

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Senegal

Exporter Guide

Annual 2018

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Report Highlights:

For calendar year (CY) 2017, the U.S. exported \$19.5 million of food and agricultural products to Senegal. Bulk and intermediate products currently represent the largest share of U.S. agricultural exports to Senegal, accounting for 89 percent in CY 2017. According to the World Bank, Senegal is one of the strongest economies in West Africa, with an annual gross domestic product (GDP) growth rate of over six percent over the last three years. Although representing a small segment of the total population, a growing middle- to upper-class consumer base is slowly changing its buying habits and food preferences, which is leading to increased demand for high-value imported foods.

Post:

Dakar

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Market Fact Sheet: Senegal

Executive Summary

Senegal is one of the strongest economies in West Africa, with an annual gross domestic product (GDP) growth rate of over 6 percent over the last three years. Senegal imports approximately 70 percent of its food needs. Population growth, urbanization and evolving diets have led to increased and diversified food imports. Top agricultural imports in Senegal are rice, wheat, corn, onions, palm oil, sugar, and potatoes. Sauces, mixed condiments, seasonings, and beef and beef products may have export growth potential for U.S. suppliers interested in the Senegalese market.

Senegal: Quick Facts

Consumer-Oriented Exports to Senegal from the World (USD): \$684.26 million (2017)

Top Product Prospects:

Sauces, mixed condiments, seasonings, and beef and beef products

Agricultural Trade Flows in 2017 (USD billion) *

Food & Agricultural Product Exports to the World	\$0.48
Food & Agricultural Product Imports from the World	\$1.83

Modern Retail Stores

Casino
Auchan
Carrefour
U Supermarket
Hypermarket Exclusive

Hotels and Restaurants

Pullman Dakar Teranga Hotel
King Fahd Hotel
Radisson Blu Hotel
Terrou-Bi
Novotel
Club Med
The Palms
Marina Bay
Beluga
Group Fouchette Restaurants

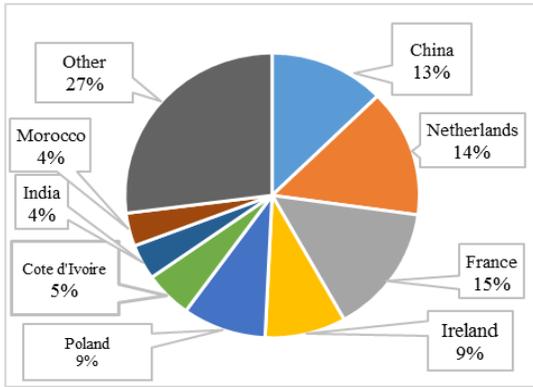
GDP/Population:

Population: 15 million (July, 2018 est.)
GDP (PPP): \$54.8 billion (2017 est.)
GDP per capita (2015 PPP\$): \$2,286 (2017 est.)

Imports of Consumer-Oriented Foods

For calendar year (CY) 2017, France, Netherlands, and China were the top three suppliers for consumer-oriented foods. The U.S. represents less than one percent of total market share.

Top Suppliers of Consumer-Oriented Food (CY 2017)



Source: Global Trade Atlas

Source: Global Trade Atlas, CIA World Factbook, Global Insight, FAS research; *References Export Data only

Opportunities and Challenges for U.S. Exporters

Opportunities	Challenges
Senegal’s strategic location in the region has made the country a major commercial hub in West Africa.	In general, freight rates and transit times can be higher or longer for shipments originating from the United States in comparison to shipments from Europe or South Africa.
Senegalese consumer perception of the quality of U.S. food products is very positive; middle-to upper-class consumers are developing sophisticated buying habits and exploring new foods.	Lack of modern cold chain operations, including reliable electricity, for perishable food products create challenges for transportation outside Dakar.
More organized modern retail chains are entering the market.	Importing can be complex. Lack of transparency in rules and regulations.
Opportunities exist for U.S. food products targeting niche markets, such as high value foods in the HRI sector.	Imported products manufactured in Europe resembling American foods, such as BBQ sauce or Tex-Mex, currently supply the market with little to no competition from the USA.

Hotel, Restaurant, and Institution (HRI) Sector

Approximately five to 10 years ago, mid- and upscale restaurants in Dakar primarily catered to expatriates and tourists. Today, according to contacts, the growing Senegalese middle and upper class constitute the bulk of patrons at these establishments, representing 50 to 70 percent of regular clientele. Although a small percentage of the overall population, these consumers are willing to pay a premium for higher quality, more expensive foods.

Modern Retail Sector

Modern retail stores are expanding in Senegal. They import food products from Europe, South Africa, Morocco, neighboring ECOWAS countries, the United States, and Asia. Most of these stores are located in Dakar, and their main customers are middle- and upper-class Senegalese consumers and expatriates.

Section I: Market Overview

Although Senegal’s domestic market is small, imports constitute approximately 70 percent of its food needs. According to the World Bank, Senegal is one of the strongest economies in West Africa, with an annual gross domestic product (GDP) growth rate of over six percent over the last three years. Although representing a small segment of the total population, a growing middle- to upper-class consumer base is slowly changing its buying habits and food preferences, which is leading to increased demand for high-value imported foods. Most of Senegal’s imported food and agricultural products originate from Europe and Asia. For calendar year (CY) 2017, the U.S. exported \$19.5 million of food and agricultural products to Senegal, representing one percent of total global food and agricultural product exports to the Senegalese market. Bulk and intermediate products currently represent the largest share of U.S. agricultural exports to Senegal, accounting for 89 percent in CY 2017.

Table 1. Senegal: Opportunities and Challenges for U.S. Exporters

Opportunities	Challenges
Senegal’s strategic location in the region has made the country a major commercial hub in West Africa.	In general, freight rates and transit times can be higher or longer for shipments originating from the United States in comparison to shipments from Europe or South Africa.
Senegalese consumer perception of the quality of U.S. food products is very positive.	From 2012-2016, real GDP per capita (2015 PPP\$) growth was on average two percent per year, suggesting slow income growth.
Senegal’s infrastructure is among the best in West Africa, with one of the region’s most active maritime ports. Senegal also recently constructed a major international airport.	Senegal port fees are higher than neighboring African countries. Senegal also may impose additional taxes for certain food products.
Opportunities exist for U.S. food products targeting niche markets, such as high value foods in the HRI sector.	Lack of modern cold chain operations, including reliable electricity, for perishable food products creates challenges for transportation outside Dakar.
Middle- to upper-class consumers are developing sophisticated buying habits and exploring new foods.	No genetically engineered products are approved for food or feed use in Senegal.
More organized modern retail chains are entering the market.	Importing can be complex and time consuming.
	Lack of transparency in rules and regulations.
	Imported products manufactured in Europe resembling American foods, such as BBQ sauce or Tex-Mex, currently supply the market with little to no competition from the USA.

Source: Global Insight and FAS research

A. Food Purchasing Behavior

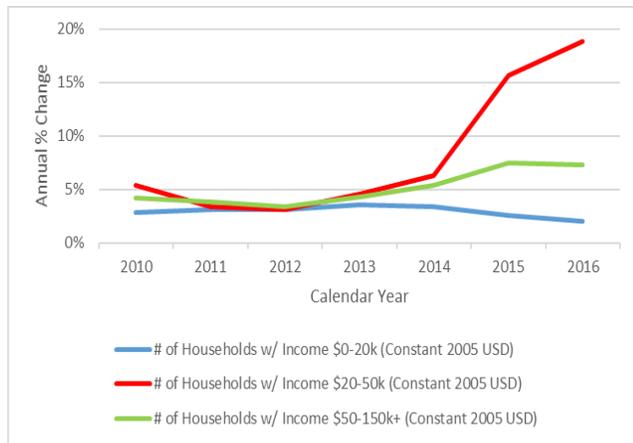
In 2014, the National Agency for Statistic and Demography (ANSD) estimated food and non-alcohol beverages represented 58.2 percent of the average Senegalese’s total household expenditures, followed by communication and charges (11.1 percent), cleaning and personal hygiene products (6.79 percent), and transportation (6.34 percent). Bread and cereals (especially rice) constituted the largest portion of the Senegalese diet. The average Senegalese eats at least one meal that includes rice per day (estimated at 90 to 100 kg per year) and enjoys regularly drinking fruit juice. Baguettes are generally consumed at breakfast. Middle- and upper-class consumers eat more fresh fruits and convenience foods, such as ready-to-eat products that require less cooking time. These consumers also may prefer imported foods due to perceptions of food safety and quality. The modern retail sector has gradually developed: more supermarkets and grocery chains have emerged in response to Senegalese urban consumers who want to

save time by buying food at one convenient location versus traveling to open air markets (please see Section IV for more information).

B. Consumer Demographics

In 2017, real GDP per capita (2015 PPP\$) was projected at approximately \$2,286, the second highest in the West Africa region (after The Gambia) covered by FAS Dakar. The population of Senegal is estimated at 15 million people, 95 percent of whom are Muslim. About 47 percent of the population lives in urban areas. Another 41 percent of the total population lives in the peanut belt located in the center of the country. By 2030, the Government of Senegal estimates that 60 percent of the population will be living in urban areas/cities.

Figure 1. Senegal: More Households Earning Higher Income



Senegal’s middle class is growing. According to Global Insight data (please see Figure 1), in 2016 the number of households that earned between \$30,000 to \$40,000 (constant 2005 USD) rose by around 45 percent, constituting approximately 62 percent of total households earning between \$20,000 to \$50,000 (constant 2005 USD). That same year, the number of households earning between \$20,000 to \$50,000 (constant 2005 USD) represented about 9.8 percent of total Senegalese households, and grew by approximately 19 percent.

Source: Global Insight

Senegal’s population is quite young: thirty-one percent are between the ages of 15-24 years. The population growth rate is approximately 2.4 percent per year. Over half of the total population (8.1 million) is of working age (15-64 years). A National Statistic and Demographic Agency (ANSD) report noted that in 2015 Dakar residents spent on average three times more on food than rural residents, and 1.7 times more than urban residents in other Senegalese cities. Senegalese consumers spend on average 58 percent of their disposable income on food and beverages.

C. Infrastructure

Senegal’s main seaport and international airport are located in the vicinity of Dakar, Senegal’s capital. The new Blaise Diagne International Airport (AIDB) is projected to become one of the highest-capacity airports in Africa, and now serves 34 airlines. Ninety percent of Senegal’s trade occurs at the Port of Dakar. Three other smaller ports are located in Kaolack, Ziguinchor and Saint-Louis. The size of Dakar’s seaport is estimated to be 350,903,470 square feet, with the capacity to host container-carriers,

cargo vessels, roll-on roll-off vessels, tankers, and fishing boats. For more information on the Port of Dakar (e.g., port taxes, required documents), please visit the Port of Dakar website [here](#).

Currently, all imports are transported inland by road, as the railroad is under renovation. Senegal's improved road network, which was upgraded in certain areas via support by the World Bank and Millennium Challenge Corporation, facilitates the transportation of imported food products to other countries such as Mali, Guinea-Bissau, Mauritania, and The Gambia.

Section II: Exporter Business Tips

Although Senegalese consumers' purchasing habits are becoming increasingly similar to those in developed economies, there are still many considerations to be aware of when trying to market U.S. food products in Senegal.

“Does my product have market access?” is the most important question exporters can ask as they research the Senegalese market (Please see the latest [Food and Agricultural Import Regulations and Standards](#) report, Section III: Import Food Standards & Regulations/Import Procedures of this report for more details). If yes, then the next thing to consider is pricing relative to Senegalese incomes. As a rule of thumb, a product is likely to be at least two to three times more costly than U.S. FOB prices after it reaches the retail shelf. Exporters should consider whether they are willing to start small, meet special labeling requirements, or ship mixed or partial containers, as well as be both persistent and patient.

A visit to Senegal to gain a first-hand feel of the market, particularly the food manufacturing sector as well as the modern retail and hotel, restaurants, and institutional sectors, will be important to determine if your product has market potential. Keep in mind that the supply of imported goods in Senegal is erratic, which may make it difficult to understand market trends. Be cognizant that good market data may not exist. You can contact the ANSD for trade data.

If an exporter is still interested in the Senegalese market, the next step is to locate a reliable importer/distributor. Agents should have extensive knowledge of government regulations and institutions involved in trade, as several government bodies may have a role in regulating certain foods or agricultural products.

Consider the following before selecting an importer/distributor:

- Do they have a strong distribution network?
- How is their distribution network structured?
- Who are their customers? Do they sell to modern retail establishments, hotels, or restaurants?
- What are their capabilities? Do they have experience handling perishable or value-added foods?
- Are they interested in marketing your products? If so, how will marketing costs be handled?
- Are they managing similar brands or products from other suppliers? If yes, consider if this leads to a conflict of interest or has other benefits, such as working with someone who has experience with a product similar to yours.
- What are the margins and costs charged by the distributor?

- Recognize that agents with fewer employees and smaller set-ups may be more adaptable and committed than those with a large infrastructure and established reputations.
- Agents with an established, long-term reputation in the market can also provide additional certainty that they are interested in developing a long-term business relationship with you.
- Be prepared to start small by shipping a few pallets or cases of a product and recognize that it could take several months or years before an importer is ready to order full containers.
- Be willing to meet country specific labeling requirements and consider working through a consolidator or participating in mixed containers.
- Good French language skills may be needed to conduct and establish strong business relationships.

Ensuring payment is another important consideration when establishing a relationship with an importer. Until a successful working relationship is established, exporters may wish to consider vehicles such as an irrevocable letter of credit. The USDA does not have the authority or expertise to mediate contractual disputes or serve as a collection agent when differences over payment arise. For firms that qualify, the Export Import Bank of the United States provides exporter insurance.

West African Economic and Monetary Union (WAEMU) regulations note that transactions for imported products worth over ten million CFA (\$18,000) (there are some exceptions – please review regulation No. 09/2010/CM/UEMOA) must be domiciled in a licensed intermediary bank, which is a bank licensed by a WAEMU country’s Minister of Finance. This means that importers/buyers who import food and agricultural products worth over approximately \$18,000 into WAEMU member states (such as Senegal) are required to use licensed banks in WAEMU to facilitate payment to exporters. A Foreign Exchange Transaction Form must be approved by a licensed intermediary bank in WAEMU before a payment can be made. Please see WAEMU Regulation No. 09/2010/CM/UEMOA for more information.

A number of regional trade associations and chambers of commerce and industry are active in Senegal. These associations work on behalf of local and multinational food and food ingredient manufacturers, processors, importers, farmers, retailers, and cooperatives. Exporters are advised to identify appropriate associations and work closely with these associations to explore opportunities in the Senegalese market.

Section III: Import Food Standards & Regulations/Import Procedures

A. Customs Clearance

The Senegalese Customs “les douanes sénégalaises” clears all traded goods at the Port of Dakar, the AIDB airport, and road borders, and uses an online system called Gaïndé that covers all customs operations. According to the Investment Climate Facility for Africa, customs clearance in Senegal generally takes one day. At the Port of Dakar, imports are generally transported from the port facility in two days; the average truck turnaround time is about 23 minutes.

B. Documents Generally Required by Senegalese Authorities for Imported Food

In general, documents required for the import clearance process include: a) two copies of the commercial invoices and /or a Pro Forma Invoice; b) a Certificate of Origin; c) a certificate of

verification issued by Cotecna (if applicable); d) a bill of lading; e) if applicable, an export certificate (e.g., health, phytosanitary etc.); and f) an Import Declaration for Food Products. For details on import procedures and requirements specific to your products, please refer to the latest [Food and Agricultural Import Regulations and Standards](#) report. For a listing of necessary export certificates, please refer to the latest [FAIRS Export Certificate](#) report.

C. Labelling Requirements

Senegal's labeling requirements are specified under ASN NS-03-068; this standard is based on the Codex General Standard for Labeling of Prepackaged Foods (Codex Stan 1-1985-Rev.1-1991). ASN NS-03-068 applies to all prepackaged foods for wholesale, retail, and catering purposes unless otherwise noted by Codex. These products must be labelled in French. Certain food products do not have any mandatory labeling requirements. In order to better understand all labelling requirements, please refer to the latest [Food and Agricultural Import Regulations and Standards](#) report.

D. Tariffs and FTAs

Senegal applies five tariff bands at 0, 5, 10, 20, and 35 percent. Food and agricultural product imports generally fall within either the 4th or 5th band; however, most will likely be subject to the 35 percent tariff rate (5th band) including:

- fresh, chilled, or frozen ovine, bovine, porcine, and poultry (please see poultry ban below) meat including offals, poultry eggs, sausages, and other similar meat products, or other foods manufactured with these meat and meat products
- refined peanut, palm, sunflower, and coconut oil, cocoa powder, chocolate, and other food preparations
- biscuits, waffles, wafers, rusks, toasted bread and similar products
- yogurt, chewing gum, potatoes, onions and shallots, prepared tomatoes, ketchup, tomato sauces

Commodities not originating from Economic Community of West African States (ECOWAS) countries are subject to several additional duties including: a) a Statistical Charge (RS) duty of one percent; b) a Community Solidarity Levy (PCS) of the WAEMU of one percent; c) an ECOWAS Community Levy of 0.5 percent; and d) a Senegalese Loaders' Council (COSEC) duty of 0.4 percent. Senegal also levies a special import tax (TCI) on sugar and wheat flour from third countries. A simplified and harmonized value-added tax (VAT) regime is applied to most food and agricultural products at 18 percent. VAT exemptions are available for unprocessed and staple food products, such as rice and wheat, which are subject to a special tax regime.

Excise duties are imposed on alcoholic and non-alcoholic beverages (excluding water) in ECOWAS countries. In Senegal, excise duties are levied on alcoholic beverages (40 percent) and aerated beverages (2.75 percent).

E. Trade policy

Food Safety Regulations and Quality Standards

The *Association Sénégalaise de Normalisation* (Senegalese Standards Association - ASN) develops and approves quality and food safety standards based on international guidelines, although not all ASN standards are mandatory. Imported food products must meet applicable mandatory ASN standards. For more information on the food safety system, including labeling, packaging, import certificates and other import requirements please refer to the latest [Food and Agricultural Import Regulations and Standards](#) report.

Poultry Import Ban

In November 2005, Senegal imposed a ban on imports of uncooked poultry and poultry products from all origins due to concerns of avian influenza. The ban is still in effect.

Agricultural Biotechnology

To date, no genetically engineered (GE) products have been approved in Senegal, which means no GE commodities or foods derived from GE commodities can be imported at the present time. Senegal's biosafety law notes that any person wishing to export a GE commodity or food derived from a GE commodity to Senegal must submit a request in writing to the National Biosafety Authority. For more information, please see the latest [Agricultural Biotechnology Annual](#) or [Food and Agricultural Import Regulations and Standards](#) report.

F. Trademarks and Patents

In Senegal, the government body responsible for managing intellectual property rights is the Ministry of Industries and Mines through the Industrial Property and Technology Service. Trademarks, industrial designs, and patents are regulated by national legislations that reference the Banjul Agreement on Trademarks, Patents, and Industrial Designs of 1997 (revised in 1999).

Section IV: Market Sector Structure and Trends

A. Food Retail

Currently, Senegal has one hypermarket (with two locations). Modern retail stores currently active in the market include: Hypermarket Exclusive, Auchan, Casino, U Supermarket, and Carrefour. These companies import food products directly from Europe, the United States, and Asia. Most of these stores are in Dakar, and their main customers are middle- and upper-class Senegalese consumers and

expatriates. However, the expatriate population is small, constituting approximately only one percent of the total population. Some of the retail establishments have opened smaller retail outlets in neighborhoods around Dakar for greater convenience, offering local and imported products. However, most Senegalese, especially those who live outside Dakar, still buy their food from informal “boutiques” and traditional, open-air markets.

B. Food Processing

More than 80 percent of the food-processing sector is located around Dakar (due to proximity of the port, airport, and good road infrastructure). Food manufacturers generally focus on one of two markets: a) international markets (exports include peanuts and canned fish) or b) local and regional markets which include products such as concentrated tomato paste, refined sugar, flour, soda, water, beer, fruit juices, milk powder, confectionary, and chocolate products, fruit jams, various condiments, and seasonings. The food manufacturing industry imports many ingredients from Europe. Regarding consumer preferences, reportedly many Senegalese consumers believe that imported processed foods are of a higher quality. Most processed foods available in the market are imported.

C. Food Service - Hotels, Restaurants, and Institutions

Approximately five to 10 years ago, mid- and upscale restaurants in Dakar primarily catered to expatriates and tourists. Today, according to contacts, the growing Senegalese middle and upper class constitute the bulk of patrons at these establishments, representing 50 to 70 percent of regular clientele. These consumers are willing to pay a premium for higher quality, more expensive foods. Senegalese middle- and upper-class consumers are travelling more frequently for business, study, and leisure; when these consumers return to Senegal they want to have the same international dishes that they experienced abroad. Post sources believe that Senegalese consumers in Dakar prefer international cuisine while dining outside the home and enjoy trying new foods. Many of these high-end restaurants are located in hotels. Dakar, Mbour, Saint-Louis, and Cap Skirring are the important tourist destinations in Senegal and have the largest concentration of upscale hotels. For more information on the HRI sector, please see this GAIN [report](#).

Section V: Agricultural and Food Imports

A. Agricultural & Food Import Statistics

Information on U.S. agricultural exports to Senegal for all categories, including bulk, intermediate, and consumer oriented products, may be found [here](#).

B. High-value, Consumer Oriented Products

Information on processed food exports from the U.S. to Senegal may be found [here](#).

Section VI: Key Contacts and Further Information

Office of Agricultural Affairs
United States Department of Agriculture
U.S. Embassy Dakar
Route des Almadies. B.P. 49 Dakar, Senegal.
Email: agdakar@fas.usda.gov - Website: www.fas.usda.gov

APPENDIX: STATISTICS

Table 2. Senegal: Consumer-oriented Exports to Senegal with the Most Growth Potential

Product/ Category	C Y 20 17 U. S. M a r k e t s h a r e	CY 2017 Total Export Market Size, USD	CY 2013- 2017 Compound Annual Rate of Growth	Import tariff Rate (custo m duties)	Key Competito rs	Market Attractiveness for USA
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Beef-boneless, frozen – HS 020230	0%	\$12.7 million	1%	35%	CY 2017 Main competitors : India (81%), Brazil (6%), France (2%), United Kingdom (2%), Spain (2%), Uruguay (1%), Argentina (1%), Ireland (1%)	Senegalese enjoy bovine meat. It is the second source of protein after fish. Although high quality U.S. beef is generally more expensive than beef from other origins, some restaurants and hotels that cater to middle and upper income consumers have expressed interest in sourcing U.S. beef.
Sauces and Preparations Therefor, Mixed Condiments and Seasonings – HS 210390	3%	\$6.1 million	2%	20 %	CY 2017 Main competitors : China (45%) and France (30%).	Although the U.S. does not export many sauces or condiments to Senegal, there may be an export sales opportunity with mid- and upscale restaurants/hotels that focus on introducing new cuisine to the market.

Source: Global Trade Atlas System and FAS Dakar research

Table 3. Senegal: Key Trade & Demographic Information

	CY 2013	CY 2014	CY 2015	CY 2016	CY 2017
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Agricultural Exports From All Countries to Senegal (USD billions)	\$1.58	\$1.59	\$1.56	\$1.40	\$1.83
U.S. Market Share of Agricultural Exports from the World to Senegal (%)	1.20%	1.40%	0.80%	1.70%	1.06%
Consumer-Oriented Agricultural Exports From All Countries to Senegal (USD millions)	\$605	\$645	\$580	\$644	\$709
U.S. Market Share of Consumer-Oriented Agricultural Exports from the World to Senegal (%)	0.80%	0.50%	0.50%	0.50%	0.33%
Total Population (millions)	14.1	14.5	15	15.4	15.8
Urban Population (millions)	6.3	6.4	6.8	7.1	7.4
Per Capita Gross Domestic Product (USD), PPP	\$2,273	\$2,332	\$2,443	\$2,566	\$2,712
Unemployment Total (% of Total Labor Force), modeled ILO estimate	7.68%	6.35%	4.85%	4.84%	4.84%

Source: Global Trade Atlas System; World Bank

Table 4. Senegal: Top Food and Agricultural Product Exports from the World to Senegal

(USD thousands)	CY 2013	CY 2014	CY 2015	CY 2016	CY 2017
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Bulk Products					
Wheat	\$160,222	\$157,875	\$127,065	\$112,185	\$127,988
Rice	\$380,209	\$397,269	\$405,904	\$311,364	\$475,430
Consumer-Oriented Products					
Beef and Beef Products	\$13,224	\$15,512	\$160,445	\$15,154	\$18,381
Dairy Products	\$77,321	\$102,556	\$80,917	\$79,700	\$75,060
Milk and Cream	\$45,926	\$67,730	\$49,943	\$49,005	\$36,440
Malt Extract	\$144,162	\$168,382	\$98,275	\$118,358	\$180,072
Cheese and Curd	\$12,587	\$13,299	\$12,589	\$12,794	\$14,263
Butter	\$3,478	\$4,576	\$3,368	\$3,320	\$5,426
Alcoholic Beverages	\$16,154	\$17,123	\$14,105	\$15,404	\$17,474
Non-Alcoholic Beverages	\$69,745	\$92,076	\$110,795	\$112,643	\$93,618
Food Preparations	\$208,589	\$223,902	\$134,411	\$165,948	\$227,377
Condiments and Sauces	\$9,276	\$14,535	\$11,238	\$10,295	\$10,558
Fats and Oils	\$170,261	\$167,411	\$188,149	\$139,058	\$233,341
Pasta	\$6,741	\$8,572	\$12,906	\$19,666	\$11,434
Onions And Shallots	\$66,676	\$39,287	\$49,543	\$52,750	\$47,355
Potatoes	\$29,882	\$20,104	\$21,357	\$29,641	\$19,425
Processed Vegetables and Pulses	\$20,108	\$18,840	\$23,433	\$22,751	\$46,724
Spices	\$2,275	\$2,278	\$2,623	\$3,306	\$3,551
Cookies (Sweet Biscuits)	\$10,687	\$12,676	\$13,053	\$10,346	\$11,217
Sugar Confectionery, Chocolate and Confectionery	\$7,872	\$11,101	\$6,468	\$10,188	\$9,556

Source: Global Trade Atlas System