Required Report: Required - Public Distribution

Date: December 02, 2024

Report Number: SG2024-0013

Report Name: Cotton and Products Update

Country: Senegal

Post: Dakar

Report Category: Cotton and Products

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Report Highlights:

MY2024/25 cotton area harvested for Senegal, Mali, and Burkina Faso is estimated to decrease 17 percent to 981,000 HA. This is mainly due to decreased planted area resulting from a late rainy season in all three countries, as well as civil conflict in Burkina Faso. Senegal imposed stricter finance and credit criteria, reducing the number of farmers willing to produce cotton. MY2024/25 cotton production is estimated at 1.7 million bales, decreasing 18 percent from the previous MY. MY2024/25 exports and stocks are estimated at 1.7 million bales and 212,000 bales, respectively. With the relaunching of the textile industries in all three forementioned countries, MY 2024/25 consumption is expected to increase four percent at 52,000 bales. MY 2023/24 area and cotton production estimates remain at 1.2 million HA and 2.2 million bales, respectively.

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Executive Summary:

Marketing Year (MY) 2024/25 cotton area harvested for Senegal, Mali, and Burkina Faso is estimated to decrease 17 percent compared to the previous MY to 981,000 hectares (HA). There are a number of causes for the decline in planted area. Civil conflict in Burkina Faso resulted in a 25 percent reduction in planted area, while the Government of Senegal imposed stricter criteria for financing and credit (see below), also driving down planted area by 20 percent reduction. Finally, the late start of the rainy season in all three countries discouraged farmers from planting more. MY2024/25 cotton production is estimated at 1.73 million bales a decrease of 18 percent from the previous year. MY2024/25 exports and stocks are estimated at 1.7 million bales and 212,000 bales, respectively. With the relaunching of the textile industries in all three forementioned countries, MY2024/25 consumption is expected to increase four percent to 52,000 bales. MY 2023/24 area and cotton production estimates remain at 1.2 million hectares and 2.22 million bales, respectively. Exports and stocks for MY 2023/24 are estimated at 2.2 million bales and 222,000 bales, respectively.

Mali MY2024/25 harvested area is estimated to decrease 12 percent from the previous MY to 623,000 HA. This is mainly due to the late start of the rainy season, the late distribution of urea, delayed payments from CMDT to farmers for MY2023/24 cotton, and abandoned area due to flooding. MY2024/25 production is also forecast to decrease 18 percent to 1.09 million bales. MY2024/25 exports are forecast to decrease 24 percent to 1.06 million bales based on available supplies.

In Burkina Faso, MY2024/25 area planted and cotton production are estimated to decrease 25 percent and 20 percent, respectively. Civil insecurity is the main cause of declining production declines, leading to a 113,000 HA drop (approximate). MY2024/25 exports and stocks are estimated at 600,000 bales and 28,000 bales, respectively, based on available supply.

Senegal’s cotton production for MY2024/25 is estimated to increase eight percent despite a 20 percent area decrease to 12,000 HA from the previous MY. The decrease is due to Senegal’s Société de développement et des fibres textiles (SODEFITEX) implementing stronger criteria for farmers to participate in financing and credit programs. However, higher than expected yields more than made up for the loss in planted area. MY2024/25 exports are estimated to increase eight percent based on available supply while stocks are expected to remain the same as the previous year. This programming reflects a SODEFITEX priority to improve production efficiency.

MY2023/24 consumption for all three countries is estimated to remain the same than the previous year at 50,000 bales.

Mali

Production

Mali MY2024/25 area harvested is estimated at 623,000 hectares (HA), representing a12 percent decrease from the previous MY and 10 percent less than the previous forecast. Heavy rains caused abandoned area due to flooding. Also, the late distribution of urea in certain zones and delayed payments for the MY2023/24 production campaign from the Compagnie Malienne pour le Développement du Textile (CMDT) discouraged some farmers to plant. Consequently, Mali estimates MY2024/25 production to decrease 18 percent from the previous year at 1.09 million bales and 15 percent from the September 2024 estimate.

The Government of Mali's final estimate for MY2023/24 is unchanged from the previous estimate at 710,000 HA of cotton harvested and 1.33 million bales produced.

Consumption and Value-Added Cotton

MY2024/25 consumption remains estimated at 27,000 bales, increasing eight percent from the previous year. The Compagnie Malienne de Textile (COMATEX) in the Ségou region reopened in 2023 and is expected to process about 2,000 - 3,000 MT of cotton fiber per year. For more information, please refer to the previous report (GAIN SG2024-0008).

Trade

Exports in MY2024/25 are projected at 1.06 million bales based on available supply. Post's MY2023/24 export estimate was increased 87 percent to 1.4 million bales based on revised supply estimates.

Mali conveys its cotton fiber by truck to six major ports: Dakar (60 percent), Abidjan and San Pedro (30 percent), with the 10 percent remaining divided among Lomé, Nouakchott, and Conakry ports.

Stocks

CMDT always carries a buffer stock representing 10 percent to 20 percent of production. On this basis, MY2024/25 stocks are projected at 182,000 bales and at 179,000 bales for MY2023/24.

Policy

The Malian transitional government continues to support the cotton sector by subsidizing fertilizers, urea, and cotton farm gate prices. See Tables 1 and 2.

Burkina Faso

Production

Burkina Faso MY2024/25 area harvested is estimated at 346,000 HA representing a 25 percent decrease compared to the previous MY and a 30 percent decrease from the previous forecast. Area loss, estimated at about 113,000 HA, is mainly due to the conflict-related insecurity that prevented farmers from accessing their land. Input prices, which are announced by the Government of Burkina Faso, changed on two occasions leading to confusion and decisions not to plant. The second announcement with a price reduction did not induce more farmers to plant. (See Table 2).

According to private sector sources, MY 2024/25 cotton production is projected at 612,000 bales, decreasing 20 percent from the previous year and about 24 percent from the August 2024 forecast. Despite a late start of the rainy season and a high percentage of the late planted seeds, yields for MY2024/25 are projected to be higher.

Post's MY2023/24 area harvested estimate remains unchanged at 462,000 HA. This represents a 25 percent decrease from MY2022/23 due to civil conflict. Post's MY2023/24 production estimate is decreased by 20,000 bales to 765,000 based on final government data.

Consumption and Value-Added Cotton

The MY2024/25 and MY2023/24 estimates remain at 25,000 bales due to the country's low processing capacity. There is one cotton spinning company, *La Filature du Sahel* (FILSAH) supplied by SOFITEX and two new textile companies: COTEXA and Textile des Forces Armées du Burkina Faso (TEX FORCES-BF).

Trade

Post estimates MY2024/25 exports at 600,000 bales based on available supply. Burkina Faso's milling capacity is minimal, and the majority of its production is exported.

Cotton companies ship fiber via rail or truck to different ports in relation to the cotton gin's location. SOFITEX ships to the ports of Lome, Abidjan, Tema, and Cotonou. SOCOMA uses the Port of Lome for most shipments, but will use the Port of Cotonou for smaller quantities. FASOCOTON ships from the port of Lome. Almost all of Burkina Faso's cotton fiber is sold prior to planting. Major buyers, located mainly in Switzerland, include Cargill, Reinhart, and Louis Dreyfus Commodities.

Stocks

MY2024/25 stocks are estimated to decrease 28 percent from the previous MY to 28,000 bales based on available supply and normal export conditions.

Stocks estimate for MY2023/24 remain at 41,000 bales.

Policy

The Burkina Faso transitional government continues to support the cotton sector by subsidizing input prices for cotton farmers. In MY2024/25, a total subsidy of USD $65.9 million was granted to farmers for input price reduction. The subsidy was provided from the Association Interprofessionnelle de Coton du Burkina Faso (AICB) ($2.4 million), Burkina Faso's three cotton companies ($45.1 million), and the Government of Burkina Faso ($18.3 million). The Government of urkina Faso's contribution was significantly lower than in previous years. In MY2023/24 the government provided $121 million.

Senegal

Production

MY2024/25 cotton area is projected at 12,000 HA, representing a 20 percent decrease from MY2023/24 and 1,000 HA less than the previous estimate. This area reduction is the consequence of the decision taken by the cotton company SODEFITEX to implement stronger criteria for farmers to participate in financing and credit programs. The intent of this program was to improve production outcomes and to better target farm support programs. Therefore, only 60 percent of the previous cotton producers were able to participate in MY2024/25. The remaining 40 percent of cotton farmers have planted alternative crops such as corn, peanut, and sorghum in MY2024/25.

MY2024/25 cotton production is estimated at 27,000 bales, increasing eight percent from MY2023/24 and 23 percent from the Post's August 2024 estimate. According to cotton industry sources, the rainy season lasted longer than expected, allowing late-planted seeds to mature. Rains were particularly abundant in September with 140 millimeters more than MY 2023/24. (MY 2024/25 projected yields are up to 490 kg/HA compared to 363 kg/HA in MY2023/24). There were localized infestations of *H. armigera* that was quickly managed without any major loss.

MY2023/24 harvested area is estimated at 15,000 HA, a 12 percent decrease from MY 2022/23. Declining plantings are attributable to insect infestations (jassid) in MY 2022/23 which discouraged farmers to plant additional hectares. MY2023/24 production remains unchanged from MY 2022/23 due to better yield.

Consumption and Value-Added Cotton

Senegal's local consumption is forecast at zero bales for MY2024/25 and MY2023/24. There have been some investments in the textile industry sector. One industry that was relaunched in August 2024, Domitexka, may start buying cotton fiber next year.

Trade

Cotton exports for MY2024/25 are projected to increase eight percent to 27,000 bales based on available supply. Senegal cotton fiber is exported via Dakar port to major traders mainly located in Switzerland.

MY2023/24 exports are estimated flat at 25,000 bales based on available supply.

Stocks

MY2024/25 and MY2023/24 are estimated at 2,000 bales.

Policy

The Government of Senegal continues to support the cotton sector by decreasing input prices and increasing the cotton farm gate prices since last year. See Tables 1 and 2.

Table 1. West Africa: Fixed Farm Gate Prices for Grade One Cotton (in CFA franc)

	Official 22/23 Farm Gate Price	**Official 23/24 Farm Gate Price**	**Official 24/25 Farm Gate Price**
Burkina Faso	300 ($0.52)	325 ($0.54)	325 ($0.54)
Mali	285 ($0.49)	295 (~$0.50)	300 ($0.50)
Senegal	300 ($0.52)	350 (~$0.50)	350 ($0.58)

Source: Official government data from Mali, Senegal, and Burkina Faso
$1= 575 CFA francs for 2022/23 $1=600 CFA francs from 2023/24 per kg

Table 2. West Africa: Pricing for Nitrogen, Phosphorus, Potassium and Urea (in CFA franc)

	Official 2022/23 Input Prices	**Official 2023/24 Input Prices**	**Official 2024/25 Input Prices**
Burkina Faso	NPK: 16,000 ($27.82) Urea: 16,000 ($27.82)	NPK: 28,000 ($46.66) Urea: 32,000 ($53.33)	NPK: 18,500 ($30.83) Urea: 18,500 ($30.83)
Mali	NPK: 12,500 ($21.73) Urea: 12,500 ($21.73)	NPK: 14,840 ($24.73) Urea: 14,840 ($24.73)	NPK: 14,840 ($24.73) Urea: 14,840 ($24.73
Senegal	NPK: 15,012 ($26.11) Urea: 13,112 ($22.80)	NPK: 15,012 ($26.11) Urea: 13,112 ($22.80)	NPK: 14,500 ($24.17) Urea: 10,900 ($18.170)

Source: Official government data from Mali, Senegal, and Burkina Faso
$1= 575 CFA francs for 2022/23 $1=600 CFA francs from 2023/24; All prices for 50 kg bag

Mali: Cotton Production, Supply and Distribution

(1,000 Hectares (HA), 1,000 bales, PERCENT, KG/HA)

Cotton	**2022/2023**		**2023/2024**		**2024/2025**	
Market Year Begins	**Aug 2022**		**Aug 2023**		**Aug 2024**	
Mali	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Harvested (1000 HA)	596	596	710	710	700	623
Beginning Stocks 1000 480 lb. Bales	301	301	261	276	389	179
Production 1000 480 lb. Bales	735	750	1328	1328	1200	1095
Imports 1000 480 lb. Bales	0	0	0	0	0	0
Total Supply 1000 480 lb. Bales	1036	1051	1589	1604	1589	1274
Exports 1000 480 lb. Bales	750	750	1175	1400	1150	1065
Domestic Use 1000 480 lb. Bales	25	25	25	25	25	27
Loss 1000 480 lb. Bales	0	0	0	0	0	0
Domestic Use and Loss 1000 480 lb. Bales	25	25	25	25	25	27
Ending Stocks 1000 480 lb. Bales	261	276	389	179	414	182
Total Distribution 1000 480 lb. Bales	1036	1051	1589	1604	1589	1274
Stock to Use % (PERCENT)	33.68	35.61	32.42	12.56	35.23	16.67
Yield (KG/HA)	269	274	407	407	373	383

Burkina Faso: Cotton Production, Supply and Distribution

(1,000 Hectares (HA), 1,000 bales, PERCENT, KG/HA)

Cotton	**2022/2023**		**2023/2024**		**2024/2025**	
Market Year Begins	**Aug 2022**		**Aug 2023**		**Aug 2024**	
Burkina	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Harvested (1000 HA)	618	618	462	462	470	346
Beginning Stocks 1000 480 lb. Bales	46	46	56	51	56	41
Production 1000 480 lb. Bales	775	780	765	765	720	612
Imports 1000 480 lb. Bales	0	0	0	0	0	0
Total Supply 1000 480 lb. Bales	821	826	821	816	776	653
Exports 1000 480 lb. Bales	750	750	750	750	700	600
Domestic Use 1000 480 lb. Bales	15	25	15	25	15	25
Loss 1000 480 lb. Bales	0	0	0	0	0	0
Domestic Use and Loss 1000 480 lb. Bales	15	25	15	25	15	25
Ending Stocks 1000 480 lb. Bales	56	51	56	41	61	28
Total Distribution 1000 480 lb. Bales	821	826	821	816	776	653
Stock to Use % (PERCENT)	7.32	6.58	7.32	5.29	8.53	4.48
Yield (KG/HA)	273	275	361	361	334	385

Senegal: Cotton Production, Supply and Distribution

(1,000 Hectares (HA), 1,000 bales, PERCENT, KG/HA)

Cotton	**2022/2023**		**2023/2024**		**2024/2025**	
Market Year Begins	**Aug 2022**		**Aug 2023**		**Aug 2024**	
Senegal	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Harvested (1000 HA)	17	17	15	15	13	12
Beginning Stocks 1000 480 lb. Bales	2	2	10	2	11	2
Production 1000 480 lb. Bales	25	25	24	25	22	27
Imports 1000 480 lb. Bales	0	0	0	0	0	0
Total Supply 1000 480 lb. Bales	27	27	34	27	33	29
Exports 1000 480 lb. Bales	17	25	23	25	25	27
Domestic Use 1000 480 lb. Bales	0	0	0	0	0	0
Loss 1000 480 lb. Bales	0	0	0	0	0	0
Domestic Use and Loss 1000 480 lb. Bales	0	0	0	0	0	0
Ending Stocks 1000 480 lb. Bales	10	2	11	2	8	2
Total Distribution 1000 480 lb. Bales	27	27	34	27	33	29
Stock to Use % (PERCENT)	58.82	8	47.83	8	32	7.41
Yield (KG/HA)	320	320	348	363	368	490

Attachments:

No Attachments