



## GIEWS Country Brief Senegal

Reference Date: 07-November-2022

### FOOD SECURITY SNAPSHOT

- Cereal production expected at above-average levels in 2022
- Record high cereal imports forecast in 2021/22
- Prices of cereals increased sharply in 2022
- Unprecedented levels of acute food insecurity for about 880 000 people in 2022

### Cereal production expected at above-average levels in 2022

Harvesting of the 2022 coarse grain crops (maize, millet and sorghum) is underway and it is expected to be completed by the end of November. Harvesting of the 2022 rice crops is expected to take place from early November until January and production prospects are favourable.

The rainy season had a timely start in June, supporting land preparation and early crop development. Between July and October, rains had an overall even distribution in time and space, with cumulative amounts at average to above-average levels. The favourable rains boosted soil moisture levels and resulted in average to above-average vegetation conditions of crops (VCI map), supporting yield expectations across most parts of the country. However, pockets of below-average rains and dry spells at the beginning of the rainy season were registered in parts of northern Podor Department and southeastern Kédougou Department. Torrential rains in July and August in northern departments of Podor, Dagana and Matam resulted in localized flooding in areas adjacent to the Senegal River that led to significant destruction of standing crops, the disruption of agricultural livelihoods and losses of productive assets.

The planted area to cereal crops, particularly rice and maize, increased on a yearly basis, underpinned by a series of government measures, including the rise of paddy farm gate prices from CFA 130 to CFA 160/kg, a scaled-up allocation of credit to farmers and the distribution of agricultural equipment and inputs at subsidized prices.

Despite crop losses associated to floods, the 2022 aggregate cereal production is expected at about 3.9 million tonnes, a 12 percent year-on-year increase and over 25 percent above the previous five-year average, due to increased plantings and high yields.

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Crop Calendar

(\*major foodcrop)



Source: FAO/GIEWS.

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#### Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Rice (paddy)	1 210	1 327	1 430	7.8
Millet	953	1 040	1 133	8.9
Maize	588	755	900	19.3
Others	307	359	423	17.7
<b>Total</b>	<b>3 059</b>	<b>3 481</b>	<b>3 886</b>	<b>11.6</b>

Note: Percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

The overall favourable weather conditions also resulted in an improvement of pasture conditions and boosted fodder availability and water points' levels, leading to a recovery of livestock body conditions and production following dry conditions in rangelands in 2021 that led to poor pastoral conditions in 2021 and early 2022.

### Record high cereal imports forecast in 2021/22

Despite the above-average 2021 cereal production, cereal import requirements are forecast at record high levels in 2021/22. Imports of rice in the 2022 calendar year are forecast at 1.5 million tonnes, 10 percent above the five-year average, while imports of wheat and maize in the 2021/22 marketing year (November/October) are estimated at 800 000 tonnes and 450 000 tonnes, about 15 and 30 percent, respectively, above the average. The increased cereal imports reflect a strong demand, particularly for exports towards neighbouring Mali, where domestic production in 2021 was severely affected by conflicts and unfavourable weather conditions.

The government implemented a series of measures since the second half of 2021 aiming to boost the national food supply and contain inflationary pressure. Import duties for wheat grain and wheat flour were suspended in August 2021 while they were reduced for rice and other food products, including cooking oil and sugar, in February 2022, until further notice. The cut in import duties has been a contributory factor to increased pace of imports in 2021/22.

### Prices of cereals increased sharply in 2022

Prices of locally produced coarse grains have increased significantly and steadily in 2022 and they were over 60 percent higher on a yearly basis. Prices of local and imported varieties of rice have also increased during the same period, although to a lesser extent, and they were, as of September, up to 25 percent above their year-earlier levels. The increase in prices, in spite of above-average domestic production of cereals, high imports and exemptions of the Value added tax (VAT) for rice, reflects increased production costs, driven by high prices of fertilizers and energy, and strong export demand. Furthermore, the depreciation of the national currency, the West African CFA franc, that was equivalent to CFA 662.33/USD 1 in September 2022 compared to CFA 557.30/USD 1 in September 2021, has increased the cost of imported foodstuffs, including rice.

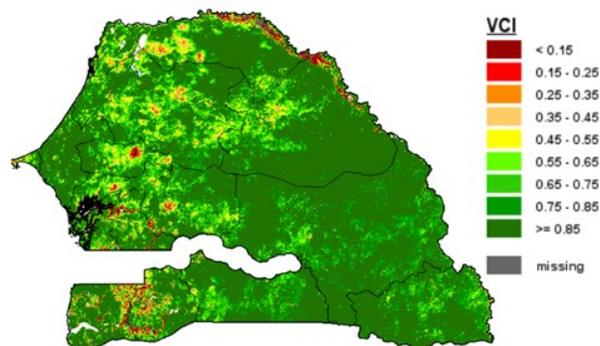
### Unprecedented levels of acute food insecurity for about 880 000 people in 2022

According to the March 2022 "Cadre Harmonisé" (CH) analysis, about 880 000 people were estimated to face acute food insecurity (CH Phase 3 [Crisis] and above) between June and August 2022, including nearly 9 000 people in CH Phase 4 (Emergency). This is the highest number on record and well above the 490 000 people estimated to be acute food insecure during the same period in 2021.

The sharp increase is mostly associated to the high food prices and the poor availability of pasture and fodder which affected livestock production and pastoral livelihoods in 2021 and the first half of 2022. In addition, according to the United Nations High Commissioner for Refugees (UNHCR), as of September 2022, over 12 000 refugees, mainly from Mauritania, were present in the country and most of them are heavily dependent on humanitarian assistance. Since late 2021, the government

## Senegal - Vegetation Condition Index (VCI)

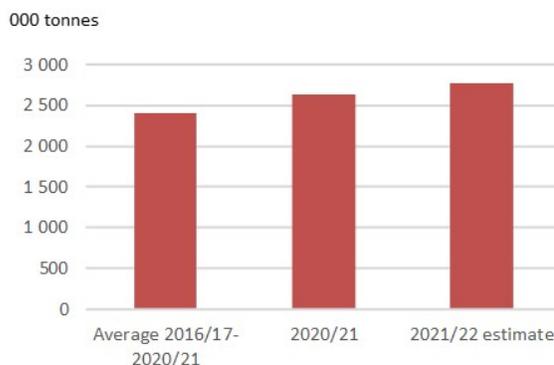
Dekad1, October 2022



Source: FAO/GIEWS Earth Observation System.

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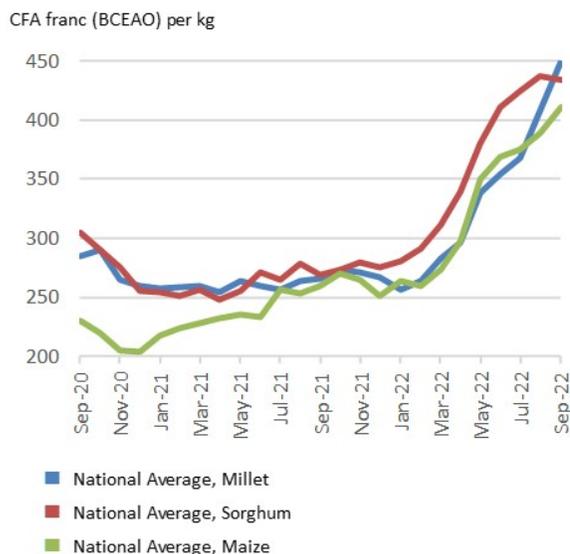
### Cereals Imports



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).  
Source: FAO/GIEWS Country Cereal Balance Sheets.

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### Selected retail cereal prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

implemented a number of policies that aim to improve food security conditions. These include VAT exemptions and price ceilings for imported and locally produced basic food commodities, the reduction of import duties for essential foodstuffs, notably rice and wheat flour, and a one-off cash transfer of CFA 80 000 for about 540 000 vulnerable households that was rolled out between May and July 2022.

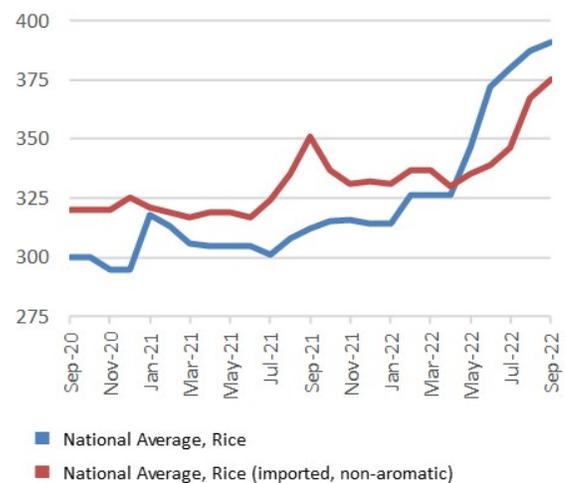
Despite the improvement of pastoral conditions and the ongoing 2022 cereal harvests, that are expected to improve food availability, there are still concerns about food access as prices of locally produced and imported food commodities remain at extremely high levels. The annual inflation has increased steadily in recent months and reached a record high rate of 12 percent last September, likely eroding the purchasing power of most vulnerable households. New CH estimates of the number of people facing acute food insecurity in the last quarter of 2022 are expected to be released in late November by the Permanent Interstate Committee for Drought Control in the Sahel (CILSS).

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### Selected retail rice prices

CFA franc (BCEAO) per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.