

Voluntary Report – Voluntary - Public Distribution

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Report Name: Pulse Market Overview

Country: Senegal

Post: Dakar

Report Category: Exporter Guide, Food Processing Ingredients, Food Service - Hotel Restaurant Institutional, Retail Foods, Competitor, Export Promotion Programs, Honey, Market Development Reports, Market Promotion/Competition, Product Brief, Promotion Opportunities, Sales Mission Evaluation, Snack Foods, Trade Show Announcement, Trade Show Closing, Trade Show Evaluation

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Report Highlights:

Senegalese cowpea production is estimated at 152,000 MT in the 2022/23 December- November marketing year (MY), a 36 percent decline from the previous year. Pulse imports are estimated at 42,800 MT for MY 2023, growing from 37,000 MT in MY 2021 and 27,000 in 2022. Exporters seeking to enter the Senegalese market should be aware that significant volumes of pulses transit Morocco, Tunisia, and the UAE.

I. Production

Senegal is a producer of *Vigna unguiculata L. Walpers*, popularly referred to as cowpea, black-eyed pea, or *Niébé*. Cowpea is widely planted in Senegal and serves with peanut as the country's most important leguminous crop rotation, complementing grains such as corn, millet and sorghum. The crop is well adapted to Senegalese soils, is drought resistant, and is generally resilient to climate change. Cowpea is typically planted at the onset of the rainy season in June or July and harvested near the end of the calendar year. They are cultivated across the country, although the regions of Diourbel, Louga, and Thiès lead the country in production. Improved short cycle varieties (two months) are common, and yields can reach 800 kg to 1 metric ton (MT) per hectare.

Senegalese cowpea production is estimated at 152,000 MT in the 2022/23 December- November marketing year (MY). This represents a thirty six percent decline from the previous season. Senegal's Ministry of Agriculture attributes the production decline to stalk borer infestation (*papaipema nebris*) and infrequent precipitation at the start of the rainy season. During the same year, cowpea production area was estimated at nearly 294,000 HA.

Senegal does not produce dry beans (including white navy beans and red kidney beans), nor does it produce commonly consumed green peas and brown lentils.

II. Consumption

Senegal consumed an estimated 126,300 MT of pulses, or 7.4 kg on a per capita basis in 2022.

Table 1: MY 2022/23 Senegal Estimated Annual Consumption of Pulses

PULSE	2022 HUMAN CONSUMPTION (MT)	2022 CONSUMPTION (KG PER CAPITA)
Cowpea	83,600	4.8
Green Peas	21,861	1.2
Lentils	7,236	0.4
Chickpeas	6,706	0.4
Mungo Bean	5,210	0.3
Kidney Bean	52	0.003
Others	5,448	0.3

Source: Trade Data Monitor LLC and USDA Dakar Estimate

Pulses constitute a major food source for Senegalese consumers, but consumption follows very specific patterns. Cowpea is by far the most consumed pulse (nearly 5kg per person per year) and is consumed throughout the year in a multitude of ways, including with bread, in meat stews, or as cowpea flour. Cowpea flour is used to prepare fritters (a popular snack) and is frequently used as an ingredient in infant foods. Cowpea leaves and pods are also popular sources of human food and livestock fodder. Despite cowpea's importance, Senegal's Ministry of Agriculture reports that inadequate storage results in annual post-harvest losses of nearly 40 percent (see PSD residual).

Lentils and green peas are consumed throughout the year, while dry beans are mostly associated with holiday meals. White navy beans are the most popular dry bean, representing approximately 90 percent of consumption. Kidney beans make up the remainder. They are served in a variety of dishes around the Senegalese religious ceremonies of *Tamkharit*, *Gamou*, and *Magal Touba*, as well as during the new year holiday.

III. Trade

Senegal is a net importer of pulses. Marketing year 2022/23 imports of dry beans are summarized in Table 2:

Table 2: MY 2022/23 Senegal Estimated Annual Imports of Pulses

Green Peas	21,861
Lentils	7,236
Chickpeas	6,706
Mungo Bean	5,210
Small Red Beans	50 MT
Kidney Bean	2 MT
Cowpeas	2 MT
Others	848 MT
Total	41,915 MT

Source: Trade Data Monitor LLC

Table 3: MY 2022/23 Major Pulse Suppliers to Senegal

Country	Export Volume	Market Share
Canada	12,115 MT	29%
Morocco	10,879 MT	26%
Turkey	5,306 MT	13%
China	2,668 MT	6%
India	2,634 MT	6%
United Arab Emirates	1,519 MT	4%
Argentina	1,124 MT	3%
Others	5,448 MT	13%

Source: Trade Data Monitor LLC (Year Ending Series: December, 2022 - November, 2023)

Senegalese importers are opportunistic and move in and out of the pulse market depending on profit margins. Importers are mostly self-financed, with the scale reflecting importers that typically handle volumes that do not exceed ten 20-foot containers per month. Each importer interviewed described current import volumes as low, given there are better margins to be made trading other commodities. Most importers are selling in a hybrid of direct-to-consumer and wholesale markets. They note their clients are price sensitive, and that many consumers, if given the option between 20 or 25 kg bags, will opt for the smaller bag given its lower cost (even if the price per kg is higher). As a result, the standard shipping format is 20 kg bags loaded into 20-foot containers.

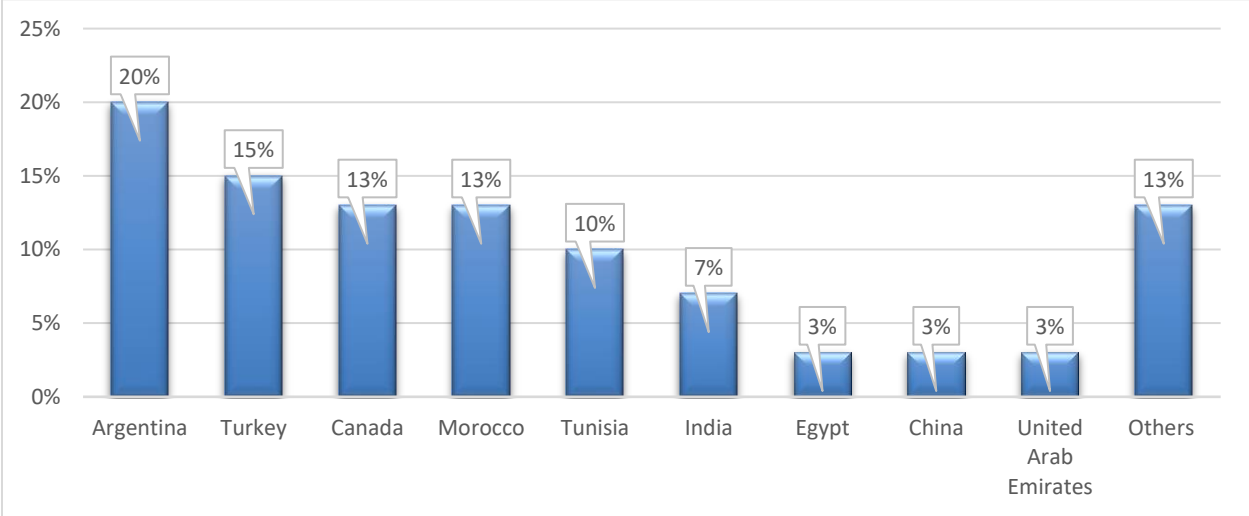
Senegal’s imports of pulses for MY 2023 were estimated at nearly 42,800 MT, a huge jump as compared to MY 2021 and 2022 which were estimated respectively 37,000 MT and 27,000 MT. The United States exported nearly 620 MT of pulses to Senegal in 2022 (430 MT of lentils and 183 MT of chickpeas). (Source Trade Data Monitor LLC).

Despite being a net importer, Senegal exports a small amount of cowpea to neighboring countries. In MY 2023, Senegal exported 640 MT of dry beans to Guinea Bissau, The Gambia, Italy and the Netherlands. (Source Trade Data Monitor LLC).

Transshipment

Major dry bean suppliers to Senegal include Argentina, Turkey, Canada, Morocco, Tunisia, India, Egypt, China and the United Arab Emirates (five-year average- see Chart 1). The majority of imported pulses are Canadian and Argentine lentils and green peas. Other origins, notably Morocco, Tunisia and the United Arab Emirates are likely intermediaries, either transshipping or providing consumer packaging and re-exporting.

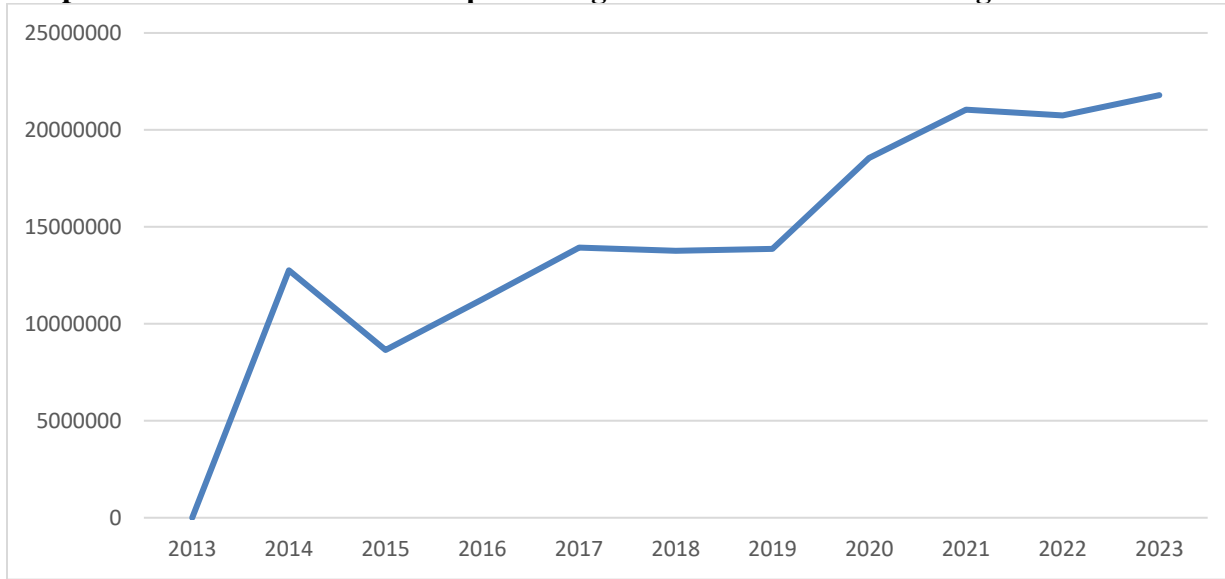
CHART 1: Top Pulse Exporters to Senegal: Five Year Average



Source: Trade Data Monitor LLC (Year Ending Series: December, 2017 – November, 2023)

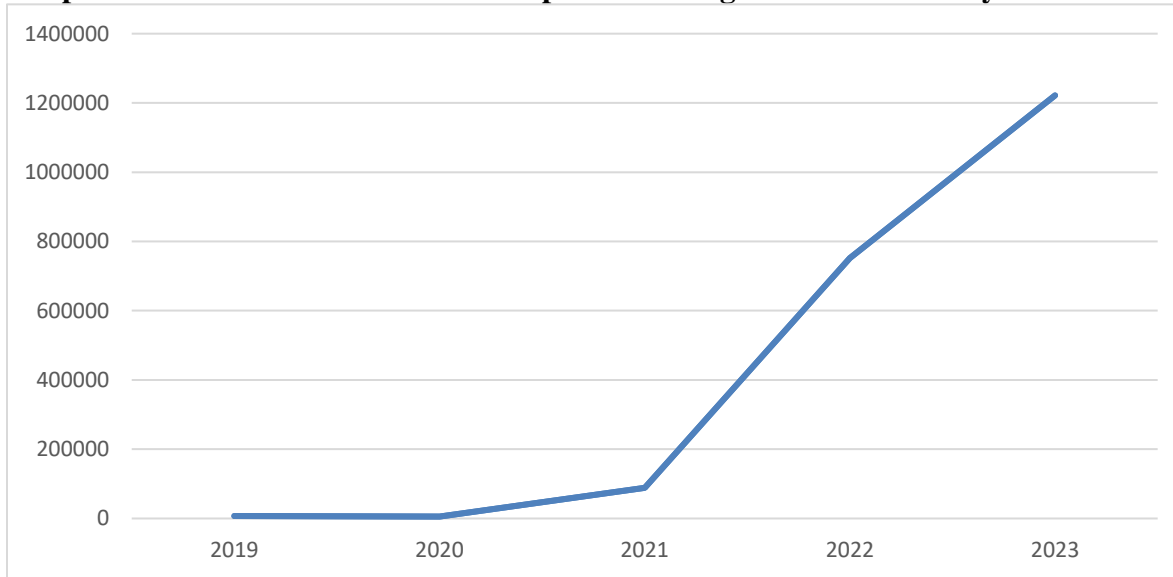
Exporters looking to enter Senegal and other West African markets should consider that Senegalese importers may have established trade relationships with intermediaries in these countries, notably Morocco. Senegal is Morocco’s top export destination in West Africa, receiving 21 percent of the Kingdom’s agricultural exports. Over the last decade, Senegal’s imports of Moroccan agricultural products grew from nearly \$12.7 million in MY 2013/14 to nearly \$21.8 million in MY 2022/2023 (source Trade Data Monitor LLC). Top Moroccan exports include couscous, soybean/sunflower/palm oil, pulses, and miscellaneous food preparations, all of which are produced from imported raw materials. Moroccan pulse exports to Senegal grew from 240 MT in 2017 to 11,000 MT in 2023.

Graph 2: Value of Morocco's Export of Agricultural Products to Senegal since 2013



Source: Trade Data Monitor LLC

Graph 3: Value of Moroccan Pulses Imports to Senegal for the last five years



Source: Trade Data Monitor LLC

Table 4: Production Supply and Distribution

Senegal	MY 2022/23 Post Estimate
Beginning Stocks	700 MT
Area Harvested	294,000 HA
Production	152,000 MT
MY Imports	42,000 MT
TY Imp. from U.S.	620 MT
Total Supply	194,700 MT
MY Exports	640 MT
Feed & Residual	67,100 MT
FSI Consumption	126,300 MT
Ending Stocks	660 MT
Total Distribution	194,700 MT
Yield (Rough)	0.517
TS=TD	0

Source: FAS Dakar estimates

IV. Policy

The Government of Senegal requires import certificates or other certification/accreditation for imported processed food, animal products, live animals, plants and plant products, fish and seafood products, and feed. Food and agricultural products that enter Senegal's market are subject to inspection. Please see the latest [FAIRS Export Certificate Report](#) for more information.

West African Economic and Monetary Union (WAEMU) regulations specify that transactions for imported products worth over 10 million XOF (\$18,000) must be domiciled in a licensed intermediary bank, i.e., a bank licensed by a WAEMU country's Minister of Finance. Businesses who import food and agricultural products to Senegal valued at \$18,000 or higher are required to use licensed banks in WAEMU to facilitate exporter payments. A Foreign Exchange Transaction Form must be approved by a licensed intermediary bank before a payment can be made. Please see WAEMU Regulation No. 09/2010/CM/UEMOA for more information. Additional information is also provided by the Government of Senegal at the following [LINK](#).

An Import Declaration for Food Products (DIPA) is required to legally import any food or agricultural product and initiate the customs clearance process in Senegal. The declaration is issued by the Division of Consumption and Consumers Safety in the Ministry of Commerce and is valid for two months from the date of signature.

According to Senegalese Customs, the cumulative rate of taxes and customs duties for imported dry beans is nearly 50 percent. This includes a 20 percent customs duty and an 18 percent value-added tax. To learn more on trade processes to export products to Senegal, please check [the Senegal Import and Export Guide](#) and FAS Dakar latest [FAIRS Export Certificate Report](#).

Attachments:

No Attachments.