



GIEWS Country Brief Senegal

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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 epizootic 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

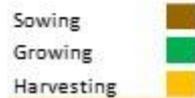
Due to favourable rainfall conditions and timely provision of inputs by the Government, the 2018 cereal production is estimated at about 2.8 million tonnes, about 55 percent above average and 14 percent above last year's record. The major increases were observed in rice paddy and maize production.

Senegal

Crop Calendar (*major foodcrop)



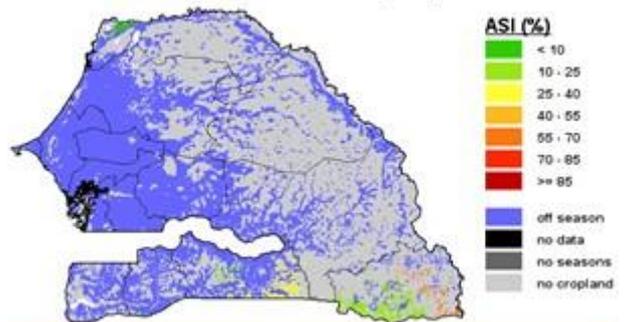
lean period



Source: FAO/GIEWS.

Senegal - Agricultural Stress Index (ASI)

From start of season 1 to Dekad 3, May 2019



Source: FAO/GIEWS Earth Observation System.

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

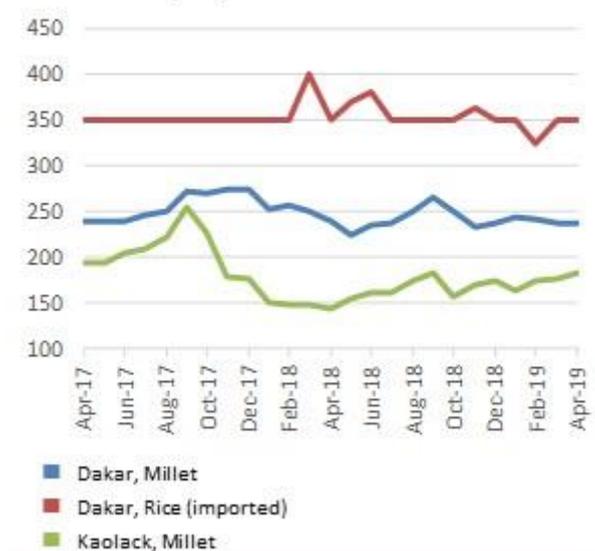
	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Rice (paddy)	772	1 011	1 207	19.3
Millet	640	876	897	2.5
Maize	293	410	486	18.3
Others	159	221	299	35.2
Total	1 863	2 519	2 889	14.7

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

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Selected retail cereal prices

CFA Franc BCEAO per kg



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