



COUNTRY FACT SHEET ON FOOD AND AGRICULTURE POLICY TRENDS

Socio-economic context and role of agriculture

The Republic of Senegal is a lower middle income country located on the coast of West Africa with an agriculture sector accounting for 17.5 percent of the GDP. Although the contribution of agriculture to the economy is lower than the average in sub-Saharan Africa (24 percent), the sector remained the primary means of livelihood for 69 percent of the workforce in 2013. Senegalese farmers mainly grow sugarcane, groundnuts and cotton as primary cash crops. The rest of the production is dominated by subsistence crops, especially cereals: rice, millet, sorghum and maize.¹

Senegal has experienced slow economic growth rates since 2006 compared to other sub-Saharan African countries. The economic slowdown is in part attributed to a decline of traditional economic drivers (construction and services), the persistence of a current account deficit in the balance of payments and insufficient levels of productivity of the agriculture sector.² Regarding agriculture, the sector has been facing major challenges that have weakened its proper development. These include poor access to water, only 1.3 percent of agricultural land equipped for irrigation, and vulnerability

Selected indicators		2007	2009	2011	2013
SOCIO-ECONOMIC	GDP (current billion US\$) *	11.3	12.8	14.4	14.8
	GDP per capita (US\$) *	947.9	1 018	1 083.3	1 046.6
	Agricultural value added (% of GDP) *	13.8	17.3	15.7	17.5
	Agricultural value added (annual % growth) *	(average 2007-2013)		4.3	
	(2013)		2.5		
	Total population (thousand)	11 905	12 587	13 331	14 133
	Rural population (% of total)	58.5	58	57.5	56.9
	Agricultural labour force (% of total labour force)	71.3	70.7	70	69
	Human Development Index **	(2013)		0.485 (ranking 163)	
	Per capita cultivated land (ha)	0.25	0.31	0.26	0.25 (2012)
AGRICULTURAL PRODUCTION & TRADE	Area equipped for irrigation (ha)	120 000 (2012)			
	Value of total agriculture production (constant gross value 2004-2006, billion US\$)	657	1 336	891	1 030 (2012)
	Value of cereals production (constant gross value 2004-2006, billion US\$)	206	608	366	483 (2012)
	Yield for cereals (hg/ha)	7 221	11 336	9 663	11 803
	Cereal import dependency ratio (%)	(2009-2011)		51.2	
	Top 3 commodities	Production quantity (2012) Production value (2012) Import quantity (2011) Import value (2011) Export quantity (2011) Export value (2011)			
		Sugar cane; Groundnuts with shell ;Millet Groundnuts with shell ; Rice paddy; Meat indigenous, cattle Wheat; Sugar refined; Onions, dry Wheat; Sugar refined; Food Prep, Flour, Malt extract Groundnut oil; Cake of groundnuts; Food Prep Nes Groundnut oil; Food Prep Nes: Cigarettes			
	Top 3 trade partners	Import value (2011) Export value (2011)		France, Côte d'Ivoire, Brazil Lebanon, Guinea, France	
	Top 3 commodities available for consumption (2011)	Rice (Milled Equivalent); Groundnut oil; Wheat and products			
FOOD SECURITY & NUTRITION	Per capita food supply (kcal/capita/day)	2 344	2 442	2 426	NA
	General (g) and Food (f) CPI (2000=100)	NA	99.2 (g), 99.5 (f) (2010)	102.2 (g), 103.6 (f)	105.3 (g), 107.6 (f)
	People undernourished (million)	(2008-2010) (2011-2013)		1.9 2.0	
	Proportion of undernourished (%)	(2008-2010) (2011-2013)		14.8 14.8	
	Prevalence of underweight children under 5 years of age (%)	NA	NA	19.2	14.4 (2012)
	Prevalence of stunting among children under 5 years of age (%)	NA	NA	28.7	15.5 (2012)
	Prevalence of wasting among children under 5 years of age (%)	NA	NA	9.8	8.7 (2012)
	Global Hunger Index ^	(2014)		13.8 (serious)	
	Access to improved water sources (% of population) *	71	72	73	74 (2012)

Source: FAOSTAT; *Source: WB; **Source: UNDP; ^ Source: IFPRI (accessed on 27 April 2015)

¹ www.new-ag.info/en/country/profile.php?a=530, accessed on 27/01/2015.

² République du Sénégal. Février 2014. Plan Sénégal Emergent (PSE). Available at : www.gouv.sn/Plan-Senegal-Emergent-PSE.html.

to climatic shocks, with high risks of drought and regular, severe flooding affecting urban areas. Inadequate access to land, low sustainability of fishery resources and poorly structured value chains also contribute to the challenges encountered. However, there have been signs of recovery since 2014: a strengthening domestic demand, an improved business climate and the launching of the Emerging Senegal Plan (PSE).

Senegal is experiencing a high population growth rate, close to three percent, while almost half of its population remained under

the national poverty line in 2011. The results of a national food security and nutrition survey conducted in 2013 showed that 2.2 million people, 15.5 percent of the population, are food insecure.³ In that regard, one of the biggest food security challenges in Senegal will be addressing the nation's high and growing dependence on food imports,⁴ even though important efforts are already being deployed to achieve rice self-sufficiency in the country.

1. Government objectives in agriculture, food and nutrition security

The government aims to make agriculture an engine of economic growth, as stated in the **Agro-Sylvo-Pastoral Orientation Law (LOASP)** voted in 2004, which constitutes the legal framework for the development of agriculture in Senegal for the next 20 years. The adoption of this law resulted in the formulation of several operational programmes such as the **National Agricultural Development Programme**, the **National Livestock Plan** and the **Grand Agricultural Offensive for Food and Abundance (GOANA)**.

The past ten years have been characterized by the succession of several important governmental economic and social policy strategies, the main ones being the two **Poverty Reduction Strategy Papers (DSRP I 2003-2005 and DSRP II 2006-2010)** and the **Economic and Social Policy Document (DPES 2011-2015)** replaced in November 2012 by the **National Strategy for Economic and Social Development (SNDES 2013-2017)**. In December 2013, the government launched the **Emerging Senegal Plan (PSE)**, an accelerated version of the SNDES, which, since enactment, has been the reference for economic and social policy in the medium and long term with the aim of making Senegal an emerging economy by 2035. All these governmental economic and social policy frameworks are structured around three main areas identified as priorities: (i) growth, productivity and wealth creation; (ii) human capital, social protection and sustainable development; and (iii) governance, institutions, peace and security.

In terms of growth, the **Accelerated Growth Strategy (SCA)**, adopted in 2008 and then included in the SNDES and the PSE,

aims to double GDP and GDP per capita in 10 and 15 years, respectively. In order to achieve this, high potential key economic clusters have been identified, including: livestock, agriculture and agroindustry (cereals, horticulture, oleaginous and products from wild harvest), fish and aquaculture products.

The **Accelerated Programme for Agriculture in Senegal (PRACAS)**, the agricultural component of the PSE, was launched in February 2014. It is built around the vision of a competitive, diversified and sustainable agriculture sector that would be the major source of economic development by 2017. This programme aligns with the previous agriculture development programmes, being a reformulation of all of them and thus maintaining continuity. The government decided, as an initial step, to focus its investments on strategic products with the objectives of achieving rice and onion self-sufficiency by 2017 and 2016, respectively, optimizing the performance of the groundnut sector and developing the off-season fruits and vegetables sector. The programme will then progressively cover all main agricultural commodities.

Within the context of the agricultural policy of the Economic Community of West African States (ECOWAS) and the Comprehensive Africa Agriculture Development Programme (CAADP), Senegal has elaborated its **National Agricultural Investment Programme (PNIA)⁵** and related **Investment Plan** for the 2011-2015 period. The IP focuses on eight specific objectives, among which the increase of inputs production and productivity; the enhancement of agricultural products value through further processing; and the improvement of market access for agricultural products.

2. Trends in key policy decisions (2007 to 2014)

2.1 Producer-oriented policy decisions

As already mentioned, the Senegalese producers and the agriculture sector in general are confronted with a number of challenges that must be addressed by public authorities. Since the 2007-2008

food price crisis, the government has been implementing important measures to support production and the main focuses have been the improvement of risk management and the increase of domestic rice production. Other important matters have received

³ www.wfp.org/countries/senegal/overview, accessed on 16/04/2015.

⁴ www.fao.org/giews/countrybrief/country.jsp?code=SEN&lang=fr, accessed on 16/04/2015.

⁵ <http://agric.comm.ecowas.int/ECOWAP/Plans-Nationaux-d-Investissement/?lang=en>, accessed on 22/01/2015.

less attention such as fisheries management and the poor structuring of value-chains. As for the land policy, identified by the LOASP as a priority for agricultural development and modernization, the document should be completed by the end of 2015.

Promoting national rice production

Achieving rice self-sufficiency has been on the governmental agenda since the 2007-2008 food security crisis highlighted the country's increased vulnerability to external food price shocks. In January 2008, the inter-ministerial council presented the **National Programme for Self-Sufficiency in Rice (PNAR)**, proposing to increase white rice production from 350 000 tonnes in 2008 to one million tonnes in 2012.⁶ Rice self-sufficiency is considered by the government as a driver for food sovereignty, economic growth, employment and reduction of the trade deficit, as domestic production only covered 20 percent of the national annual needs in 2008. In 2010, the PNAR was officially launched as the implementation instrument of the **National Strategy for the Development of Rice growing (SNDR)**. The objectives of the SNDR are to promote and increase the national rice production while meeting the consumer demand with competitive prices. Strategies for development include: increasing cultivated areas, modernising the means and methods of production, and professionalizing the value chain actors. The SNDR also includes support measures to maintain producers' profit margins, including input subsidies and facilitation of access to credit. However, with only 423 482 tonnes of paddy rice nationally produced in 2013, the government is still far from the objective. This is why the PRACAS has reiterated the intention to achieve rice self-sufficiency in Senegal, by 2017 this time.

Increased investments in flood and water management

Since the DSRP II (2006-2010), risks and disasters prevention and management have become governmental priorities and growing attention has been dedicated toward flood management, especially after the recent severe floods in 2005, 2009 and 2012. This has led the government to launch a **Ten-Year Flood Management Plan (PDGI 2012-2022)** and to establish a ministerial department for the restructuration and planning of flood risk areas. In 2013, the **Storm water Management and Climate Change Adaptation Project**, focused on the region of Dakar, was launched in collaboration with the World Bank. A Flood Prevention and Management Unit was also created with the objectives of preventing floods, reducing risk and developing adequate pipes and drainage systems. At the same time, rainfall has been decreasing, leading the government to validate the **Integrated Water Resources Management Action Plan**



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With an annual consumption of 74kg per head, Senegal is among the largest consumers of rice in West Africa. To cover the needs of the population and reduce the trade deficit, the government is willing to increase the national production to achieve rice self-sufficiency by 2017.

(PAGIRE) in 2007. The integrated water resources management aims to improve the efficient use of water resources and establish a balance between ecosystems preservation and water needs for agriculture and industry. The **Local Small Scale Irrigation Support Project (PAPIL)**, launched in 2006 with the financial support of the African Development Bank, has also produced encouraging results that have led the government to develop a National Small Scale Irrigation Development Plan.⁷

Agricultural insurance as risk mitigation instrument

In 2008, the **National Agricultural Insurance Company of Senegal (CNAAS)** was created as a public-private partnership between the Senegalese State and private partners with initial resources of FCFA 1.5 billion (US\$ 3.5 million). The CNAAS offers a wide range of subsidized insurance products for farmers such as: crop and livestock insurance, drought insurance for maize and groundnuts, insurance for artisanal fishing vessels, and rainfall shortage insurance for millet, sorghum, groundnut, cotton, maize and rice. As the first national agricultural insurance scheme, the CNAAS has faced a number of constraining factors in the development of its insurance portfolio including the cost of establishing rural networks, the affordability of products for low-income farmers, and the lack of risk market infrastructure such as livestock identification, training for intermediaries, and research and development of products. Actions have been taken to overcome these challenges, and partnerships and agreements have for instance been signed with microfinance institutions, farmers associations and development partners for technical assistance.⁸

Rebuilding seed stocks

In 2013, Senegal joined the **New Alliance for Food Security and Nutrition (NASAN)** that had been launched in 2012 during the G8 Summit. The NASAN replaced the **GOANA** launched

6 According to FAOSTAT (2014), rice production (paddy) only reached 630 654 tonnes in 2012 and decreased to 423 482 tonnes in 2013.

7 www.aps.sn/articles.php?id_article=136753, accessed on 02/02/2015.

8 DRFI Country Notes – Working Paper. November 2012. Senegal: Disaster Risk Management and Insurance Country Note. Available at: www.gfdrr.org/sites/gfdrr.org/files/DRFICountryNote_Senegal_Jan072013_Final.pdf

in 2008 in response to the food security crisis. The objectives of the NASAN include the improvement of the productivity and competitiveness of the agriculture sector in order to ensure food security. One of the actions to achieve this objective in Senegal is the implementation of a policy for rebuilding seed stocks.⁹ The government has since committed to allocate FCFA 5 billion (US\$ 10.3 million) annually toward seed programmes; its commitment was fulfilled in 2014 and 2015 Finance Laws.

2.2 Consumer-oriented policy decisions

The government has been putting considerable efforts in facilitating consumers' access to social services over the past years, hoping to develop strong human capital that will support economic growth. Beside achievements in reducing food insecurity and malnutrition and ambition to improve financial accessibility to quality health care, the government has taken various measures to improve household wellbeing and disposable income. Despite this, Senegal is unlikely to achieve the Millennium Development Goals (MDGs), especially in regard to primary school enrolment and poverty reduction. A principal constraint is access to electricity; the nation has one of the highest electricity production costs in Sub-Saharan Africa and a disparate coverage rate of 57 percent in urban areas and only 10 percent in rural areas.¹⁰

Achievements towards improved nutrition

For the past 15 years, nutrition has remained a major governmental issue and Senegal has achieved significant results, successfully becoming the first African country to be recognized by the International Food Policy Research Institute (IFPRI) in 2011 for its achievements in nutrition improvement.¹¹ This is largely due to the Coordination Unit for the fight against Malnutrition (CLM), created in 2001. The CLM has been responsible for the implementation of the **Nutrition Enhancement Programme (PRN)**, launched in 2002. The objectives of the PRN are to improve the nutritional status of children as well as pregnant and lactating women in poor rural and urban areas and to strengthen the organisational and institutional capacities of the country. The ten-year programme was originally designed for a three-phase implementation: (i) testing of new, effective and sustainable strategies for nutrition specifically targeting the rural areas (2002-2006), (ii) expanding the nutrition interventions within other regions of Senegal (2006-2010), and (iii) ensuring the integration of nutrition policy in sectorial and national programmes (2010-2012). The government has since decided to extend the programme and has committed to

increase its financial contribution to 50 percent by 2016 (from 34 percent in 2014), the rest being financed by external partners.¹²

Improving access to drinking water and sanitation

In 2005, the government established the **Drinking Water and Sanitation Millennium Programme (PEPAM)**. For the 2005-2015 period, the PEPAM constitutes the governmental framework for the interventions aimed at achieving the MDGs in the drinking water and sanitation sectors. The objectives of the programme are to increase the proportion of urban and rural populations using improved drinking water source and sanitation facility by 2015. Multiple projects have been implemented under the PEPAM, in collaboration with international development partners, to develop new drinking water, wastewater and sanitation infrastructures across the country. Recent figures show a progress in access to improved drinking water sources, from 69 percent in 2004 to 74 percent in 2012, and sanitation facilities, from 46 percent to 52 percent.¹³ The government has already prepared a roadmap for developing post-2015 targets to continue efforts in the sector.¹⁴

Price control measures to lower the cost of living

The decrease of the cost of living was one of the commitments made by the current president during the elections of March 2012. The inter-ministerial council meeting held in April 2012 on the decrease of basic commodities prices decided on an immediate price reduction of rice, sugar and oil. These three commodities are heavily imported and at the time their prices were consistently rising. Since, ministerial decrees have implemented price ceilings for the three commodities and other decrees are regularly adopted to fix price ceilings for hydrocarbons used for consumption, such as butane and gasoline. Additionally, the National Assembly adopted in January 2014 a law that lowers rents. All rent levels are targeted by the decrease that goes up to 29 percent for lower rates.

Family grants to fight against social exclusion

In October 2013, the government launched the **National Programme of Family Security Grants**. Annual cash transfer of FCFA 100 000 (US\$ 207) are provided to poor families and vulnerable groups in order to counteract social exclusion and strengthen families' educational, productive and technical capabilities. The budget dedicated to those grants has increased from FCFA 10.5 billion (US\$ 22 million) in 2014 to FCFA 20 billion (US\$ 38 million) in 2015 to reach out 200 000 families. The objective of the programme is to cover 250 000 families.

9 La Nouvelle Alliance pour la Sécurité Alimentaire et la Nutrition au Sénégal. Available at: <http://new-alliance.org/resource/cadre-de-coop%C3%A9ration-%C3%A0-la-nouvelle-alliance-au-s%C3%A9n%C3%A9gal> 20 Single parent with an orphan or vulnerable child, elderly poor person, or person with an extreme disability unable to work.

10 www.crse.sn/crse.php?pg=4electricite, accessed on 16/03/2015.

11 <http://wca.ifpri.info/files/2012/01/CommuniquéFPRI-CLM.pdf>, accessed on 02/03/2015.

12 www-wds.worldbank.org/external/default/WDSContentServer/WDSP/AFR/2011/11/05/655E4630338522ED852579230059BB92/1_0/Rendered/PDF/PRN2000Aide0Mmoire0Mission0conjointe.pdf, accessed on 02/03/2015.

13 <http://mdgs.un.org/unsd/mdg/Data.aspx>, accessed on 29/01/2015

14 Ministère de l'Hydraulique et de l'Assainissement, Programme d'eau potable et d'assainissement du Millénaire. Feuille de route Post-OMD 2014-2025. Available at : www.pepam.gouv.sn/docs/RAC%202014/Feuille_de_Route%20Post-OMD.pdf

2.3 Trade-oriented policy decisions

Over the reference period of 2007-2014, the government trade policy has been oriented towards the promotion of national production, in accordance with the national strategy of making agriculture a driver of economic development. The horticulture sector has especially been subject to increasing attention regarding national trade opportunity.

Imports restrictions in favour of domestic production

During the last decade, the government has imposed temporary bans on imports of specific commodities in order to incentivize the production and marketing of local products. Poultry imports which have been banned since 2005, originally due to the bird flu crisis, will remain suspended at least until 2020 in order to promote the development of local industry. Regarding the onion sector, imports have been intermittently suspended (notably in 2009, 2012 and 2013).¹⁵ As for the sugar sector, several import bans or quotas imposed by the government have protected the sales of the Senegal Sugar Company (CSS), a private company created in 1970 that signed an exploitation agreement with the government guaranteeing them a monopoly of sugar production to gradually replace imports with national production.¹⁶ In 2013, the government introduced an import licensing system with an objective of national production promotion. Import licenses have

a two-months limited period of validity and their issuance is conditional upon presenting an attestation justifying the actual needs of the applicant company.

Promoting horticulture exports

There has been an increasing interest from the authorities to develop the horticultural sector, which is part of the clusters identified within the SCA framework. In 2010, the Senegal Origin Foundation for Fruit and Vegetables was created and received the recognition of public interest by the Minister of Economy and Finances. Its objective is to support the development of the national horticulture export sector through the promotion of public-private partnerships in order to strengthen international competitiveness.¹⁷ The mango has drawn particular attention since the national export promotion agency (ASEPEX) pointed out in 2011 that mango production was growing rapidly and that Senegal could increase its export market shares.¹⁸ As a result, in 2014, a project to improve the competitiveness of Senegalese mango was approved by the Council of the Enhanced Integrated Framework (EIF)¹⁹ in collaboration with the government. The specific objective of the 3-year project is to further increase the exportable quantity of mango and its derivative products through the identification of new opportunities at national and international levels.

3. Emerging issues and challenges

Fisheries development impeded by a number of constraints

Fisheries and aquaculture are one of the key economic clusters identified within the SCA to contribute to the economic growth. In this respect, the government has engaged in many efforts and investments to support the sector, including the implementation of fisheries management measures, the reduction of after-capture losses and the strengthening of fisheries research and fisheries cooperation. However, the sector is still facing major challenges and constraints that affect its proper development and sustainability. These constraints include the weak regulation of access to fisheries resources, the overexploitation of stocks, inappropriate legal and institutional frameworks for fisheries management and limited funding. The contribution of the sector to the country's trade balance consequently decreased from 24 percent in 2005 to 12 percent in 2012. It is crucial to quickly overcome these constraints in order to revive the sector which is essential not only for food security, but for national employment and the Senegalese economy in general.²⁰



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Fishermen spreading the catch of the day on the beach. Fish is a major source of protein for the Senegalese population and fishing creates a lot of employment. Despite this economic and social importance, the sector is facing serious challenges.

15 For more information: www.inter-reseaux.org/revue-grain-de-sel/48-mecanisation-et-motorisation/article/la-regulation-du-marche-de-l?lang=fr.

16 www.financialafrik.com/2014/03/15/archives-dafrique-il-etait-une-fois-la-compagnie-sucriere-du-senegal-css/, accessed on 13/02/2015.

17 www.iflexsenegal.org/fr/qui-sommes-nous, accessed on 31/01/2015.

18 According to ASEPEX, the mango production increased from 300 tonnes in 1998 to 7 658 tonnes in 2011. The production reached 15 000 tonnes in 2014. For more information: http://asepex.sn/IMG/pdf/FICHE_MANGUE_2010_1_-3.pdf and http://asepex.sn/IMG/pdf/Mangue_-_Bilan_campagne_2012.pdf.

19 For more information : www.wto.org/english/tratop_e/devel_e/teccop_e/if_e.htm and www.atlc.sn/.

20 République du Sénégal. Ministère de la Pêche et des Affaires Maritimes. 06/06/2013. Conseil interministériel sur la pêche : Document introductif. Available at : www.aprapam.org/wp-content/uploads/2013/07/Document-introductif-du-conseil-interminist%C3%A9riel-sur-la-%C3%A4che_version-final.pdf

Development of inclusive value chains

Emphasis has been placed on increasing national rice production in order to decrease foreign imports. Investments towards domestic production must be supplemented by an increased attention to the demand and more specifically on the participation of smallholders in the market. The large, existing urban demand for rice presents an opportunity for smallholder farmers to engage and integrate themselves within large urban markets. In this regard, two important problems need to be addressed: (i) the quality of locally produced rice needs to be adjusted to meet consumers' standards, and (ii) transaction costs of bringing locally produced rice to the urban markets need to be reduced. Public and private investments in the rice value chain should be scaled up and the policy environment must be improved to create favourable conditions for domestic rice to compete with imported rice.²¹ More generally, the PSE identifies the weak structure of value chains as a major constraint to agricultural development. Indeed, as the sector is principally made up of family smallholdings (about 90 percent), barriers that prevent smallholders from participating in important parts of the value chains must be removed.

Need for more policy coherence, especially regarding the energy sector

As discussed above, the Senegalese government has been putting considerable efforts toward improving its population's living conditions. For the success of such efforts, the government must resolve the issue of access to electricity. Energy availability is known to be paramount to the improvement of various social issues including poverty alleviation, agricultural productivity growth and improvement of women's conditions.²² Therefore, the Senegalese electricity sector has to address its main challenges, namely: (i) the mobilization of substantial investments for the development, renewal and maintenance of facilities, (ii) the improvement of the quality of the electricity service in the context of a strong growth in demand, and (iii) the increase the electrification rate, particularly in peri-urban areas and in rural areas.²³ The situation is even more problematic as the government is subsidizing the national electricity company, Senelec, to compensate for tariffs. In 2014, an allocation of 20 billion FCFA (US\$ 42 million) was dedicated for the compensation. This represents a high cost for the country especially when the poorest populations cannot even benefit from it since they are not connected to the power grid.²⁴ Therefore, there is an urgent need to reform the sector in order to expand coverage, develop alternative sources of renewable energy, in particular in rural areas, and improve the human development as well as the competitiveness of the agricultural value chain.

21 Colen, L., M. Demont, and J. Swinnen. 2013. *Smallholder participation in value chains: The case of domestic rice in Senegal*, In: Rebuilding West Africa's Food Potential, A. Elbehri (ed.), FAO/IFAD. Available at: www.fao.org/docrep/018/i3222e/i3222e12.pdf

22 United Nations Development Programme. 2004. World Energy Assessment: overview 2004 Update. Available at: www.undp.org/content/undp/en/home/librarypage/environment-energy/sustainable_energy/world_energy_assessmentoverview2004update.html

23 www.crse.sn/crse.php?pg=4electricite, accessed on 16/03/2015.

24 International Monetary Fund. January 14, 2015. Senegal: Selected Issues Paper. Available at: www.imf.org/external/pubs/cat/longres.aspx?sk=42598.0



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