

AN OVERVIEW OF THE DAIRY SUB-SECTOR IN BOTSWANA



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Introduction

The commercial dairy industry is in its infancy though it started in the late 1970s.

- Dairy enterprises are categorized into small-scale, medium-scale and large-scale.
- National milk demand is about 65 million litres.
- Local production is 11% of the demand, indicating that 89% of liquid milk is imported.
- In 2020/21, the national dairy herd was estimated to be 3704 cattle while 1225 of these are milking COWS.
- Milk production per cow per day is 16 litres.



Introduction cont....

- Generally, national dairy herd has declined over time (Figure 1).
- On the other hand, the population of milking cows has remained constant over time (Figure 1).
- Imports of liquid milk are far greater than local milk production (Figure 2 and Table 1), indicating a business opportunity.

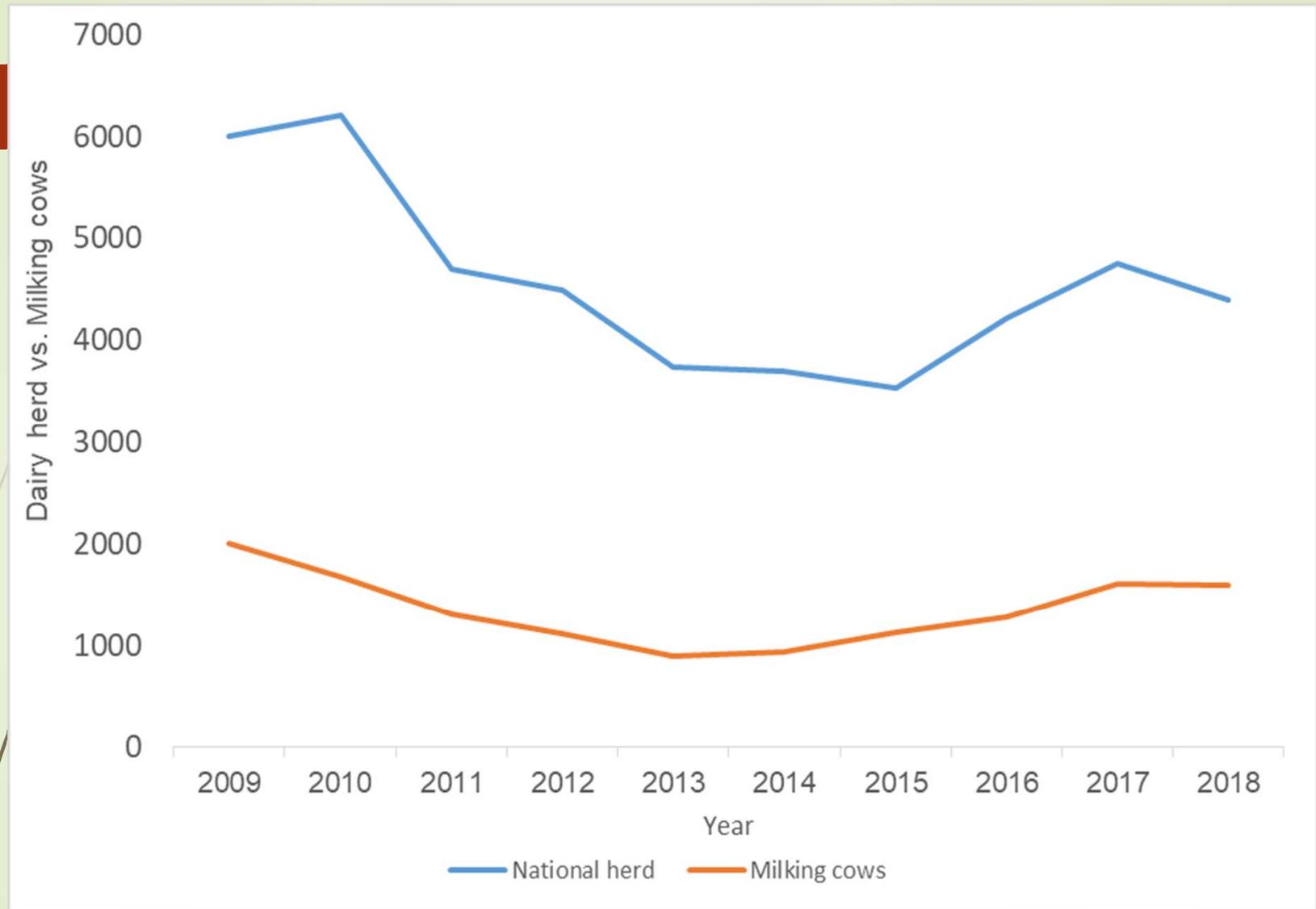


Figure 1: National dairy herd vs. milking cows

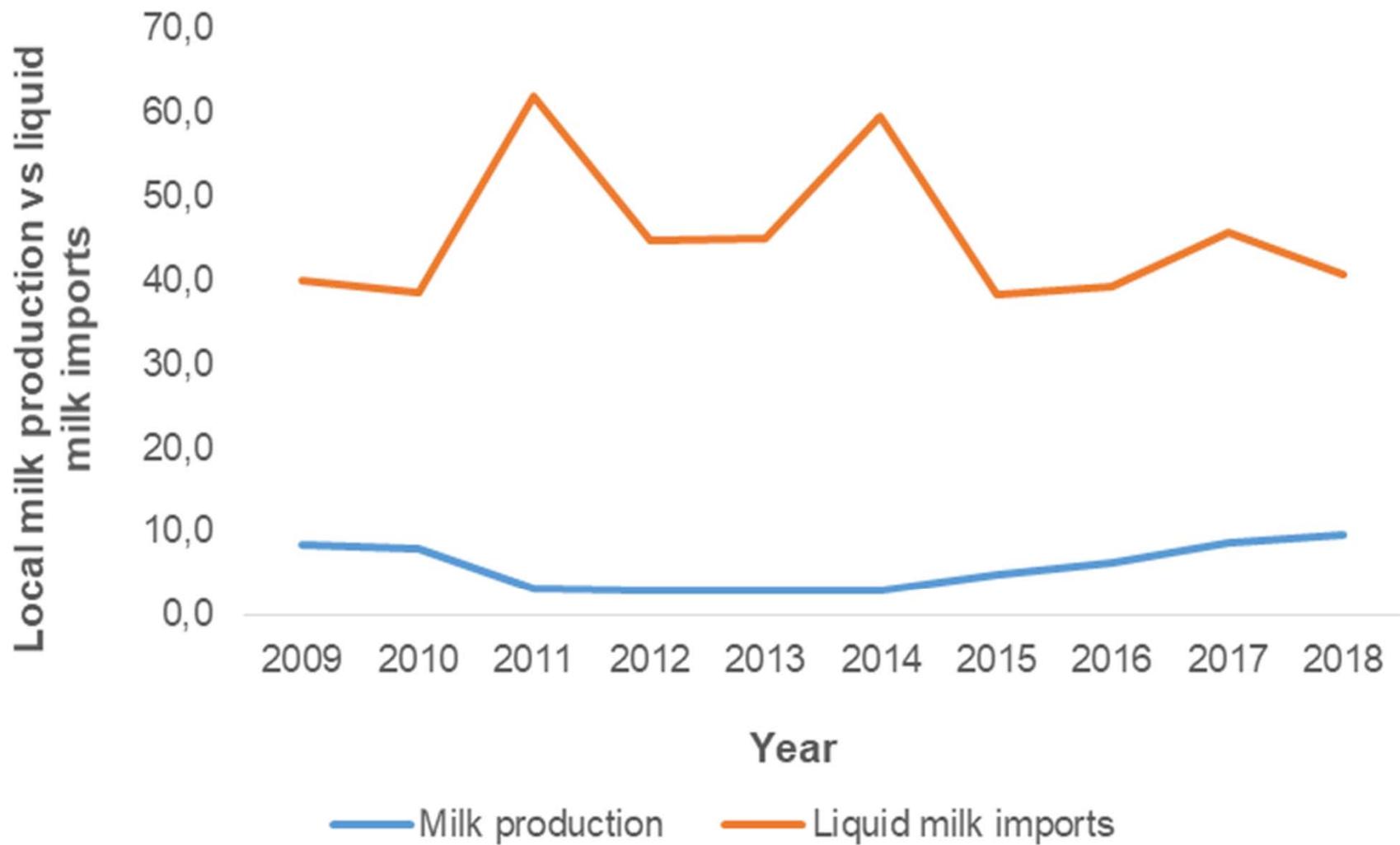


Figure 2: Local milk production vs. liquid milk imports



Year	Local Milk Production (L)	Milk imports (L)	Cost of milk Imports (Pula)
2818/19	9 582 986	40 538885	175 947 904
2019/20	8 083441	53 539 970	240 952 693
2020/21	7 164 944	53 842 182	244 748 318

Table 1: Local milk production vs. milk imports

Most of the milk imports are from South Africa



Introduction contd.

- Dairy breeds in Botswana:
 - Friesian*
 - Dairy Swiss*
 - Jersey*
 - Guernsey
 - Ayrshire
 - Shorthorn
 - Milking Simmental
 - **Crosses**

Main dairy cattle breeds in Botswana



Friesian



Jersey



Dairy Swiss



Guernsey



Major challenges

- Shortage of dairy cattle
- Recurrent droughts
- Outbreak of diseases, e.g., FMD
- Inadequate and expensive dairy feed
- Unskilled manpower
- Limited land for dairy farming
- Undeveloped value chain
- Lack of appropriate infrastructure



Dairy Strategy

The Strategy has eight (8) pillars:

- Develop a Well-Functioning Dairy Value Chain.
- Develop Strategic Dairy Farm Areas.
- Develop Strategic Fodder Production Zones.
- Appropriate Dairy Support Infrastructure.
- Increase the National Dairy Herd (Numbers And Breeds).



Dairy Strategy cont....

- Facilitate Market Access.
- Create an Enabling Environment for the Dairy Sub-sector.
- Promote Research and Development in the subsector.
- In addition, a Dairy Value Chain Study was conducted in 2015 to map out issues of production, processing, distribution and marketing.



Dairy Value Chain Study

Recommendations from the Study:

- Establish National Dairy Production and Marketing Organisation.
- Increase domestic consumption of processed dairy products.
- Promote processing and value addition to raw milk production.
- Promote commercial dairy farming.



Investment opportunities

- Milk production
- Heifer production
- Fodder and feed production and processing
- Milk processing (fresh milk ,UHT)
- Milk products (cheese ,butter ,yoghurt, sour milk ,cream etc.)

Conclusion

- Despite many challenges business opportunities are many.
- There is need to increase dairy national herd by employing assisted reproductive technologies such as embryo transfer, and artificial insemination and importation of cattle
- There must be a deliberate effort to produce fodder in large-scale.
- Research in dairy farming must be prioritized and intensified.
- Capacity building of extension staff and farmers be intensified.



THANK YOU