

**Required Report:** Required - Public Distribution

**Date:** April 10, 2023

**Report Number:** SG2023-0003

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

**Country:** Senegal

**Post:** Dakar

**Report Category:** Cotton and Products

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### **Report Highlights:**

The harvested area for Marketing Year (MY) 2023/24 is forecasted to rise five percent at 1.39 million hectares (MHA) compared to the previous year based on good farm gate prices, increase access to inputs, and improved national security particularly in Burkina Faso. MY 2023/24 cotton production is forecasted to increase 24 percent to 2.44 million bales based primarily on improved pest control due to the introduction of a new insecticide to fight Jassids. MY 2023/24 stocks are projected to increase 25 percent to 124,000 bales based on available supply. MY 2022/23 area and cotton production are estimated at 1.32 million hectares and 1.96 million bales dropping one percent and 20 percent, respectively, due mainly to a significant Jassids infestation in all three countries. MY 2022/23 exports are estimated to drop 15 percent based on available supplies and land transportation issues in Burkina Faso due to security issues in certain zones.

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## **Executive Summary:**

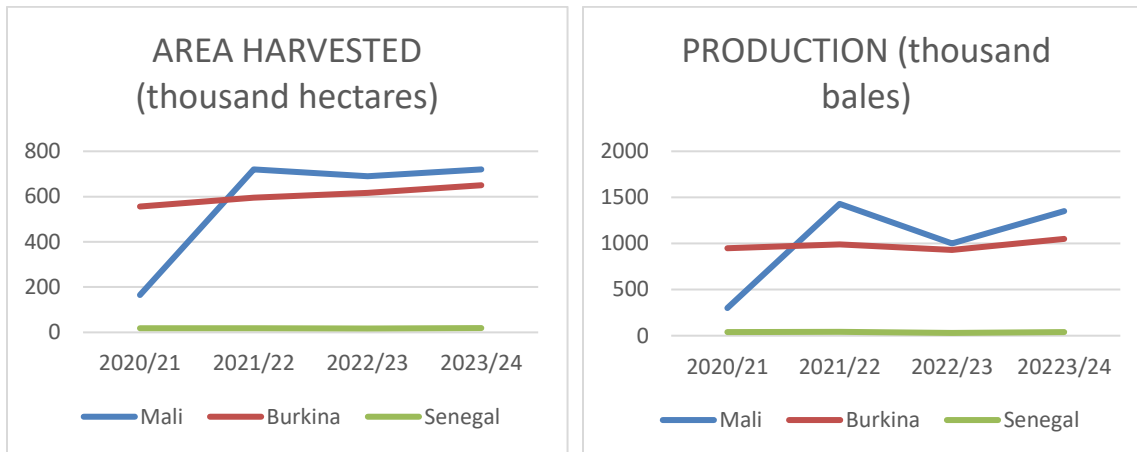
The harvested area for Marketing Year (MY) 2023/24 is forecasted to rise five percent at 1.39 million hectares (MHA) compared to the previous year based on good farm gate prices, increase access to inputs, and improved national security which will allow more cotton producers to return to their farmland and cotton-related input providers to deliver inputs in a more timely manner. This latter factor is particularly evident in Burkina Faso. MY 2023/24 cotton production is forecasted to increase 24 percent to 2.44 million bales based primarily on improved pest control due to the introduction of a new insecticide to fight Jassids. MY 2023/24 stocks are projected to increase 25 percent to 124,000 bales based on available supply. MY 2022/23 area and cotton production are estimated at 1.32 million hectares and 1.96 million bales dropping one percent and 20 percent, respectively, due mainly to a significant Jassids infestation in all three countries. MY 2022/23 exports are estimated to drop 15 percent based on available supplies and land transportation issues in Burkina Faso due to security issues in certain zones.

Mali area and production levels for 2023/24 are forecasted to increase 4 and 35 percent at 720,000 hectares (HA) and 1.35 million bales, respectively, compared to the previous year. MY 2023/24 exports are predicted to increase 13 percent to 1.32 million bales.

Area for 2023/24 in Burkina Faso is forecasted to increase five percent from the previous year. Production level for 2023/24 is forecasted to rebound 13 percent to 1.05 million bales.

In 2022/23, all three countries were infested by a new strain of Jassids reducing yield and therefore decreasing cotton production. Mali was the country most affected, with a 30 percent decrease in production, followed by Senegal (29 percent), and Burkina Faso (6 percent) compared to the previous year. Production declines in Burkina Faso in MY 2022/23 were not only due to pest infestation but also to the lack of fertilizers and urea, as well as a delay in distribution in certain zones due to security issues. Additionally, the security issues, especially in the eastern part of the country, prevented farmers from working their land. See figure 1 and 2.

In MY 2022/23 exports for Mali, Senegal, and Burkina Faso are estimated to decrease 15 percent from the previous year based on available supply. Stocks in MY 2022/23 are estimated to drop 66 percent to 99,000 bales mainly due to Mali stock decrease from the previous year after the Economic Community of West African States (ECOWAS) lifted the embargo on exports from Mali.



**Figure 1 and 2:** Mali, Senegal and Burkina Faso area and production levels from MY2020/21 to MY 2023/24

### *Burkina Faso*

#### **Production**

MY 2023/24 area is forecasted to increase five percent to 650,000 hectares (HA) compared to the previous year on the expectation of a good cotton farm gate price (which has not yet been announced), increased availability of fertilizers, and improved security – especially in the eastern region of Burkina Faso.

Cotton production in MY 2023/24 is estimated to increase 13 percent to 1.05 million bales from last year based on improved methods for control of pests. Cotton industries and extension services will raise awareness among farmers to plant earlier to reduce jassids' infestation. In the Societe Cotonniere du Gourma (SOCOMA) zone, displaced people are returning to their villages because they could not find land elsewhere. According to a private industry contact, the number of farmers in Burkina Faso before the crisis was estimated at 69,000. At the height of the crisis the number of farmers dropped to 32,000 and has subsequently increased to 39,000 in MY 2022/23. For MY2023/24, cotton stakeholders organized a national day workshop to discuss a national strategy to fight jassid infestations, including the use of newly approved insecticides. Even though the new products have not yet been approved by the Sahelian Committee for Pesticides, the Government of Burkina Faso (GOBF) will provide an exception for the use in MY 2023/24 of three new pesticides. The Regional Production Program Integrated Cotton in Africa (PR PICA) which country members (including Benin, Burkina Faso, Cameroon, Cote d'Ivoire, Mali, Senegal, Chad, and Togo) reported that researchers have found three most effective insecticides products that are systemic and have a residual efficacy of at least two weeks: GRACIA 10 EC (Fluxametamide 100 g/l); JACOBIA@AFS (under code) and Flonicamide 050 WG (500g/kg). For MY 2023/24, country members are welcome to use those insecticides, if approved by their government, while waiting their registration at the Sahelian Committee for Pesticides.

Estimates for area harvested and cotton production in MY 2022/23 are estimated at 617,000 hectares and 930,000 bales, respectively. This represents a four percent increase in area harvested and a six percent

decrease in cotton production. The drop in production is not only due to the aforementioned jassid infestation but also due to the following factors:

- logistics issues that delayed arrival and distribution to production sites;
- delays or lack of fertilizer applications;
- difficulty in accessing certain unsecure zones to distribute inputs due to the presence of jihadists; and
- government interdiction on the distribution of urea in certain zones because of possible use of urea as an explosive.

In the SOCOMA zone, only 30 percent of the needed fertilizer was distributed.

According to a private industry contact, the Societe Burkinabe des Fibres Textiles (SOFITEX) Zone has been the most infested with Jassids. The insects had the most destructive impact on the late-planted seeds and infested other crops such as gombo and sorrel. In Burkina Faso, cotton production loss due to the jassid infestation is estimated at 262,000 bales. As a result of all these factors, yield in Burkina Faso decreased 10 percent compared to the previous year.

In addition, Burkina Faso is facing severe attacks from non-state armed group (NSAG). In SOCOMA, a private industry contact reported that acute insecurity caused a drop in cotton output from 223,300 bales in 2016 to 69,300 bales in 2020 and reduced producer revenues from \$30 million to \$5 million in 2020 in the Eastern Region during this period.

The 2022/23 marketing campaign started on November 2022 and should end by mid-May 2023. FAS Dakar was told that until now there has not been a problem with farmers paying back their loans. Once all cotton will be collected, the cotton industries will do a final assessment of the campaign and they will be able to judge profits/losses for farmers during the MY 2022/23.

Farmers are requesting the return of Bt cotton, but cotton stakeholders have not yet found a partner that can provide a cotton variety that meets the industries' expectations – particularly for fiber length.

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

Local consumption for 2023/24 remains estimated at 25,000 bales, the same as in the previous year due to an unchanged capacity to process cotton fiber. Burkina Faso has only one cotton spinning company *La Filature du Sahel* (FILSAH) with an annual processing capacity of about 20,000 bales of cotton fiber into yarn. One of the main barriers to an increase in cotton processing is the cost of electricity. On average, Burkina Faso produces about 200,000 tons of cotton fiber and 300,000 tons of seed cotton. The seed cotton is processed into oil and used as planting seeds. Cotton processing is a top priority for the government, and this has been reaffirmed by the Prime Minister recently. According to a private industry contact, the Ministry of Trade thinks that one or two new processing companies may be in place within the next two years.

Other reasons for not developing the cotton processing industry are the cost of logistics. The nearest port is located 7,000 km to 10,000 km from the capital., Additional barriers to development of the cotton processing industry include high fuel prices and an unreliable water supply due to the lack of an underground aquifer. However, Burkina Faso does have an

abundance of inexpensive labor to support a cotton processing industry. There is a national school of engineering that trains textile engineers. The first promotion will graduate this year in 2023.

### **Trade**

Post forecasts Burkina Faso's cotton exports in 2023/24 at one million bales, up 11 percent compared to the previous year based on available supply and improved security that may facilitate logistics.

Estimated exports in MY 2022/23 will decrease four percent to 900,000 bales due to a decrease in supply. In February 2023, a local media outlet reported that the non-state armed group (NSAG) caused damages to a SOCOMA cotton ginning factory and burned 17,300 bales of cotton. It was the first ever direct attack against a cotton factory in Burkina Faso. A few days later, a NSAG reportedly set fire to cotton fields near N'Dorola (Kenedougou province, Hauts Bassins region), where a SOFITEX cotton ginning factory is located. The attacks on the cotton factory and cotton fields foreshadow further economic distress for Burkina Faso since the mining sector, the largest source of Burkina's export revenue, has been badly affected by the activities of violent extremist organizations.

### **Stocks**

Post forecasts 2023/24 stocks at 111,000 bales due to logistical issues, especially in the SOCOMA zone due to regional insecurity. To avoid attacks by NSAG, cotton is being transported to the Port of Cotonou by trucks using a new itinerary via Niger or Togo which doubles transit and increases transportation costs to 200,000 CFA (\$334) per truck. This route slows the transportation of cotton fiber. Nevertheless, a private contact thinks that despite this slowness most of the cotton could be evacuated to the Port of Cotonou by August/September.

Estimated stocks in MY 2022/23 stocks are 18,000 bales due to a decrease in production.

### **Policy**

The Government of Burkina Faso continues to support the cotton sector by increasing the subsidy of the farm gate and fertilizer prices in MY 2022/23. Prices have not yet been announced but FAS Dakar believes they will likely be favorable to farmers. Some decisions have been taken to use new insecticides to fight jassids and the GOBF has given permission to use certain pesticides provisionally awaiting the approval from the Sahelian Committee of Pesticides (SCP).

## ***Mali***

### **Production**

MY 2023/24 area is forecasted to increase four percent to 720,000 HA compared to the previous year on expectation of a good farm gate price that will motivate farmers to plant more and an increase in access to fertilizers including those that will help fight against jassids. MY 2023/24 cotton production is forecasted to increase 35 percent at 1.35 million bales compared to the previous year based on improved pest management and increased plantings.

MY 2022/23 area and production are estimated at 690,000 hectares and one million bales, dropping four percent and 30 percent, respectively from last year. Yield in MY 2022/23 is estimated to drop 27 percent due to the Jassids infestation.

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

Post forecasts 2023/24 consumption at 25,000 bales, unchanged from the previous year. In the near future, Mali may process more cotton fiber locally. According to the media Panorama Papers, the Government of Mali signed an agreement with the Government of China for the installation of two spinning industries in Koutiala and Bamako totaling \$354 million. For more information, see [here](#).

### **Trade**

Exports in 2023/24 are forecast at 1.32 million bales a 13 percent over the previous year based on available supply. The MY 2022/23 exports are estimated to decrease 21 percent from the previous year due to a decline in the harvest.

### **Stocks**

Stocks for 2023/24 are projected at 10,000 bales, the same quantity as in the previous year as ECOWAS' embargo on Mali was lifted.

### **Policy**

The Government of Mali (GOM) has made the cotton sector a priority and for MY 2023/24, the GOM has instructed all relevant ministerial departments concerned with the problem of jassids will initiate urgent consultations in order to issue an exception to authorize the utilization of the identified insecticides not yet registered to fight against jassids.

## ***Senegal***

### **Production**

Cotton area in 2023/24 is forecasted to increase 12 percent to 19,000 HA from the previous year based on a good farm gate price and a projected increase in access to inputs for farmers. MY 2023/24 production is forecasted to increase 33 percent to 40,000 bales from the previous year on expectation of better pest management.

MY 2022/23 area and production are estimated to reduce six percent and 29 percent to 17,000 HA and 30,000 bales, respectively, largely due to the impact of a significant jassids infestation which reduced the yield about 25 percent. Farmers were forced to abandon their farms, especially in Velingara (Linkering, Kounkane) and Kedougou (Saraya) regions. Researchers have conducted tests and identified new pesticides that can be efficient in combatting Jassids. The new pesticides will be provisionally approved by the GOS to be used for MY 2023/24 awaiting final approval by the SCP.

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

Senegal's local consumption is forecasted at zero bales for 2023/24 and estimated at zero bales for 2022/23 due to the lack of a cotton processing industry.

## Trade

Cotton exports for 2023/24 are forecasted to increase 33 percent to 40,000 bales compared to the previous year based on available supply. MY 2022/23 exports are estimated to decrease 29 percent at 30,000 bales due to low supply because of the expected poor harvest.

## Stocks

Stocks for 2023/24 are forecast at 3,000 bales, the same as the previous year.

## Policy

The Government of Senegal continues to support the cotton sector by subsidizing cotton farm gate prices.

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

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

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 2020/21 Input Prices	Official 2021/22 Input Prices	Official 2022/23 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: 16,000 (\$27.82) Urea: 16,000 (\$27.82)	N/A
Mali	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)	N/A
Senegal	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)	N/A

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



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

Cotton Market Year Begins Burkina	2021/2022		2022/2023		2023/2024	
	Aug 2021		Aug 2022		Aug 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	595	595	620	617	0	650
Beginning Stocks 1000 480 lb. Bales	51	51	96	81	0	86
Production 1000 480 lb. Bales	960	990	900	930	0	1050
Imports 1000 480 lb. Bales	0	0	0	0	0	0
MY Imports from U.S. 1000 480 lb. Bales	0	0	0	0	0	0
Total Supply 1000 480 lb. Bales	1011	1041	996	1011	0	1136
Exports 1000 480 lb. Bales	900	935	860	900	0	1000
Domestic Use 1000 480 lb. Bales	15	25	15	25	0	25
Loss 1000 480 lb. Bales	0	0	0	0	0	0
Total Dom. Cons. 1000 480 lb. Bales	15	25	15	25	0	25
Ending Stocks 1000 480 lb. Bales	96	81	121	86	0	111
Total Distribution 1000 480 lb. Bales	1011	1041	996	1011	0	1136
Stock to Use % (PERCENT)	10.49	8.44	13.83	9.3	0	10.83
Yield (KG/HA)	351	362	316	328	0	352

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

Cotton Market Year Begins Mali	2021/2022		2022/2023		2023/2024	
	Aug 2021		Aug 2022		Aug 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	720	720	690	690	0	720
Beginning Stocks 1000 480 lb. Bales	296	296	401	210	0	10
Production 1000 480 lb. Bales	1430	1430	1000	1000	0	1350
Imports 1000 480 lb. Bales	0	0	0	0	0	0
MY Imports from U.S. 1000 480 lb. Bales	0	0	0	0	0	0
Total Supply 1000 480 lb. Bales	1726	1726	1401	1210	0	1360
Exports 1000 480 lb. Bales	1300	1491	950	1175	0	1325
Domestic Use 1000 480 lb. Bales	25	25	25	25	0	25
Loss 1000 480 lb. Bales	0	0	0	0	0	0
Total Dom. Cons. 1000 480 lb. Bales	25	25	25	25	0	25
Ending Stocks 1000 480 lb. Bales	401	210	426	10	0	10
Total Distribution 1000 480 lb. Bales	1726	1726	1401	1210	0	1360
Stock to Use % (PERCENT)	30.26	13.85	43.69	0.83	0	0.74
Yield (KG/HA)	432	432	316	316	0	408

**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	2021/2022		2022/2023		2023/2024	
	Aug 2021		Aug 2022		Aug 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Harvested</b> (1000 HA)	19	18	16	17	0	19
<b>Beginning Stocks</b> 1000 480 lb. Bales	3	3	3	3	0	3
<b>Production</b> 1000 480 lb. Bales	40	42	28	30	0	40
<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	43	45	31	33	0	43
<b>Exports</b> 1000 480 lb. Bales	48	42	28	30	0	40
<b>Domestic Use</b> 1000 480 lb. Bales	0	0	0	0	0	0
<b>Loss</b> 1000 480 lb. Bales	-8	0	0	0	0	0
<b>Total Dom. Cons.</b> 1000 480 lb. Bales	-8	0	0	0	0	0
<b>Ending Stocks</b> 1000 480 lb. Bales	3	3	3	3	0	3
<b>Total Distribution</b> 1000 480 lb. Bales	43	45	31	33	0	43
<b>Stock to Use % (PERCENT)</b>	6.25	7.14	10.71	10	0	7.5
<b>Yield (KG/HA)</b>	458	508	381	384	0	458

**Attachments:**

No Attachments