

AFRICAN UNION
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FOR ANIMAL RESOURCES

Sustainable Solutions for Dairy Growth:

Unlocking the Potential of Feed and Fodder in Africa

Summary

The Resilient African Feed and Fodder Systems (RAFFS) Project conducted an extensive assessment of the feed and fodder sectors across six African countries: Kenya, Nigeria, Zimbabwe, Uganda, Cameroon, and Somalia. The evaluation focused on three key dimensions: Baseline Vulnerability, Crisis Impact, and Operational Resilience, using a structured scoring framework to assess sectoral weaknesses, ongoing challenges, and resilience levels.

Findings indicate significant variations in sector development and crisis response capabilities across the countries. Zimbabwe scored the highest, classified as emerging, while the other five countries were categorized as unstructured, highlighting major deficiencies in industry coordination, data ecosystems, investment, and policy frameworks. The feed and fodder crisis is exacerbated by climate change, economic instability, and political conflicts, leading to supply shortages, high costs, and weak institutional responses. A key takeaway from the assessment is the need for improved data analytics, policy harmonization, strategic investments, and multi-stakeholder coordination to strengthen resilience in the sector.

Country-Specific Analysis

Kenya

Kenya has one of the more structured feed industries, particularly in the concentrates sub-sector, with active industry groups such as the Association of Kenya Feed Manufacturers (AKEFEMA) and the Fodder and Pasture Society of Kenya. However, the sector remains largely informal, and challenges persist with feed balance gaps, high post-harvest losses (46%), and fragmented data systems. The country experiences a 60% feed deficit, largely attributed to a growing livestock population outpacing fodder productivity. Kenya has an estimated annual demand for 10 million metric tons of feed, while local production only meets 4 million metric tons, creating a deficit of 6 million metric tons. While investments in feed financing and insurance schemes are increasing, they remain high-risk and underdeveloped. Kenya's crisis is driven by prolonged droughts, which have resulted in livestock losses, income reduction, and market disruptions. Policy efforts exist, but implementation is ad hoc and inconsistent.

Nigeria

Nigeria's feed industry is highly fragmented and still in its developmental phase, with significant regional disparities affecting access and availability. The sector faces major challenges due to weak industry articulation, poor feed balance mechanisms, and a lack of centralized data systems. The country has an annual demand of 8.5 million metric tons of feed, but only 5.3 million metric tons are produced locally, leaving a deficit of 3.2 million metric tons. The feed crisis is primarily driven by farmer-herder conflicts, climate-related droughts, and economic volatility, leading to high production costs and market inefficiencies. Despite the existence of government-led initiatives like L-PRES and NLTP, investments remain limited. While some contracting occurs among private actors, formalized agreements are rare, making it difficult to ensure quality feed supply. Nigeria requires significant policy reforms, investment mobilization, and institutional coordination to advance the sector.



Zimbabwe

Zimbabwe's feed sector is comparatively structured, with over 21 medium-to-large feed manufacturers. However, feed balance data is inadequate, limiting industry planning and investment decisions. Unlike other assessed countries, Zimbabwe has active livestock feed policies, though implementation gaps exist. The country's eight-month-long dry season significantly impacts feed availability, necessitating greater investment in fodder production and storage. The national feed requirement is estimated at 6.2 million metric tons annually, but only 3.8 million metric tons are produced, creating a deficit of 2.4 million metric tons. The primary crises affecting the sector include climate change-driven droughts and economic instability, with farmers struggling to access affordable inputs. Nonetheless, multi-stakeholder initiatives are emerging, supporting the growth of feed production capacity and resilience strategies.

Uganda

Uganda's feed sector is disorganized and poorly coordinated, with a lack of regulatory oversight and data aggregation mechanisms. The country has made some progress in developing a national feed balance, but industry players remain disjointed, and investments are low-risk averse. The sector has limited contractual engagement, and best practices are poorly adopted. Uganda's annual demand for feed is 5.6 million metric tons, but local production stands at 3.1 million metric tons, leading to a shortfall of 2.5 million metric tons. Uganda's crisis is largely driven by climate change, high feed costs, and supply chain inefficiencies, causing significant livestock productivity declines. Investment remains minimal, and coordination gaps persist, reducing the effectiveness of response interventions.

Cameroon

Cameroon's feed and fodder sector is underdeveloped, with low adoption of industry best practices and weak coordination between stakeholders. While both the government and private sector invest in feed production, these efforts remain small-scale and fragmented. The absence of standardized feed balance assessments and reliable data ecosystems exacerbates inefficiencies in the sector. The country's annual feed demand is estimated at 4.3 million metric tons, while only 2.5 million metric tons are produced, resulting in a deficit of 1.8 million metric tons. Cameroon's crisis impact is poorly understood, limiting the scope of intervention strategies. Policy and investment gaps need urgent attention to improve sector resilience and sustainability.

Somalia

Somalia's feed sector is one of the weakest, with minimal industry structure, investment, and regulatory frameworks. The country experiences severe feed shortages due to recurrent droughts, insecurity, and poor supply chain infrastructure. The industry remains informal, and feed balance assessments have been developed but not consolidated. The national feed demand is approximately 2.7 million metric tons annually, while local production meets only 1.2 million metric tons, leaving a deficit of 1.5 million metric tons. Data systems are almost non-existent, and coordination efforts among stakeholders are poorly executed. Given Somalia's fragile state, climate-resilient strategies, policy interventions, and investment mobilization are critical to stabilizing the sector.

Key Messages Emerging from the Analysis

i. ***Sector Fragmentation Hinders Growth –*** The lack of structured coordination across government, private sector, and farmer cooperatives weakens the feed and fodder ecosystem.

ii. ***Investment Gaps Are a Major Limitation –*** Across all countries, there is limited financial backing, making it difficult to scale solutions.

iii. ***Climate Change Is a Critical Risk Factor –*** Every country assessed faces significant feed production challenges due to weather-related disruptions.

iv. ***Policy and Regulation Need Strengthening –*** Existing policies are inconsistent or poorly implemented, requiring harmonization and enforcement.

v. ***Data is Key to Better Decision-Making –*** The absence of reliable data makes planning, investment, and intervention tracking difficult.



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