

Assessing sustainability and resilience of three dairy value chains in Southern Mediterranean countries

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The challenges faced by dairy value chains in Southern Mediterranean countries are multi-faceted. The identification of possible solutions requires a holistic analysis, including environmental, economic, social and institutional aspects. This study is a preliminary analysis of the challenges faced in three case studies in Morocco (Kenitra), Turkey (Marmara) and Egypt (Giza). The analysis considers the point of view of (i) local experts, (ii) international experts and stakeholders, (iii) local stakeholders, addressing (i) with structured interviews, (ii) with a roundtable, (iii) with focus groups with local stakeholders. Identified challenges spanned all parts of the dairy value chains and were common to the three studies or specific to some of them. Feed provision is subject to droughts affecting provision quantity and timing, it is subject to currency fluctuation where coming from abroad. Farmers' challenges include limited access to resources, education, veterinary cares, markets; low negotiation power; gender inequality; poor knowledge about animal welfare practices; cattle diseases. Transportation faces challenges such as inadequate storage facilities and long transportation distance. The three case studies pointed out the existence of a formal and informal dairy value chain. Informal value chains involve direct selling to transporters with high negotiation power and sometimes involved in fraudulent practices. The inaccessibility by farmers to milk collection centres favours informal markets with prices often unfavourable. Policy challenges were also identified, such as policy schemes changing too often and unfavourable choices about import/exports. On the consumer side, a challenge is the perception that fresh milk from the informal market is safer than from the formal value chain. This analysis constitutes a basis for further discussion about possible strategies at the systemic or at the local level and further activities in the SUPREM-MILK project.