



Dairy Food Systems Partnership (DairyFSP)

Transforming food systems together



Agenda

DairyFSP

- From initial scoping to agenda setting
- Food systems approach and thematic priorities
- Dairy Food Systems Partnership (DairyFSP)

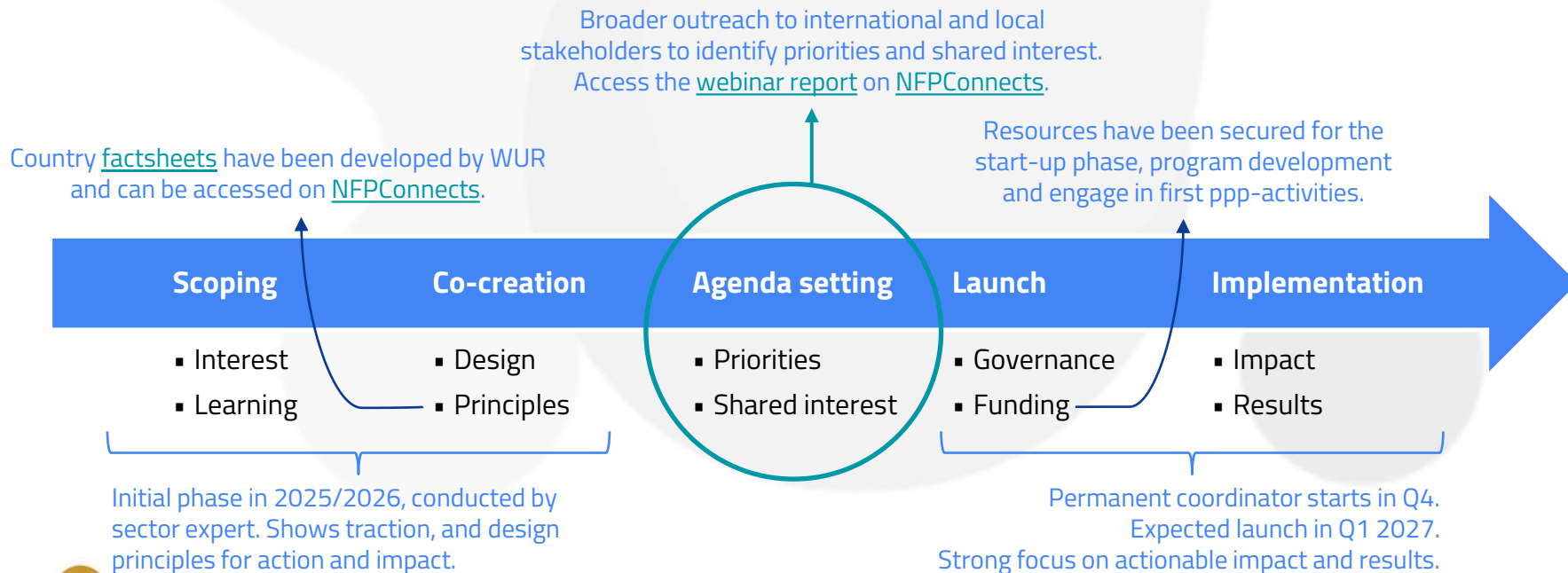


From initial scoping to agenda setting



From initial scoping to agenda setting

Developing a shared agenda for the dairy sector in Ethiopia, Kenya and Uganda.

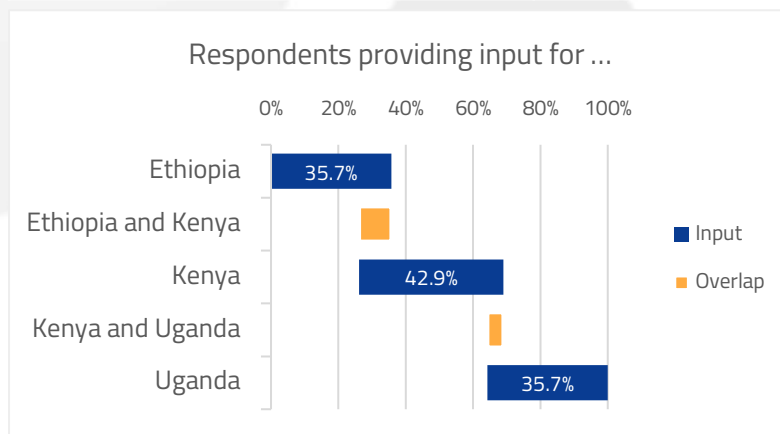


From initial scoping to agenda setting

NFP involved international and local stakeholders through a webinar and survey.

- Stakeholder traction is strong, with over >100 unique contributors through webinar, survey and other meetings.
- Strong private sector involvement (55% of respondents), with balanced input from government (10%), civil society (20%) and knowledge institutes (15%).
- Most stakeholders (85-90%) that provided input are focused on one country only, there is little overlap in stakeholder networks for the three countries in scope. As a consequence, partnerships can function independently in each country.
- Stakeholder interest in Kenya is slightly but not significantly stronger than in Ethiopia and Uganda. Other countries and regions have also been identified for potential future expansion.
- Strong desire to build on and add to existing platforms and projects, and caution to not duplicate what is already done.

Indicator	Value
Webinar attendance	79
Survey responses	50
% female respondents	20%
% private sector respondents	54%
% East African respondents	70%
% European respondents	30%





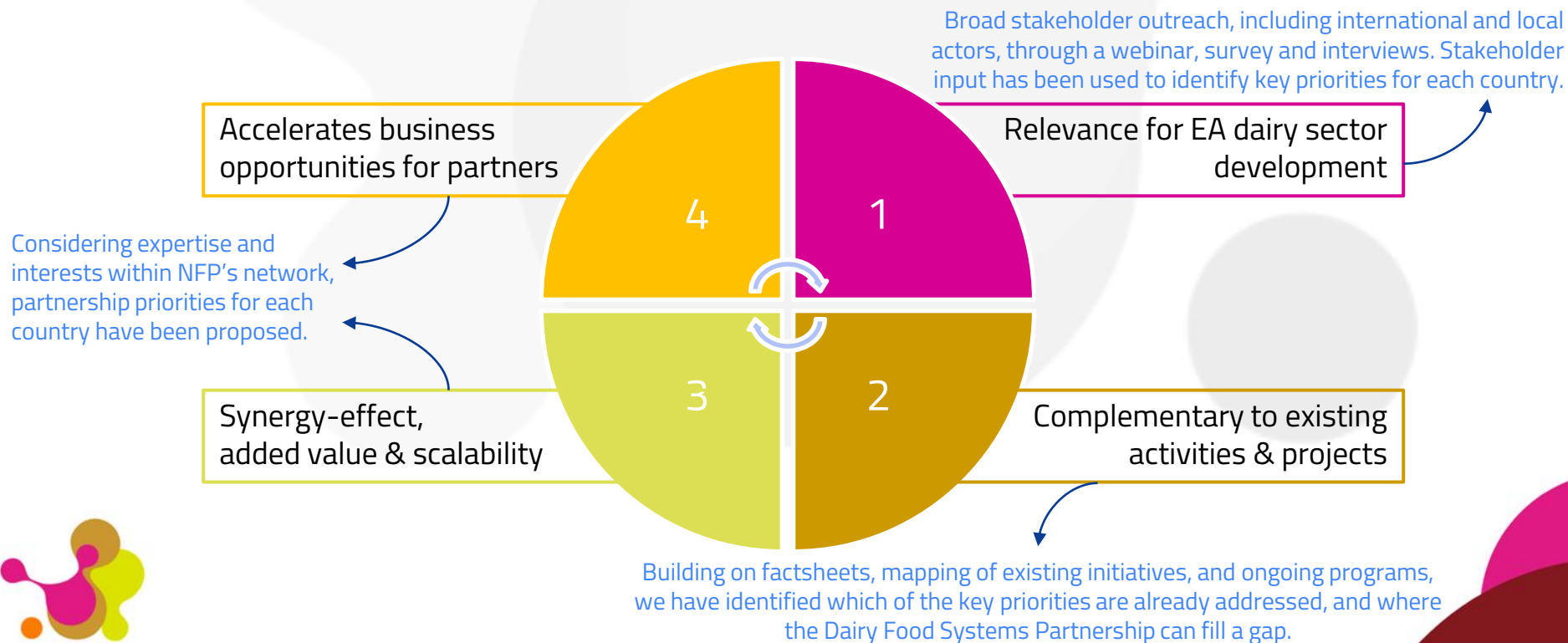
Thematic priorities

Food systems framework and action agenda



Thematic priorities

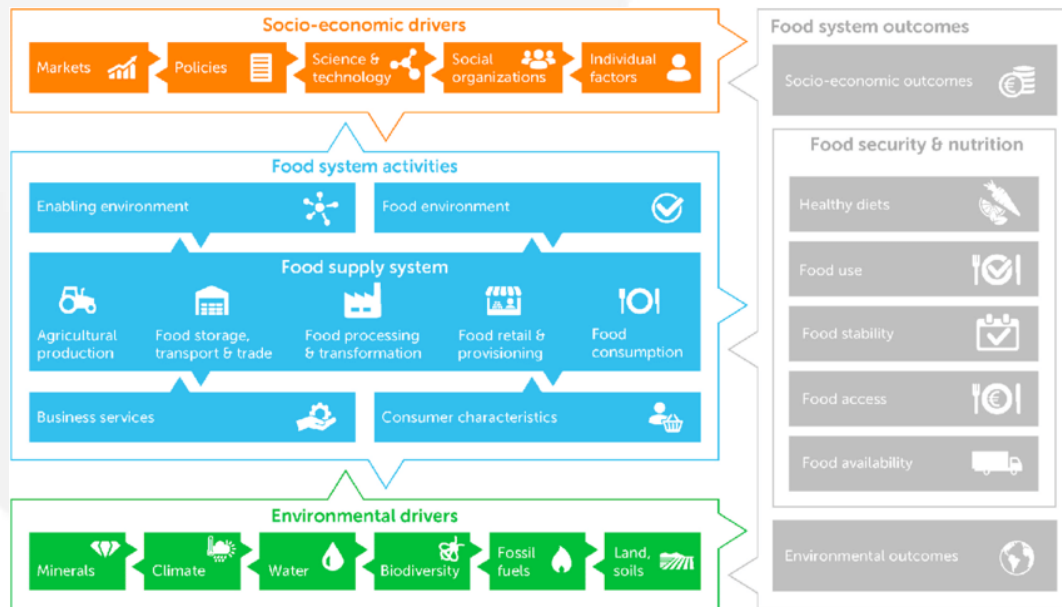
The longlist of potential themes is refined based on stakeholder priorities and current gaps.



Thematic priorities

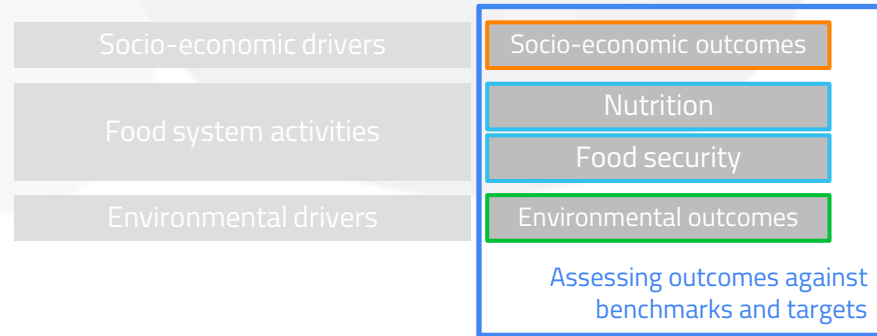
Using a food systems approach, outcomes and priorities are assessed in agenda setting.

- A food systems approach (FSA) is a framework for sustainable solutions for the sufficient supply of healthy food.
- Key elements of the approach:
 - Food security and nutrition outcomes combined with socio-economic and environmental outcomes.
 - Drivers and activities enable outcomes. To transform a system, the relation between needs to be understood.
 - Feedback loops and interconnectedness are distinguishing factors in systems thinking.
 - A change in drivers can result in a change in outcomes.
- The framework offers a checklist of topics that should be addressed.



Thematic priorities

Food systems outcomes



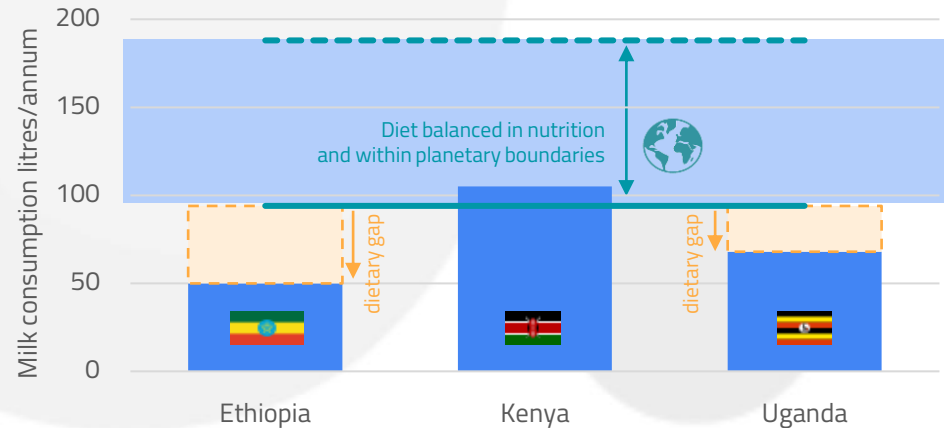
Socio-economic drivers	Socio-economic outcomes
Food system activities	Nutrition
	Food security
Environmental drivers	Environmental outcomes

Thematic priorities: nutritious diets

Current consumption levels indicate dairy consumption as a priority in Ethiopia and Uganda.

- The EAT-Lancet Commission on Food, Planet and Health, has developed diet recommendations that combine human health and planetary sustainability targets.
- The Planetary Health Diet is high in vegetables, moderate in grains, and balanced in protein.
- The recommendation is **a daily intake of 250g dairy** (whole milk equivalent). This is one large glass of milk daily. This represents 6% of total daily calories from dairy.
- Daily intake should not exceed 500g dairy per person per day to stay within planet boundaries.

Per capita consumption compared to nutritional targets and planetary boundaries



- Dietary gap
- Per capita consumption
- EAT-Lancet nutrition recommendation
- - - EAT-Lancet planetary boundary

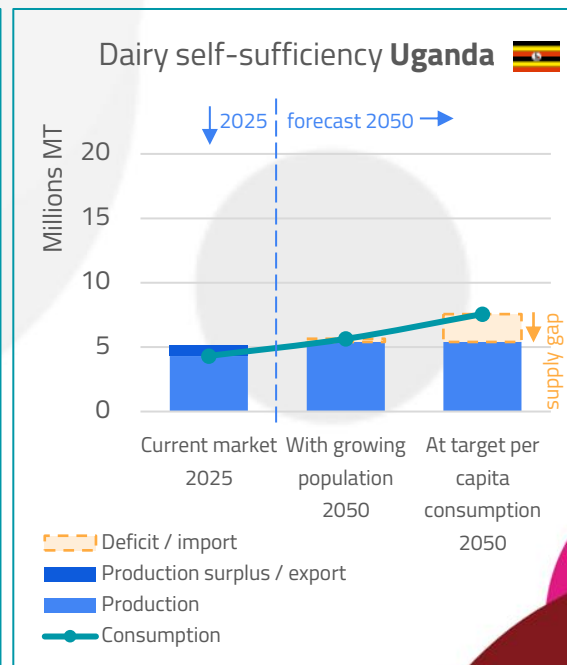
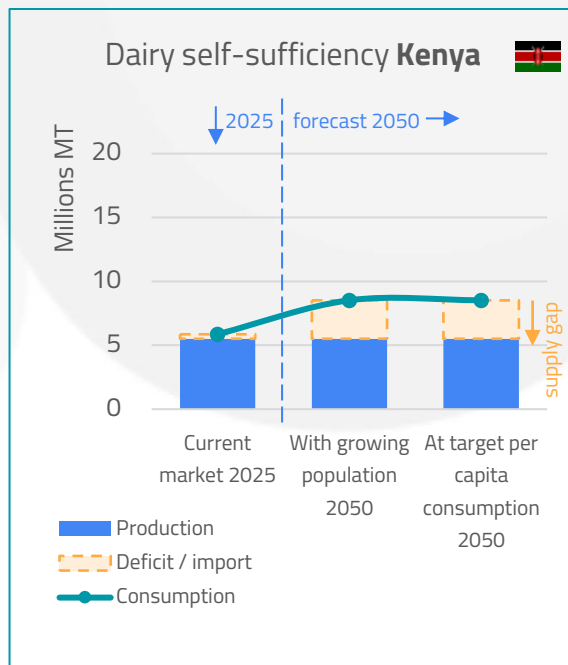
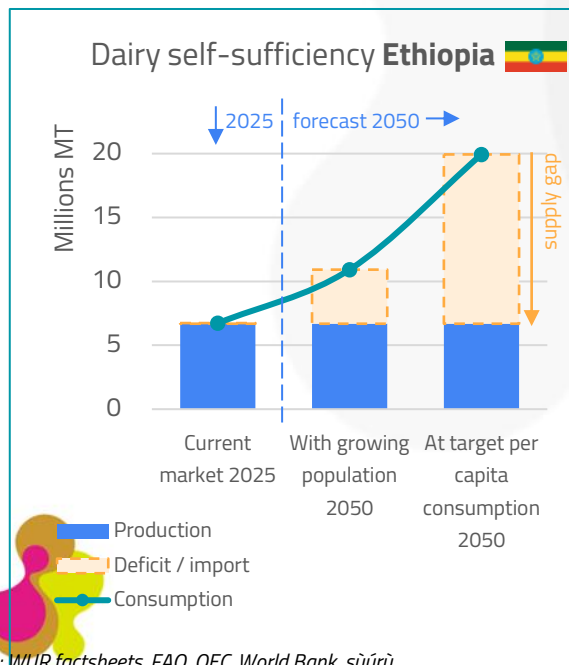
- Lactose intolerance may influence what type of dairy can and should be consumed.

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Thematic priorities: food security

With a growing population, self-sufficiency and availability will become priority.

- Population growth affects food security and self-sufficiency if production growth is not addressed. Combining population growth with increasing per capita consumption to EAT-Lancet recommendation will increase pressure on supply.
- Ethiopia may experience a significant supply shortage, while Uganda is at risk of losing the regional export market.

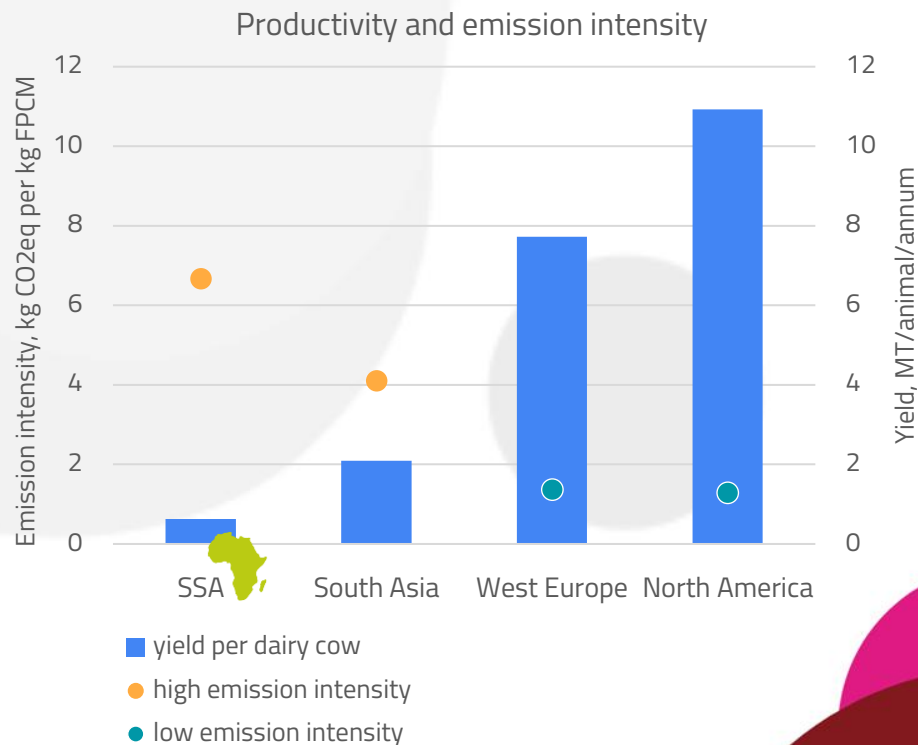


Thematic priorities: sustainable production

With low yield per cow, emissions per unit of milk produced are high.

- While specific emissions data for the countries in scope was not found, average figures for Sub-Saharan Africa compared to global benchmarks show a clear relationship between emission intensity and yield.
- **With low yield per cow, the emissions per unit of milk produced are high (high emission intensity).**
- Low yield can be affected by genetics, animal feed, animal health and husbandry, or a combination of those factors. There is a wide variety in production systems and productivity levels.
- By increasing milk yield per cow, the emission per unit of milk produced can be significantly reduced.
- Other factors potentially reducing environmental impact include reduction of food losses, land use and animal nutrition.

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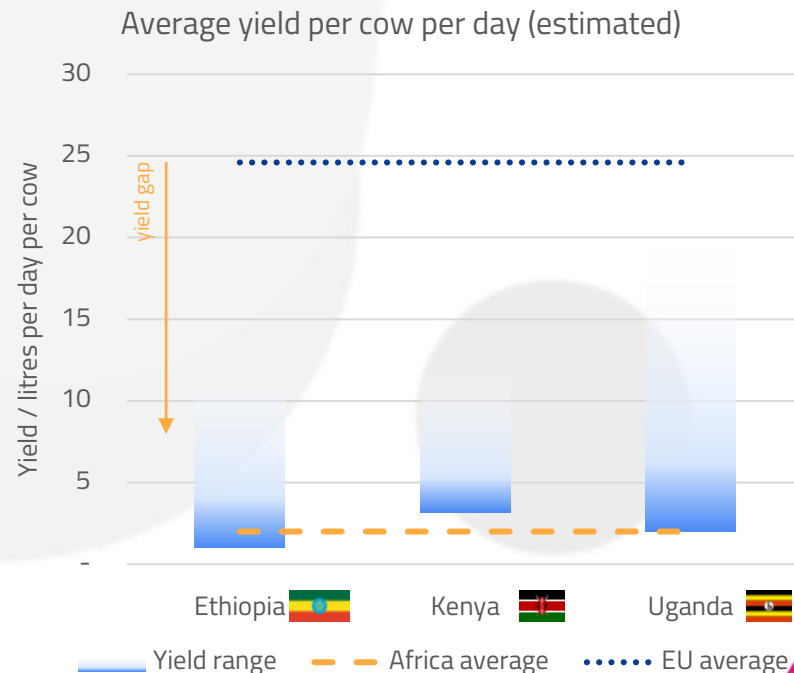


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Thematic priorities: sustainable production

While yield is around or above the average in Africa, productivity is far behind European levels.

- Yields correlate with farming systems, with smallholders typically producing yields ranging from 1-5 litres per day, and professionally managed farms realizing yields between 15-25 litres per day. The average yield in each country correlates with the proportion of milk produced in different farming systems.
- While in **Kenya** and **Uganda** yield per cow per day is estimated somewhat above the average for Africa, yields are significantly lower than international benchmarks.
- Yield in **Ethiopia** is among the lowest in the world, with very low daily output per cow, except in a few professional farming systems.
- These low yields result from the combination of business model factors reported by stakeholders: a combination of health and genetics with feed and access to finance and professional farm management.

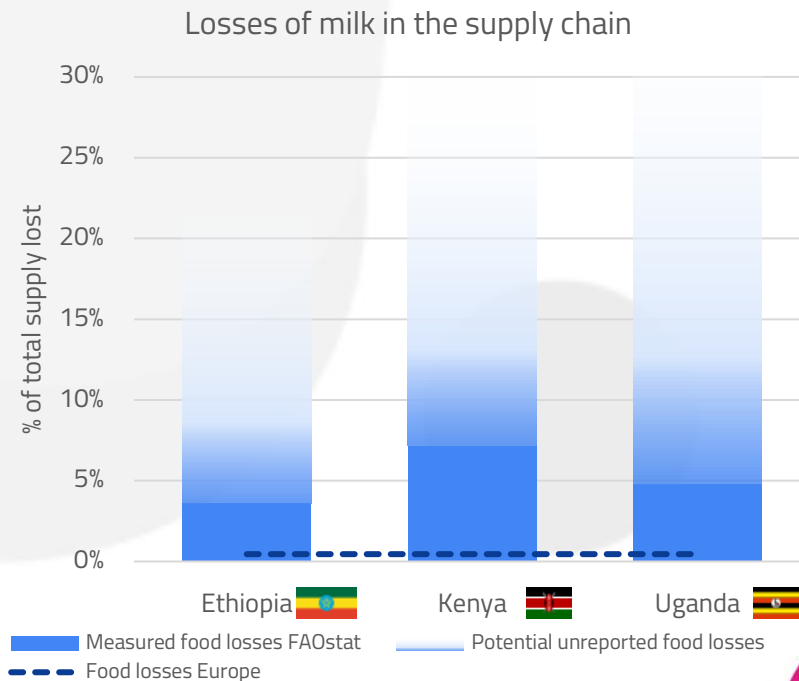


Thematic priorities: milk losses

Milk losses in the supply chain are significant, largely driven by spillage and spoilage.

- Measured milk losses reported in FAOstat range from 3-7% across East Africa, compared to 0.5% in Europe.
- While methodology is not always comparable, stakeholders and other research indicate much higher losses, including missed production due to animal health, value losses from forced farm-level consumption, and additional losses at various level of the distribution chain. Potential total losses range up to 20-40% depending on source.
- Total losses are influenced by quality assurance (rejections), spillage and spoilage due to lack of milk storage or cold chain solutions, and a mismatch between supply and demand seasonality.
- In **Ethiopia**, with the less formalized market, losses appear lower than in **Kenya** and **Uganda**. This could be explained by a more communal consumption pattern (farmers supply directly to their communities), but the lower level of formalization may also imply there is less visibility of data.

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Summary: food systems outcomes

Large differences in food systems outcomes between the three countries.

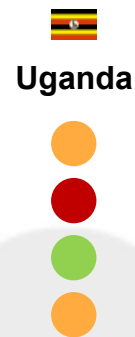
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In **Ethiopia**, with a much less formalized value chain and market, challenges include farmer livelihoods, lack of nutrition and food security, and heavy climate impact.



Kenya, with a history in dairy production and consumption, largely meets current socio-economic, nutrition and food security outcomes, but needs to develop production to meet future demand and control quality and food safety.

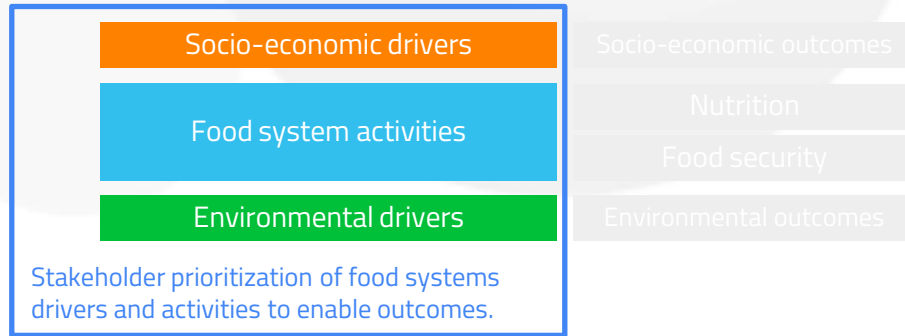


Uganda, currently mostly export focused, is tapping into a socio-economic opportunity, but is not meeting local nutrition target and has a negative climate impact.



Thematic priorities

Food systems drivers and activities



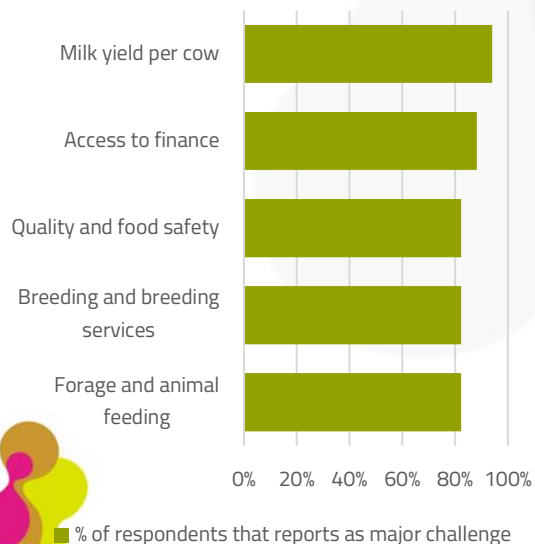
Thematic priorities

Stakeholder priorities vary from production systems to fixing socio-economic drivers.

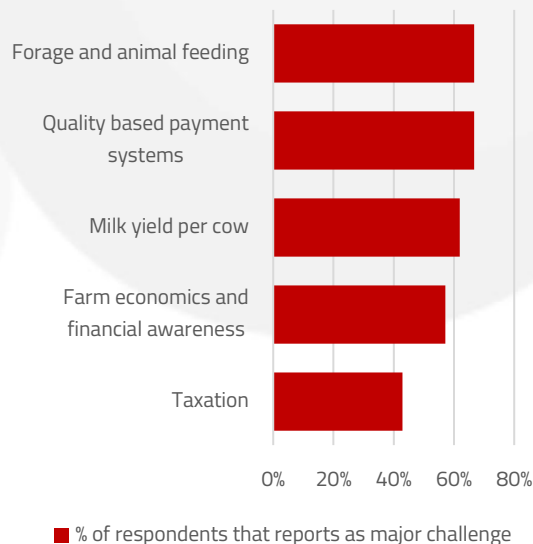
- Stakeholder input was collected ranking activities and issues on a scale from *major challenges* to *works well*.
- Top priorities are listed based on the % of respondents that reports each issue as a major challenge.

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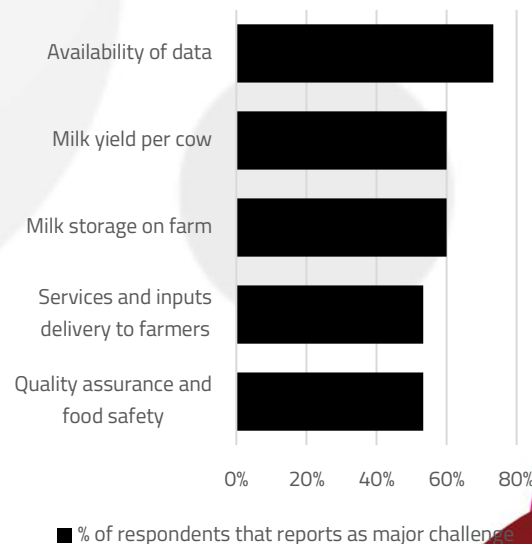
Top 5 challenges reported in **Ethiopia**



Top 5 challenges reported in **Kenya**



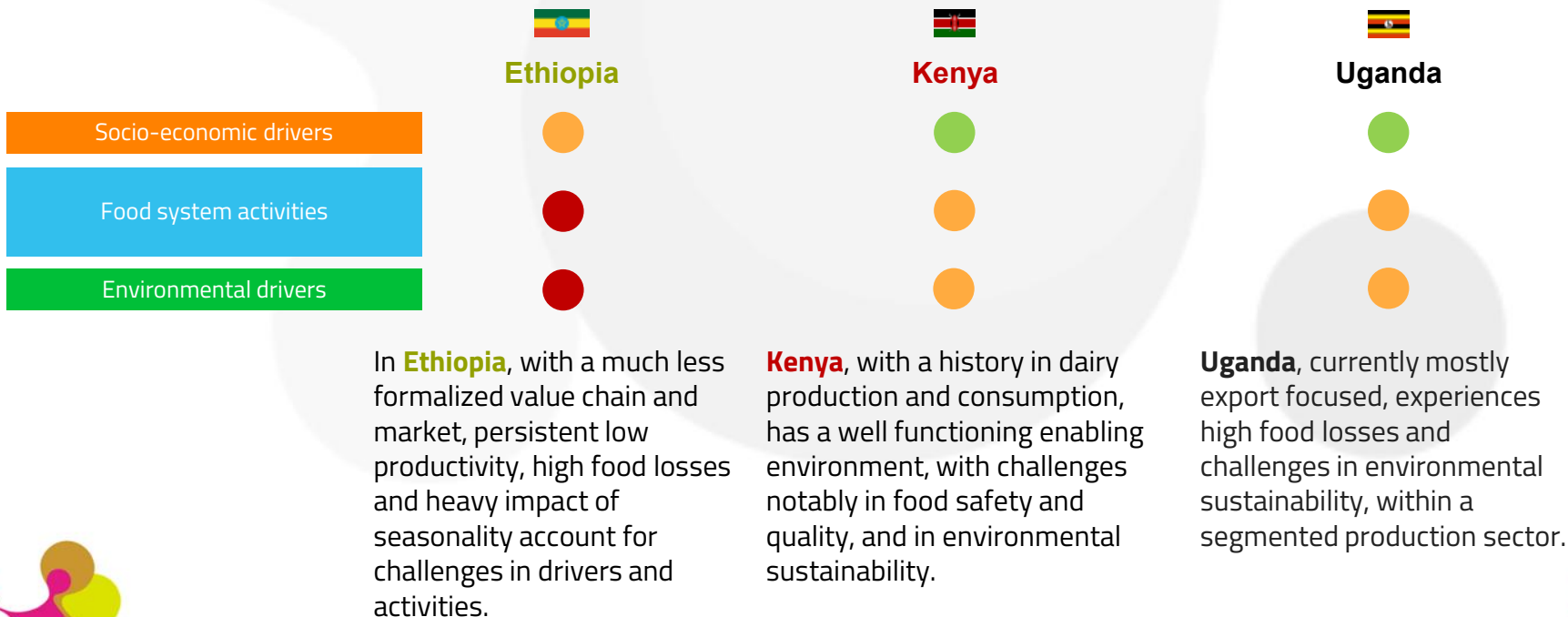
Top 5 challenges reported in **Uganda**



Summary: drivers and activities

Large differences in food systems drivers and activities between the three countries.

Socio-economic drivers	Socio-economic outcomes
Food system activities	Nutrition
	Food security
Environmental drivers	Environmental outcomes



Dairy Food Systems Partnership (DairyFSP)



DairyFSP: mission and vision

A learning community of practice and a coalition for tangible impact.



Mission

- Link sustainable development to business opportunities to drive measurable, long-lasting impact

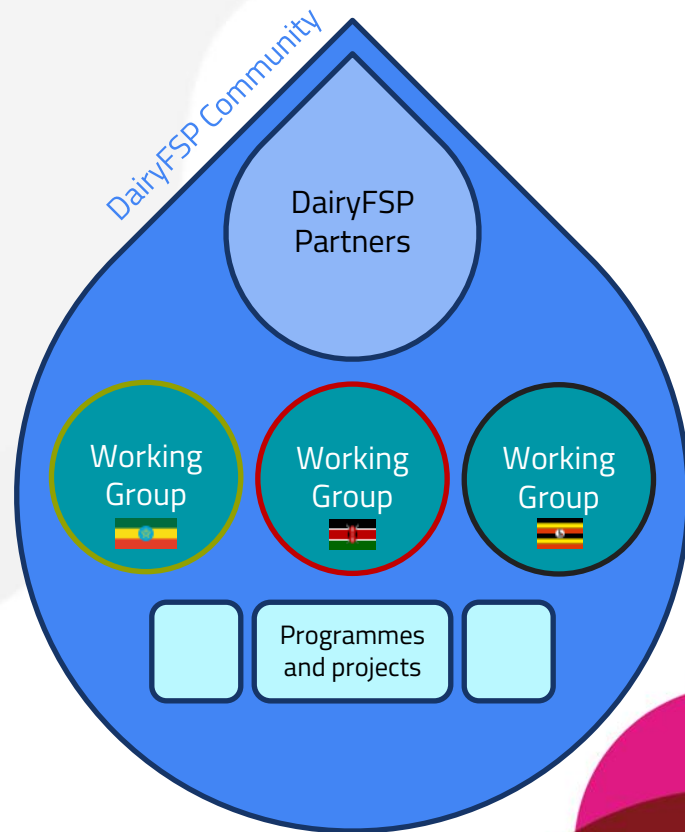
Vision

- Cultivate **collaboration** between public and private sector, civil society and knowledge institutes
- Establish strong alliances with country partners and international coalitions to maximize impact
- Activate the right partners towards a shared goal working on a **shared agenda**
- Operates across disciplines, countries, stakeholders and projects to accelerate scale-up growth
- **Builds on existing programs** and investments to drive innovation and create added value
- **Keep it simple** and get the basics right as a first step
- Mobilize shared insights to learn and grow together
- Optimize efficiency by utilizing an integrated mix of existing support and financial instruments

DairyFSP: governance and membership

Partners commit to active participation.

- Partners (10-12 members) form the core of DairyFSP and commit to:
 - Adherence to DairyFSP principles and code of conduct (tbc)
 - Active participation in quarterly global sounding board
 - In kind or in cash contributions to sector transformation through working groups or programmes
 - A representative mix of stakeholders from private sector (4-5), public sector (2), knowledge institutes (2) and civil society (2-3)
 - Affiliate partners may be invited for specific topics
- Country Working Groups will be formed:
 - Including global partners and key local stakeholders
 - To coordinate dependencies between programmes and projects
 - To share learnings and networks
- A wider community of dairy stakeholders and actors:
 - Includes all organizations and individuals that sign up
 - Will be informed through NFPCconnects and a mailing list
 - Can be invited to ad hoc meetings and collaborations





Next steps

Bringing the partnership to life!

- Presented at World Food Day 2026 in The Netherlands.
- Shaping the partnership with willing partners.
- Meetings to be held in Ethiopia, Kenya and Uganda in Q4/2026 and Q1/2027.





Breakout

**What should be the first milestone
in the next 6-12 months
of the partnership?**



DairyFSP

Join the community

Contact:

Ingrid Korving

ikorving@nlfoodpartnership.com

LEARN MORE



Dairy Food Systems Partnership

Co-create. Resilience. Impact



Join the community





Thank you!

Transforming food systems together