

**Required Report:** Required - Public Distribution

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## **Report Name:** Grain and Feed Annual

**Country:** Senegal

**Post:** Dakar

**Report Category:** Grain and Feed

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### **Report Highlights:**

MY 2026/27 area harvested for Senegal, Mali, and Guinea combined is forecast at 2.0 million HA. Milled rice production is forecast at 3.74 million MT. Both area and production represent a two percent year-over-year increase. Mali accounts for 52 percent of the combined rice production followed by Guinea (30 percent) and Senegal (18 percent). MY 2026/27 imports are forecast to increase less than two percent to 3.54 million tons based on available supply and population growth. In Senegal, unsold rice from the previous season and trade disruptions to fertilizer imports are increasing uncertainty for yields and area planted for the coming season.

## **SENEGAL - RICE**

### **Production**

Marketing Year (MY) 2026/27 area harvested is forecast to increase two percent from last year to 260,000 hectares (HA) based on stable access to finance, distribution of inputs, and favorable farm gate prices. MY 2026/27 milled rice production is forecast at 670,000 metric tons (MT), representing a four percent increase over the previous marketing year on expectation of sufficient rainfall and manageable pest pressure.

Local media reported in April that more than 50,000 MT of local rice (paddy and white rice) from the 2025 dry and rainfed seasons has gone unsold for about four months, creating a crisis. Stakeholders are asking for government support with a subsidy of \$0.08/kg for local rice to be competitive with imported rice. The Prime Minister officially announced support for institutional local rice purchases. However, as soon as it started banks requested loan repayments which left farmers with a difficult financial situation. If the situation is not resolved before the 2026 off-season and rainy season, it could demotivate farmers to plant more during MY 2026/27. In addition, with the disruptions in the strait of Hormuz, through which transits one third of global fertilizer trade, the International Fertilizer Development Center (IFDC) is anticipating a shortage and price increases in West Africa. This could result in lower yields and area planted for MY 2026/27 unless the government heavily subsidizes fertilizer prices.

MY 2025/26 area harvested and milled rice production is estimated by the government of Senegal (GOS) at 254,000 HA (a six percent increase) and 646,000 MT (a 0.5 percent increase), respectively. The department of Dagana accounts for about 19 percent of the production area, followed by the departments of Velingara (14 percent) and Kolda (15 percent).

Local rice is produced in two seasons: the dry season (Feb/March-June/July) and the rainy season (June/Jul-Nov/Dec). In the Casamance, rice production is mainly rainfed compared to the Senegal River Valley (SRV) where it is mostly irrigated. In MY 2025/26, the production of rice in the Casamance accounted for about 52 percent of total production. SRV rice production is estimated at 47 percent, leaving the other regions (Senegal oriental and Sine Saloum) at one percent. In Casamance, the mechanization rate is much lower. Production in SRV is mainly intensive while it is more extensive in the south. Yield in the Casamance is typically lower (between 2.0 - 3.5 tons/HA) than in the SRV (six tons/HA in the dry season and four tons/HA in the rainy season). In other regions such as Fatick, Kaolack and Sine Saloum rice production yields about three tons/HA.

Fertilizer prices for MY 2026/27 have not been fixed yet. For MY 2025/26, sources note a price increase for NPK (Nitrogen, Phosphorus, and Potassium) 15 15 15, and NPK 15 10 10 formulas compared to the previous year (See Exhibit 1). Urea prices remain the same as the previous year.

**Exhibit 1: Senegal Fertilizer Prices**

	Urea	NPK 15 15 15	NPK 15 10 10
MY 2024/25	\$16.66	\$15.83	\$12.50
MY 2025/26	\$16.66	\$14.16	\$10.83

Price is for 50 kg bag.

**Consumption**

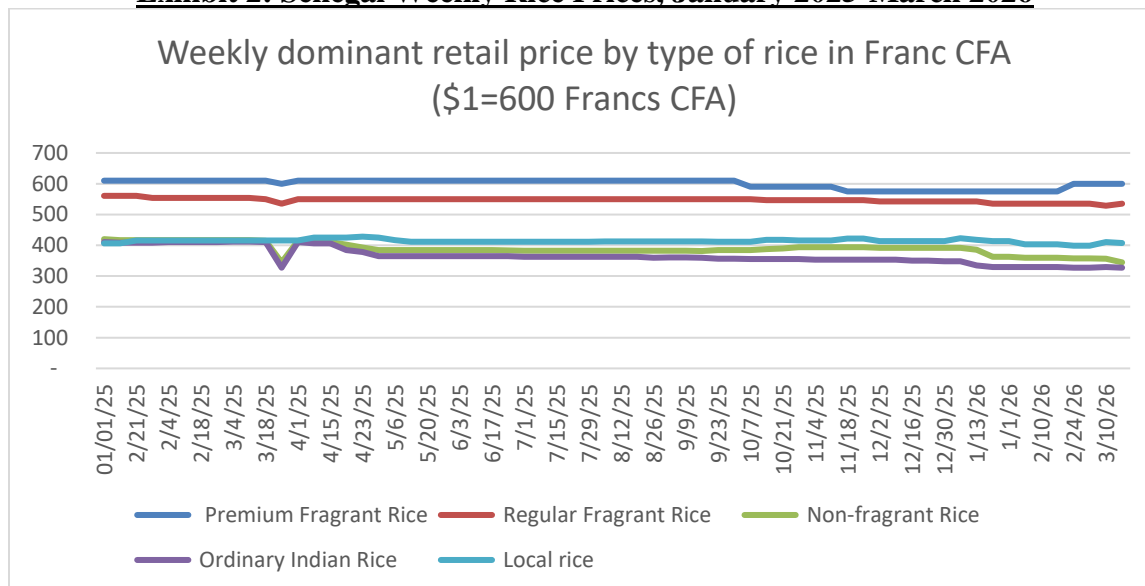
MY 2026/27 milled rice consumption is forecast at 2.35 million MT, a two percent increase over the previous marketing year based on population growth. MY 2025/26 consumption is estimated at 2.3 million MT based on available supply and population growth.

The GOS is only involved in purchasing rice if the food security situation is or could be impacted. The Conseil National de Sécurité Alimentaire (CNSA) is the competent authority to fight food insecurity, reduce poverty, eradicate hunger and malnutrition, and improve the population’s resilience. Rice continues to be the most consumed cereal in Senegal. It is followed by millet, corn, sorghum, and fonio.

The rice market is segmented between local rice, non-fragrant ordinary rice (from India and other origins), standard aromatic rice, and premium aromatic rice. The most consumed variety in Senegal is non-fragrant Indian rice, which is cheaper than local rice and fragrant rice. In March 2026, imported Indian rice cost \$0.55/kg compared to local rice at \$0.69/kg, a 24 percent difference.

The national agency that regulates the food market ([ARM](#)) monitors prices and stocks in the country. Rice prices reveal disparities depending on the type of product. See Exhibit 2 below.

**Exhibit 2: Senegal Weekly Rice Prices, January 2025-March 2026**



There are also price differences across the country attributed to logistical factors, geographic location, transportation costs, local supply, and demand dynamics.

### **Trade**

Even though rice production is steadily increasing, growth remains insufficient to meet Senegalese demand. MY 2026/27 milled rice imports are forecast to increase three percent to 1.76 million MT, based on population growth, increased demand, and stable prices. Senegal is the third-largest rice importer in Africa after Nigeria and Côte d'Ivoire.

MY 2025/26 milled rice imports are estimated at 1.71 million MT to meet demand, representing a two percent increase compared to the previous marketing year.

For market share among Senegal's rice imports, in Trade Year 2024/25 (January 2025-December 2025), India (42 percent), Brazil (19 percent), Thailand (18 percent), and Pakistan (13 percent) were the top exporting countries. Most Indian imports (69 percent) consist of broken rice.

Rice export levels for MY 2026/27 are forecast at 80,000 MT, unchanged from the previous year based on available supply. Mali is the top export destination from Senegal, followed by Guinea-Bissau, The Gambia, Mauritania, and Guinea.

### **Stocks**

MY 2026/27 stocks are forecast at 239,000 MT while MY 2025/26 stocks are estimated at 234,000 MT. There is a security stock held by the private sector at around 200,000 MT which is monitored by the ARM.

### **Policy**

Effective January 6, 2026, the GOS officially announced the reduction of the retail price for ordinary (non-fragrant broken rice) from \$0.58/kg to \$0.50/kg in the Dakar region. For the other regions, prices are increased by transport differentials. Regarding locally produced rice, the GOS signed an agreement with all rice stakeholders in November 2025 which fixed the ex-factory price for white rice at \$0.58 per kg, a rate designed to "ensure fair remuneration for producers and encourage local consumption." Traders have committed to purchasing the entirety of the volumes available at production sites.

The Ministry of Agriculture also announced the establishment of an import indexation mechanism to encourage market supply using domestic production.

A comprehensive communication and promotion campaign will launch under the Ministry's supervision to showcase Senegalese rice and encourage consumers to make it their preferred choice. An inter-ministerial framework, bringing together the Ministries of Trade and Agriculture, has been established to monitor the implementation of these decisions.

## **GUINEA - RICE**

### **Production**

Guinea MY 2026/27 area harvested is forecast at 880,000 HA representing a three percent increase compared to the previous marketing year. This growth is based on regular planting conditions with increased access to good quality seeds as well as affordable and sufficient fertilizers. MY 2026/27 milled rice production is forecast at 1.125 million MT, a 2.5 percent increase on the expectation of a good rainy season and manageable pest pressure.

According to official data, MY 2025/26 area and milled rice production are estimated at 857,000 HA and 1.1 million MT. Production represents a four percent increase over the previous marketing year.

Rice is grown in four zones: Maritime Guinea, Upper Guinea, Mid Guinea, and Forest Guinea. The regions that produce the most rice are Kankan (36 percent), Nzerekore (28 percent), Faranah (16 percent), and Kindia (10 percent). Guinea has four rice production ecosystems: lowland (10 percent), alluvial plains (9 percent), hillside (65 percent), and mangrove (16 percent). For detailed information on Guinea production and consumption please visit [here](#).

### **Consumption**

MY 2026/27 milled rice consumption is forecast at 2.36 million MT based on population growth and available supply. MY 2025/26 is estimated at 2.30 million tons. Both represent a 2.4 percent increase compared to the previous marketing years. There is a high preference for parboiled rice due to its higher nutritional content over white rice, mostly consumed in certain zones such as Forest Guinea. In urban areas such as Conakry, imported rice, which is less expensive than local rice, is most consumed.

### **Trade**

MY 2026/27 rice imports are forecast at 1.3 million MT and MY 2025/26 imports are estimated at 1.27 million MT, based on population growth.

India remains the main supplier with more than 90 percent of the market share.

### **Stocks**

Post forecast MY 2026/27 stocks at 139,000 MT and for MY 2025/26 at 144,000 MT based on available supply.

### **Policy**

The Government of Guinea (GOG) continues investment to boost rice production. For MY 2025/26, GOG invested about \$13 million for the agricultural campaign which will contribute to increase more than 14,000 HA of hydro-agricultural land and introduce new rice hybrid varieties.

## MALI - RICE

### Production

MY 2026/27 area harvested is forecast at 860,000 HA, a one percent increase over the previous year, based on sufficient quantity and quality of seeds and fertilizers. MY 2026/27 milled rice production is forecast to rise 1.5 percent from last year to 1.95 million MT based on a good rainy season.

MY 2025/26 area harvested is estimated to increase eight percent to 850,000 HA. MY 2025/26 milled rice production is estimated at 1.9 million MT according to official government of Mali statistics, a 7.4 percent increase from the previous year. Mali rice production is divided between irrigated (Feb/May and May/Dec) and rainfed (May/Dec) seasons.

### Consumption

Mali rice consumption for MY 2026/27 is forecast at 2.4 million MT and MY2025/26 at 2.35 million MT. Both figures are based on population growth and available supply. Rice is becoming more popular in Mali due to its ease of cooking. Mali has a higher preference for 25-35 percent broken rice (70 percent of consumption) versus 100 percent broken rice (20 percent ).

### Trade

MY 2026/27 rice imports are forecast to decrease five percent to 475,000 tons, based on higher ending stocks than the previous year.

MY 2025/26 rice imports are estimated to increase 5.3 percent to meet local demand. Most rice is trans-shipped to Mali by truck from the port in Senegal. According to Trade Data Monitor statistics, Senegal and India are the top rice suppliers. Local farm gate and retail prices decreased in MY 2025/26 compared to MY 2024/25 (See Exhibit 3.) According to traders, this price decrease is due to an abundant supply caused by the success of the MY 2025/26 agricultural campaign compared to the previous year.

### Exhibit 3: Mali Rice Prices

Price comparison in the same period in February 2025 and 2026	Farm gate price	Retail price
MY 2025/26	\$0.5 per Kg	\$0.79 per Kg
MY2024/25	\$0.66 per Kg	\$0.91 per kg

### Stocks

MY 2026/27 and MY2025/26 stocks are forecast at 254,000 MT and 229,000 MT, respectively.

### Policy

According to media reports, the Malian government has announced a \$24.4 million initiative to nearly double the nation's rice production by 2030 in partnership with the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) Mali. The 10-year strategy targets a production increase from 3 million tons to 5.5 million tons of paddy rice. For more information see [here](#).

### Senegal: Rice, Milled: Production, Supply, and Distribution Table

Rice, Milled Market Year Begins	2024/2025		2025/2026		2026/2027	
	Oct 2024		Oct 2025		Oct 2026	
Senegal	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	240	240	265	254	0	260
Beginning Stocks (1000 MT)	285	285	248	258	0	234
Milled Production (1000 MT)	643	643	680	646	0	670
Rough Production (1000 MT)	946	946	1000	950	0	985
Milling Rate (.9999) (1000 MT)	6800	6800	6800	6800	0	6800
MY Imports (1000 MT)	1650	1675	1600	1710	0	1765
TY Imports (1000 MT)	1475	1670	1500	1680	0	1700
Total Supply (1000 MT)	2578	2603	2528	2614	0	2669
MY Exports (1000 MT)	80	95	90	80	0	80
TY Exports (1000 MT)	75	90	90	80	0	80
Consumption and Residual (1000 MT)	2250	2250	2300	2300	0	2350
Ending Stocks (1000 MT)	248	258	138	234	0	239
Total Distribution (1000 MT)	2578	2603	2528	2614	0	2669
Yield (Rough) (MT/HA)	3.9417	3.9417	3.7736	3.7402	0	3.7885

## Guinea: Rice, Milled: Production, Supply, and Distribution Table

Rice, Milled Market Year Begins	2024/2025		2025/2026		2026/2027	
	Oct 2024		Oct 2025		Oct 2026	
Guinea	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2100	820	2100	857	0	880
Beginning Stocks (1000 MT)	237	237	488	151	0	144
Milled Production (1000 MT)	2442	1055	2310	1098	0	1125
Rough Production (1000 MT)	3700	1598	3500	1664	0	1705
Milling Rate (.9999) (1000 MT)	6600	6600	6600	6600	0	6600
MY Imports (1000 MT)	1209	1209	1200	1270	0	1300
TY Imports (1000 MT)	1200	1200	1250	1270	0	1300
Total Supply (1000 MT)	3888	2501	3998	2519	0	2569
MY Exports (1000 MT)	100	100	100	70	0	70
TY Exports (1000 MT)	100	100	100	70	0	70
Consumption and Residual (1000 MT)	3300	2250	3400	2305	0	2360
Ending Stocks (1000 MT)	488	151	498	144	0	139
Total Distribution (1000 MT)	3888	2501	3998	2519	0	2569
Yield (Rough) (MT/HA)	1.7619	1.9488	1.6667	1.9417	0	1.9375

**Mali: Rice, Milled: Production, Supply, and Distribution Table**

Rice, Milled Market Year Begins	2024/2025		2025/2026		2026/2027	
	Oct 2024		Oct 2025		Oct 2026	
Mali	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	930	790	930	850	0	860
Beginning Stocks (1000 MT)	194	194	185	157	0	229
Milled Production (1000 MT)	1791	1790	2020	1922	0	1950
Rough Production (1000 MT)	2755	2754	3108	2957	0	3000
Milling Rate (.9999) (1000 MT)	6500	6500	6500	6500	0	6500
MY Imports (1000 MT)	500	475	375	500	0	475
TY Imports (1000 MT)	500	475	375	500	0	475
Total Supply (1000 MT)	2485	2459	2580	2579	0	2654
MY Exports (1000 MT)	0	2	0	0	0	0
TY Exports (1000 MT)	0	2	0	0	0	0
Consumption and Residual (1000 MT)	2300	2300	2350	2350	0	2400
Ending Stocks (1000 MT)	185	157	230	229	0	254
Total Distribution (1000 MT)	2485	2459	2580	2579	0	2654
Yield (Rough) (MT/HA)	2.9624	3.4861	3.3419	3.4788	0	3.4884

**1 USD=~600 Francs CFA**

**Attachments:**

No Attachments