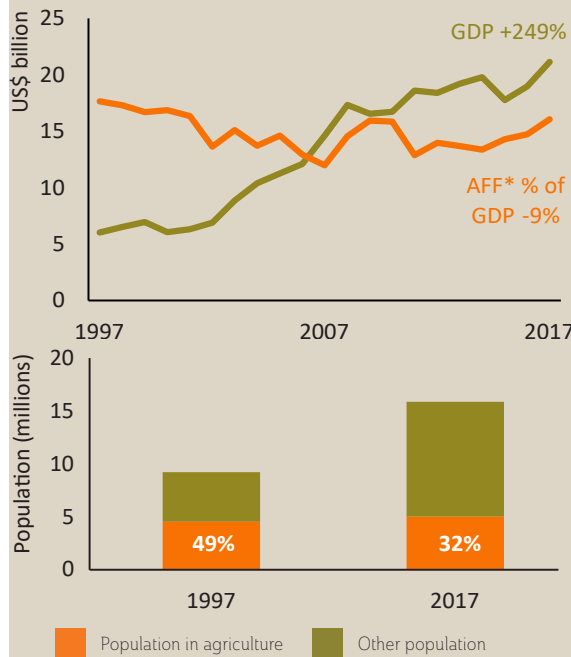




MACROECONOMIC CONTEXT

Growth has been over 6% since 2014 and the forecast remains optimistic with oil and gas production expected in 2022. All sectors supported growth in 2018; agriculture's contribution to GDP is growing due to support programmes, robust external demand, and large infrastructure investments (16% of total in 2017). Senegal is classed by the World Bank as a low-income country and has a low Human Development Index (ranked 164 of 189 countries).

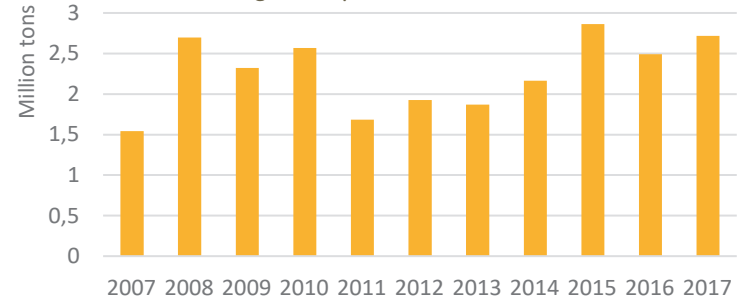


FOOD PRODUCTION

Top 10 horticultural crops (000 tons, 2017)

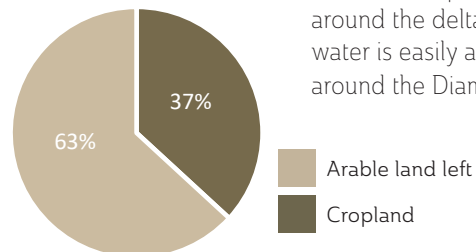
1	Groundnuts	915	6	Mangoes	132
2	Onions	400	7	Potatoes	119
3	Cassava	336	8	Brassicas	76
4	Watermelons	242	9	Peas	59
5	Tomatoes	138	10	Other fruit	49

Trends in fruit and vegetable production



Senegal's comparative advantages for fruit and vegetable production

- According to a recent report from the World Bank, horticulture is the future for Senegalese farming. At a time when agricultural productivity has decreased, horticulture is the best performing subsector, supported by a strong increase in direct foreign investment.¹
- Senegal's ability to export by sea and road to EU markets in only 5–6 days is a competitive advantage.
- The leading vegetable production zone, the Niayes region, combines a suitable climate for off-season production with proximity to Dakar and to transport and port infrastructures for exports.²
- For tropical fruits Casamance is the more important production area.
- Horticultural production is developing around the delta near Saint-Louis, where water is easily available, and to the north around the Diama dams.

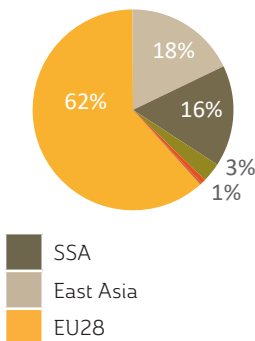


TRADE

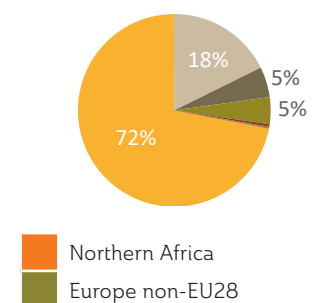
Senegal has an increasingly negative physical trade balance for fruit and vegetables – in 2016 it imported 247,992 tons more than it exported.

Exports are mainly to the EU, representing 62% of the quantity and 72% of the value of all exports; exports to East Asia are 18% of quantity, and to SSA 16%. Leading exports to the EU include cashew nuts, tomatoes, sweetcorn and mangoes.

Cumulated quantity (2006–16)



Cumulated value (2006–16)



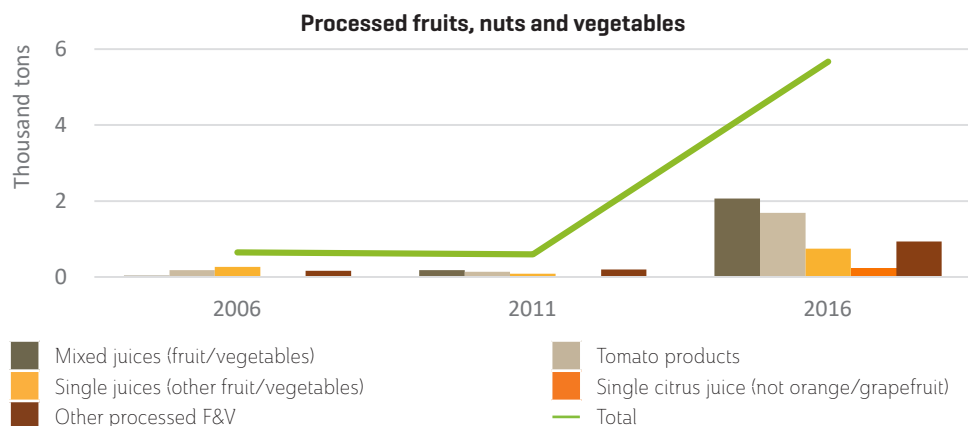
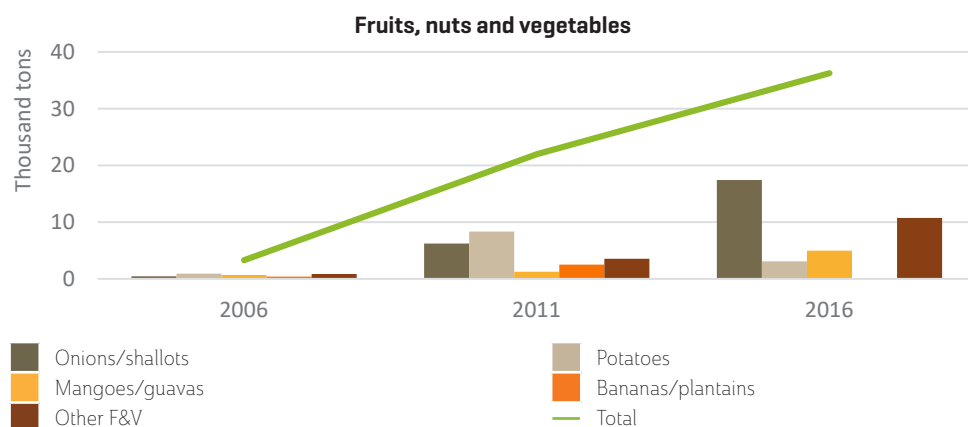
SSA
East Asia
EU28

Northern Africa
Europe non-EU28

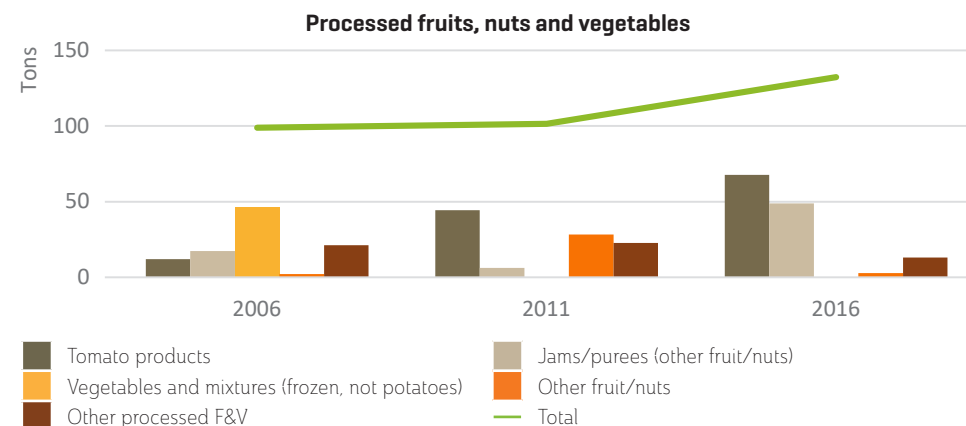
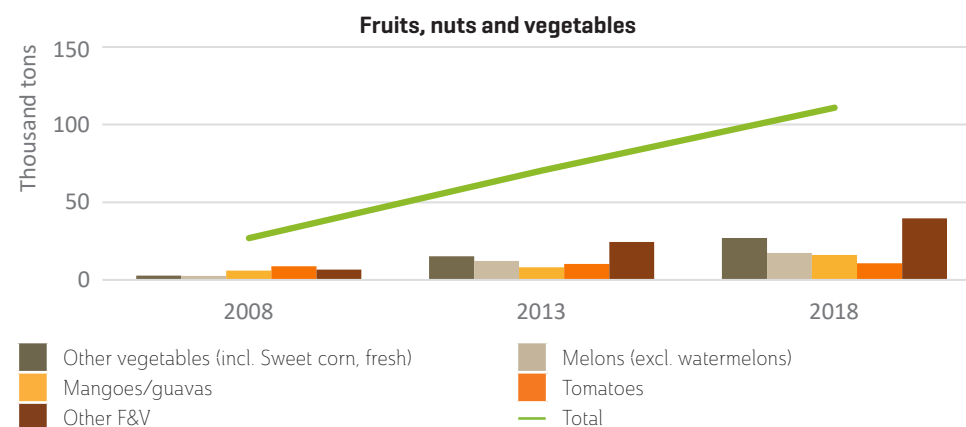


EXPORTS OF FRUITS, NUTS AND VEGETABLES: REGIONAL AND EUROPEAN MARKETS (BY VOLUME)

EXPORTS TO SSA



EXPORTS TO EU28





FOCUS ON THE MARKET

Supply

The Plan for an Emerging Senegal (to 2035) states that in 2016/17 horticultural production increased 6% on 2015/16; fruit production increased 2.27% compared to the average of the past five years; and exports of fruit and vegetables increased 29%.³

Demand

Although the food security situation is largely stable across the country, localised pockets of acute food needs remain during the June–August lean season.⁴ One study found that fruit and vegetables comprised 42% of all foods consumed; the most common were potato, carrot, mango and lettuce.⁵

Key facts

A recent study shows that Senegal's sharp growth in horticultural exports contributes to the capacity to import food, and does not jeopardise the availability of food.⁶

In Senegal high-end markets are developing fast, with Auchan and Carrefour supermarkets creating an important market for producers.

Between 2004 and 2014, horticultural exports grew from 13,321 tons to 85,414 tons (54% annually).⁷ In 2017 Senegal's total fruit and vegetable exports reached 100,000 tons for the first time.⁸

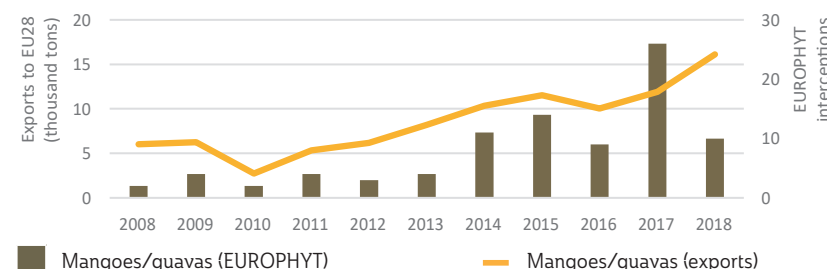
In 1999 Senegal exported just 680 tons of mangoes to the EU, mainly by air. Between 2000 and 2016, following the start of exports by sea, the volume going to EU markets grew by 20% annually, reaching a record 30,000 tons in 2018.

Green beans (bobby beans) are primarily grown by SMEs on contract to wholesale companies. Tomatoes are predominantly cherry tomatoes, grown in greenhouses or under shade netting for the European market, a requirement that places it beyond the capacity of most smallholders.⁶

A 2010 econometric study of horticultural crops in Senegal suggested that watermelon could have a strong comparative advantage on the export market.⁹

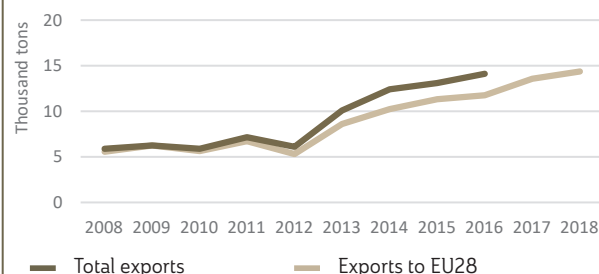
EU MARKET AND SPS ISSUES

The main problem is rising interceptions of fruit flies (mainly Tephritidae and *Bactrocera* spp.) on mangoes, this is concerning in light of the impending new EU Plant Health Regulation on



Non-European Fruit Fly, effective from December 2019, which puts in place special measures related to imports of mangoes.¹⁰ In 2018 Senegal had six RASFF notifications on eggplant, for a variety of PPPs.

One to watch: fresh beans



90% of Senegal's green bean exports are produced in the Niayes region through vertically integrated supply chains. Producers fill the out-of-season niche from December to March, before Europe begins production.⁶ Promoting fresh beans as a premium product, one Italian importer insists on strict protocols, with harvesting, sorting and packing carried out by hand to extend shelf-life.¹¹

	National	Regional	EU	World
Potential		Bananas Processed tomatoes Fruit juices (mixed and single) Jams/purees	Processed tomatoes Fruit juices (mixed and single)	
Developing		Onions/shallots Potatoes Mangoes Baobab fruit juice	Cashews Sweet potatoes Sweetcorn Green onions, Radishes, Chillies, Butternuts, Watermelons Groundnuts	
Mature	Groundnuts Mangoes	Groundnuts	Green beans, Cherry tomatoes Mangoes Melons (excl. watermelons) Alliums	



Notes

- ¹ Fresh Plaza (2015) Horticulture: the future of Senegalese agriculture. *Fresh Plaza*, 23 February. <https://www.freshplaza.com/article/2135652/horticulture-the-future-of-senegalese-agriculture/>
- ² Matsumoto-Izadifar, Y. (2008) *Senegal – Making Better use of Agribusiness Potential*. Paris: Organisation for Economic Co-operation and Development. <https://www.oecd.org/dev/40534078.pdf>
- ³ Presidency of Senegal (n.d.) *Emerging Senegal: What is the PES?* <http://www.presidence.sn/en/pse/presentation>
- ⁴ USAID (2019) *Food Assistance Fact Sheet – Senegal*. <https://www.usaid.gov/senegal/food-assistance>
- ⁵ Anderson, C.A. et al. (2010). Dietary intake of Senegalese adults. *Nutrition Journal*, 9(1). https://www.researchgate.net/publication/41485754_Dietary_intake_of_Senegalese_adults
- ⁶ Van den Broeck, G., Van Hoyweghen, K. and Maertens, M. (2018) *Horticultural exports and food security in Senegal*. *Global Food Security*, 17: 162–171.
- ⁷ D'Alessandro, S. et al. (2015) *Senegal Agricultural Sector Risk Assessment*. Washington, DC: World Bank Group. <https://openknowledge.worldbank.org/bitstream/handle/10986/22747/Senegal000AgriOctorOriskOassessment.pdf>
- ⁸ Fresh Plaza (2018) Senegal: Horticultural exports exceeded 100,000 tons in 2017. *Fresh Plaza*, 3 January. <https://www.freshplaza.com/article/187207/Senegal-Horticultural-exports-exceeded-100,000-tons-in-2017/>
- ⁹ IED Afrique (2010) *Compétitivité du Secteur Horticole au Sénégal : Étude des Filières de la Banane, de l'oignon et de la Pastèque*. <http://www.iedafrique.org/Competitivite-du-secteur-horticole.html>
- ¹⁰ EPA Monitoring (2019) New EU Plant Health Regulation on Non-European Fruit Fly Could Put Squeeze on Smaller ACP Mango Exporters. *EPA Monitoring*, 25April. <https://epamonitoring.net/neweu-plant-health-regulation-on-non-european-fruit-fly-could-put-squeeze-on-smaller-acp-mango-exporters/>
- ¹¹ Fresh Plaza (2017) Italy: High-quality green beans from Senegal. *Fresh Plaza*, 24 February. <https://www.freshplaza.com/article/2171422/italy-high-quality-green-beans-from-senegal/>

Local research: ClassM



Sources

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BBC News – Country Profiles: www.bbc.co.uk/news/world/africa

World Bank Country Overviews: www.worldbank.org/en/where-we-work

CIA World Factbook: www.cia.gov/library/publications/the-world-factbook/

Human Development Index 2018 – a composite index of life expectancy, education and per capita income indicators: http://hdr.undp.org/sites/default/files/2018_human_development_statistical_update.pdf

AFF as percentage of GDP (AFF = Gross Output Agriculture, Forestry and Fishing): <https://data.worldbank.org/indicator/nv.agr.totl.zs>

Population: <https://data.worldbank.org/country/>

Population employed in agriculture: <https://data.worldbank.org/indicator/sp.rur.totl.zs>

Food production: www.fao.org/faostat/

Trends in fruit and vegetable production: www.fao.org/faostat/

Cropland and arable land left: World Bank

Total exports (quantity and value): IFPRI

Global imports and exports, top 10 fresh fruit and vegetables, and top 10 processed fruit and vegetables: IFPRI

Regional imports and exports, top 10 fresh fruit and vegetables, and top 10 processed fruit and vegetables: IFPRI

Exports to EU28, top 10 fresh fruit and vegetables, and top 10 processed fruit and vegetables: <https://ec.europa.eu/eurostat>

Focus on the EU market: https://ec.europa.eu/food/plant/plant_health_biosecurity/europhyt_en