FOOD SECURITY SNAPSHOT
• Favourable moisture conditions allow timely planting of 2020 planting season
• Above-average output estimated in 2019
• Prices of cereals showed mixed trends in July, but were generally higher compared to year earlier
• Continued assistance still needed for vulnerable people

Favourable moisture conditions allow timely planting of 2020 planting season
Planting of the 2020 crops of coarse grains (millet, sorghum, rice and maize), started on time across the country with the onset of the rains in June. Abundant rains since June resulted in favourable moisture conditions for the germination and establishment of the crops, which are currently at maturity stage and the harvest is expected to start in October. The weather forecast points to above-average rainfall amounts throughout October in most parts of the country and the rain is expected to have a positive impact on yields. Localized production shortfalls are likely to occur in the districts of Dakar, Thiès, Rufisque, Kaolack, Saint-Louis, Louga and Diourbel as well in the areas bordering the Senegal valley due to flooding.

Favourable rainfall in July-August in most pastoral areas of the country improved natural pasture conditions and contributed to the replenishment of water reserves to satisfactory levels. This helped improve livestock body conditions, enhancing the animal market value. The animal health situation is overall stable, with small seasonal outbreaks of epizootic diseases, such as the Peste des petits Ruminants (PPR) in sheep and goats, and the Foot and Mouth (FMD) in cattle.

Above-average cereal production estimated in 2019
Favourable rainfall in 2019 benefitted crop development in most parts of the country. The national cereal production in 2019 is estimated at 2.7 million tonnes, 11 percent above the average of the last five years. However, several areas experienced production shortfalls due to pockets of drought at the start (June) and the end (September) of the seasons as well as flooding during July-August 2019, that affected crops particularly in Bakel and Podor regions.
To cover domestic demand, the country relies heavily on rice imports, which account for approximately half of the total domestic cereal requirements. On average, the country imports about 2 million tonnes of cereals, including about 1.2 million tonnes of rice and 0.5 million tonnes of wheat. Despite the above-average 2019 cereal production, import requirements for the 2019/20 marketing year (November/October) are expected to increase at above-average levels due to the strong demand by local traders aiming at replenishing their stocks.

**Prices of cereal showed mixed trends in July, but were generally higher compared to year earlier**

Despite the easing of some COVID-19-related restrictive measures in June, some markets are still closed, while others are operating at reduced level due to concerns about virus propagation. Prices of millet, after declining in June, showed mixed trends in July, but were overall higher year on year, supported by a strong domestic demand and limited commodity flows amid the pandemic coupled with declining domestic availabilities. Prices of rice were stable in June and July due to the increased supply from the off-season crops harvested in the Senegal River valley and in Matam District.

**Continued assistance still needed for vulnerable people**

Despite the overall satisfactory food security situation, pockets of food insecurity remain and food assistance is needed by the most vulnerable population. Prior to the COVID-19 outbreak, the number of food insecure people was projected to peak at about 766,000 during the lean season between June and August 2020, well above the 341,000 food insecure that were estimated in the same period of 2019. However, the situation is worse than previously expected on account of the impact from the COVID-19 pandemic, including the containment measures that adversely affected households’ livelihood activities and incomes.

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**Senegal**

**Cereal Production**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
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<tbody>
<tr>
<td>Rice</td>
<td>1,045</td>
<td>1,155</td>
<td>1,220</td>
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<td>Millet</td>
<td>796</td>
<td>807</td>
<td>900</td>
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<tr>
<td>Maize</td>
<td>415</td>
<td>531</td>
<td>434</td>
<td>-18.2</td>
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<tr>
<td>Others</td>
<td>234</td>
<td>275</td>
<td>250</td>
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<td>Total</td>
<td>2,491</td>
<td>2,788</td>
<td>2,804</td>
<td>1.3</td>
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</table>

Note: percentage change calculated from unrounded data.


**Senegal**

**Selected retail cereal prices**

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

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Above-average cereal production harvested in 2019

Seasonal dry weather conditions are prevailing in most areas of the country and planting of the 2020 crops is expected to begin in June-July with the normal onset of the rains.

Harvesting of the major crops, including millet, sorghum and rice (paddy), was completed in November 2019. The 2019 national cereal production is estimated at 2.7 million tonnes, 28 percent above average, but 4 percent below the record 2018 output. Despite the average production at the national level, several localities recorded production shortfalls due to pockets of drought at the start (June) and the end (September) of the seasons as well as flooding that affected crops particularly in Bakel and Podor regions.

In most pastoral areas, seasonal rains are expected to start in July. The pastoral lean season is progressing normally with an average availability of pasture across the country, with the exception of some areas in the east that are facing localized pasture deficits. The domestic transhumant herds are expected to return from southern areas to pastoral areas in July with the normal onset of the rains. The animal health situation is generally stable, with no major disease outbreaks recorded.

Above-average import requirements forecast

The country relies heavily on imports to cover its total domestic cereal consumption needs. Although the 2019 cereal production is estimated at an above-average level, import requirements in the 2019/20 marketing year (November/October) are forecast at an above-average level of 2.3 million tonnes. An increase in rice imports is expected due to the slight decline in rice production in the Senegal river valley and the intention of traders to build their stocks.

Reference Date: 15-April-2020

FOOD SECURITY SNAPSHOT

- Above-average output gathered in 2019
- Cereal import requirements forecast at above-average level
- Cereal prices stabilized due to adequate supply
- Pockets of food security remain among most vulnerable population

Above-average import requirements forecast

The country relies heavily on imports to cover its total domestic cereal consumption needs. Although the 2019 cereal production is estimated at an above-average level, import requirements in the 2019/20 marketing year (November/October) are forecast at an above-average level of 2.3 million tonnes. An increase in rice imports is expected due to the slight decline in rice production in the Senegal river valley and the intention of traders to build their stocks.
Cereal prices stabilized due to adequate supply

Despite the seasonal contraction in supply, markets are well stocked as a result of regular internal trade flows and imports. Prices of coarse grains were relatively stable or declined in February on account of good domestic supplies. However, the reduced 2019 output and strong domestic demand, particularly in urban areas, kept prices above their values a year earlier.

Pockets of food insecurity remain among most vulnerable population

According to the March 2020 "Cadre Harmonisé" analysis, the aggregate number of severely food insecure people (CH Phase 3: “Crisis” and above) is estimated at about 436 000, significantly up from the 151 000 people estimated in March 2019. If appropriate measures and responses are not implemented, this number is projected to increase to nearly 766 000 people during the next lean season between June and August 2020, well above the about 341 000 food insecure people that were estimated for the June-August 2019 period. The deterioration in the food situation and the increase in the number of food insecure population is due to the effects of adverse weather events (drought and floods) on cereal and fodder production.

COVID-19 and measures adopted by the Government

In view of the evolving COVID-19 situation, the Government has decreed a State of Emergency, with the implementation of a total country lockdown and curfew. The Government has also taken some sanitary, social and economic measures. The Government has created a national social solidarity fund of XOF 1 000 billion, which will be sourced from public resources and open to voluntary contributions. Mandatory restrictions on population movements, combined with heightened levels of fear, have led many people to remain at home. Although these measures have not affected the access to food, further restrictions on population movements could hamper the access to land and have a negative impact on the 2020 agricultural production.

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Senegal

Cereals Imports

000 tonnes

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td></td>
<td>2 500</td>
<td>2 000</td>
<td>1 500</td>
</tr>
<tr>
<td>Note:</td>
<td>Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Senegal

Selected retail cereal prices

CFA Fr. BCEAO per kg

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

Reference Date: 12-June-2019

FOOD SECURITY SNAPSHOT
• Timely start of 2019 planting season
• Above-average output gathered in 2018
• Strong economic growth and low food inflation rate
• Cereal prices stabilized due to adequate supply
• Pockets of food security remain among most vulnerable population

Timely start of 2019 planting season
Planting of the 2019 coarse grain crops (maize, millet and sorghum), to be harvested from late September to early October, started on time in June in a few regions (South-East) of the country and is expected to finalize in July. In 2019, planting of the rice crop and sowing of groundnuts, to be harvested from November, is also underway and is expected to be completed by end-August. The start of the rains was on time in early June in the South Eastern Region (Kedougou) and cumulative rainfall amounts resulted in favourable moisture conditions to support planting operations and crop growth.

In April 2019, the Forum of Seasonal Agro-Climatic released its forecast for the whole rainy season (June/October) across the Sahel and Soudanian zones. The forecast points to below-average rainfall amounts with prolonged dry spells and an early cessation of rains in coastal areas as well as in the northwest. If this forecast materializes, this will impact the agricultural production, the availability of pasture and water and pastoralists livelihoods.

In most pastoral areas, seasonal rains are expected to start in July. Currently, pasture availability is scarce and most water points dried up, with the emergence of epizooic diseases and generalized worsening of animal body condition. Senegal has experienced, from March 2019, a severe equine influenza on donkeys and horses mainly in Diourbel, St Louis, Tambacounda and Sédhiou.

Above-average cereal production gathered in 2018
Due to favourable rainfall conditions and timely provision of inputs by the Government, the 2018 cereal production is estimated at about 2.8 million tonnes, about 55 percent above average and 14 percent above last year’s record. The major increases were observed in rice paddy and maize production.
The good performance of the season is also explained by the increased access of factors of production, including the certified seeds and inputs which led to an increase in cultivated areas of 3 percent compared to 2017/18 and 22 percent compared to the average of the last five years. This has also contributed to increase the yields compared to the average of the past five years.

To cover domestic demand, the country relies heavily on rice imports, which account for approximately half of the total domestic cereal requirements. On average, the country imports about 2 million tonnes of cereals, including about 1.2 million tonnes of rice and 0.5 million tonnes of wheat. Although cereal production is estimated at an above-average level in 2018, imports in the 2018/19 marketing year (November/October) are forecast to remain stable as traders aimed to maintain their stocks at optimum level.

### Strong economic growth and low food inflation rate

According to the Economic Intelligence Unit (EIU), the economic growth is forecast to remain strong at about 6.8 percent in 2019. The economic expansion is supported by high private investments in the sectors of oil, energy, transport infrastructure, agriculture, tourism, textiles and information technology. The findings in oil and gas, and the stable political environment also contribute to maintain a robust economic growth. Overall, the country's food inflation is minimal, averaging 2.57 percent from 2010 until 2019, reflecting relatively stable domestic food prices. Inflation in 2019 is expected to remain well below the UEMOA (Union Economique et Monétaire Ouest Africaine) convergence rate of 3 percent.

### Cereal prices stabilized due to adequate supply

Despite the seasonal decline of supplies, markets were well stocked as a result of farmers' destocking following the normal onset of the rainfall in early June and regular internal trade flows and imports. This has contributed to keep prices of coarse grains relatively stable in April compared to March and down from a year earlier.

### Pockets of food insecurity remain among most vulnerable population

Despite the overall satisfactory food security situation, pockets of food insecurity remain and food assistance is needed by the most vulnerable population. According to the March 2019 “Cadre Harmonisé” analysis, about 151 500 people were estimated to be in need of food assistance from March to May 2019, with a decrease from 320 000 people estimated in March to May 2018. This number is expected to increase over 340 000 people during the lean season (June to August 2019) if no mitigation actions are taken.

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**Senegal**

### Cereal Production

<table>
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<tr>
<th></th>
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<tbody>
<tr>
<td>Rice (paddy)</td>
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<td>1 011</td>
<td>1 207</td>
<td>19.3</td>
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<tr>
<td>Millet</td>
<td>640</td>
<td>876</td>
<td>897</td>
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<td>Maize</td>
<td>293</td>
<td>410</td>
<td>486</td>
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<tr>
<td>Others</td>
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<tr>
<td>Total</td>
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<td>2 519</td>
<td>2 889</td>
<td>14.7</td>
</tr>
</tbody>
</table>

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheet.

### Senegal

#### Selected retail cereal prices

CFA Franc BCEAO per kg

Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.
Above-average cereal production gathered in 2018

Harvesting activities for millet, sorghum and maize crops have almost finalized, while harvesting of rice and groundnut crops is still ongoing and will be completed by end-January. Due to favourable rainfall conditions and timely provision of inputs by the Government, the 2018 cereal production is estimated at about 2.5 million tonnes, about 35 percent above average and similar to last year’s record. Major increases were observed in millet and maize production.

In main grazing areas of the country, favourable rains ensured sufficient and quality pastures for livestock as well as an adequate replenishment of main water points. Overall, animals have satisfactory body conditions and improved market value. The animal health situation is generally stable, with no major disease outbreaks recorded.

The country relies heavily on rice imports, which account for approximately half of the total domestic cereal requirements. On average, the country imports about 1.8 million tonnes of cereals, including about 1.2 million tonnes of rice and about 500,000 tonnes of wheat. Although, cereal production is estimated at an above-average level in 2018, imports in 2018/19 are forecast to remain stable or slightly decrease as traders are expected to replenish their stocks.

Cereal prices declining on most markets

In most markets, prices of millet declined in October 2018, with the expectation of a good 2018 harvest and were significantly lower than a year earlier level. Prices of imported rice, the most consumed cereal in the country, remained relatively stable, while those of husked rice, locally produced and with higher quality, recorded some increases in October 2018, before the new harvest began in November 2018.
Pockets of food security remain among most vulnerable population

According to the Economic Intelligence Unit (EIU), high private investments in oil, energy, transport infrastructure, agriculture, tourism, textiles and information technology will continue to maintain a stable economic growth of about 7 percent in 2018. The positive geological findings, including oil and gas, and the stable political environment, also contribute to maintain a robust economic growth.

Despite the overall satisfactory food security situation, pockets of food insecurity remain and food assistance is needed by the most vulnerable population. According to the November 2018 “Cadre Harmonisé” analysis, about 94 500 people were estimated to be in Phase 3: “Crisis” and above during the period October-December 2018, down from 315 000 in October-December 2017. The caseload is projected to increase to 375 700 from June to August 2019 period, if mitigation measures are not taken.

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**Timely start of 2018 planting season**

Planting of the 2018 coarse grains crops (maize, millet and sorghum), to be harvested from September, started on time in June in the southern and western parts of the country and continued in the northern cropping areas where it is about to finalize. Planting of rice, to be harvested from November, is expected to be completed by end-August. Land preparation and planting operations for groundnuts, the major cash crop produced in the country, are ongoing and the harvest will start in November. The cumulative rainfall amounts since June resulted in favourable moisture conditions for crop growth in the country.

Favourable rains have improved pasture supply and quality, allowing animals to maintain good body conditions and enhance their market value. No major disease outbreaks have been recorded yet. As a result, the animal health situation is relatively satisfactory.

**Above-average cereal production gathered in 2017**

Favourable weather conditions and Government support to the agricultural sector in 2017 have contributed to obtain a bumper cereal output for the third consecutive year. The 2017 national cereal production was estimated at 2.5 million tonnes, about 18 percent above the previous year’s good output and about 52 percent above the last five-year average. Major increases were observed in millet and maize production.

Imports account for almost half of the country’s total domestic cereal requirements. On average, the country imports about 1.8 million tonnes of cereals, including about 1.2 million tonnes of rice and about 500 000 tonnes of wheat. Following an above-average harvest, the import requirements for the 2017/18 marketing year (November/October) are set at average 1.9 million tonnes, with a decrease of about 16 percent compared to the previous year.
Stable cereal prices with some declining trends

Prices of coarse grains remained generally stable in May due to sufficient level of supply and normal demand. Since mid-June, production of off-season local rice crops strengthened market availability in the producing areas. Millet and imported rice were showing some declining trends between May and April 2018 in Dakar.

Food security situation mostly stable although pockets of food insecurity remain

According to the Economic Intelligence Unit (EIU), the economy grew at about 6.8 percent in 2017 and is expected to remain stable in 2018 due to higher private investment, particularly in the sectors of oil, energy, transport infrastructure, agriculture, tourism, textiles and information technology. In 2018, the food price inflation year-on-year is forecast at 1.4 percent, up from 1.3 percent reported in 2017, due to higher global oil and food prices.

Despite three consecutive years of above-average harvests, pockets of food insecurity remain. According to the March 2018 “Cadre Harmonisé” analysis, about 320 000 people were estimated to be food insecure in March to May 2018 compared to 315 000 in October-December 2017. This number is expected to increase to 750 000 during the lean season between June and August 2018 if no mitigation actions are taken.

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FOOD SECURITY SNAPSHOT

- Favourable rains and continued Government support contributed to obtain bumper cereal output in 2017
- Feed and water availability impacts livestock condition as dry season progresses
- Cereal prices stable or declining in recent months
- Food security situation mostly stable although pockets of food insecurity prevail

Above-average cereal production gathered in 2017

Seasonal dry conditions prevail in most parts of the country. Land preparation and planting of the 2018 cereal crops will begin with the arrival of the rains, usually from June.

Harvesting of the 2017 maize and millet crops, the major coarse grains produced in the country, was completed last November 2017, while the rice harvest was concluded in January 2018. Favourable weather conditions and continued Government support to the agricultural sector have contributed to obtain a bumper cereal crop for the third consecutive year. The 2014-2017 National Programme for Self-Sufficiency in Rice was designed to increase domestic rice production and reduce rice import requirements by providing subsidized seeds and fertilizers. Although the programme ended, the Government pledged to continue the provision of subsidized inputs also in the 2018/19 marketing year.

Official estimates put the 2017 aggregate cereal production at about 2.5 million tonnes, about 18 percent above the previous year's already record output and over 35 percent above the last five-year average. Although the cereal planted in 2017 increased by only about 2.5 percent compared to the previous year, average yields of millet, maize and sorghum rose by 34, 21 and 12 percent, respectively.

Feed and water availability impacts livestock condition as dry season progresses

Substantial rainfall deficits were observed during the 2017 rainy season. With the progress of the ongoing dry season, as of March 2018, 19 out of the 42 departments reported feed stock deficits, leading to livestock degradation and mortalities. While pasture remains locally available in the southern regions of
Senegal, grazing is affected by bush fires (so far about 14 000 hectares burnt) and increased competition on pastures by animals from Mauritania. As a result, livestock prices have fallen sharply in various markets, recording a 20-35 percent drop compared to the same period last year. Watering remains a challenge with the majority of the surface ponds seasonally drying out and pastoralists forced to rely only on underground wells.

**Cereal prices declining**

Prices of coarse grains remained stable or declined in January 2018 on account of the good 2017 harvest and average demand for stockpiling. Prices of local and imported rice have remained mostly stable. On average, the country imports about 1.8 million tonnes of cereals, including 1.2 million tonnes of rice and 500 000 tonnes of wheat, covering almost half of the country's total domestic cereal requirements. India, Thailand and Brazil are the largest suppliers of rice.

**Food security situation mostly stable although pockets of food insecurity prevail**

A large segment of the Senegalese population relies on traditional agriculture and livestock-related activities to maintain their livelihoods and, therefore, remains in a state of chronic vulnerability due to unpredictable seasonal rains and climatic conditions. Moreover, the high import dependency rate for food exposes the population to fluctuations in the global market.

Despite three consecutive years of above-average harvests, pockets of food insecurity prevail. According to the latest “Cadre Harmonisé” analysis, if nothing is done between June and August 2018, about 750 000 people (out of 15 million inhabitants) are projected to be in Phase 3: “Crisis” and Phase 4: “Emergency”, with an increase from about 420 000 in March-May 2018.

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FOOD SECURITY SNAPSHOT

- Favourable rains and continued Government support contributed to bumper cereal output in 2016
- Cereal prices declining in recent months
- Improved food security situation anticipated in marketing year 2016/17 (November/October)

Above-average cereal production gathered in 2016

Seasonal dry conditions prevail in most parts of the country. Land preparation and planting of the 2017 cereal crops will begin with the arrival of the rains, usually from June.

Harvesting of maize and millet, the major coarse grains produced in the country, was completed in November 2016, while the rice harvest was concluded in January 2017. Favourable weather conditions and continued Government support to the agricultural sector have contributed to obtain a bumper cereal crop for the second year in a row. Official estimates put the 2016 aggregate cereal production at about 2.11 million tonnes, slightly down from the previous year’s record output, but about 46 percent above last five-year average. Maize output was 63 percent above the level of the previous five years. By contrast, production of millet, the most important staple crop, decreased by about 13 percent compared to the 2015 output, but was still 16 percent above average. The good precipitation levels also improved pasture conditions throughout the country.

A record crop was already gathered in 2015 following favourable rains and Government support. The 2015 aggregate cereals production was estimated at some 2.15 million tonnes, 72 percent above the previous year’s level and 56 percent above the average of the previous five years.

Cereal prices declining

Good supplies from the new 2016 harvest have resulted in price declines for coarse grains in recent months. However, prices in February 2017 were still above their year-earlier levels. By contrast, prices of local and imported rice have remained mostly stable. Generally, domestic production covers about half of the country’s cereal utilization requirements. Therefore, Senegal continues to rely heavily on rice imports from the international market to meet its food requirements.
Food security situation mostly stable reflecting two consecutive years of bumper harvests

A large segment of the Senegalese population relies on traditional agriculture and livestock-related activities to maintain their livelihoods and, therefore, remains in a state of chronic vulnerability due to unpredictable seasonal rains and climatic conditions. Moreover, the high import dependency rate for food exposes the population to fluctuations in the global market.

The bumper harvests gathered over the last two years are expected to significantly improve the fragile food security situation. According to the last “Cadre Harmonisé” analysis conducted in the country, about 430 000 people are estimated to be in Phase 3: “Crisis” and above.

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Source: Agence Nationale de la Statistique et la Démographie (ANSD)
Favourable rains and continued Government support contributed to bumper 2016 cereal output for second consecutive year
Cereal prices on the decline in December but higher than year earlier levels
Improved food security situation anticipated in marketing year 2016/17 (November/October)

Above-average cereal production gathered in 2016
Harvesting of maize and millet, the major grains produced in the country, was completed in November 2016, while the rice harvest was completed in January 2017. Favourable weather conditions and continued Government support to the agricultural sector have contributed to a significant increase in cereal production for the second year in a row. Preliminary estimates put the 2016 aggregate cereal production at about 2.25 million tonnes, 5 percent above the previous year’s bumper output and about 55 percent above-average. Maize output was almost double the level of the previous five years, while production of millet, the most important staple crop, decreased by about 7 percent compared to the 2015 output, but was still 24 percent above average. The good precipitation levels also improved pasture conditions throughout the country.

A bumper crop was already gathered in 2015 following favourable rains and Government support. The 2015 aggregate cereals production was estimated at some 2.15 million tonnes, 72 percent above the previous year’s level and 56 percent above the average of the previous five years.

Cereal prices on the decline
Good supplies from the new 2016 harvest have resulted in price declines for coarse grains. However, prices in December 2016 were still above their year-earlier levels. For example, aggregate millet prices in December 2016 were 12 percent higher than their levels in December 2015. By contrast, prices of local and imported rice were nearly at the same levels as in the previous year. Generally, domestic production covers a little over half of the country’s cereal utilization requirements. Therefore, Senegal continues to rely heavily on rice imports from the international market to meet its food requirements.
**Food security situation mostly stable reflecting two consecutive years of bumper harvests**

A large segment of the Senegalese population relies on traditional agriculture and livestock-related activities to maintain their livelihoods, and, therefore, remains in a state of chronic vulnerability due to unpredictable seasonal rains and climatic conditions. Moreover, the high import dependency rate for food exposes the population to fluctuations in the global market.

The bumper harvests gathered over the last two years are expected to significantly improve the fragile food security situation. However, according to the last “Cadre Harmonisé” analysis conducted in the country, about 345,000 people were estimated to be in Phase 3: Crisis and above.
FOOD SECURITY SNAPSHOT

- Crop prospects remain uncertain due to rainfall deficits in parts of the country
- Improved food security situation anticipated in marketing year 2015/16 (November/October)

Precipitation improved from July in most parts of the country but overall crop prospects remain uncertain

The 2016 coarse grains harvest has started. Harvesting of rice is expected to begin in November. Following irregular and insufficient rains in most parts of the country at the beginning of the cropping season, precipitation increased significantly from July, thus reconstituting soil water reserves and improving crop prospects. However, as plantings were delayed and replanting carried out in several regions, crops and pastures will need rains to continue until mid-October to cover their entire growing cycle. The Government has continued to support the agricultural sector through the provision of seeds and fertilizers. An above-average 2016 crop is expected, according to preliminary estimates by the National Agricultural Statistics Services.

In 2015, favourable weather conditions and enhanced Government support to the agricultural sector contributed to a significant increase in cereal production. Official estimates put the 2015 output at about 2.15 million tonnes, 72 percent above the previous year’s level and 56 percent above average. Production of millet, the most important staple crop, increased by 83 percent, while production of groundnuts, increased by 68 percent compared to the 2014 output. The good precipitation levels also improved pasture conditions throughout the country.

A reduced crop was gathered in 2014 due to irregular rains throughout the cropping season. The aggregate 2014 cereal production was estimated at about 1.2 million tonnes, similar to the previous year’s harvest, but a 9 percent drop relative to the five-year average. Moreover, the erratic rains caused the depletion of grazing resources and lowered water points’ level in the major pastoral areas of the country.

Cereal prices are generally stable

Despite the good crop gathered last year, prices of coarse grains have remained similar to their year-earlier levels. Millet prices in August 2016 were nearly at the same levels as last year.
Similarly, local and imported rice prices were about last year’s levels. Domestic production covers a little over half of the country’s cereal utilization requirements. Therefore, Senegal continues to rely heavily on rice imports from the international market to meet its food requirements.

**Food security situation is mostly stable reflecting bumper harvest gathered in 2015**

A large segment of the Senegalese population relies on traditional agriculture and livestock related activities to maintain their livelihoods, and therefore, remains in a state of chronic vulnerability due to unpredictable seasonal rains and climatic conditions. Moreover, the high import dependency rate for food exposes the population to fluctuations in the global market.

The bumper harvest gathered in 2015 has significantly improved the fragile food security situation. According to the last “Cadre Harmonisé” analysis conducted in the country, about 220 461 people were estimated to be in Phase 3: “Crisis” and above.
Early Crop Prospects Uncertain Due to Rainfall Deficits in Parts of the Country

Improved Food Security Situation Anticipated in Marketing Year 2015/16 (November/October)

Crop prospects improved, reflecting increased rains in July

Following irregular and insufficient rains in most parts of the country at the beginning of the cropping season, precipitation increased significantly in July over the main producing areas, thus reconstituting soil water reserves and improving crop prospects. Satellite imagery for early August indicated that crops continued to benefit from good rains. However, as plantings were delayed and replanting carried out in several regions, crops and pastures will need rains late in the season to cover their entire growing cycle.

In 2015, favourable weather conditions and enhanced Government support to the agricultural sector contributed to a significant increase in cereal production. Official estimates put the 2015 aggregate cereal production at about 2.15 million tonnes, 72 percent above the previous year’s output and 56 percent above average. Production of millet, the most important staple crop, increased by 83 percent, while production of groundnuts, increased by 68 percent compared to the 2014 output. The good precipitation levels also improved pasture conditions throughout the country.

A reduced crop was gathered in 2014 due to irregular rains throughout the cropping season. The aggregate 2014 cereal production was estimated at about 1.2 million tonnes, similar to the previous year’s harvest, but a 9 percent drop relative to the five-year average. Moreover, the erratic rains caused the depletion of grazing resources and lowered water points’ level in the major pastoral areas of the country.

Food security improved significantly since September 2015

A large segment of the Senegalese population relies on traditional agriculture and livestock related activities to maintain their livelihoods, and, therefore, remain in a state of chronic vulnerability due to unpredictable seasonal rains and climatic conditions.
conditions. Moreover, the high import dependency rate for food exposes the population to fluctuations of the global market.

The bumper harvest gathered in 2015 has significantly improved the fragile food security situation. According to the last “Cadre Harmonisé” analysis conducted in the country, about 37,500 people were estimated to be in Phase 3: “Crisis” and above between October and December 2015, compared to over 1 million during June-August 2015.
GIEWS Country Brief

Senegal

Reference Date: 09-March-2016

FOOD SECURITY SNAPSHOT
• Favourable rains and Government support contributed to improved 2015 harvest
• Improved food security situation anticipated in marketing year 2015/16 (November/October)

Above-average cereal production gathered in 2015
Harvesting of maize and millet, the major grains produced in the country, was completed in November 2015, while the rice harvest was completed in January 2016. Favourable weather conditions and enhanced Government support to the agricultural sector have contributed to a significant increase in cereal production in 2015. Preliminary estimates put the 2015 aggregate cereal production at about 2.27 million tonnes, 82 percent above the previous year’s output and 65 percent above-average. Production of millet, the most important staple crop, increased by 83 percent, while production of groundnuts, the main cash crop for farmers, increased by 68 percent compared to the 2014 output. The good precipitation levels also improved pasture conditions throughout the country.

A reduced crop was gathered in 2014 due to irregular rains throughout the cropping season. The aggregate 2014 cereal production was estimated at about 1.2 million tonnes, similar to the previous year’s harvest, but a 9 percent drop relative to the five-year average. Moreover, the erratic rains caused the depletion of grazing resources and lowered water points’ level in the major pastoral areas of the country.

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Senegal

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Senegal Country Brief

Reference Date: 10-September-2015

**FOOD SECURITY SNAPSHOT**

- Agricultural production in 2015 is expected to recover from last year’s reduced output
- Cereal production dropped significantly in 2014 due to insufficient rains
- About 1,040,000 people estimated to be in need of assistance

**FOOD SECURITY SNAPSHOT**

- Agricultural production in 2015 is expected to recover from last year’s reduced output
- Cereal production dropped significantly in 2014 due to insufficient rains
- About 1,040,000 people estimated to be in need of assistance

**Crop prospects improved, reflecting increased rains in August**

Irregular and insufficient rains at the beginning of the cropping season in June and July delayed plantings of coarse grains in several parts of the country, notably in central areas of Senegal. However, significant increase in precipitation and soil water reserves from the last dekad of July over the main producing areas has improved crop prospects. Satellite imagery analysis for early September indicate that good rains continued to fall over most of the country. Hence, the outlook for the harvest to start from mid-September is generally favourable despite the need for continued rains in the following weeks to allow crops to reach full maturity.

Last year, growing conditions for cereal crops and pastures have been poor in most parts of the country due to irregular rains at the beginning of the cropping season and subsequent erratic precipitation in July and August. The aggregate 2014 cereal production was estimated at about some 1,251,000 tonnes, similar to the previous year’s harvest, but a 16 percent drop relative to the five-year average. Production of millet, the most important staple crop, is estimated to have dropped by 38 percent compared to the five-year average, while production of groundnut, the main cash crop, declined by 21 percent. Moreover, the erratic rains caused the depletion of grazing resources and lowered water points’ level in the major pastoral areas of the country.

**High import dependency persists**

Senegal relies heavily on cereal imports (mostly rice) to meet its food requirements. Domestic rice production covers only about half of the country’s cereal utilization. Senegal imports an average of about 1 million tonnes of rice per annum. Cereal imports in the 2014/15 marketing year (November/October) are forecast at some 1.6 million tonnes, including, 1.1 million tonnes of rice.

In spite of the last year’s reduced harvests, cereal prices have remained mostly stable in most parts of the country, mainly because of the above-average crop gathered in neighbouring Mali.

**Continued assistance is needed for vulnerable people**

A large segment of the Senegalese population relies on traditional agriculture and livestock-related activities to maintain their livelihoods, and, therefore, remain in a state of chronic vulnerability due to
unpredictable seasonal rains and climatic conditions. Moreover, the high import dependency rate for food exposes the population to fluctuations of the global market. Last year’s poor harvests have exacerbated the already fragile food situation. According to the last “Cadre Harmonisé” analysis conducted in the country, about 1 040 000 people are estimated to be in Phase 3: “Crisis” and above, during June-August 2015.
GIEWS Country Brief

Senegal

Reference Date: 06-May-2015

**FOOD SECURITY SNAPSHOT**
- Cereal production estimated to have dropped significantly in 2014 due to insufficient rains
- About 640 000 people estimated to be in need of assistance

Below-average cereal harvest gathered in 2014
There is little agricultural activity in Senegal in this period, except for limited cultivation of some off-season crops. Planting of the 2015 cereal crops are expected to begin with the start of the rainy season in June.

Harvesting of millet and maize, the major grains produced in the country, was completed in November, while the rice harvest was concluded in late December. Growing conditions for cereal crops and pastures have been poor in most parts of the country due to irregular rains at the beginning of the cropping season in May/June, which delayed plantings, and subsequent erratic precipitation in July and August. The aggregate 2014 cereal production was estimated at about some 1 251 000 tonnes, similar to the previous year’s harvest, but a 16 percent drop relative to the five-year average. Production of millet, the most important staple crop, is estimated to have dropped by 38 percent compared to the five-year average, while production of groundnut, the main cash crop, declined by 21 percent. Moreover, the erratic rains caused the depletion of grazing resources and lowered water points’ level in the major pastoral areas of the country.

High import dependency persists
Senegal relies heavily on cereal imports (mostly rice) to meet its food requirements. Domestic rice production covers only about half of the country’s cereal utilization. Senegal imports an average of about 1 million tonnes of rice per annum. Cereal imports in the 2014/15 marketing year (November/October) are forecast at some 1.6 million tonnes, including 1.1 million tonnes of rice.

In spite of last year’s reduced harvests, average national millet prices have remained below the levels of one year earlier, mainly because of the above-average crop gathered in neighbouring Mali.

Continued assistance is needed for vulnerable people
A large segment of the Senegalese population relies on traditional agriculture and livestock-related activities to maintain their livelihoods, and, therefore, remain in a state of chronic vulnerability due to unpredictable seasonal rains and climatic conditions. Moreover, the high import dependency rate for food exposes the population to fluctuations of the global market. Last year’s poor harvests have exacerbated the already fragile food situation. According to the last “Cadre Harmonisé” analysis conducted in the country, about 640 000 people are estimated to be in Phase 3: “Crisis” and above during March-May 2015.
Senegal

Reference Date: 09-March-2015

FOOD SECURITY SNAPSHOT
- Cereal production estimated to have dropped 38 percent in 2014 due to insufficient rains
- About 927,000 people estimated to be in need of assistance

Sharp decline in 2014 cereal production due to rainfall deficits

There is little agricultural activity in this period, except for limited cultivation of some off-season crops. Planting of the 2015 cereal crops are expected to begin with the start of the rainy season from April.

Harvesting of millet and maize, the major grains produced in the country, was completed in November, while the rice harvest was concluded in late December. Growing conditions for cereal crops and pastures have been poor in most parts of the country due to irregular rains at the beginning of the cropping season in May/June which delayed plantings and subsequent erratic precipitation in July and August. A joint CILSS/FAO/WFP Crop Assessment Mission, which visited the country last November, estimated the cereal harvest in 2014 at some 925,000 tonnes, representing a decline of 27 percent compared to last year’s favourable harvest, and a 38 percent drop relative to the five-year average. Production of millet, the most important staple crop, is estimated to have dropped by 30 percent compared to 2013, while production of groundnut, the main cash crop, declined by 38 percent. Moreover, the erratic rains caused the depletion of grazing resources and lowered water points’ level in the major pastoral areas of the country.

High import dependency persists

Senegal relies heavily on cereal imports (mostly rice) from the international market to meet its food requirements. Domestic rice production covers only about half of the country’s cereal utilization requirements; therefore, its rice imports amount to an average of about 1 million tonnes per annum. Cereal imports in the 2014/15 marketing year (November/October) are forecast at some 1.7 million tonnes. Rice imports would account for about 1.1 million tonnes.

In spite of last year’s reduced harvests, average national millet prices were 4 percent lower compared to the levels one year earlier, mainly on account of the above-average crop gathered in neighbouring Mali.

Continued assistance is needed for vulnerable people

A large segment of the Senegalese population relies on traditional agriculture and livestock-related activities to maintain their livelihoods, and, therefore, remain in a state of chronic vulnerability due to unpredictable seasonal rains and climatic conditions. Moreover, the high import dependency rate for food exposes the population to fluctuations of the global market, keeping poor households in cycles of indebtedness and poverty. Last year’s poor harvests have exacerbated the already fragile food situation. According to the last “Cadre
Harmonisé” analysis in the country conducted in November 2014, about 927,000 people are estimated to be in Phase 3: “Crisis” and above during January-March 2015.
FOOD SECURITY SNAPSHOT
- Preliminary forecast for 2014 harvest points to a large decline in cereal production
- Coarse grains prices at high levels
- Humanitarian assistance continues to be needed

Sharp decline forecast in 2014 cereal production due to rainfall deficits

Harvesting of the 2014 cereal crops is underway across the country. Growing conditions for cereal crops and pastures have been poor in most parts of the country due to irregular rains at the beginning of the cropping season in May/June which delayed plantings and subsequent erratic precipitation in July and August. As a result, a below-average cereal harvest is forecast in 2014, for the second consecutive year. Production of groundnut, the main cash crop, is also anticipated to decline significantly. Moreover, the erratic rains caused the depletion of grazing resources and lowered water points' level in the major pastoral areas of the country.

Last year’s aggregate cereal production was also well below average, estimated at some 1.3 million tonnes (about 15 percent and 20 percent lower than in 2012 and the average of the previous five years). Production of millet, the most important staple crop, dropped by 22 percent compared to 2012.

Coarse grains prices on the increase

Reflecting last year’s reduced crop, millet prices have been following an upward trend since last June. By contrast, prices of imported rice, one of the most widely consumed cereals in the country, have remained relatively unchanged over the last two years. Rice prices increased steeply in the country from December 2011, but Government intervention in the form of price controls has kept prices stable since April 2012.

Senegal still relies heavily on rice imports from the international market to meet its food requirements. Domestic production covers only about half of the country’s cereal utilization requirements, therefore, its rice imports amount to an average of about 900 000 tonnes per annum.

Food and agricultural assistance needed as food security situation remains precarious

A large segment of the Senegalese population relies on traditional agriculture and livestock related activities to maintain their livelihoods, and, therefore, remain in a state of chronic vulnerability due to unpredictable seasonal rains and climatic conditions. Moreover, the high import dependency rate for food exposes the population to fluctuations of the global market, keeping poor households in cycles of indebtedness and poverty. According to the last Cadre Harmonisé analysis in the country conducted in March 2014, about 738 750 people were estimated to be in Phase 3 (Crisis) and above during the lean season from June-August, as a result of the lingering effects of the
previous crises and the impact of last year’s erratic rains on crops and pastures in some regions. A new Cadre Harmonisé exercise is underway in the region and the results will be released soon.

The United Nations and humanitarian partners launched a three-year Regional Strategic Response Plan (RSRP) earlier this year to provide aid to millions of people in nine countries of the Sahel belt. The country plan for Senegal is seeking to mobilize USD 122 to provide food and non-food assistance to over 2.6 million people across the country.
GIEWS Country Brief

Senegal

Reference Date: 05-August-2014

FOOD SECURITY SNAPSHOT
- Early crop prospects are uncertain due to insufficient and irregular rains
- Cereal prices remain mostly stable
- Humanitarian assistance continues to be needed

Late and inadequate seasonal rains affect prospects for current crops

Erratic and insufficient rainfall since the beginning of the rainy season in May/June over most parts of the country have delayed plantings and affected growing crops. Satellite imagery analysis indicates low Vegetation Health Index in much of Senegal’s groundnut basin and in the northern and Casamance agro-ecological zones. Due to the earlier drier conditions, adequate rainfall in August will be critical for regeneration and development of crops.

Last year’s aggregate cereal production was also well below average, estimated at some 1.3 million tonnes (about 15 percent and 20 percent lower than in 2012 and the average of the previous five years). Production of millet, the most important staple crop, dropped by 22 percent compared to 2012.

Cereal prices remain stable

In spite of the reduced crop gathered in 2013, coarse grains prices have been mostly stable since January 2014. Adequate availability at regional level contributes to price stability in Senegal. Similarly, prices of imported rice, one of the most widely consumed cereals in the country, have remained relatively unchanged over the last two years. Rice prices increased steeply in the country from December 2011, but Government intervention in the form of price control has kept prices stable since April 2012.

Senegal still relies heavily on rice imports from the international market to meet its food requirements. Domestic production covers only about half of the country’s cereal utilization requirements, so its rice imports amount to an average of about 900 000 tonnes per annum.

Food and agricultural assistance needed as the food security situation remains precarious

A large segment of the Senegalese population relies on traditional agriculture and livestock related activities to maintain their livelihoods, and, therefore, remain in a state of chronic vulnerability due to unpredictable seasonal rains and climatic conditions. Moreover, the high import dependency rate for food exposes the population to fluctuations of the global market, keeping poor households in cycles of indebtedness and poverty. According to the last Cadre Harmonisé analysis conducted in the country, about 738 750 people are estimated to be in Phase 3 (Crisis) and above during the lean season from June-August, as a result of the lingering effects of previous crises and the impact of last year’s erratic rains on crops and pastures in some regions. An additional 2.9 million people are estimated to be in Phase 2

GIEWS, Global Information and Early Warning System on Food and Agriculture
that is at risk of food insecurity.

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FOOD SECURITY SNAPSHOT

- Estimates point to a significant decline in cereal production in 2013
- Coarse grain prices have remained at relatively high levels
- Humanitarian assistance continues to be needed

2013 coarse grains production severely reduced by irregular rains

Harvesting of the 2013 cereal crops was completed in December. Dry spells, floods and poor rainfall distribution during the growing period (July to October) resulted in a sharp decline in cereal production. A joint CILSS/FAO/FEWSNet/WFP Crop and Food Security Assessment Mission that visited the country in October 2013 estimated 2013 aggregate cereals production at some 1.3 million tonnes (including off-season crop harvest forecasts), about 12 percent lower than the 2012 output and 17 percent below the average of the previous five years. Production of millet, the most important staple crop, dropped by 14 percent compared to 2012. The most affected regions include Louga, Matam, Polder, Diourbel, Kaffrine and Fatick. Pastures were also affected in these areas.

In 2012, an average harvest was gathered owing to overall favourable climatic conditions. Aggregate 2012 cereal production was estimated at about 1.5 million tonnes, about 36 percent up on 2011 drought-affected harvest, but similar to the five-year average.

High coarse grains prices persist

Reflecting the average crop gathered in 2012 (following the 2011 poor harvest), coarse grains prices have remained relatively higher last year. Although the new cereal harvests led to slight decrease in prices in late 2013, millet prices in Dakar in November 2013 were still 5 percent higher than the 2011/12 crisis affected levels. Millet prices in Saint Louis were 25 percent higher. By contrast, prices of imported rice have remained relatively stable. Rice prices increased steeply in the country from December 2011, but Government intervention in the form of price control has kept prices stable since April 2012.

Senegal still relies heavily on rice imports from the international market to meet its food requirements. Domestic production covers only about half of the country’s cereal utilization requirements, so its rice imports amount to an average of about 900 000 tonnes per annum.

Food and agricultural assistance needed as the food security situation remains precarious

A large segment of the Senegalese population relies on traditional agriculture and livestock related activities to maintain their livelihoods, and is in a state of chronic vulnerability due to unpredictable seasonal rains and climatic conditions. Moreover, the high import dependency rate for food exposes the population to fluctuations of the global market, keeping poor households in cycles of indebtedness and poverty. About 2.2 million people are estimated to be at risk of food insecurity this year,
as a result of the lingering effects of previous crises and the impact of last year’s erratic rains on crops and pastures in some regions.

The United Nations and humanitarian partners recently launched a three-year Regional Strategic Response Plan (RSRP) to provide aid to millions of people in nine countries of the Sahel belt. The country plan for Senegal is seeking to mobilise 122 million dollars to provide food and non-food assistance to over 2.6 million people across the country.
A reduced crop expected in 2013

The 2013 coarse grains harvest is underway, while harvesting of rice is expected to begin in November. Following last year’s bumper crop, a reduced harvest is anticipated this year. Delayed rains and prolonged dry spells have affected 2013 crop production in several parts of the country, notably in the centre and the north. The most affected regions include Louga, Matam, Diourbel, Kaffrine and Fatick. The National Agricultural Statistics Service has forecasted a below-average harvest for this year.

In 2012, an above-average harvest was gathered owing to favourable climatic conditions and enhanced government support to the agricultural sector, through the provision of seeds and fertilizers. Aggregate 2012 cereal production was estimated at about 1.67 million tonnes, about 52 percent up on 2011 drought-affected harvest, and a 15 percent increase relative to the five-year average. The rice harvest, estimated at about 627 000 tonnes, was the largest ever recorded. In addition, production of groundnuts, the main cash crop for farmers, increased by 31 percent compared to 2011 output.

Cereal prices exhibit mixed trends

In spite of the good crop gathered last year, coarse grains prices have remained relatively higher. Millet prices in August 2013 in Dakar were 6 percent higher than last year’s crisis affected levels. Higher prices are also reported in cereal producing regions such as Fatich and Kolda. By contrast, prices of imported rice have remained relatively stable in recent months. Rice prices increased steeply in the country from December 2011, but Government intervention in the form of price control has kept prices stable since April 2012.

Senegal still relies heavily on rice imports from the international market to meet its food requirements. Domestic production covers only about half of the country’s cereal utilization requirements, so its rice imports amount to an average of about 900 000 tonnes per annum.
GIEWS Country Brief
Senegal

Reference Date: 10-June-2013

FOOD SECURITY SNAPSHOT
- Above-average precipitation expected in 2013
- Cereal production recovered significantly in 2012 from previous year’s low level
- Coarse grain prices show mixed trends, while imported rice prices remain mostly stable

Seasonably dry conditions prevail in most parts of the country
Although some rains fell in the extreme south-east in May, seasonably dry conditions continue to prevail in most parts of the country. Rains are expected to start and progress towards the centre and the north in June and July. According to the first 2013 weather forecast carried out by Agryhymet Centre and ACMAD, the western part of West Africa including Senegal is likely to receive above-average rainfall between July and September this year.

Cereal production recovered significantly in 2012
Harvesting of maize and millet, two major grains produced in the country, for the 2012 season was completed in November, while the rice harvest was completed in late January. Favourable weather conditions and enhanced government support to the agricultural sector, through the provision of seeds and fertilizers, contributed to the increase in national cereal production after the previous year drought-induced sharp drop. Aggregate 2012 cereal production was estimated at about 1.67 million tonnes, about 52 percent up on 2011 drought-affected harvest, and a 15 percent increase relative to the five-year average. The rice harvest, concluded in early 2013 and estimated at about 627 000 tonnes, is the largest ever recorded. In addition, production of groundnuts, the main cash crop for farmers, increased by 31 percent compared to 2011 output.

Cereal prices exhibit mixed trends
In spite of the good crop gathered, coarse grains prices, declined only slightly during the harvest period (September-November) 2012. Millet prices in April 2013 in Dakar were 16 percent higher than a year earlier. In cereal producing regions of Kolda, prices have increased by 7 percent over the same period. Reduced imports from Mali may have contributed to the high coarse grains prices in Senegal. By contrast, prices of imported rice have remained relatively stable in recent months. Rice prices increased steeply in the country from December 2011, but Government intervention in the form of price control has kept prices stable since April 2012.

Senegal still relies heavily on rice imports from the international market to meet its food requirements. Domestic production covers only about half of the country’s cereal utilization requirements, so its rice imports amount to an average of about 900 000 tonnes per annum.
Cereal production recovered significantly in 2012

Harvesting of maize and millet, two major grains produced in the country, for the 2012 season was completed in November, while the rice harvest was completed in late January. Favourable weather conditions and enhanced government support to the agricultural sector, through the provision of seeds and fertilizers, contributed to the increase in national cereal production after the previous year drought-induced sharp drop. Aggregate 2012 cereal production was estimated at about 1.67 million tonnes, about 52 percent up on 2011 drought-affected harvest, and a 15 percent increase relative to the five-year average. The rice harvest, concluded in early 2013 and estimated at about 627,000 tonnes, is the largest ever recorded. In addition, production of groundnuts, the main cash crop for farmers, increased by 31 percent compared to 2011 output.

Cereal prices exhibit mixed trends

In spite of the good crop gathered, coarse grains prices, declined only slightly during the harvest period (September–November) 2012. Millet prices in March in Dakar were 15 percent higher than a year earlier. In cereal producing regions of Diourbel and Kolda, prices have increased by 25 percent and 21 percent respectively over the same period. Reduced imports from Mali may have contributed to the high coarse grains prices in Senegal. By contrast, prices of imported rice have remained relatively stable in recent months. Rice prices increased steeply in the country from December 2011, but Government intervention in the form of price control has kept prices stable since April 2012.

Senegal still relies heavily on rice imports from the international market to meet its food requirements. Domestic production covers only about half of the country’s cereal utilization requirements, so its rice imports amount to an average of about 900,000 tonnes per annum.
Reference Date: 22-March-2012

**FOOD SECURITY SNAPSHOT**
- Cereal production in 2011 is estimated at 1.1 million tonnes, 36 percent less than in 2010
- High cereal prices affect vulnerable groups
- Some 850,000 people are in need of emergency assistance; urgent action required to avoid deterioration of the food security situation

### 2011 cereal production sharply reduced

Harvesting of the 2011 cereal crops was completed in December. Following three consecutive years of very good crop, a reduced harvest was gathered in 2011. Delayed rains and prolonged dry spells have affected crop production in several parts of the country, notably in the centre and the north. The 2011 aggregate cereal production is estimated at some 1.1 million tonnes, some 36 percent less than the previous year’s good harvest and 21 percent below the average for the previous five years.

### Cereal prices on the increase

Reflecting these reduced harvests, prices of locally produced cereals have increased unseasonably in recent months in most markets. For instance, millet prices in Dakar in January 2012 were 35 percent higher than in January 2011. In Kaolack, a major cereal producing area located in the groundnut basin, millet prices in January 2012 were about 25 percent above their levels of a year earlier, while in Matam, located in a drought affected deficit area in the north-east of the country, millet prices increased by about 50 percent over the same period reaching record levels in January 2012.

Prices of imported rice, stable in recent months, increased in January in most of the monitored markets. However, in the capital Dakar and in markets located in its proximity prices were still similar to a year earlier. By contrast, in inland markets far from Dakar, which is the main entry port, they were up to 25 percent higher due to high transport costs.

### Food and agricultural assistance needed

According to a joint assessment conducted by FAO, WFP and the Government, some 850,000 people are estimated to be food insecure. The most severely affected areas are located in the regions of Kaffrine, Kedougou, Tambacounda, Louga, Linguère, Saint Louis and Matam.
**GIEWS Country Brief**

Senegal

Reference Date: 5-December-2011

**FOOD SECURITY SNAPSHOT**

- Cereal production is estimated to drop by 15 percent in 2011
- Cereal prices are increasing

**A reduced crop expected in 2011**

The 2011 coarse grains harvest is nearly complete, while harvesting of rice is underway. Following 3 consecutive years of very good crop, a reduced harvest is anticipated this year. Delayed rains and prolonged dry spells have affected 2011 crop production in several parts of the country, notably in the centre and the north.

A joint FAO/CILSS/WFP Crop Assessment Mission which visited the country recently estimated 2011 aggregate cereal production at some 900 000 tonnes, 15 percent less than last year's good harvest but about 4 percent below the average for the previous five years. The important millet crop is expected to decrease by 18 percent to some 668 000 tonnes while the paddy crop is estimated at about 500 000 tonnes, 17 lower than last year. Production of groundnut, the main cash crop, will be down by 27 percent to some 940 000 tonnes.

**Cereal Prices on the increase**

Reflecting these reduced harvests, prices of locally produced cereals, have increased in recent months in most markets despite the ongoing 2011 crop harvests. For instance, millet prices in Dakar in November 2011 were 21 percent higher than in November 2010. In Kaolack, a major cereal producing area located in the groundnut basin, millet prices in November 2011 were about 60 percent above their levels of a year earlier. Millet prices are likely to stay high, given that its production has decreased and its supply will be limited in the whole western Sahel region during marketing year 2011/12. Although rice price has been mostly stable so far, the impact of rising coarse grain prices on rural vulnerable households' food security should be monitored closely.
GIEWS Country Brief

Senegal

Reference Date: 27-May-2011

FOOD SECURITY SNAPSHOT
• The 2011 cropping season is expected to start with the onset of rains, normally in June
• A good cereal harvest was gathered in 2010 for a third consecutive year
• Overall food supply situation remains satisfactory
• Cereal prices are stable

Seasonably dry conditions prevail
The seasonal rains have not yet started and farmers are currently preparing their fields. Planting of the 2011 cereal crops is scheduled to start in June with the onset of the rains.

A good cereal harvest was gathered in 2010
Harvesting of maize and millet, the major grains produced in the country, was completed last November, while the rice harvest was completed in January 2011. Favourable weather conditions and continued government support towards the agriculture sector contributed to a good national cereal production for a third consecutive year. The official estimate puts the 2010 aggregate cereal production at about 1.77 million tonnes, 5 percent below the 2009 record crop but 29 percent above average. The output of groundnuts, the main cash crop, was estimated at 1.28 million tonnes compared with 1.03 million tonnes in 2009.

Cereal Prices remain stable
Reflecting these good harvests, markets are well supplied. Although prices increased from January/February 2011 in several markets, following seasonal patterns, they remained below or close to their levels of the previous year. For example, millet prices in Dakar in March 2011 were about 8 percent below their level of a year earlier. Price of imported rice has also been flat, having declined by 2 percent over the same period in Dakar. However, the year-on-year inflation rate in the food sector was estimated at 8.6 percent in March 2011, driven mostly by prices of fish (50.6 percent increase), milk (13.5 percent), fruits (6.4 percent) and vegetables (6.5 percent).
The food situation remains satisfactory

Harvesting of maize and millet, the major grains produced in the country, was completed in November, while the rice harvest was completed in January. Favourable weather conditions and continued government support towards the agriculture sector contributed to the increase in national cereal production for a third consecutive year. The cereal harvest in 2010 is estimated at 1.97 million tonnes, representing an increase of 6 percent compared to last year’s bumper harvest, and a 44 percent increase relative to the five-year average, according to Government sources. The output of groundnuts, the main cash crop, was estimated at 1.04 million tonnes compared with 1.03 million tonnes in 2009.

Reflecting these good harvests, markets are well supplied and cereal prices remained mostly stable over the past year across the country.
FOOD SECURITY SNAPSHOT

- Harvest prospects are favourable, following adequate weather conditions and continued government support to the agricultural sector.
- Overall food supply situation remains satisfactory

Early harvest prospects are favourable

The Government has continued this year to support the agricultural sector, through the provision of subsidised seeds and fertiliser, which is likely to keep planted area as high as in the previous year. Moreover, soil moisture has been generally adequate to meet crops’ water requirement since the beginning of the growing season in June, allowing satisfactory crop development in main producing zones. Millet and sorghum are generally at the heading/flowering stage. Maize is maturing. Rice is growing satisfactorily. Early harvest prospects are good provided normal weather conditions continue. Pastures have regenerated countrywide, improving livestock conditions.

Last year, cereal production increased by 8 percent compared to the previous year and 53 percent relative to the 5-year average, due to favourable weather conditions and enhanced government support to the agricultural sector.

Reflecting these good harvests, markets are well supplied and cereal prices remain mostly stable across the country.
Cereal production increase in 2009/10, for the second year running

Harvesting of maize and millet, two major grains produced in the country, for the 2009/10 season was completed in November, while the rice harvest was completed in late December. Favourable weather conditions and enhanced government support to the agricultural sector, through the provision of seeds and fertilisers, contributed to the increase in national cereal production for a second consecutive year. Relatively smaller production rises were also observed in the southern regions of Kolda, Tambacounda and Ziguinchor. Aggregate 2009 cereal production was estimated at about 1.87 million tonnes, about 8 percent up on last year’s good harvest, and a 52 percent increase relative to the 5-year average. The rice and millet harvest is the largest recorded over the last 10 years and rice production is 23 percent greater than the previous season’s production level. Excessive rainfall in late August caused flooding, negatively affecting an estimated 500 hectares of cereal crops in Fatik, Kolda, Kédougou, Matam, St. Louis and Tambacounda.

The establishment of Banque verte, a new rural credit agency, is expected to improve financial access for farmers and help support production growth for the forthcoming 2010/11 agricultural season, with planting scheduled to begin in June.

Strong growth in the horticultural sector

In addition, the horticultural export sector witnessed a large growth in 2009, supported by strong government investment aimed at improving smallholders’ participation in the sector. The growth in production has contributed to lowering vegetable prices and boosting smallholders’ income. Horticultural exports increased by 30 percent in 2009, over levels recorded in 2008 according to Agence Nationale de la Statistique et de la Démographie.

Proportionally higher cereal prices in the far north and south

Despite the decline in coarse grain prices to pre-crisis levels of mid-2008, access to food remains difficult for rural and urban households in food deficit areas. As of January 2010, coarse grain prices throughout Senegal were generally lower compared to levels one year earlier. However, prices of millet, sorghum and maize in the northern region of Saint Louis increased by 4, 9 and 20 percent, respectively, over the same period. On the other hand, prices of coarse grains were the highest in the southern region of Ziguinchor. Both these areas are relatively small coarse grain producers, which might account for the
comparatively higher prices observed in both regions. Moreover, rice prices still remain above average.
**FOOD SECURITY SNAPSHOT**

- Good rains and supportive government policies contribute to improved 2009/10 harvest
- Government investment promotes increase in horticultural production for the export sector
- Nevertheless, higher cereal prices restrict normal food access in parts of the country

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**Cereal production increase in 2009/10 season**

Harvesting of maize and millet, the major grains produced in the country, for the 2009/10 season was completed in November, while the rice harvest was completed in late December. Favourable weather conditions and government support towards the agriculture sector contributed to the increase in national cereal production for a third consecutive year, with relatively smaller production rises observed in the southern regions of Kolda, Tambacounda and Ziguinchor. A CILSS/Government Crop Assessment Mission estimated the cereal harvest in 2009 at 1.86 million tonnes, representing an increase of 7 percent compared to last year’s favourable harvest, and a 52 percent increase relative to the five-year average. Excessive rainfall in late August caused flooding, negatively affecting an estimated 500 hectares of cereal crops in Fatik, Kolda, Kédougou, Matam, St. Louis and Tambacounda.

The establishment of Banque Verte, a new rural credit agency, is expected to improve financial access for farmers and help support production growth for the forthcoming 2010/11 agricultural season, with planting scheduled to begin in June.

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**Strong growth in the horticultural sector**

In addition, the horticultural export sector witnessed a large growth in 2009, supported by strong government investment aimed at improving smallholders’ participation in the sector. The growth in production has contributed to lowering vegetable prices and boosting smallholders’ income. Horticultural exports increased by 30 percent in 2009, over levels recorded in 2008 according to Government sources.

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**Higher cereal prices observed in the far north and south, despite a general decline**

Despite an apparent decline in coarse grain prices – to comparable levels before the price-crisis period from mid-2008 – following the main harvest and improved market availability, access to food remains difficult for rural and urban households in food deficit areas. Rice prices still remain above average, primarily on account of the higher international price levels that rose during the last quarter of 2009; however, national cereal price index has remained at a steady level between the last quarter of 2009 and February 2010.

As of December 2009, average national coarse grain prices were 4 percent lower compared to levels one year earlier. Despite these lower national levels, coarse grain prices in the southern region of Ziguinchor
have increased by 15 percent over the same period, with similar increases observed in the Saint Louis in the far north. Both these areas are relatively small coarse grain producers, which might account for the comparatively higher prices observed in both regions.
Senegal

Reference Date: 18-January-2010

FOOD SECURITY SNAPSHOT
• Favourable rains and government support contribute to improved 2009/10 harvest
• Higher cereal prices restrict normal food access

Good rains support increased cereal production
Harvesting of maize and millet, the major grains produced in the country, was completed in November, while the rice harvest was completed in January. Favourable weather conditions and government support towards the agricultural sector have contributed to a further increase in cereal production this season. A recent CILSS/Government crop assessment mission has estimated that cereal production in 2009 reached 1.86 million tonnes, representing an increase of 6 percent compared to the good harvest last year and 52 percent relative to the average of previous five years. The good precipitation levels also improved pastures conditions throughout the country. However, excessive rainfall in late August caused flooding, negatively affecting crops in localised areas. According to estimates, approximately 500 hectares of cereal crops have been damaged in Fatik, Kolda, Kédougou, Matam, St. Louis and Tambacounda. In addition, preliminary estimates revealed that approximately 264 000 people have been affected by the floods, with the majority of those affected located in Dakar.

Higher than normal cereal prices persist
Although recent data shows that cereal prices have been on the decline due to improved market supplies, following the arrival of the 2009 harvests on the markets, access to food remains difficult for rural food-deficit households and urban consumers. The price of imported rice, which is determined by global markets and has undergone large fluctuations in 2009, remains more than 40 percent higher in October 2009 over the level recorded two years before. In addition, the Government has already suspended subsidies on food granted during the food price crisis of 2008.
Senegal
Selected cereal prices

CFA Franc per kg

Source: Commission à la Sécurité Alimentaire
Prospects for the 2009 cereal crops to be harvested from September are favourable

Harvesting of maize, millet and sorghum crops is expected to commence in September. Late rains in the main agriculture regions of Kolda and Tambacoua led to localised early season dryness, but precipitation levels improved during July, and vegetation indexes revealed normal crop conditions for the same month. In August favourable rainfall levels continued across the country, with satellite analysis indicating above normal vegetative growth in the Matam region. The continued Government investment in agriculture and favourable weather conditions indicates the likelihood of another good harvest for the 2009/10 season. However, flooding in the west could lead to some localized crop losses in the affected region.

Government has persevered with support to agriculture this year

Cereal production in 2008 increased significantly, by 149 percent compared to the previous season, reaching 1.76 million tonnes, with significant growth in maize (172 percent increase) and sorghum (191 percent). This increase is attributed to favourable rainfall levels, an expansion in areas planted by approximately 40 percent and the government’s investment in agriculture production, for example subsidizing the cost of seeds by 75 percent, through the Great Offensive for Agriculture and Abundance (GOANA) initiative. In 2009, the Government announced a plan to establish the Banque des Agriculteurs du Sénégal (BAS), in an initiative to provide the agriculture sector and farmers with more financial autonomy, which is expected to further support production increases.

Lower food prices improved access

The Government has suspended subsidies on all food items for 2009; however, the consequent inflationary pressure has been off-set by a drop in world food prices and the 2008 good domestic production. Nationally, cereal prices have declined by 13 percent between January and July 2009, and were 2.4 percent below the price level in the same period in 2008. In Dakar, millet and rice prices have continued a decreasing trend since the beginning of 2009 (January to May), but are still 9 and 52 percent above prices recorded in May 2007, respectively. The significant growth in cereal production for 2008/09 has improved food security conditions in Senegal. However, further price rises, prior to the harvest period, could lower food access for rural and urban households that are primarily reliant on the market.
Heavy rain during late August cause flooding in Dakar

Heavy rainfall during August caused flooding in localised western regions, with Dakar and the surrounding suburbs particular affected by the significant rainfall levels. The Government has allocated over USD 4 million towards a relief operation.