

**Required Report:** Required - Public Distribution

**Date:** December 06, 2022

**Report Number:** SG2022-0016

## **Report Name:** Cotton and Products Update

**Country:** Senegal

**Post:** Dakar

**Report Category:** Cotton and Products

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### **Report Highlights:**

Marketing Year (MY) 2022/23 (August to July) is characterized by high pest infestation of cotton leafhoppers, known commonly as jassids, in Mali, Burkina Faso, and Senegal. Post forecasts the harvested area in all three countries to fall back to the previous year level, 1.33 million hectares (MHA) due to abandoned area caused by this infestation and excess rainfall. Post forecast 2022/23 production to decrease 15 percent to 2.09 million bales due to pest-caused yield decreases. However, Post projects a six percent boost in exports for 2022/23 to 2.30 million bales compared to the previous year. The 2021/22 area and production levels are estimated to increase 80 percent and 91 percent at 1.33 MHA and 2.46 million bales.

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## Executive Summary:

Though jassids are known to farmers in the region, in marketing year (MY) 2022/23 (August to July) the pest arrived early and in abundance. Harvested area has been impacted in Mali, Burkina Faso, and Senegal, now estimated to remain the same as the previous year at 1.33 million hectares (MHA) due to abandoned area caused by the infestation and excessive rainfall. As jassids infestations cause bud and flower damage, Post anticipates 2022/23 production will drop by 15 percent at 2.09 million bales. Evaluations of area and production are being conducted, though no official updates have been released. 2021/22 area and production are estimated to increase 80 percent and 91 percent at 1.33 MHA and 2.46 million bales.

Post expects exports for 2022/23 to increase six percent at 2.30 million bales compared to the previous year. For 2021/22, exports are estimated to remain at 2.18 million bales, a 10 percent increase compared to exports from the previous year.

Insecticides were not effective in combating pest infestations. The most infested farms were abandoned and the others are expected to have low yield due to the loss of cotton buds and flowers. Several measures have been taken to fight the jassid that appeared during the 2022/23 campaign. Cotton Researchers have recommended to split the harvest (first harvest when 50 percent of the cotton boll is open and a second harvest when the remaining bolls are open), reduce the interval of insecticide treatments from 14 days to 10 days, and increase farmers awareness to continue spraying where necessary. In the meantime, lab and field tests are being conducted to try new insecticides on the pest.



Source: Regional Program for Integrated Cotton Production in Africa (PR PICA) – Cotton plant infested by Jassids

## *Mali*

### **Production**

Area and production evaluations for 2022/23 are still being conducted by cotton stakeholders. However, according to a private industry contact, area harvested in 2022/23 is estimated to drop 4 percent to 690,000 hectares (ha) due to serious jassid infestations and abandoned area caused by excess rain. The most infested areas are in the Southern part of the country, especially in Sikasso and Bougouni zones. Yield is forecast to drop and according to a private industry contact, 2022/23 production may decrease more than 20 percent from the previous year to 1.10 million bales.

Post estimates that 2021/22 area and production levels will remain at 720,000 HA and 1.43 million bales.

### **Consumption and Value-Added Cotton**

Mali is one of the top cotton producing countries in West Africa, but only two percent of its cotton fiber is processed locally. Post estimates that in 2022/23 consumption will remain at 25,000 bales, unchanged from the previous year.

### **Trade**

Exports in 2022/23 are forecast at 1.27 million bales, a 6 percent increase from the previous year due to available supply. Estimated exports for 2021/22 remain at 1.20 million bales.

### **Stocks**

Stocks for 2022/23 are projected at 10,000 bales representing 95 percent decrease from the previous year. Stocks in 2021/22 stocks are estimated at 210,000 bales, representing a 200 percent increase from the previous year. This increase in stocks is due to the logistical issues caused mainly by the ECOWAS embargo of Mali.

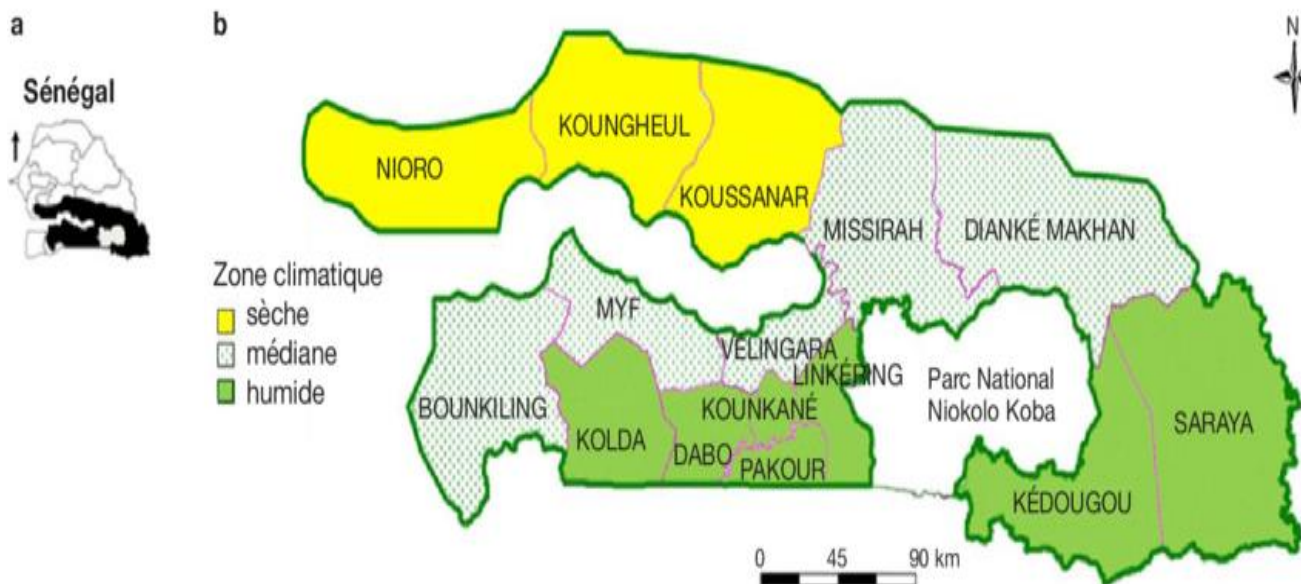
### **Policy**

The Government of Mali (GOM) continues to support the cotton sector, but it is not clear yet how it will help farmers who lost part or most of their cotton production due to pest infestation to pay back their credit.

## *Senegal*

### **Production**

Senegal 2022/23 cotton area is estimated to decrease 11 percent at 16,000 ha compared to the previous year due to pest infestation that forced some farmers to abandon their field especially in Velingara (Linkering, Kounkane) and Kedougou (Saraya) regions. Farmers received enough quantity of pesticides but inefficient to fight this new jassid strain. Field and lab tests are being conducted to find the right insecticides to be used in 2023/24 campaign. Cotton production in 2022/23 is forecasted to decrease 33 percent at 28,000 bales due to low yield. According to a private industry contact, only farmers that planted earlier can expect their plant to complete the entire cycle of maturity.



Source: Senegal. [Cotton Production zone in Senegal](https://www.researchgate.net/figure/Bassin-de-production-cotonniere-au-Senegal-a-et-localisation-des-secteurs-de-production_fig1_329127341) [https://www.researchgate.net/figure/Bassin-de-production-cotonniere-au-Senegal-a-et-localisation-des-secteurs-de-production\\_fig1\\_329127341](https://www.researchgate.net/figure/Bassin-de-production-cotonniere-au-Senegal-a-et-localisation-des-secteurs-de-production_fig1_329127341)

According to private industry sources, harvested area for 2021/22 remain unchanged from the previous year at 18,000 ha and cotton production in 2021/22 shows an 11 percent increase to 42,000 bales due to increased use of fertilizer which improved yields by about 10 percent.

### Consumption and Value-Added Cotton

Senegal does not have operational cotton industry and therefore local consumption will remain at zero bales for 2022/23 and 2021/22.

### Trade

Cotton exports for 2022/23 is forecast to decrease 33 percent at 28,000 bales compared to the previous year due to low supply. The estimated 2021/22 exports are down seven percent at 42,000 bales due to decreased available supply. Senegal exports all its cotton fiber through the Port of Dakar. All the fiber travelled by truck from the ginning factory warehouses to the port.

### Stocks

Stocks for 2022/23 are forecast at 3,000 bales, the same as the previous year.

### Policy

The Government of Senegal continues to support the cotton sector. The Ministry of Agriculture has visited cotton fields impacted by jassid infestations and have promised to provide assistance to cotton farmers.



Source: Senegal. The Senegalese Ministry of Agriculture visiting an infested farm by jassids in the South of Senegal <https://www.seneplus.com/societe/aly-ngouille-au-chevet-des-cotonculteurs-du-sud-est-du-senegal>

## ***Burkina Faso***

### **Production**

Based on private industry sources, Post forecasts that 2022/23 harvested area will increase five percent to 625,000 ha compared to the previous year. The initial objective at the beginning of the campaign was much higher (675,000 ha) but due to jassid infestations, especially in the SOFITEX (Banfora and Bobo Dioulasso) and FASOCOTON zones, prevalence of weeds, and some areas that flooded, seven percent of the total area projected was abandoned by cotton farmers. Post forecasts 2022/23 cotton production will decrease three percent to 965,000 bales compared to the previous year due to low productivity caused by pest infestations and possible diversion of cotton fertilizer to cereals production due to delayed distribution.

For 2021/22 harvested area and cotton production levels are estimated to increase seven and four percent compared to last year to 595,000 HA and 990,000 bales, respectively.

### **Consumption and Value-Added Cotton**

Local consumption for 2022/23 is forecast at 25,000 bales, the same as the previous year due to the unchanged capacity to process cotton fiber. Only one spinning company, *La Filature du Sahel* (FILSAH) is operating in Burkina Faso and can only process about 5,400 tons of fiber into yarn per year.

For more information on value-added cotton, please see the previous 2022 GAIN [report](#) .

## Trade

Post forecasts Burkina Faso's cotton exports in 2022/23 at one million bales, up seven percent compared to the previous year due to low available supply.

## Stocks

Post forecasts 2022/23 stocks at 18,000 bales due to a poor harvest compared to previous year. Estimates for stocks in 2021/22 are 78,000 bales, up 63 percent compared to the previous year due to delays in transportation.

## Policy

The government of Burkina Faso supports the cotton sector and has subsidized farm gate and fertilizer prices. However, Post is not aware of any decision that has been taken yet to support farmers impacted by the pest infestation.

**Table 1. West Africa: Fixed Farm Gate Prices for Grade One Cotton**

(CFA francs)	Official 2019/20 Farm Gate Price	Official 20/21 Farm Gate Price	Official 21/22 Farm Gate Price	Official 22/23 Farm Gate Price
Burkina Faso	265 (\$0.46)	240 (\$0.41)	270 (\$0.47)	300 (\$0.52)
Mali	275 (\$0.48)	250 (\$0.43)	280 (\$0.49)	285 (\$0.49)
Senegal	300 (\$0.52)	300 (\$0.52)	300 (\$0.52)	300 (\$0.52)

Source: Official government data from Mali, Senegal, and Burkina Faso; \$1= 575 CFA francs; CFA francs per KG

**Table 2. West Africa: Pricing for NPK (Nitrogen, Phosphorus, Potassium) and Urea**

(CFA francs)	Official 2019/20 Input Prices	Official 2020/21 Input Prices	Official 2021/22 Input Prices	Official 2022/23 Input Prices
Burkina Faso	NPK: 14,000 (\$24.35) Urea: 14,000 (\$24.35)	NPK: 14,000 (\$24.35) Urea: 14,000 (\$24.35)	NPK: 14,000 (\$24.35) Urea: 14,000 (\$24.35)	NPK: 16,000 (\$27.82) Urea: 16,000 (\$27.82)
Mali	NPK: 11,000 (\$19.13) Urea: 11,000 (\$19.13)	NPK: 11,000 (\$19.13) Urea: 11,000 (\$19.13)	NPK: 11,000 (\$19.13) Urea: 11,000 (\$19.13)	NPK: 12,500 (\$21.73) Urea: 12,500 (\$21.73)
Senegal	NPK: 14,675 (\$25.52) Urea: 13,112 (\$22.80)	NPK: 15,012 (\$26.11) Urea: 13,112 (\$22.80)	NPK: 15,012 (\$26.11) Urea: 13,112 (\$22.80)	NPK: 15,012 (\$26.11) Urea: 13,112 (\$22.80)

Source: Official government data from Mali, Senegal, and Burkina Faso; \$1= 575 CFA francs; CFA francs per 50 KG Bag

**Table 3. Mali- Cotton Production, Supply and Distribution Data Statistics**  
(1,000 Hectares (HA), 1,000 bales, PERCENT, KG/HA)

Cotton Market Year Begins Mali	2020/2021		2021/2022		2022/2023	
	Aug 2020		Aug 2021		Aug 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Harvested</b> (1000 HA)	165	165	720	720	740	690
<b>Beginning Stocks</b> 1000 480 lb. Bales	621	621	296	10	501	210
<b>Production</b> 1000 480 lb. Bales	300	300	1430	1430	1220	1100
<b>Imports</b> 1000 480 lb. Bales	0	0	0	0	0	0
<b>MY Imports from U.S.</b> 1000 480 lb. Bales	0	0	0	0	0	0
<b>Total Supply</b> 1000 480 lb. Bales	921	921	1726	1440	1721	1310
<b>Exports</b> 1000 480 lb. Bales	600	886	1200	1205	1200	1275
<b>Domestic Use</b> 1000 480 lb. Bales	25	25	25	25	25	25
<b>Loss</b> 1000 480 lb. Bales	0	0	0	0	0	0
<b>Total Dom. Cons.</b> 1000 480 lb. Bales	25	25	25	25	25	25
<b>Ending Stocks</b> 1000 480 lb. Bales	296	10	501	210	496	10
<b>Total Distribution</b> 1000 480 lb. Bales	921	921	1726	1440	1721	1310
<b>Stock to Use % (PERCENT)</b>	47.36	1.1	40.9	17.07	40.49	0.77
<b>Yield (KG/HA)</b>	396	396	432	432	359	347

**Table 4. Burkina Faso-Cotton Production, Supply and Distribution Data Statistics**  
(1,000 Hectares (HA), 1,000 bales, PERCENT, KG/HA)

Cotton Market Year Begins Burkina	2020/2021		2021/2022		2022/2023	
	Aug 2020		Aug 2021		Aug 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Harvested</b> (1000 HA)	556	556	595	595	650	625
<b>Beginning Stocks</b> 1000 480 lb. Bales	183	183	51	48	96	78
<b>Production</b> 1000 480 lb. Bales	950	950	960	990	965	965
<b>Imports</b> 1000 480 lb. Bales	0	0	0	0	0	0
<b>MY Imports from U.S.</b> 1000 480 lb. Bales	0	0	0	0	0	0
<b>Total Supply</b> 1000 480 lb. Bales	1133	1133	1011	1038	1061	1043
<b>Exports</b> 1000 480 lb. Bales	1067	1060	900	935	925	1000
<b>Domestic Use</b> 1000 480 lb. Bales	15	25	15	25	15	25
<b>Loss</b> 1000 480 lb. Bales	0	0	0	0	0	0
<b>Total Dom. Cons.</b> 1000 480 lb. Bales	15	25	15	25	15	25
<b>Ending Stocks</b> 1000 480 lb. Bales	51	48	96	78	121	18
<b>Total Distribution</b> 1000 480 lb. Bales	1133	1133	1011	1038	1061	1043
<b>Stock to Use % (PERCENT)</b>	4.71	4.42	10.49	8.13	12.87	1.76
<b>Yield (KG/HA)</b>	372	372	351	362	323	336



**Table 5. Senegal-Cotton Production, Supply and Distribution Data Statistics**  
(1,000 Hectares (HA), 1,000 bales, PERCENT, KG/HA)

Cotton Market Year Begins Senegal	2020/2021		2021/2022		2022/2023	
	Aug 2020		Aug 2021		Aug 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Harvested</b> (1000 HA)	18	18	19	18	19	16
<b>Beginning Stocks</b> 1000 480 lb. Bales	10	10	3	3	3	3
<b>Production</b> 1000 480 lb. Bales	38	38	40	42	30	28
<b>Imports</b> 1000 480 lb. Bales	0	0	0	0	0	0
<b>MY Imports from U.S.</b> 1000 480 lb. Bales	0	0	0	0	0	0
<b>Total Supply</b> 1000 480 lb. Bales	48	48	43	45	33	31
<b>Exports</b> 1000 480 lb. Bales	45	45	48	42	30	28
<b>Domestic Use</b> 1000 480 lb. Bales	0	0	0	0	0	0
<b>Loss</b> 1000 480 lb. Bales	0	0	-8	0	0	0
<b>Total Dom. Cons.</b> 1000 480 lb. Bales	0	0	-8	0	0	0
<b>Ending Stocks</b> 1000 480 lb. Bales	3	3	3	3	3	3
<b>Total Distribution</b> 1000 480 lb. Bales	48	48	43	45	33	31
<b>Stock to Use %</b> (PERCENT)	6.67	6.67	6.25	7.14	10	10.71
<b>Yield</b> (KG/HA)	460	460	458	508	344	381

**Attachments:**

No Attachments