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Report Highlights:

Marketing year (MY) 2023/24 area harvested for Mali, Burkina Faso, and Senegal is expected to remain the same as the previous year at 1.23 million hectares (MHA), as increases in Mali and Senegal were offset by losses in Burkina Faso due to insecurity. Combined with lower pest pressure and favorable weather conditions, MY 2023/24 production in the region is predicted to increase 33 percent to 2.06 million bales from the previous year. MY 2023/24 exports and stocks are estimated at 2.04 million bales and 275,000 bales. For MY 2022/23, severe pest infestations across the region coupled with insecurity in Burkina Faso resulted in year-over-year losses in area harvested and production of 8 and 37 percent, respectively, estimated at 1.23 MHA and 1.55 million bales.

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Executive Summary:

For marketing year (MY) 2023/24, private industry forecasts area harvested for Mali, Burkina Faso, and Senegal to remain the same as the previous year at 1.23 million hectares (MHA), as production incentives (good farm gate prices, governments' input subsidies, and farmers' debt cancellation) in Mali and Senegal have offset losses in Burkina Faso due to insecurity. However, with lower pest pressure and favorable weather conditions, production in the region is predicted to increase 33 percent to 2.06 million bales, which the private sector considers to be relatively normal levels. Exports and stocks are forecast at 2.04 million bales and 275,000 bales despite lower demand in the international market.

For MY 2022/23, area and production are estimated at 1.23 MHA and 1.55 million bales, respectively, representing an 8 percent and 37 percent drop from the previous year, due mainly to jassid infestations and insecurity in Burkina Faso that limited access to farms and prevented the distribution of inputs.

Mali MY2023/24 area harvested is forecast to increase 21 percent at 720,000 HA despite some abandoned area due to flooding while production is forecast to increase 77 percent at 1.33 million bales after a previous poor campaign due to jassid infestations.

Burkina Faso continues to suffer from the insecurity that prevented farmers from accessing their land and disrupted distribution of cotton company inputs, especially in the Société Cotonnière du Gourma (SOCOMA) zone. Therefore, MY 2023/24 area and production levels are projected to drop 21 percent and 10 percent to 490,000 HA and 705,000 bales, respectively. Only 5,000 HA was planted in SOCOMA this year, representing eight percent of their initial target.

MY 2023/24 area harvested in Senegal is projected at 18,000 HA, a six percent increase, while production is forecast to rise 20 percent to 30,000 bales based on good rainfall and less pest pressure. The Government of Senegal (GoS) agreed to pay back all loans contracted by farmers who lose their production last year due to jassid infestation.

Exports for Mali, Burkina Faso, and Senegal in MY 2023/24 are expected to rebound 37 percent compared to the previous year on greater supply. Despite the low demand in the international market, cotton industries said they will be able to export their cotton fiber by the end of the marketing year. MY 2022/23 exports have reduced 37 percent compared to the previous year as traders slowed down the speed of cotton fiber embarkation due to timid demand from the millers.

Mali

Production

Based on the private sector's estimate, MY 2023/24 area is forecast to increase 21 percent to 720,000 HA. The availability of inputs (including fertilizers and urea, which were delivered to farmers on time) and a four percent raise in the MY 2023/24 cotton farm gate price to 295 CFA (\$0.5) per kg motivated farmers to plant. In addition, the Malian transitional government has covered all input credits contracted by farmers in MY 2022/23 for around 10 billion CFA (\$16.7 million) for farmers that lost production due to jassid attacks and floods in the previous year. The Malian transitional government also subsidized 129 percent of the fertilizer and urea prices for cotton which cost to farmers 14,000 CFA (\$23.34) per 50 kg instead of 32,000 CFA (\$53.34).

MY 2023/24 cotton production is expected to increase 77 percent at 1.33 million bales due to less pest pressure and a good rainy season.

MY 2022/23 area and production are estimated at 596,000 hectares and 750,000 bales, respectively, dropping 17 percent and 48 percent from the prior year due mainly to jassid infestations and lack of fertilizers and urea.

Consumption and Value-Added Cotton

Post forecasts MY2023/24 consumption at 25,000 bales, unchanged from the previous year. Consumption is expected to rise once the new company named Societe Malienne de Fil (SOMAFIL) becomes operational in two years, for which the Malian transitional government and the government of the People's Republic of China (PRC) have signed a Memorandum of Understanding (MOU) to build two spinning units in Koutiala and Bamako for a total investment of \$354 million. According to private sector contacts and media reports, the two spinning mills will have a capacity of 45,000 MT of cotton fiber to be transformed into yarn (20,000 MT in Koutiala and 25,000 MT in Bamako). The investment project will be carried out by Malian Textile Fiber Development Company (CMDT) in partnership with the Chinese company, Qingdao, with a percentage share of 85 percent and 15 percent, respectively.

Trade

Exports in 2023/24 are forecast at 1.31 million bales, an 81 percent increase over the previous year based on available supply. MY 2022/23 exports plummeted 48 percent to 725,000 bales from the previous year due to low available supply and issues with transportation logistics.

Stocks

CMDT always carries a buffer stock representing 10 percent to 20 percent of the production. On this basis, MY2023/24 stocks are projected at 196,000 bales and at 201,000 bales for MY 2022/23.

Policy

The Malian transitional government continues to make the cotton sector a priority by subsidizing fertilizers, urea, and cotton farm gate prices and paying debts for farmers' losses due to jassid infestations and flooding in MY 2022/23.

Burkina Faso

Production

According to private industry, MY 2023/24 area harvested remains forecast at 490,000 HA, a 21 percent drop compared to the previous year. Extension services are conducting an assessment to estimate final numbers that will be available at the end of November or beginning of December. The Société Cotonniere du Gourma (SOCOMA) has only realized eight percent (5,000 HA) of its initial objective due to insecurity in this part of the country that prevented farmers from accessing their farms and halted the distribution of inputs. The other two remaining zones, Société Burkinabe des Fibres Textiles (SOFITEX) and FASO COTON, lost a marginal amount of their initial target due to abandonment from

flooding and insecurity. While the farm gate cotton price for MY 2023/24 has been fixed at 325 F CFA (\$0.54) per kg, an eight percent increase compared to the previous year, fertilizers and urea prices increased 75 percent and 100 percent respectively from the previous year, potentially discouraging plantings.

MY 2023/24 production is forecasted at 705,000 bales, a ten percent decrease compared to the previous year. During ten days in August, rains were heavy especially in the FASOCOTON zone causing washout of insecticide treatments, waterlogging, and disruptions to agricultural maintenance (weeding, fertilization, and phytosanitary treatments) as compared to some drought pockets in the SOFITEX zone (Hounde and Dedougou) during the same period. In September, rains returned to average. Private sector actors believe that the rainfall irregularities are associated with pest pressure—i.e., *Helicoverpa armigera* in the SOCOMA and SOFITEX zones, jasside and *Bemisia tabaci* in SOFITEX zone—and likely impacted MY2023/24 yields. In addition, the high prices and low accessibility of fertilizer could have reduced farmers' applications below the recommended levels.

MY 2022/23 area and production level are estimated at 618,000 HA and 780,000 bales representing 4 percent increase and 21 percent decrease, respectively, compared to last year. For more information, please visit the [previous](#) 2023 Cotton and Products Annual GAIN report.

Consumption and Value-Added Cotton

MY 2023/24 and MY 2022/23 remain forecast at 25,000 bales based on national processing capacity with the only cotton spinning company *La Filature du Sahel* (FILSAH).

Trade

Post forecasts Burkina Faso's cotton exports in MY 2023/24 at 700,000 bales, down five percent compared to the previous year based on lower available supply. Private industry believes that even though the international demand has fallen and prices are fluctuating, they will be able to sell their production before the end of the campaign.

Estimated exports in MY 2022/23 fell 21 percent to 740,000 bales due to a drop in supply.

Stocks

Post forecasts 2023/24 stocks at 76,000 bales, down 21 percent compared to the previous year based on greater exports.

Stocks in MY 2022/23 are estimated at 96,000 bales, up 19 percent from the previous year due to logistics and transportation challenges across certain routes.

Policy

The Burkina Faso transitional government continues to support the cotton sector by increasing the subsidy of the farm gate in MY 2022/23. However, subsidies for fertilizers and urea remain low compared to the previous year. In MY 2023/24, the Burkina Faso transitional government only subsidized fertilizers and urea prices at 10 billion CFA in MY 2023/24 compared to 72.6 billion the previous year.

Senegal

Production

Cotton area in 2023/24 is estimated to increase six percent from the previous year, at 18,000 HA. Farmers were motivated to plant cotton, especially after the Government of Senegal (GoS) wiped out all farmers input debts following the loss of revenues due to the jassid infestations in MY 2022/23.

MY 2023/24 production is forecast to rise 20 percent to 30,000 bales from the previous year. The rainy season started late and there was less pest pressure compared to the previous year. However, there was some drought affected areas which could lower yield especially in Tambacounda region.

MY 2022/23 area and production levels are estimated at 17,000 HA and 25,000 bales, a 6 and 40 percent drop, respectively, from the prior year, due mainly to jassid infestations.

Consumption and Value-Added Cotton

There is no company in Senegal processing locally produced cotton. Therefore, Senegal's local consumption is forecast at zero bales for 2023/24 and projected at zero bales for 2022/23.

Trade

Cotton exports for 2023/24 are projected to increase 20 percent to 30,000 bales compared to the previous year based on available supply. Private industry thinks that they will export almost 90 percent of the available supply despite a slow demand from the international market.

MY 2022/23 exports are estimated to fall 40 percent at 25,000 bales due to a production decline caused by jassid infestations.

Stocks

The Senegalese cotton company Société de Développement et des Fibres Textiles (SODEFTEX) estimates stocks for 2023/24 and 2022/23 at 3,000 bales.

Policy

In MY 2023/24, the GoS canceled all debts contracted by farmers to buy inputs after they lost revenues due jassid infestations.

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)	325 (\$0.54)
Mali	250 (\$0.43)	280 (\$0.49)	285 (\$0.49)	295 (~\$0.50)
Senegal	300 (\$0.52)	300 (\$0.52)	300 (\$0.52)	300 (~\$0.50)

Source: Official government data from Mali, Senegal, and Burkina Faso; \$1= 575 CFA francs from 2020/21 to 2022/23 \$1=600 CFA francs for 2022/23 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)	NPK: 28,000 (\$46.66) Urea: 32,000 (\$53.33)
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)	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: 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 from 2020/21 to 2022/23 \$1=600 CFA francs for 2022/23; All prices for 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	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	596	596	700	720
Beginning Stocks 1000 480 lb. Bales	196	196	301	201	261	201
Production 1000 480 lb. Bales	1430	1430	735	750	1250	1330
Imports 1000 480 lb. Bales	0	0	0	0	0	0
Total Supply 1000 480 lb. Bales	1626	1626	1036	951	1511	1531
Exports 1000 480 lb. Bales	1300	1400	750	725	1125	1310
Domestic Use 1000 480 lb. Bales	25	25	25	25	25	25
Loss 1000 480 lb. Bales	0	0	0	0	0	0
Domestic Use and Loss 1000 480 lb. Bales	25	25	25	25	25	25
Ending Stocks 1000 480 lb. Bales	301	201	261	201	361	196
Total Distribution 1000 480 lb. Bales	1626	1626	1036	951	1511	1531
Stock to Use % (PERCENT)	22.72	14.11	33.68	26.8	31.39	14.68
Yield (KG/HA)	432	432	269	274	389	402

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	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	618	618	490	490
Beginning Stocks 1000 480 lb. Bales	51	51	96	81	106	96
Production 1000 480 lb. Bales	960	990	775	780	700	705
Imports 1000 480 lb. Bales	0	0	0	0	0	0
Total Supply 1000 480 lb. Bales	1011	1041	871	861	806	801
Exports 1000 480 lb. Bales	900	935	750	740	675	700
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	96	81	106	96	116	76
Total Distribution 1000 480 lb. Bales	1011	1041	871	861	806	801
Stock to Use % (PERCENT)	10.49	8.44	13.86	12.55	16.81	10.48
Yield (KG/HA)	351	362	273	275	311	313

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
Area Harvested (1000 HA)	18	18	17	17	18	18
Beginning Stocks 1000 480 lb. Bales	3	3	2	3	10	3
Production 1000 480 lb. Bales	42	42	25	25	33	30
Imports 1000 480 lb. Bales	0	0	0	0	0	0
Total Supply 1000 480 lb. Bales	45	45	27	28	43	33
Exports 1000 480 lb. Bales	48	42	17	25	35	30
Domestic Use 1000 480 lb. Bales	0	0	0	0	0	0
Loss 1000 480 lb. Bales	-5	0	0	0	0	0
Domestic Use and Loss 1000 480 lb. Bales	-5	0	0	0	0	0
Ending Stocks 1000 480 lb. Bales	2	3	10	3	8	3
Total Distribution 1000 480 lb. Bales	45	45	27	28	43	33
Stock to Use % (PERCENT)	4.17	7.14	58.82	12	22.86	10
Yield (KG/HA)	508	508	320	320	399	363

Attachments:

No Attachments