Project Diversify

A Data-Based Initiative to Identifying New and Emerging Opportunities for Diversifying U.S. Dairy Exports

Western Africa

IDFA
International Dairy Foods Association

Executive Summary

Over the past two decades, the U.S. dairy sector has evolved drastically. As milk production has steadily increased – up 32% between 2004-2024 – the growth of domestic dairy consumption has moderated slightly.[1] In turn, international markets are consistently purchasing a growing share of U.S. milk production. U.S. dairy exports have grown from under $1 billion in 2000 to nearly $10 billion annually today, primarily through cheese and ingredients. Exports now account for a meaningful and rising portion of U.S. dairy utilization, supporting farm income, processing capacity, and employment across the country.

At the same time, this export success has come with increasing market concentration. Due to geographical proximity, interrelated supply chains, convenience, and market clearing effects, the United States has become heavily reliant on a small number of foreign destinations—most notably China, Canada, and Mexico—which together account for approximately 46% of total U.S. dairy export value and 49% by volume. With the addition of Japan and South Korea, that concentration of total U.S. dairy exports jumps to 58% by value or volume. With nearly 20% of U.S. milk eventually being exported, that means nearly 12% of all U.S. milk finds a home in just five foreign countries.

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[1]https://www.ers.usda.gov/amber-waves/2026/february/fewer-farms-more-milk-the-changing-structure-and-costs-of-us-dairy-farming

Executive Summary

Based on these figures and trends, U.S. dairy's underlying lesson can and must be that global market diversification should be a cornerstone of the industry's long-term export strategy.

Enter **IDFA's Project Diversify**, an initiative designed to consider potentially underexamined export regions using data-backed metrics, proprietary formulas, and policy and market analyses. The goal is to provide a fresh look at global markets that may have been overlooked by U.S. dairy exporters. In the first report of this ongoing series, IDFA applies this framework to **Western Africa**, using specific methodology to evaluate markets based on stability, demand, and growth as related to U.S. dairy exports. The findings identify **Nigeria, Senegal, and Côte d'Ivoire**, as the markets warranting further evaluation by the U.S. dairy industry.

The report concludes with recommendations for U.S. dairy exporters to consider when evaluating these markets. The findings are intended to support informed decision making and sector-wide discussion about how the U.S. dairy industry can build a more resilient, diversified global strategy in the years ahead.

U.S. dairy's underlying lesson can and must be that global market diversification should be a cornerstone of the industry's long-term export strategy

"As we've seen across U.S. agriculture, relying too heavily on a single major market can leave an industry vulnerable to economic, geopolitical, and supply chain disruptions. To support long-term resilience and growth, the U.S. dairy industry must expand and strengthen its global trade relationships and pursue a more diversified export strategy."

- Michael Dykes, D.V.M.
President and CEO, International Dairy Foods Association

IDFA's Methodology

The International Dairy Foods Association's methodology in creating this report was to survey available internationally recognized standards and metrics for a market's general stability, economic forecast, regulatory environment, dairy consumption, and import/export relationships – both quantitative and qualitative. These metrics included, but are not limited to:

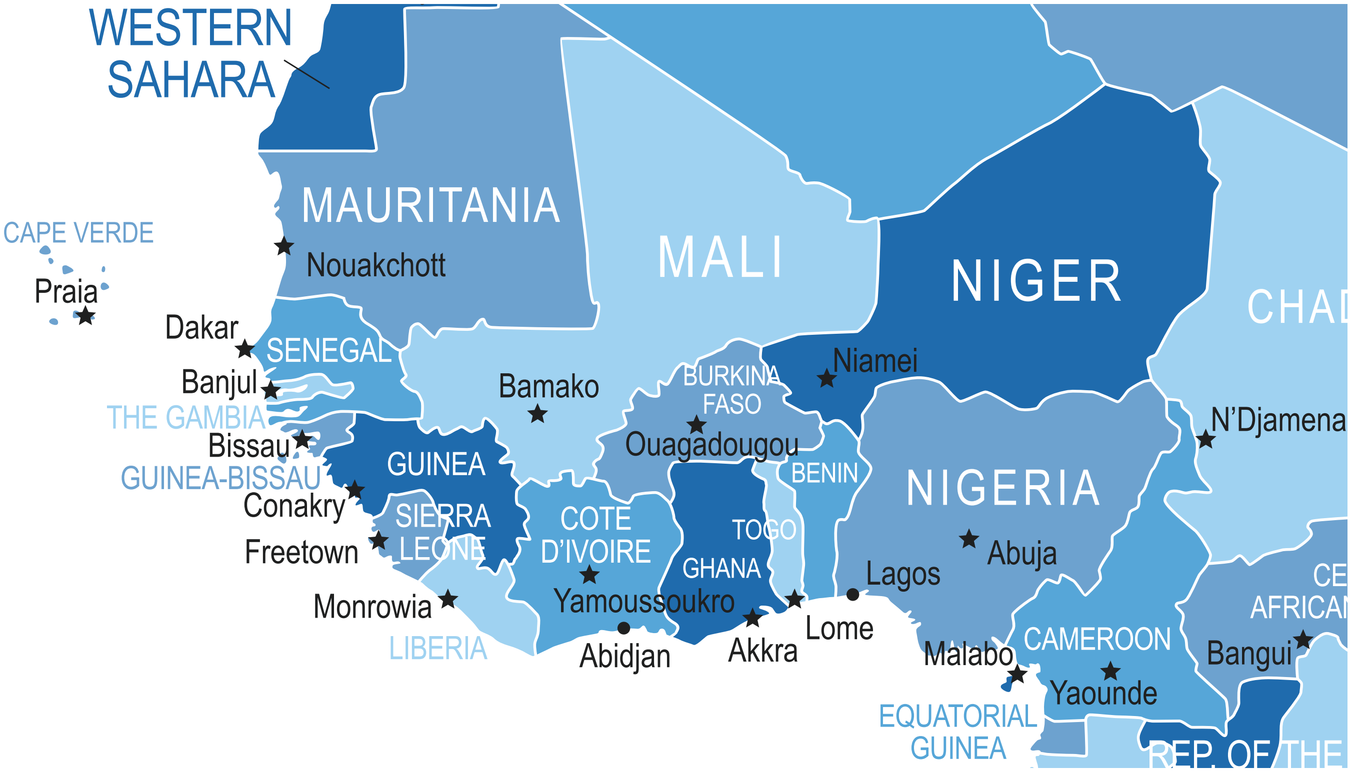
- calculations of a market's import dependence;
- market size and growth;
- economic stability;
- purchasing power; and
- dairy specific demand.

The metrics are compiled, weighted, and synthesized to generate a comparative view of export opportunities across individual markets within a region.

This first report focuses on western Africa as an initial region for evaluating export diversification opportunities. For the purposes of this report, "western Africa" includes all sixteen countries commonly cited as part of the region: Benin, Burkina Faso, Cabo Verde, Côte d'Ivoire, The Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone, and Togo.

Data is collected on a per-country basis, with corresponding values input for each metric. The values are assigned a "weight" to balance their relative importance for the calculation.

IDFA's Methodology



The collective value of these weighted metrics is used to illustrate the overall economic viability for an individual country as a potential trading partner for U.S. dairy. With this overall score for each country calculated, regional comparison is possible.

Background

The current export profile of U.S. dairy is a result of many factors. Free trade agreements such as the North American Free Trade Agreement (NAFTA, later the U.S.-Mexico-Canada Agreement, or USMCA) integrated dairy supply chains across North America, while China's rapid income growth and evolving diets drove substantial demand for imported dairy products and ingredients during the 2010s. These trends encouraged U.S. exporters to deepen commercial relationships in a limited number of high volume destinations.

But the experience of other U.S. agricultural sectors provides a cautionary tale. Heavy reliance on China as an export destination for soybeans, for example, left producers exposed when trade tensions sharply curtailed access to that market, resulting in significant export losses and price volatility.

While dairy's experience is not the same as U.S. soy, recent policy developments, geopolitical tensions, and shifting trade priorities underscore the vulnerability inherent in such dependence. In addition, China's explicit pursuit of greater self sufficiency in key food sectors—including dairy—has introduced structural uncertainty for exporters. Similar risks have surfaced in other concentrated markets, where regulatory changes, quota administration, or political dynamics can quickly disrupt trade.

Background

For the U.S. dairy industry, diversification must therefore focus on broadening the portfolio of export destinations to reduce exposure to shocks in any single market and to position the industry for durable growth. A diversified export base can enhance resilience by:

- Smoothing demand volatility when policy or economic disruptions occur in major markets
- Creating new growth pathways for a wider range of dairy products and ingredients
- Supporting longer term investment decisions in processing capacity and product innovation
- Strengthening the industry's negotiating position in trade and regulatory discussions

While IDFA's Project Diversify will ultimately evaluate a wider range of regions, this report engages in data-based analysis first of western Africa. Future reporting that similarly compares countries across multiple regions is planned as part of the Project Diversify series.

Findings

Against this backdrop, Africa overall, and particularly western Africa, presents a compelling, yet underexamined, opportunity set for U.S. dairy exporters. The region combines rapid population growth, expanding urban centers, and growing demand for affordable, nutritious food products with limited domestic dairy production capacity in many countries. In several markets, imports already play a central role in meeting consumer demand for dairy products and ingredients. When evaluating metrics across all countries in western Africa, three countries clearly rose to the top: Nigeria, Senegal, and Côte d'Ivoire.

Export Potential – Relative to Region		
Rank	**Country**	**Calculated Market Advantage Above Regional Average**
1	Nigeria	64.17%
2	Senegal	44.34%
3	Côte d'Ivoire	43.77%

Cumulatively, the average market potential of these three countries is approximately 71% stronger than all other countries in the western Africa region. The table of all countries' metrics across the region can be found in the Appendix while each of the top market opportunities is reported in greater detail below.

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Opportunity#1: Nigeria

Nigeria is the largest relative opportunity in western Africa for a range of reasons. Nigeria's population is larger than many regional neighbors, with more than 240 million people, and the country has maintained strong economic growth. It is also a reliable importer and a consistent buyer of other U.S. agricultural products. While certain data elements were unavailable when ranking Nigeria's metrics, IDFA assesses Nigeria's population size, coastal location, and high import rates as factors that keep it as a top contender for U.S. dairy export diversification in the region.[2] Put simply, Nigeria is an ocean-shipping accessible country with a rapidly growing population that must be fed.

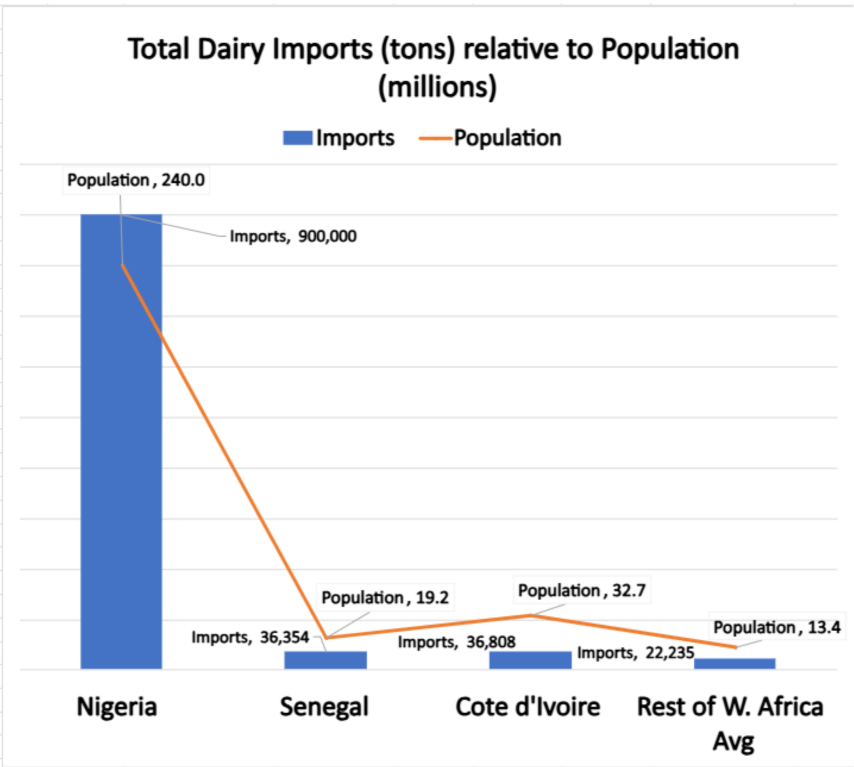
Based on IDFA's market analytics, the dairy export opportunities in Nigeria are 64% greater than the average western African market.

When considering dairy export opportunities, Nigeria has strong opportunities for milk, fat-filled, and whey powders in particular. In 2025, Nigeria reported spending over $1.5 billion on overall dairy-based imports by value.[3] In 2023, the U.S. accounted for only $2 million of the $568 million of dairy exports to Nigeria. Although this trend is slowly changing, U.S. dairy continues to face strong competition from EU and New Zealand competitors.[4] There is strong consumer demand for these dairy-based powders, a low (~5%) average tariff rate, and value-added tax (VAT)

[2]The "B Ready" indicator value for Nigeria was a proxy estimate based on the average of similar economies (due to inaccessible data).
[3]Vanguard News. June 2, 2025. https://www.vanguardngr.com/2025/06/nigeria-spends-over-1-5bn-annually-on-milk-imports-produces-only-700000-metric-tonnes-minister/
[4]U.S. International Trade Administration. Commercial Guide: Nigeria. https://www.trade.gov/country-commercial-guides/nigeria-agriculture-sector

Opportunity#1: Nigeria

exemptions on many dairy products. There is also strong consumer recognition of these powders, with industry experts noting the Nigerian consumer preference for lickable sticks or sachets of fat-filled milk powder sold individually by local street vendors. Such examples are in addition to other household uses, like reconstituted milk powder in cereals. Although not the wide product range other, more mature U.S. dairy export markets may boast, industry sources point to these practices creating important sources of Nigerian consumer protein and nutrition, while creating what may be the first experience of consuming dairy and building or maintaining a new generation of dairy consumers.[5]



These consumption habits are further supported by the Nigerian government, which is promoting expansion of the country's domestic dairy production through state-supported partnerships that use multinational processors from Europe and South Africa to process local milk alongside those processors' own imports of higher-value dairy ingredients (e.g. lactose, whey, powdered milk).[6] This results in a market that is perhaps not a traditional export market for U.S. dairy exporters, but which may provide opportunities for U.S. dairy exports by modeling others' methods of success in Nigeria: through governmental support, distributor partnerships, and/or by building facilities domestically to package powders locally. As seen in the chart above, Nigeria is the largest importer of dairy products (by volume) in western Africa.

[5]https://www.desmog.com/2025/07/14/ireland-mediocre-milk-powder-west-africa/
[6]Reference: https://dairynews.today/news/nigeria-aims-to-boost-local-dairy-production-to-cut-import-dependency.html.

Opportunity#1: Nigeria

Despite the positive opportunities and positioning of Nigeria, U.S. dairy interests evaluating the market should do so with clear vision as to the challenges that its technical barriers to trade and monetary policies create. Nigeria has a history of occasionally implementing foreign exchange restrictions that ultimately prohibited the importation of a variety of products in an effort to curb inflation, reduce import reliance, and bolster local production. Dairy was one such targeted product, with Nigeria prohibiting imports of dairy from 2020-2024 with the exception of products from six companies primarily based in Europe and Africa.[7] In addition, Nigeria's domestic currency is volatile, making Nigerian consumers highly price-sensitive and giving them unpredictable purchasing power.[8]

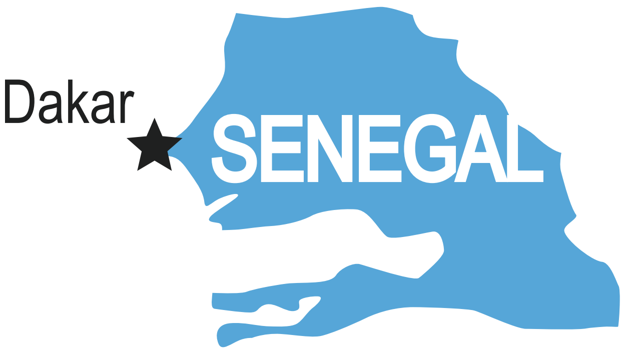
Even with these headwinds, the U.S. government actively supports U.S. businesses in Nigeria, the ongoing need for dairy imports in Nigeria rises, and the United States is recognized as a stable supplier of other agricultural staples like wheat. Overall, opportunities exist in the Nigerian market to maximize momentum and create new outlets for U.S. powders.[9]

[7]Reference: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Nigeria+Officially+Lifts+Foreign+Exchange+Dairy+Import+Restrictions_Lagos_Nigeria_NI2024-0003.pdf.

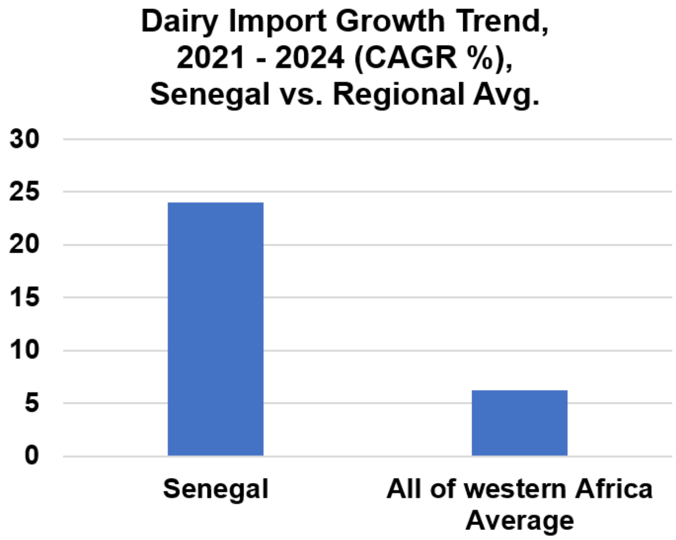
[8]Journal of Applied Statistics, academic article on "Exchange Rate Volatility in Nigeria: Consistency, Persistency & Severity Analyses on https://dc.cbn.gov.ng/cgi/viewcontent.cgi?article=1280&context=jas.

[9]https://dmarketforces.com/us-nigeria-sign-commercial-investment-partnership-to-deepen-trade-ties/

Opportunity#2: Senegal



Senegal is a comparatively smaller market with lower purchasing power and smaller population than many of its neighbors. However, the overall economic growth trends and favorable business environment qualify Senegal as the second-strongest market for U.S. dairy exporters. The Senegalese market is more favorable than the average country in western Africa by a margin of over 44%, barely edging out Côte d'Ivoire by 0.39%.



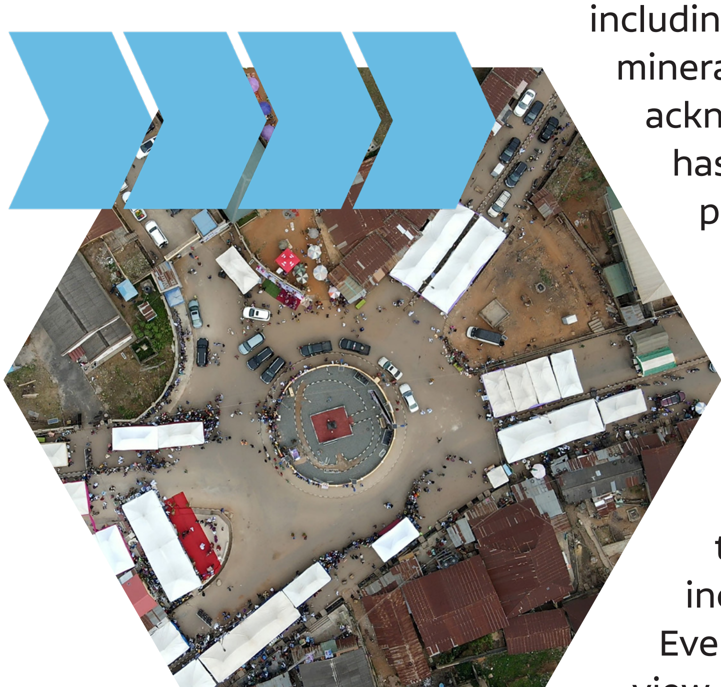
The annual gross domestic product (GDP) rate for Senegal grew by 6.7% in 2024 and 6.1% in 2025. A portion of the country's consistently strong growth over the past few decades is driven by the Senegalese hospitality sector and an increased presence of expatriates. These expatriates - many of whom are of the Senegalese diaspora and are based part-time in Europe - represent 4% of the country's population but reportedly contribute approximately 10% towards its GDP.[10,11] Despite Senegal's volume of imported dairy products being low, the economic growth and demand changes indicate potential opportunities for increased exports of U.S. dairy products.[12,13] This theory is bolstered by the recent trend (based on 2023- 2025 data, as available) of

[10]https://www.africanews.com/2026/04/03/senegal-the-diaspora-a-key-driver-of-the-economy-business-africa/
[11]https://www.abcexpat.com/market-focus-senegal/
[12]USDA FAS. Report on Growth Potential for U.S. Agricultural Products in Senegal. https://www.fas.usda.gov/sites/default/files/2024-08/Senegal-IATR-Final.pdf
[13]USDA FAS. 2025 Exporter Guide to Senegal. https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide%20Annual_Dakar_Senegal_SG2025-0013.pdf

Opportunity#2: Senegal

Senegal's comparatively high import growth of dairy products relative to the rest of western Africa, on average.

The country has been pursuing a comprehensive and aggressive economic development campaign by making foreign investment a cornerstone of the development strategy. Importantly, the monetary system is reported to be straightforward and reliable compared to many neighboring countries in western Africa.[14] Through business-friendly policies like establishing tax exemptions and other financial benefits in "The Special Economic Zones" of the country, Senegal has broadened investor interest. Notably, companies from the Gulf States, Asia, and North Africa are increasingly expanding their footprint in Senegal across sectors, including construction, manufacturing, critical minerals, and natural gas.[15] It is important to acknowledge, however, that recent reporting has questioned Senegal's debt management practices. The Senegalese government has disputed all accusations of a "debt crisis," but there is risk of negative sentiment potentially bleeding into the economic health of the country.[16]



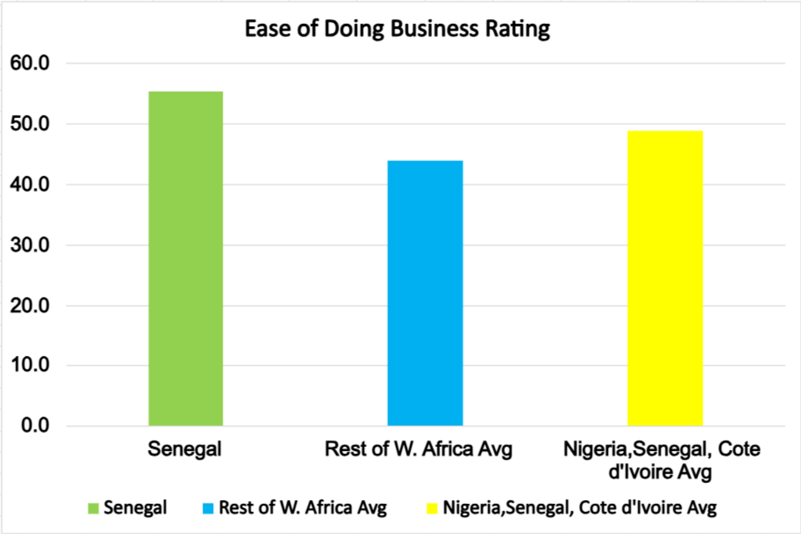
In restaurants and food retail stores in tourist and expat hubs like Dakar, there is increasing demand for dairy and snack foods. Even consumers with low purchasing power view dairy as a staple and will purchase multiple single-serve packets of whole milk powder daily, as long as the price is reasonable.

Consistent with regional practice, a trading relationship with European dairy companies – France, in particular – is long-established in Senegal. However, U.S.

[14]https://www.trade.gov/country-commercial-guides/senegal-investment-climate-statement
[15]https://www.trade.gov/country-commercial-guides/senegal-investment-climate-statement
[16]https://www.reuters.com/world/africa/senegal-says-debt-fully-transparent-aligned-with-imf-figures-2026-04-21/

Opportunity#2: Senegal

companies seeking to enter the Senegalese food retail market may be able to capitalize on the broad perception of American brands as luxury items. According to the U.S. Department of Agriculture (USDA), there is growing interest in non-European dairy products and U.S. snack foods in Senegal. To avoid sharp competition on inexpensive daily essentials (milk powders), U.S. dairy companies may find more success with price-sensitive consumers through leaning into luxury marketing and targeting premium retailers in Senegal.[17]



The Ease of Doing Business Rating in the above chart is based on the B-Ready Score. The B-READY Score is a comprehensive metric used by the World Bank to summarize the overall quality of the business environment of a country. It quantifies the efficiency of public services, regulatory frameworks, taxation practices, and other related standards.

Senegal does not maintain the same challenging political barriers or rigidity with import fees and sanitary barriers as many of its neighbors in western Africa. The ease of doing business in Senegal is reinforced by a superior "business ready" or "B-READY" score from the World Bank compared to both Nigeria and Côte d'Ivoire and the regional average in western Africa.[18] Like Côte d'Ivoire, Senegal also serves the important regional role as a transit hub for west African trade to flow through. A stable political environment and recent oil discovery reinforce the favorable trajectory predicted for Senegal's economy and dairy consumer base. Additionally, the CFA Franc, Senegal's currency, is used across eight western Africa countries and is pegged to the Euro at a fixed exchange rate, creating monetary stability.[19]

[17]USDA FAS. Senegal's Food and Beverage Marketing Landscape. https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Senegal%27s%20Food%20and%20Beverage%20Marketing%20Landscape_Dakar_Senegal_SG2024-0007.pdf

[18]*The B-READY Score is a comprehensive metric used by the World Bank to summarize the overall quality of the business environment of a country. It quantifies the efficiency of public services, regulatory frameworks, taxation practices, and other related standards. https://www.wbginstitute.org/topic/315/business-ready

[19]U.S. International Trade Administration (ITA), U.S. Department of Commerce. https://www.trade.gov/country-commercial-guides/senegal-investment-climate-statement

Opportunity#3: Côte d'Ivoire

Côte d'Ivoire's metrics place it third in the western Africa region, narrowly ranking behind Senegal. Côte d'Ivoire is uniquely situated for growth in dairy importation and processing due to its large coastline and advanced port infrastructure, as well as strong economic growth and stability indicators. Foreign direct investment into Côte d'Ivoire has dramatically increased over the past decade, increasing from 720 million in 2020 to 3.8 billion in 2024.[20] The Ivorian market uses its infrastructure and stability to serve as a central hub for the west African market and has a growing middle class that contributes to Côte d'Ivoire's potential as a dairy import market for the United States. In fact, in 2025, the U.S. Department of Agriculture named dairy products the top growth industry domestically and one of the top opportunities for U.S. exporters, noting that the country's general business operations and regulatory approaches are among the most sophisticated in the region (see table).[21]

Quick Facts CY 2024

Imports of Consumer-Oriented Products
($852 million)

List of Top 10 Growth Products in Host Country

1) Dairy products	2) Pork & pork products
3) Fresh vegetables	4) Wine, related products
5) Beef & beef prod.	6) Non-alcoholic bevs.
7) Food preparations	8) Processed vegetables
9) Eggs, egg products	10) Bakery, cereals, pasta

Food Industry by Channels (U.S. billion)

Retail Food Industry	$48.8 billion
Food Service-HRI	$1.4 billion
Food and Agriculture Exports	$9.8 billion

Top 10 Host Country Retailers (by sales)

1) Prosuma	6) Sangel
2) CDCI	7) Super U
3) Carrefour	8) Supeco
4) Auchan	9) Miniprix
5) Mata Holding	10) Monoprix

GDP/Population
Population *(millions)*: 29.9 (CIA, 2024 est.); 31.9 (NSI, 2025 projected)
GDP *(billions USD)*: $79.4
GDP per capita *(USD)*: $2,728

Sources: National Statistics Institute (NSI), Trade Data Monitor, Central Intelligence Agency (CIA), Industry Associations, market intelligence.

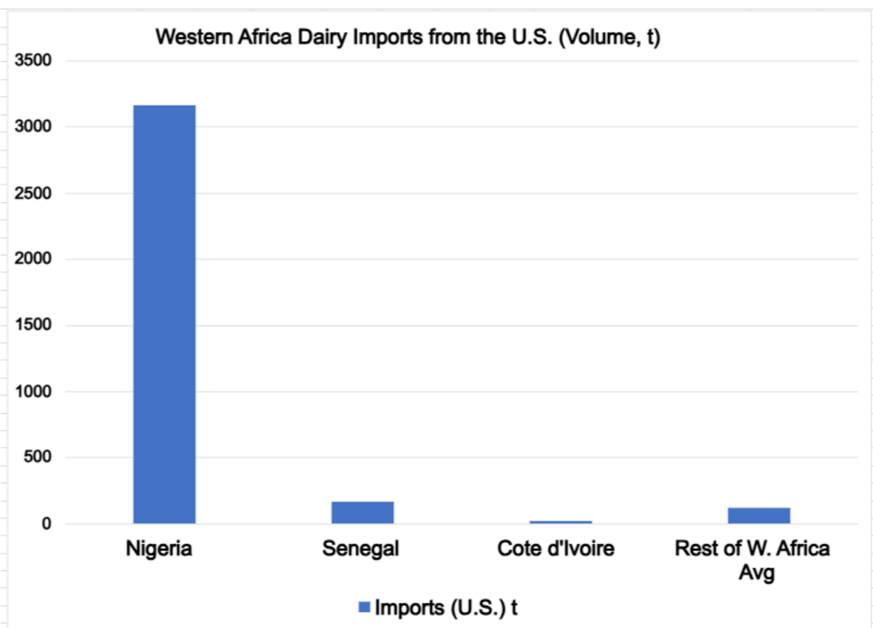
As of 2024, USDA reported that Côte d'Ivoire was dependent on imports for 83% of its dairy consumption, further underscoring the opportunity for growth.[22] USDA's reference

[20]https://www.africanews.com/2026/04/03/senegal-the-diaspora-a-key-driver-of-the-economy-business-africa/
[21]References: USDA GAIN Report on Côte d'Ivoire's Food Processing Sector. https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food%20Processing%20Ingredients%20Annual_Accra_Cote%20d%27Ivoire_IV2025-0005. USDA Gain Report on Côte d'Ivoire's Retail Food Sector. https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Retail%20Foods%20Annual_Accra_Cote%20d%27Ivoire_IV2025-0012.pdf.
[22]USDA FAS. Côte d'Ivoire Retail Foods Annual: 2024. https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Retail%20Foods%20Annual_Accra_Cote%20d%27Ivoire_IV2024-0009#:~:text=C%C3%B4te%20d'Ivoire%20is%2083,such%20as%20yogurt%20and%20puddings

Opportunity#3: Côte d'Ivoire

France is the top supplier of food ingredients to Cote D'Ivoire, holding 16% of the market. Meanwhile, the U.S. only accounts for 0.3% of the imported food ingredients in Cote D'Ivoire.

to dairy growth may be supported by Côte d'Ivoire hosting European-based multinational food processors, including canned and powdered milk processors. Most countries in western Africa receive butter from increasing regional production, but Côte d'Ivoire imports more butter and anhydrous milkfat from the EU–another demonstration of its willingness to liberalize and import dairy as needed.



Due to the colonial connections with France and francophone nations, Côte d'Ivoire can often be overlooked by both Ivoirian importers and U.S.-based exporters. France is the top supplier of food ingredients to Côte d'Ivoire, holding 16% of the market, with Spain and the Netherlands trailing at 8.5% and 7% market share, respectively. Meanwhile, the U.S. only accounts for 0.3% of the imported food ingredients in Côte d'Ivoire.[23] As depicted in the above graphic, Côte d'Ivoire is importing a negligible amount of dairy products from the U.S., less than Senegal and the average country in the region.

[23]https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Retail%20Foods%20Annual_Accra_Cote%20d%27Ivoire_IV2024-0009#:~:text=C%C3%B4te%20d'Ivoire%20is%2083,such%20as%20yogurt%20and%20puddings.

Opportunity#3: Côte d'Ivoire

Beverage bases comprise the bulk of France's food ingredient exports to Côte d'Ivoire, but EU companies also export a significant portion of fresh cream, powdered milk, condensed milk, and baking inputs. However, the Ivoirian government announced an ambitious policy to increase milk production by 35% by 2030.[24] The policy stipulates that half of the milk should be processed into higher-value dairy products like yogurt. To meet the Ivorian government's goal, the country's dairy industry will need to significantly scale domestic processing capacity. Reaching this scale will require access to large quantities of additives and ingredients for dairy products. Coupled with the drive to meet government mandates, changing consumer tastes are also compounding the increased demand for dairy ingredients in Côte d'Ivoire.

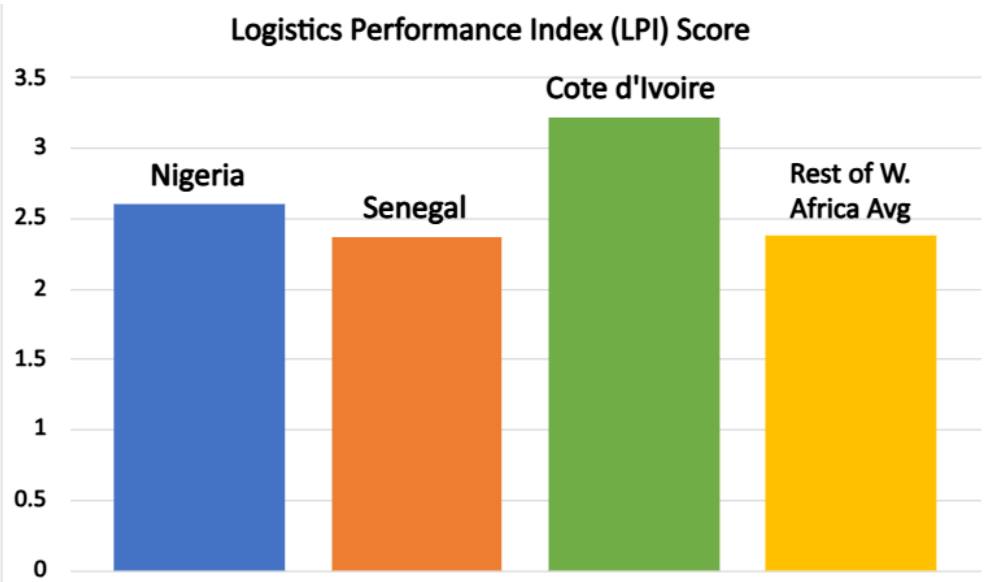
Ready-to-eat snack foods and confections featuring dairy ingredients represent potential for the quickly urbanizing economy and growing population of Côte d'Ivoire. Along with an increasing middle class, and the country's advanced and diversified processing capacity, the restaurant and service sectors are a natural entry point for U.S. exporters. More disposable income across the country has bolstered the popularity of Western style restaurants and U.S.-based fast-food establishments. The prevalence of food service has also contributed to an increased demand for prepared sauces, condiments, dressings, and seasonings. Packaged condiments and shelf-stable sauces represent a promising angle for U.S. exporters, both as luxury retail goods or as supply for food service establishments.

Côte d'Ivoire is investing billions of dollars in port and rail expansions aimed at continuing its trajectory as a growing commercial hub for Western Africa.

[24]https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Cote%20d%27Ivoire%20Designates%20the%20United%20States%20as%20the%20SELAB%202026%20Country-of-Honor%20_Accra_Cote%20d%27Ivoire_IV2024-0016

Opportunity#3: Côte d'Ivoire

Another key advantage that Côte d'Ivoire maintains over both Senegal, Nigeria, and all other countries in western Africa is a lower average tariff rate on dairy products. Specifically, Côte d'Ivoire's average tariff rate is 20% instead of the 35% rate average maintained by western African contemporaries.[25] Both Côte d'Ivoire and Senegal maintain additional import fees and high VAT rates of 18% which can be prohibitive, especially for U.S. exporters who have higher shipping costs than European competitors due to regional proximity.[26]



However, compared to Nigeria, Côte d'Ivoire's non-tariff barriers appear to be minimal for U.S. dairy imports. The Ivorian regulatory landscape and import procedures are broadly recognized as comparably efficient for the region. As captured through the World Bank's Logistics Performance Index (LPI), Côte d'Ivoire has comparably advanced trade logistics, including navigable customs clearance procedures and timely transportation standards.

Côte d'Ivoire is building on this status through investing billions of dollars in port and rail expansions aimed at continuing its trajectory as a growing commercial hub for western Africa.[27] Côte d'Ivoire officials are also actively engaged in a formal dialogue with U.S. officials aimed at increasing U.S. business relationships with the market.[28]

[25]https://export.customsinfo.com/Default.aspx
[26]https://export.customsinfo.com/
[27]Reference: https://www.trade.gov/cote-divoire.
[28]Reference: https://ci.usembassy.gov/senior-bureau-official-fitrell-highlights-u-s-commitment-to-stronger-commercial-ties-with-africa-during-visit-to-cote-divoire/.

Concluding Recommendations and IDFA Actions

Commitment to diversification in some of the least-considered regions will require U.S. dairy exporters to adopt a strategic long-term growth mindset that evaluates previously under-considered factors such as population growth rates, average age of consumers in a market, etc. For instance, where the United States currently dominates as a dairy supplier to Mexico, exporters must begin to imagine the wealth of opportunities that could await if efforts were focused on countries with burgeoning populations yet unexplored or tourism destinations untapped for U.S. goods. Early integration in these markets may prove transformative in the long-term for stability, longevity, and brand recognition across future massive generations of rising middle-class consumers. Similarly, U.S. dairy exporters may need to consider product offerings differently to reach these markets, such as the Nigerian example of single-serve sachets of fat-filled milk powder blends. By redesigning U.S. dairy around more unique and domestically appealing products, gateways to create whole societies of dairy consumers may open, whose dairy consumption grows as their economy does.

Concluding Recommendations and IDFA Actions

While only U.S. shippers can ultimately diversify their exports across the markets in question, IDFA recognizes the role we must also play in encouraging the diversification discussion. IDFA therefore commits to:

- Developing a dairy-specific online database that exporters can use to search opportunities by region, market, or product;
- Engaging with the U.S. government on opportunities to facilitate U.S. dairy product exports to these markets;
- Facilitating deep-dive discussions on the top market(s) per region with embassy officials for IDFA member companies; and
- Engaging in a feedback loop with IDFA member companies with market intelligence and insights on these and other emerging markets worth discussing.

As IDFA members engage with us on this and future Project Diversify reporting, IDFA will update and adjust these recommendations to remain evergreen and effective in the globally changing landscape.

Contact our team at trade@idfa.org with any questions.

Project Diversify

Western Africa

The International Dairy Foods Association (IDFA), Washington, D.C., represents the nation's dairy manufacturing and marketing industry, which supports more than 3.05 million jobs that generate $52 billion in direct wages and $779.45 billion in overall economic impact.

IDFA's diverse membership ranges from multinational organizations to single-plant companies, from dairy companies and cooperatives to food retailers and suppliers, all on the cutting edge of innovation and sustainable business practices. Together, they represent most of the milk, cheese, ice cream, yogurt and cultured products, and dairy ingredients produced and marketed in the United States and sold throughout the world.

Delicious, safe and nutritious, dairy foods offer unparalleled health and consumer benefits to people of all ages.

IDFA
International Dairy Foods Association

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