-Zone”, outlets selling pasteurized milk at fixed price set by the government, where consumers can get affordable safe milk (TRAIDE, 2019).
Figure 9. Annual per capita milk supply in Rwanda, 2010–2021

Source: Author’s own elaboration based on FAO. 2024. FAOSTAT: Food Balances. [Accessed on 28 February 2024].
Note: Milk includes fresh and processed products (excluding butter) derived from milk of cattle, buffalo, goats, camel, sheep (full variable description can be found in the Food Balance Sheets (FBS) classification list available at FAO. 2024. FAOSTAT: Food Balances. [Accessed on 28 February 2024]. https://www.fao.org/faostat/en/#data. Licence: CC-BY-4.0.

With respect to dairy trade, Rwanda is a net importer of dairy products, mainly cheese, butter, cream and milk powders. The value of dairy imports increased in the last years to reach USD 23.2 million in 2022 from USD 2.1 million in 2014 (Figure 10). Limited exports of pasteurized milk and fermented milk are reported to Burundi, the Democratic Republic of the Congo, South Sudan, Mali, the Central African Republic and Kenya as well as some informal exports of raw and fermented milk to Burundi and the Democratic Republic of the Congo (TRAIDE, 2019).
Untapped export opportunities exist for milk powders and UHT in Eastern Africa, especially in those countries – like Burundi, the Democratic Republic of the Congo, Uganda and Tanzania – with an emerging urban middle class (TRAIDE, 2019). However, export competitiveness remains a major issue, considering the existing gap between Rwandan dairy companies and mature international competitors, such as Kenya and Uganda. Targeted investments could help increase dairy firms’ processing capacity, promote diversification and value addition to be able to supply, for instance, niche markets with alternative eco-friendly packages (Makoni et al., 2014).

2.4.2 Women’s participation in the dairy value chain

Women’s roles in dairy value chains differ by production system, sociocultural context and other local factors. In the extensive grazing system, women mainly care for calves and home-processing to transform raw milk into processed milk and other dairy products, while men and boys mainly engage in grazing. In some regions of Rwanda, women are not allowed to do the milking, while in others, sometimes young women are allowed. Women farmers tend to be more involved in production-related activities close to homestead, and in charge of decisions over milk quantity to process, sell or retain for household consumption. Gender patterns in decision-making over dairy incomes are diversified. Women may not be able to retain earnings from milk sales when intra-household unequal sharing of resources and income is reported. Anecdotal evidence shows that in some cases women do not engage in dairy chores when they are not getting involved in decisions over income and when
they do not get any benefits – this dynamic be possibly related to decreased levels of household productivity (FAO, 2017c).

Gender inequalities in decision-making power, labour and income control in the household contribute to the low participation of women in dairy processing and marketing activities (Ingabire et al., 2018). Female participation in the transportation node is almost inexistent, especially in rural areas where women do not ride bicycles and motorcycles, with the exception of the Nyanza district where some cases of women small-scale entrepreneurs hiring male transporters were found (FAO, 2017c). Women have difficulties in accessing market networks and extension and animal health services. Some MCCs and cooperatives provide a number of supportive services, including milk marketing, trainings, facilitated loans, veterinary services and inputs. On average, women join cooperatives and access MMCs to a lesser extent than men, however, women’s representation in local decision-making institutions overall improved under the framework of the Rwandan Constitution that established that women should make up 30 percent of all national and local institutions (art. 9).

Commercial dairying is not yet well-developed in Rwanda, where farming systems are predominantly subsistence oriented. Positive outcomes of increased milk market participation were reported by dairy farmers interviewed by FAO, particularly in relation to milk consumption, employment and social capital (FAO, 2017c). Informal retail trade networks, made up of sellers of fresh raw milk, boiled fresh milk or processed dairy products, involve many small-scale value chain operators, including women. In Kigali, the retail trade of milk and milk products is run by both women and men on the basis of their financial and managerial capacities (FAO, 2017c). In Nyagatare and Nyanza districts, a few enterprises run by women have emerged, but are still scarcely represented in the formal sector. Women farmers, traders and entrepreneurs risk to be marginalized from profitable markets and networks, if greater commercialization is not accompanied by specific gender-responsive measures that help them transition into the formal economy (FAO, 2017c). Local challenges and trade-offs are to be explored further also to inform future gender-responsive programming for the promotion of a formal dairy value chain.

2.4.3 Gender policy developments in the dairy sector

In the last two decades, Rwanda has made dramatic policy efforts in progressing on gender equality and women’s empowerment. An outstanding achievement is in political representation, where the country ranks first for female quota in national parliaments worldwide (IPU, 2023). Rwanda has an advanced policy and legal framework on gender, including the Gender Based Violence (GBV) Law, the National Gender Policy, and the Land and Inheritance Law. In spite of the progress made at the policy level, though, gender inequalities are still widespread, especially in rural areas. Gender gaps remain significant in the agriculture sector where women represent the majority of workers (about 66 percent out of total workforce). The labour market is characterized by persistent gender inequalities as women are underrepresented in non-farm wage employment and over-represented

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8 The FAO study was carried out in different districts: Gicumbi, Nyagatare and Nyanza Districts, from Northern, Eastern, and Southern Provinces, respectively; and Kigali City.
in informal and unpaid family labour (FAO, 2020d). Subsistence farming engages poor women with the lowest levels of education and the highest rates of illiteracy (UN Women, UNDP-UNEP PEI and World Bank, 2015). Female-headed households, representing about 30 percent of total households, are very poor compared to male-headed ones (National Agriculture Policy, 2018). Major gender issues in the Rwandan agricultural system are the gendered labour and land use dynamics, and financial and production gaps and constraints.

**Vision 2050** (2015), the long-term country strategic framework, promotes an agriculture sector “equally transformed by both men and women professional farmers and commercialized value chains”, through the adoption of gender-responsive measures especially focused on enhancing productivity. The **Agriculture Gender Strategy (AGS)** (2010) envisions a gender-inclusive transformation of the agricultural sector towards increased commercialization, production intensification, mechanization and value addition. AGS strives to institutionalize gender equality in agriculture by enhancing gender mainstreaming in policy implementation and partnerships at national and local level.

The **National Agriculture Policy (NAP)** (2018) aims to transform the subsistence-oriented farming system into a business-oriented sector capable of supplying domestic and export markets. In alignment with AGS, NAP recognizes that unequal power relationships negatively affect women’s agency and agricultural productivity. Women’s economic empowerment is promoted in the areas of technology and capacity development (Pillar 2), and markets and off-farm opportunities (Pillar 4). Specific measures include provision of financial products for income-generating on-farm and off-farm activities; facilitated access to start-up funds for women-led agribusinesses; promotion of savings groups and cooperatives; support to business plans; and labour-saving technologies to reduce women’s workload.

Launched in 2019, the **Gender and Youth Mainstreaming Strategy** strives to ensure that women, men and youth have equal voice and benefits from agricultural productive resources and opportunities. This Strategy was developed in support of the Strategic Plan for Agricultural Transformation (PSTA4) and the National Agriculture Policy (NAP) (2018). Action Area 2 “Markets and value chain representation” includes support mechanisms to increase women’s and youth's equal participation in markets and value chain, eliminate labour segregation, and improve productivity through agribusiness promotion.

In the dairy sector, gender equality is mainstreamed in the **National Dairy Strategy (NDS)** (2013). NDS aims to develop efficient and safe dairy production, processing and marketing systems, create efficient business practices, and adopt nutrition-oriented product diversification strategies. Emphasis is given to improving value addition and milk quality standards, especially important for smallholders to achieve the long-term goal of formalization. Trade goals in the dairy strategy are coherent with those of the **National Trade Policy (NTP)**, which include producing affordable milk products for domestic and regional markets and investment in value-added products like cheese and fermented milk. Burundi and the Democratic Republic of the Congo are identified in the policy document as potential export markets. On the demand side, NDS seeks to increase per capita milk consumption by orienting consumers towards processed milk rather than raw milk. With respect to gender equality, NDS foresees pilot tests to create small businesses and women’s groups in support of dairy marketing and retailing, especially in urban areas.
The Rwandan Livestock Master Plan (R-LMP) (2017) is the livestock sector strategy for 2016/17–2021/22. R-LMP, developed with support from FAO, has planned for priority actions in four value chains, namely poultry, pork, dairy and red meat (FAO, 2020e). Lessons learned from the implementation of the R-LMP, ended in 2022, will feed the new Animal Resources Strategy of the next strategic plan for agricultural transformation (PSTA) 5 currently in preparation. Key messages from multistakeholder discussions held in March 2023 on the outcomes of the R-LMP include the need to integrate a more holistic food systems perspective in livestock strategies, to be not solely focused on boosting production, and address the contributions of research and development (R&D), climate change adaptation, expansion of livestock trade, improvement of food safety, and a focus on gender and inclusion (IFPRI, 2023). The Dairy Value Chain Development Roadmap included in R-LMP promotes a trade-oriented strategy for the dairy sector growth: additional milk output would be used to substitute imported milk products and for export in form of processed products (such as milk powder UHT or casein milk protein) to raise foreign exchange earnings. The roadmap aims to increase of crossbred dairy cow heard by 46 percent, with respect to the baseline, and milk production by 65 percent. The dairy systems targeted in the roadmap are the “commercialized specialized dairy” (CSD) and the “improved family dairy” (IFD), namely the smallholder family system, which is predominant in Rwanda, handling 97 percent of national milk output. Market priority goals for the smallholder system are to: i) boost functional capacity and utilization of MCCs; ii) strengthen and/or create new dairy cooperatives; iii) enhance capacity of existing MCCs to adopt and enforce quality standards and controls; iv) strengthen linkages between informal milk traders, MCCs, cooperatives and processors; v) increase the percentage of milk marketed in the formal sector (from 10 to 15 percent, to 80 percent); vi) attract investors in milk cold chain and processing; vii) improve road infrastructures; viii) encourage new milk processing plans for pasteurized milk, UHT and powdered milk.

Livestock and dairy sector matters are addressed in few other broad and sectoral policy frameworks, such as Vision 2050, the Economic Development and Poverty Reduction Strategy II (EDPRS II), and the Strategic Plan for Agriculture Transformation IV (PSTA 4) 2018–2024. In PSTA4, market- and trade-related goals for the dairy sector regard the development of inclusive dairy markets, better market infrastructures, strengthened market linkages through new MCCs, increased value addition and export (Priority Area 3). Moreover, attention is given to the expansion of regional trade for high-value agricultural commodities, including in dairy value chains. In PSTA4, women’s economic empowerment is promoted through capacity development activities, e.g., on technical, leadership and management skills, and agribusiness incentives. Key milestones are to reach target increases in women’s participation in marketing and technical trainings, and equal representation in farmer organizations and leadership positions. PSTA4 has also established the Agribusiness Window of the Agricultural Development Fund to support female entrepreneurship.

Gender equality in the dairy sector was included in the programme “One Cow One Poor Family” (or GIRINKA) which distributed more than 133 000 cows to poor households. No gender-sensitive evaluations were carried out since then to assess the programme’s long-term intended and unintended effects. However, recent studies and programmatic documents, including the Rwandan Agricultural Gender Strategy (AGS), pointed to few negative gender impacts of the GIRINKA programme, such as the issue of ownership of cows eventually turned to men as household heads, and the high costs of zero-grazing infrastructures hardly affordable by poor female-headed households (Harris-Coble,
LeBeau and Colverson, 2018; Makoni et al., 2014; FAO, 2017c). AGS aims to contribute to poverty reduction and sustainable development through the institutionalization of gender-responsive programming, budgeting, and reporting systems in the agriculture sector. Strategic objectives include developing capacities to enhance gender responsiveness in the delivery of agricultural services, and to promote equal participation in decision-making processes. Key to the development of a commercial value chain is ensuring facilitated equal access to finance, knowledge, skills and technology and markets. Interventions include the creation of opportunities and services channelled through farmer organizations and cooperatives that will have increased levels of women’s representation (at least 30 percent).

According to the National Trade Policy (NTP) (2010), dairy is one of the sector clusters potentially relevant for new lucrative export markets. Together with the National Export Strategy II (NES II) (2015), NTP provides guidance for Rwanda’s trade expansion. Strategic objectives are to: i) stimulate trade-led sectoral growth mainstreaming trade in national plans; ii) harmonize institutional frameworks for better trade policy formulation; iii) promote conformity with international standards and greater engagement in trade negotiations; and iv) increase investments. In the dairy sector, NTP emphasizes affordability, accessibility and availability of dairy products in domestic and international markets, enhanced milk quality control and public-private partnerships. It also identifies the need to address dairy sector’s challenges through short to medium-term support plans, in alignment with the national dairy strategy. In 2018, the Ministry of Trade and Industry introduced a support measure to promote fair dairy market competition, setting a minimum price (200 Rwandan Francs for 1 litre of milk) that a farmer would get at MCC (Ntirenganya, 2018). The national trade policy views gender equality as a legitimate policy goal and trade conducive to inclusive development (Chapter 4.4). Making trade policies an instrument for tackling social issues is important to ensure that the gains from an export-led growth also reach disadvantaged people. Gender-sensitive targeted interventions, support measures and capacity building would facilitate the transition of women-led businesses in the formal sector. NTP endorses the integration of gender issues in trade policy formulation and negotiations at national, regional and international levels. A preliminary step would be developing gender-sensitive assessments of the effects of trade liberalization and trade agreements in order to acquire a better understanding of women’s and men’s issues and opportunities under liberalized markets.

2.4.4 Conclusions

Rwanda has an advanced gender-responsive policy and normative framework fostering the enactment of a trade policy and business environments conducive to gender equality and women’s empowerment. Agricultural policies and programmes reviewed aim to create and scale up a more inclusive development of small-scale value chains by supporting the reinforcement of institutional and operational mechanisms that would facilitate the removal of gender-based barriers to agribusiness activities and facilitate women’s access to markets. Both dairy and trade policies include gender-sensitive interventions targeting women-led firms to improve their technological, financial and business capacity in order to close the productivity gap and improve export competitiveness. Trade and gender initiatives moreover promote women’s greater participation and leadership in dairy groups and cooperatives to enhance marketing and retailing, especially in urban areas. Trade objectives in
the dairy policy are consistent with those of the national trade policy, i.e. increase production of high-quality dairy products and create surplus for international markets. Strengthened policy coherence and institutional coordination would mitigate the risks of uncoordinated interventions, unintended impacts and waste of resources since, to date, gender initiatives in agriculture are covered by multiple policies and programmes. M&E of the existing policies and programmes could benefit from the integration of intersectionality-based gender impact assessments that would guide improvement and measures to address collateral effects and trade off.
Chapter 3

What prospects for women in dairy trade?
3.1 Enabling inclusive dairy markets: gender policy experiences and way forward

In the last decades, notable efforts were deployed, to a different extent, by Eastern African governments to enable favourable normative and policy environments conducive to gender equality and women's empowerment in the agriculture sector. This review assessed the extent to which gender policymaking is pursued in policies and programmes for the dairy sector growth, particularly in the areas of markets and trade, in Ethiopia, Kenya and Rwanda. The cross-sectoral policy analysis revealed that gender equality objectives may be mutually reinforcing, overlapping, or rather competing in the same national policy framework and across different sectoral policies and strategies. Overall, differentiated levels of gender responsiveness were found in the programmatic documents reviewed. Policy measures for women and girls are usually incorporated in existing sectoral programmes (gender mainstreaming) rather than being the subject of dedicated women-centred plans (gender-responsive policy making). Gender interventions in dairy markets and value chains are more frequently found in agricultural programmes than in dairy-specific strategies or trade policies. Based on the overall review, most common measures in the dairy marketing and trade areas regard: i) financial support to women-led entrepreneurship (incentives, credit schemes, facilitated loans, etc.); ii) capacity building on technical and managerial skills; iii) support to women’s representation and voice in stakeholder organizations; iv) gender sensitization campaigns. Strengthening trade is prioritized in some agricultural and dairy policies, with emphasis placed on commercialization and value addition to create or boost an export-oriented dairy industry. Gender mainstreaming in trade policies is very limited.

Good practices in gender mainstreaming policymaking are worth noting. First, with respect to their respective baselines, Ethiopia, Kenya and Rwanda have progressed in establishing a more robust gender policy architecture and gender-responsive institutional mechanisms, as visible in the recent adoption of gender-sensitive agricultural policies. Second, gender equality has gained more relevance in pro-poor inclusive development strategies; women’s economic empowerment goal is included in few initiatives promoting women smallholders’ participation in domestic and international markets. Third, a few women-supportive measures have been introduced for tackling issues in the formal and informal dairy sector to reduce socioeconomic vulnerability and facilitate formalization. The dual-market sensitivity is important, considering the low participation of women in the formal sector and their precarious labour conditions in the informal sector. Lastly, some policy documents stress the need to develop more and better gender data collection and analysis, streamline tools and indicators and, although to a limited extent, adopt innovative participatory approaches to development. In some cases, gender policy formulation is grounded in informed gender analyses and gender-sensitive poverty and vulnerability assessments.

Areas for improvement in gender-responsive policy formulation are also to be noted. First, gender equality is generally poorly incorporated in dairy strategies, initiatives for women’s empowerment in markets and trade areas are scattered, and gender mainstreaming in trade policies is limited to general considerations or recommendations. Most policies focus mainly on enhancing access to key resources, while measures to strengthen women’s agency (the capability to manage and benefit from those resources) are still scarce. Also, sectoral policies rarely mention explicitly the importance of addressing gender biases and stereotypes within the implementing institutions.
Second, resources allocated to gender interventions are generally very limited. Most policies and strategies do not include specific budgeting for gender-related programming and strategies, thus enhancing the risks of implementation failure of planned gender initiatives, which require adequate financial, operational and technical capacities. Third, low cross-sectoral policy coherence and weak institutional coordination mechanisms risk to dampen the positive effects of gender strategies in agriculture and trade. The effects of interventions on gender equality are hardly traceable during monitoring and evaluation exercises, when policy measures, targets and means of implementation are overlapping or diverging across sectors. It is therefore important to identify and address areas in which difficult trade-offs between competing policy objectives may emerge (Gadhok et al., 2020).

Fourth, policy and programme initiatives rarely include women-centred interventions planned on the basis of sound gender analyses. Lastly, policy measures poorly attempt to address the structural causes of gender-based discriminatory practices and barriers on the ground. Gender-transformative approaches (GTAs) can be useful, among other tools, to address the root causes of gender inequalities and gendered norms in agricultural contexts (FAO, IFAD and WFP, 2020a). For interventions to be gender transformative, it is important to promote institutional and behavioural change by challenging gender norms and discriminatory practices at all levels, from the individual to the institutional one (FAO, IFAD and WFP, 2020b).

There are plenty of chances to seize for women’s economic empowerment in dairy markets and trade, and a wide array of policy instruments is available; based on the present review, some policy options and strategies for overcoming the identified barriers and leveraging opportunities are listed in Table 1 below.

Table 1. Policy options to promote women’s empowerment in dairy trade

<table>
<thead>
<tr>
<th>Women small-scale producers and entrepreneurs (domestic markets)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Key challenges</strong></td>
</tr>
<tr>
<td>Note: gender-based constraints can be root causes of the referred challenges.</td>
</tr>
<tr>
<td>i) lack of market information and poor linkages with urban markets; ii) low seasonal demand and price fluctuations due to changing market, environmental, social and political conditions; iii) scarce product diversification and low commercialization of value-added dairy products; iv) lack of voice and representation in dairy marketing cooperatives, associations and unions; and v) market competition with cheap dairy imports.</td>
</tr>
</tbody>
</table>

| **Policy options** | |
| i) knowledge sharing of best practices on innovative production and marketing models, dairy hubs, cooperatives and self-help groups; ii) promotion of gender-aware initiatives and targeted programmes to encourage women’s participation in dairy marketing cooperatives and associations, in order to strengthen women’s networks and linkages with profitable markets, as well as to enhance their voice and representation; iii) implementation of business hubs and social and health services in rural areas; iv) introduction of gender-sensitive inclusive business models and market-led incentives (e.g. sustainability certification schemes, high-value contract farming, quality-based payment systems) to incentivize quality milk supply and transition to the formal market; v) initiatives to increase access to technology and digitalization to expand market opportunities; vi) promotion of information and communication technologies (ICTs) and skills programmes to access information, e-marketing, financial and other online services, to respond to mobility constraints; vii) delivery of gender-sensitive capacity development on quality and safety issues; viii) delivery of targeted trainings on finance, business and leadership; ix) measures to address women's domestic workload through labour-saving technologies, services and the distribution of domestic and care tasks with family members, including men and boys. |
Women small-scale producers and entrepreneurs (regional markets)

Key challenges

i) low product diversification; ii) lack of technical capacity to comply with trade regulations, food safety and quality standards; iii) limited access to formal credit to invest in upgrading women-owned firms’ processing capacity and to comply with trade regulations, requirements and standards; iv) lack of financial capacity to afford costs associated with trade and customs procedures; v) lack of information, technical assistance, trainings and incentives to facilitate access to export markets and improve export competitiveness; and vi) implementation of gender-sensitive trade facilitation measures to remove barriers preventing female-led dairy entrepreneurs to enter international markets.

Policy options

i) promotion of trade facilitating measures for female-led agrifood entrepreneurship; ii) delivery of capacity development initiatives on quality and safety standards; iii) granting gender-specific incentives/subsidies to enhance firms’ processing capacity and quality control; iv) support an enabling business and policy environment by facilitating investments for women-led start-ups; v) promotion of gender-sensitive digital trade and trade facilitation; vi) support targeted trainings on marketing and leadership management to sustain women’s technical capacity in their business development; vii) enhance institutional coordination and partnerships to accelerate women farmers’ inclusion in formal market structures; viii) create a safe trade environment to support women cross-border traders, including through gender-sensitive trainings to custom officials, safety and hygiene facilities and infrastructures; ix) promote gender research, statistics and sharing of best practices; x) strengthen countries’ participation in international trade dialogues and advocacy for the inclusion of gender considerations in trade policies and agreements; and xi) improve cross-sectoral policy coherence and systematic gender mainstreaming at all policy levels.

Regional cooperation

i) develop more and better gender-disaggregated data on trade and regional dairy market information system; ii) support inclusive and gender-sensitive dairy platforms and multi-stakeholder dialogues; iii) implement gender-sensitive trade facilitation measures to remove barriers to trade for female-led dairy companies, including small-scale ones; iv) strengthen partnerships with relevant stakeholders and facilitate collaborative action to implement gender awareness-raising initiatives in support of women dairy farmers, traders and entrepreneurs in the informal sector; v) develop gender research and statistics also through intra-regional or inter-regional institutional partnerships; vi) support the inclusion of gender considerations in trade policies and agreements; and vii) document good practices and enhance South-South and Triangular cooperation.

3.2 Final considerations

The market-driven development of small-scale and large-scale dairy farming systems can potentially benefit millions poor rural households in Eastern Africa, with positive outcomes on poverty alleviation, rural employment and food security. In most parts of the region, however, dairy farming is still a subsistence-oriented activity, and trade is limited to domestic or local informal markets. Prospects for regional dairy trade growth exist, conditional on the development of more robust normative and policy frameworks, well-functioning supply chains, improvement of trade infrastructure, harmonization of standards or conformity assessment procedures, transparent market information systems, and synergic partnerships.
This study reviewed some gender implications of the ongoing structural transformation of the dairy sector, focusing on the gender-differentiated costs and benefits of commercial dairying in Ethiopia, Kenya and Rwanda. Greater milk market participation by dairy farm households has contributed to generate new income and employment opportunities, improving in many cases the livelihoods of women smallholders and their families, with positive impacts on women's and girls' empowerment. In other cases, however, commercial dairying contributed to increase gender inequalities, enhancing women's domestic work burden while decreasing their control over income and assets in some contexts. Trade can provide interesting opportunities for women's entrepreneurship and employment along dairy value chains. Research has also highlighted, however, that these openings arise when trade expansion is accompanied by adequate measures which address the specific constraints preventing women from being as efficient and competitive as men in the agricultural labour market, as they often remain concentrated in informal, micro-sized, low productivity and low-return activities in value chain operations. In order to ensure that all social actors reap the benefits of milk and dairy marketing, it is important that policies and strategies promote women's decent participation in dairy value chains facilitating their access to markets and encourage their formalization by increasing their capacity to meet trade requirements and standards (Blackmore, Alonso and Grace, 2015).

Policy and programme initiatives could be strengthened in the following areas: i) capacity building on technical upgrading on food safety, quality, hygene practices and gender-sensitive trainings on processing, marketing and business practices; ii) gender-responsive quality-based payment systems, training and certificate schemes; iii) introduction of energy- and time-saving technologies in milk collection and transportation, e.g. cooling containers; iv) enhancement of capacities of dairy cooperatives (both mixed and women only) and increase in women's voice in governance institutions; v) facilitation of access to productive resources and to credit for investing in upgrading women-owned firms' processing and marketing capacity; vi) health, childcare facilities and support services to facilitate women's engagement in revenue activities; vii) investments in labour-saving or-easing technologies to decrease women's unpaid and domestic work burden, and reduction of the technology and digital divide; and viii) gender-sensitive trade facilitation and digitalization.

Fostering women's empowerment and inclusive trading systems requires that policies and programmes are aligned across relevant sectors, including but not limited to trade, agriculture, labour, education, and social protection. In order to mitigate risks and harness the full benefits of trade leaving no one behind, policies and programmes that promote trade openness need to be accompanied by a set of complementary measures and social and health safety protection mechanisms able to protect women, girls from socio-economic risks and shocks (FAO, 2020f). Targeted interventions can help mitigate the negative externalities of trade and commercialization which are more severe for women and girls, particularly in fragile contexts and during crises. Synergic multi-stakeholder partnerships and aligned participatory policy formulation processes are essential to maximize the benefits of trade for all actors involved and minimize trade-offs. Indeed, policy initiatives risk to have limited or harmful impacts on gender equality, in the absence of coordinated governance mechanisms. Moreover, to avoid the risk of gender policy evaporation, policies and development programmes should set clear budgets for gender-specific activities enhancing accountability. Also, intersectionality-based gender impact assessments should be systematically conducted to investigate the impact of policy implementation. Over the years, gender mainstreaming policymaking has been helpful in raising public awareness on gender equality and women's empowerment at the global and national levels, however it failed being
effective in many cases when dealing with highly contextual dynamics. Policies and programmes would benefit from innovative approaches to gender, including gender-transformative approaches (GTAs), that can help address the root causes of gender inequalities; elicit assumptions and implicit stereotypes of the engendered policy narrative; and respond to the local complexities emerging in increasingly integrated agrifood systems.

Recommended actions for strengthening gender responsiveness in policymaking in the dairy sector include:

- **Promote** gender-sensitive participatory policy formulation processes and effective governance mechanisms strengthening cross-sectoral coordination and policy coherence;
- **Enhance** gender responsiveness of dairy strategies and programmes through improved technical and financial capacities, with designated budget, adequate monitoring and evaluation frameworks and accountability, at the national and regional level and in the framework of the African Continental Free Trade Area (AfCFTA);
- **Ensure** that trade-related measures in dairy development programmes do not reinforce gender and social inequalities but rather promote gender equality and women’s empowerment from design to evaluation;
- **Implement** inclusive social protection strategies to improve the resilience of dairy farming systems in the face of trade-related adversities and socioeconomic shocks that severely affect the most vulnerable people; and
- **Develop** more and better gender analyses, increasing gender-disaggregated data collection and applying gender-transformative approaches and intersectionality-based gender impact assessments, for more effective policy formulation, implementation, monitoring and evaluation.
Bibliography

References


Eastern African dairy value chains: what prospects for women in trade?
Gender policy developments for inclusive dairy markets and trade in Ethiopia, Kenya and Rwanda


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Additional resources - national and programmatic documents reviewed.

ETHIOPIA


KENYA


RWANDA


