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Report Highlights:

This report provides an overview of Senegal's food and agricultural market, based on engagements with major retailers, importers, processors, and food service operators throughout the country. Senegal's growing urban population, rising middle class, and dynamic retail and hospitality sectors are driving demand for high-quality imported food products. While traditional markets remain dominant, modern retail chains and U.S.-product-focused niche stores are rapidly expanding, especially in urban areas like Dakar and Thiès. The hospitality sector, particularly around Dakar and the new Diamniadio hub, is also scaling in to accommodate increasing numbers of international visitors tied to increasing major events happening in Senegal and rising business travel linked to oil and gas investments. U.S. exporters have opportunities to supply competitively priced, halal-certified, and value-added products across the retail, processing, and food service sectors by partnering with well-established local distributors.

Market Fact Sheet: Senegal

Executive Summary: Senegal is a lower-middle-income country. In 2024, Senegal's GDP reached approximately \$31 billion, with a growth rate of 6.7%. As the country transitions into an oil- and gas-producing nation, it is also increasingly positioning itself as a regional economic hub and strategic entry point into the West African Economic and Monetary Union (WAEMU), a market of over 130 million consumers. Although Senegal is a net food importer, the country is experiencing structural shifts in consumption, retail, and food processing, driven by urbanization, a growing middle class, and evolving dietary habits.

Top Suppliers of Consumer-Oriented Foods

In 2024, Senegal's imports of food and agricultural products were valued at \$3.1 billion, with \$1.3 billion in consumer-oriented products. The EU- 27 accounted for 49 percent of consumer- oriented food imports.

The United States captured less than one percent of market share of total food and agricultural

Figure 1: Source: Trade Data Monitor LLC, CY 2024

product that Senegal imported, totalling \$14.4 million including \$6.4 million in consumer-oriented foods.

Food Retail Industry: The food retail sector is dominated by traditional markets that account for 70% of food sales, where price and micro-packaging are critical for success. Meanwhile, the growing modern retail segment, led by chains like Auchan, Super U, and Carrefour, as well as niche retailers specialized in U.S. food products, offers strong entry points for U.S. exporters targeting the country's expanding middle and upper-income consumers and expatriate community

Hotel, Restaurant, and Institution Sector:

Senegal's expanding hotel and restaurant sector,

especially in Dakar and the emerging Diamniadio hub, offers strong opportunities for U.S. food exporters, driven by rising demand for premium, halal-certified products. The growing Senegalese middle- and upper class now makes up 50–70% of upscale restaurant clientele, while Dakar increasingly hosts major events and business visitors linked to the booming oil and gas sector. Key local distributors supply this segment and are essential partners for market entry.

Quick Facts

Top 10 U.S. Consumer-Oriented Prospects

- 1- Snack Foods
- 2- Non-Alcoholic Bev. (ex. juices, coffee, tea)
- 3- Condiments & Sauces
- 4- Bakery Goods, Cereals, & Pasta
- 5- Spices
- 6- Processed Poultry Products
- 7- Processed Beef Products
- 8- Dairy Products
- 9- Processed Fruit & Vegetables
- 10- Beef Cuts

2024 Consumer-Oriented Imports: \$1.3 billion

2024 Consumer-Oriented Exports: \$573 million

GDP/Population

Population: 18,593,258 (ANSD)

GDP Growth Rate: 6.7% (IMF)

GDP/Capita: \$1,700

Strengths	Weaknesses
Perception of U.S. food products and ingredients is very positive.	Retailers and processors have long- standing relationships with other non-U.S. suppliers.
Opportunities	Threats
GDP growth is leading to increased consumer purchasing power and imported products are viewed as higher quality than local products.	Although the market is growing, it is price-sensitive and less expensive ingredients from other origins may be more competitive.

SECTION I: DETAILED MARKET OVERVIEW

Senegal offers a stable and increasingly attractive business environment for U.S. exporters, particularly in the agribusiness and consumer-oriented food sectors. As one of West Africa’s most politically stable democracies with a strategic Atlantic port, Senegal serves as a gateway to the West African Economic and Monetary Union (WAEMU) market of over 130 million consumers. The country's growing urban population and rising middle class support expanding demand for high-quality imported goods, especially in urban centers like Dakar, Mbour/Saly, Thiès, and Saint-Louis.

Furthermore, the country’s new oil and gas industry, as well as recent government investments in logistics, industrial zones, and agribusiness hubs framed in “Senegal 2050” strategic vision are driving economic transformation. The private sector is also becoming more dynamic, with growth in modern retail, food processing, and hospitality.

Despite global inflationary pressures and a persistent trade deficit, Senegal remains a top growth market in Francophone West Africa where France’s historical trade dominance is gradually diminishing. The new government elected in 2024 is actively seeking to diversify trade partnerships and attract reliable international suppliers to help improve agricultural productivity and strengthen food sovereignty. These shifts create real, long-term opportunities for U.S. exporters in high-potential sectors such as grains, ingredients, meats, beverages, dairy, packaged foods, and agricultural inputs.

I.1. Population and key demographic trends

Senegal has an estimated population of over 18.5 million in 2024, with a strikingly youthful demographic: about 45 percent of the population is under the age of 15 and 75 percent is under of 35. According to national projections, the country’s population is expected to more than double by 2050, reaching around 38 million people. This demographic pressure, combined with ongoing urbanization, is reshaping food consumption patterns and creating new market dynamics.

The country is also experiencing steady urbanization, with over 50 percent of the population now living in cities. A small but growing middle class, primarily concentrated in Dakar, is progressively driving demand for higher quality, branded, and convenient food products. Young professionals and dual-income households are increasingly turning to supermarkets, imported goods, and ready-to-eat meals. Demand for safe, nutritious, and premium food options is gradually rising, especially among health-conscious and well-traveled consumers.

Year	2018	2019	2020	2021	2022	2023	2024
Total Population (millions)	15.90	16.29	16.74	17.19	17.31	18.03	18.59
Urban Population (millions)	7.5	7.8	8.1	8.4	8.7	9	9.3 (est)

I.2.Size of economy, purchasing power & consumer behavior

Senegal’s economic activity in 2024 remained resilient. The country’s GDP reached an estimated \$31 billion (World Bank), with the International Monetary Fund (IMF) reporting real GDP growth of around 6.7 percent, driven largely by the launch of commercial oil production. In 2024, Senegal officially became an oil exporter, ushering in a new phase of economic development supported by hydrocarbon revenues. Inflation remained low, averaging 0.8 percent (decreased from 5.9 percent in 2023), contributing to a stable price environment.

Looking ahead, the outlook is favorable as economic activity is projected to be strong. The IMF forecasts GDP growth to exceed eight percent in 2025, among the highest in sub-Saharan Africa, with over half of that growth expected to come from oil and gas. This expansion is expected to further boost public revenues, infrastructure development, and consumer spending power.

Year	2018	2019	2020	2021	2022	2023	2024
Real GDP growth (annual percent change)	6.2	4.6	1.3	6.5	4.0	4.6	6.7
GDP per capita (current USD)	1,460	1,440	1,470	1,600	1,570	1,730	1,810
Inflation rate (percent)	0.5	1.8	2.5	2.2	9.7	5.9	0.8
Global Agricultural Exports to Senegal (USD billions)	1.8	1.7	2.0	2.9	2.7	3.0	3.1
Global Consumer-Oriented Agricultural Exports to Senegal (USD millions)	739	770	906	1,100	1,200	1,300	1,356
Unemployment Total (percent of Total Labor Force), modeled ILO estimate	6.53	6.47	7.10	3.70	3.40	3.0	NA*

* = Data not yet available at time of publication

Despite anticipated growth in Senegal’s economy, GDP per capita remains modest at about \$1,700 and approximately 35 percent of the population still lives below the poverty line. Many consumers continue to face high prices that linger following the prior two years of global inflationary pressures. Price sensitivity remains a defining feature of the Senegalese market, particularly in rural areas and among the low-income majority, where purchasing decisions are driven almost entirely by affordability, often leading to a “race to the bottom” on price.

At the same time, the middle- and upper-class segment has a higher purchasing power that supports more diversified consumption habits. They increasingly value product quality, food safety, origin, and modern packaging, shaping demand for branded and imported food products. This demographic shift has supported the rise of modern retail chains and supermarkets, representing a market access opportunity for U.S. exporters, targeting premium or differentiated offerings. Additionally, remittances from Senegalese abroad, equivalent to nearly 10 percent of GDP, play an important role in supporting household consumption, particularly in urban areas.

I.3. Overall business climate

Relative to neighboring West African countries, Senegal ranks favorably for ease of doing business, driven by strong institutions, a relatively transparent legal system, and active engagement with international partners. The country maintains a liberal trade policy, with no major barriers to imports and a Common External Tariff (TEC) regime under WAEMU.

While logistics remain a challenge, particularly in rural areas and in the cold chain, Senegal continues to invest heavily in infrastructure to improve its business climate. Beyond the well-established Port of Dakar and the Blaise Diagne International Airport (AIBD) near Diass, major infrastructure projects are underway to expand strategic ports in Saint-Louis (supporting offshore gas exports), Bargny-Sendou (focused on industrial freight), and Ndayane (a new deep-water port being developed in partnership with Dubai Port World (DP World)). These upgrades are designed not only to strengthen Senegal's internal trade capacity but also to position the country as a key operating platform and re-export hub for other West African markets.

Despite the growing opportunities, U.S. companies remain underrepresented in the Senegalese market. U.S. food and agricultural products are generally well-regarded for their quality and reliability, but they face strong competition from European Union and South American suppliers who benefit from long-standing trade ties and geographical proximity to the country. Moreover, they have established competitive advantages by adapting to Senegalese market needs, such as flexibility to send smaller/mixed consignments and advantageous terms of payment. On the other hand, Asian and regional competitors are increasingly offering lower-cost alternatives. Additionally, many U.S. firms are still unfamiliar with the Senegalese market or lack localized distribution partners. Closing this information gap, through trade missions, marketing support, and partnerships, could help expand U.S. engagement in this promising but competitive market.

I.4. Recent food trends

Several emerging trends are redefining how food is bought, sold, and consumed, especially in Dakar and other urban centers:

- **Retail modernization:** Supermarkets and convenience store chains such as Auchan, Super U, and Carrefour continue to expand their footprint in Dakar and other secondary cities. These stores are particularly attractive to the growing middle class, which is looking for convenience, consistent quality, and branded items.
- **Emergence of U.S. food products retailers:** A number of niche retailers specializing in U.S. food brands, such as ~~the~~ American Food Store, One Stop and Shop Market, and Jayma Store have emerged in Dakar. These businesses are expanding steadily and serve as useful indicators of rising brand awareness and appetite for American-style consumer products.
- **Health and nutrition:** With greater awareness of food safety and nutrition, Senegalese consumers, especially those in urban areas, are showing increased interest in fortified, organic, and “better-for-you” products. This shift is particularly evident among women, youth, and

health-conscious consumers who seek out low-sugar beverages, whole grains, dairy alternatives, and clean-label products.

- **Digitalization and E-commerce:** Online grocery platforms and food delivery services are gradually gaining ground, especially among urban youth and professionals. Mobile usage, social media marketing, and mobile money services are making digital transactions more accessible and reliable.
- **Rise of modern street food culture:** A growing urban middle class with fast-paced lifestyles is also fueling the rise of a modern, branded street food culture. Chains such as Caliente and Nomad Burger are setting new standards for fast-casual dining in Senegal. This trend opens opportunities for semi-processed food ingredients, sauces, condiments, and packaging material.
- **Private labeling:** As local retailers compete to meet growing demand for quality at accessible prices, they are increasingly turning to private-label offerings. This presents new opportunities for U.S. suppliers who can co-brand or co-develop retail-ready products, particularly in shelf-stable food categories.
- **Agro-industrial growth:** Food processing and agribusiness remain high priorities under Senegal's development agenda, creating space for U.S. exports of food ingredients, additives, and flavorings. Additionally, there is strong and growing demand for agricultural inputs and feed ingredients that support Senegal's expanding poultry and livestock sectors.

I.5. Advantages and Challenges

Advantages	Challenges
Strong reputation of U.S. food and agricultural products for quality and safety.	Higher prices of U.S. products compared to regional and Asian competitors.
Liberal import policy with no major trade barriers for most products.	EU suppliers benefit from proximity, historical ties.
Strategic coastal location making Senegal close to European and North American markets and a gateway for landlocked countries in West Africa, like Mali (re-export potential to the subregion).	European and South American exporters have established competitive advantages, such as flexibility to send smaller consignments and advantageous terms of payment.
Expanding modern retail and hospitality sectors (HRI).	Language and labeling requirements can pose challenges (must be in French).
Growing demand for processed, packaged, and fortified foods.	Complex logistics and limited cold chain infrastructure outside Dakar.
Opportunities U.S. ingredients in food processing, dairy, poultry, and grains.	Small market, price sensitivity and low purchasing power in rural areas.
Senegal became an oil and gas producer and exporter in 2024.	

SECTION II: EXPORTER BUSINESS TIPS

U.S. exporters seeking to enter the Senegalese market should approach the country as a long-term growth opportunity that requires relationship-building, market adaptation, and local partnerships. While Senegal is relatively open to foreign trade and offers a stable business climate, navigating the market effectively requires an understanding of both the formal and informal business cultures, pricing sensitivities, and logistical realities. While the country is open to a broad range of food and agricultural imports, U.S. agri-foods are underrepresented, and exports underperform compared to origins in Europe, Asia, and South America.

II- 1- Market Research

Before entering the Senegalese market, U.S. exporters are encouraged to conduct in-depth market research to assess product viability, consumer awareness, and compatibility with local tastes and expectations. Critical questions to consider include:

- *Are consumers aware of my product?*
- *Does my product have a space in the Senegalese market basket?*
- *What nutritional or functional benefits does my product offer, especially in the growing “better-for-you” segment?*
- *Am I able to make the effort to build market presence in a small but growing market, and remain persistent over time?*
- *Is the product shelf stable or does it require cold chain capacity?*
- *Does the product appeal to consumers with aspirations for novel, high quality, or imported goods?*

A visit to Senegal is highly recommended. Seeing firsthand how the food manufacturing sector as well as the modern retail and HRI sectors operate will help exporters to better determine if product has market potential. Good market data is often limited or inconsistent, and supply chains for imported products can be erratic, making direct observation and local contact essential to understand market trends.

The next thing to consider is pricing relative to Senegalese incomes. As a rule of thumb, a product is likely to be at least two to three times more costly than the U.S. freight on board (FOB) prices by the time it reaches the retail shelf, after accounting for shipping, import duties, VAT, distribution costs, and margins. For this reason, price-sensitive mass-market goods may be less competitive unless they can be shipped affordably or positioned as aspirational products.

Exporters entering the market are advised to start small. For example, a gradual market entry by shipping mixed or partial containers can build visibility. Working through consolidators familiar with the market may help overcome initial scale issues and ensure compliance with country-specific packaging and labeling requirements.

Once product-market fit is established, the next critical step is **identifying a reliable importer or distributor**. Ideal local partners should:

- Have an established distribution network (including modern retail, HRI, or semi/wholesale channels)

- Understand Senegal’s regulatory and customs environment (as several government bodies may have a role in regulating certain foods or agricultural products)
- Be capable of handling cold chain, if applicable
- Demonstrate a long-term interest in developing niche or specialty food categories even if they start with just a few pallets or cases of a product

Logistics snapshot: Almost all goods entering Senegal transit through the Port of Dakar and are distributed mainly by truck to interior areas and neighboring markets, such as Mali. Most of the goods are distributed in the capital city which serves as Senegal’s epicenter of consumer demand. Dakar accounts for 90 percent of Senegal’s manufacturing base and 20 percent of the country’s population (nearly 3.4 million inhabitants).

Trade Shows: Regional platforms like SIAL Paris, Gulfood Dubai, Foire Internationale de l’Agriculture et des ressources Animales (FIARA) or Dakar International Fair (FIDAK) can be excellent entry points to meet buyers and evaluate the market.

For current trade statistics, product-specific opportunities, exporters are encouraged to consult the following resources: Senegal National Agency of Statistics and Demography ([ANSND](#)).

U.S. exporters are also encouraged to contact FAS Dakar for introductions to vetted local importers, market briefings, or guidance on business development in Senegal and the broader Francophone West African region.

II- 2 - Local Business Customs and Trends

Business culture in Senegal is highly relationship driven. Personal connections, trust, and in-person meetings carry significant weight. U.S. companies are advised to invest time in developing long-term relationships with local partners, agents, or distributors. A visit to the market, ideally supported by FAS Dakar or in the context of a trade mission, can go a long way toward establishing credibility.

Business discussions may progress more slowly than in the U.S., and patience is often required. Senegalese businesses value professionalism but also appreciate a warm and respectful approach.

French is the language of business and official documentation and Wolof is the local dialect that is ubiquitous in everyday commerce. Good French language skills may be needed to establish strong business relationships. Exporters should be prepared to provide French-language materials.

It is also important to understand that while larger importers operate formally, a significant portion of retail and foodservice distribution still operates through informal networks. Partnering with a local distributor who understands both systems can help navigate these complexities.

Ensuring payment is another important consideration when establishing a relationship with an importer. Until a successful working relationship is established, exporters may wish to consider vehicles such as an irrevocable letter of credit. USDA does not have the authority or expertise to mediate contractual disputes or serve as a collection agent when differences over payment arise. For firms that qualify, the Export-Import Bank of the United States provides exporter insurance. The monetary unit of Senegal is Franc CFA. In 2024, the average annual exchange rate for Senegal was 606.3 FCFA to one U.S. dollar.

Most business and banks are open with regular hours on weekdays, though many will close midday for lunch. Some businesses close early on Friday for Friday prayers.

For professional purposes, Senegalese in Dakar dress formally, and in most meetings business attire (suit and tie or dress) is appropriate. Women may wear professional business attire (like what one would see in a U.S. office) or traditional Senegalese outfits known as bubus. Business casual for men is a collared shirt with slacks and for women is dresses, skirts, or full pants and a shirt with sleeves. Business casual attire is appropriate for all events outside Dakar and meetings are occasionally held outdoors.

II-3- General Consumer Tastes and Trends

Understanding Senegalese food culture is key to succeeding in the market. While modern retail is expanding, traditional dietary preferences continue to shape consumption habits across income levels and regions.

- In Senegal, **rice, millet, sorghum, and maize** constitute the **staple food of households**, with rice being the most widely consumed. In particular, broken rice (“riz brisé”), often imported from India and Thailand, is used daily in national dishes such as Thiéboudienne (a rice and fish dish), Yassa (marinated chicken or fish with onions), and with Mafé (a peanut-based stew). While roughly 50 percent of rice consumed in Senegal is domestically produced, imports are essential to meet national demand.
- **Peanuts** play a dual role in the Senegalese economy and diet: they are a major source of protein and one of the country’s primary cash crops.
- **Fish** remains the dominant source of animal protein, accounting for up to 40 percent of animal protein intake. As fish availability has declined in recent years, consumers have increasingly turned to other protein sources.
- **Beef and/or lamb meat** is an integral part of the traditional dishes and culinary habits, eaten at least once a week, especially during weekends and social gatherings. It has experienced tremendous consumption growth in recent years due to a rise in the number of restaurants, fast-food businesses, and small roasted meat shops called “Dibiterie” in urban centers.
- **Chicken** is also increasingly favored due to its affordability and flexibility in various dishes. Poultry consumption has surged, driven by population growth and urbanization. According to the FAO, poultry slaughter has more than tripled over the last 15 years. However, local production still falls short of demand, especially during holidays and peak consumption periods. Although Senegal has banned imports of uncooked poultry since 2005, heat-treated poultry products are eligible for entry, and demand for poultry inputs, especially imported feed ingredients, continues to grow, as the country struggles with large-scale domestic feed production.
- **Dairy products**, mostly in the form of imported milk powder, are deeply ingrained in local consumption habits, serving as a staple for breakfast beverages and traditional dishes like “laxx sow” or “thiakry”, local dairy foods made from a mixture of curdled milk and millet flour granules or with millet. Milk powder is often reconstituted at home or used in processed food products, making Senegal one of West Africa’s top importers of dairy ingredients.

- **Street food** is a vital segment of Senegal’s food economy offering a variety of affordable and flavorful options such as pastels (fried fish-stuffed pastries), fatayas (savory meat turnovers), acara (black-eyed pea fritters), and “thiere ak meew” (millet couscous with milk). For U.S. suppliers, this vibrant informal sector presents a growing demand for ingredients like wheat flour, beans, seasoning, and sauces.
- Lastly, **cultural and religious sensitivities** must be respected. Senegal is over 90 percent Muslim, so halal certification is essential for meat and poultry products. Products with alcohol or pork derivatives may face limited acceptance.

SECTION III: IMPORTS FOOD STANDARDS, REGULATIONS AND PROCEDURES

III.1. Customs Clearance

All imported/exported goods must be covered by a customs declaration to proceed to the necessary verification and, if required, apply the duties and taxes for clearance. Senegalese Customs (“les douanes Sénégalaises”) clears all traded goods at the Port of Dakar, the Blaise Diagne International Airport, and road borders using an online system called **Gaïndé** for all customs operations.

For more information about customs clearance please refer to the latest [Food and Agricultural Import Regulations and Standards report](#).

III.2. Documents Generally Required by the Country Authority for Imported Food

For details on import procedures and requirements for specific products, please refer to the latest [Food and Agricultural Import Regulations and Standards report](#).

For a listing of necessary documentation export certificates, please refer to the latest [FAIRS Export Certificate report](#).

III.3. Country Language Labeling Requirements

Please refer to the latest [Food and Agricultural Import Regulations and Standards report](#).

III.4. Tariffs and FTAs

Senegal is a member of the WAEMU as well as the Economic Community of West African States (ECOWAS). Through these organizations, Senegal has adopted broad economic, import, customs, tariffs, and export regulations. Therefore, Senegal **applies five tariff bands at 0, 5, 10, 20, and 35 percent**. Most food and agricultural product imports fall within the 5th band (35 percent), including:

- fresh, chilled, or frozen ovine, bovine, porcine, and poultry (please read section II.3 for more information on the poultry ban) meat including offal, poultry eggs, sausages, other similar meat products, or other foods manufactured with these meat products
- refined peanut, palm, sunflower, and coconut oil, cocoa powder, chocolate, and other food preparations
- biscuits, waffles, wafers, rusks, toasted bread, and similar products
- yogurt, chewing gum, potatoes, onions and shallots, prepared tomatoes, ketchup, tomato sauces

For more information, please refer to the [Common External Tariff](#) and the [WTO Trade Policy Review](#) of the West African Economic and Monetary Union and its [Annex 7](#), specifically on Senegalese policies in Part 8 of the Trade Policy Review Document.

The [Senegalese Customs website](#) also includes pertinent information for importing and exporting. The U.S. Department of Commerce also publishes a country [commercial guide](#) describing bilateral and multilateral trade agreements that Senegal is party to, including with the United States.

Commodities not originating from ECOWAS countries are subject to several additional duties including:

- a Statistical Charge (RS) duty of one percent
- a Community Solidarity Levy (PCS) of the WAEMU of one percent
- an ECOWAS Community Levy of 0.5 percent
- a Senegalese Loaders' Council (COSEC) duty of 0.4 percent.

Senegal also levies a **special import tax (TCI)** on sugar and wheat flour from third countries, 10 per cent of the trigger price or by equalization.

A simplified and harmonized **value-added tax (VAT)** regime is applied to most food and agricultural products at 18 percent. VAT exemptions are available for unprocessed and staple food products, such as rice and wheat, which are subject to a special tax regime.

Excise duties are imposed on alcoholic and non-alcoholic beverages (excluding water) in ECOWAS countries. In Senegal, excise duties are levied on alcoholic beverages (40 percent) and aerated beverages (3 percent).

For more information about the TCI, special tax regimes or excise duties, please check the [World Trade Organization report](#).

III.5 Trademarks and Patents Market Research

In Senegal, the government body responsible for managing intellectual property rights is the Ministry of Industries and Mines through the Industrial Property and Technology Service. Trademarks, industrial designs, and patents are regulated by national legislations that reference the Banjul Agreement on Trademarks, Patents, and Industrial Designs of 1997 (revised in 1999).

SECTION IV: MARKET SECTOR STRUCTURE AND TRENDS

Senegal's food and agricultural market is evolving quickly, driven by a young population, growing urbanization, and greater exposure to global products, resulting in shifts to dietary habits and retail models. The modern retail, food service, and food processing sectors are becoming more dynamic, creating multiple points of entry for U.S. exporters, especially in the consumer-oriented product space. Meanwhile, inflation, supply chain volatility, and changing consumer expectations are influencing how businesses operate across these sectors. However, success in this market requires strategic pricing, tailored packaging, local partnerships, and a nuanced understanding of Senegal's hybrid retail system and price-sensitive consumers.

IV.1. Food Retail Sector

Senegal's retail system is split between a dominant traditional market and a growing modern segment. Each operates under different dynamics but presents distinct opportunities.

a- Traditional Retail Sector

- The traditional retail system, which includes open-air markets, small neighborhood grocery shops (*boutiques*), and informal street vendors, still dominate the market accounting for over 70 percent of all food purchases in Senegal. With approximately 35,000 boutiques nationwide (including nearly 15,000 in Dakar alone), these small-scale retailers play a central role in daily consumer food access. They source mainly from local traders and wholesalers of consumer goods along with influential Lebanese, Turkish, and Chinese merchants specialized in volume imports and flexible pricing, who play an important role in the food import- export business.
- Price is the single most important factor in this segment; it is the first criteria that traditional retailers care about. Retailers want certainty that they can sell at a price the consumer can afford while allowing them to make a profit. If a product cannot be sold at a profitable yet affordable retail price, it won't be accepted by the distribution chain. Moreover, consumers often purchase in small daily quantities, meaning micro-packaging and "microdosage" formats (e.g., 25g milk powder sachets, single-serve juice boxes) are essential. For U.S. exporters targeting this segment, working through distributors who understand the informal market and boutique networks is key. Club Thiossane, a notable local food distributor with deep penetration in this segment, supplies thousands of boutiques, yet their participation hinges on price competitiveness.
- In this segment, opportunities exist for U.S. products that can be competitively priced and adapted for daily consumption, especially lower tier products categories such as **basic fat filled or skimmed milk powder, biscuits, shelf-stable beverages, rice, sauces, and cheap snacks**. This is a volume-driven market, offering high potential over time despite its fragmented nature.

b- Modern Retail Sector

- The modern food retail sector in Senegal has become increasingly competitive in recent years, representing about 30 **percent** of food retail sales. International chains such Auchan, Super U (formerly Casino), and Carrefour (all French), and Hypermarket Exclusive (Indian) occupy this space. They operate hypermarkets and neighborhood outlets across Dakar, Thiès, Saint-Louis, and emerging cities, offering greater convenience to those populations with a mix of local and imported products. These supermarkets cater to middle- and upper-income consumers seeking branded, high-quality, and diverse food products and, to a lesser extent, the expatriate population **which constitutes** approximately two percent of the total population. For more information about these supermarkets please visit:
 - Auchan: www.auchan.sn
 - Carrefour: www.carrefour.sn
 - Super U: <https://superusenegal.sn>
- While these stores import directly from Europe and Asia, many also source from large local importers like **Sodial** and **Sofiex**, which handle customs clearance, warehousing, and distribution. The best entry strategy in this segment for U.S. exporters is to:
 - Partner with established local distributors with strong supermarket ties

- Offer products in packaging formats suitable for mid-sized households
- Ensure French labelling and shelf stability.

NB: Modern retail is also witnessing competition from **market niche retailers** that are **specialized in American products retail** such as the [American Food Store](#), [One stop and shop market](#), and Jayma C-Store. These businesses report growing demand for U.S. origin food products, especially snacks, sauces, condiments, beverages, and breakfast items that is strong among young professionals, international school families, expatriates, and Senegalese families with global exposure. These businesses operate in a relatively untapped niche but are scaling quickly. They also report strong interest in expanding their supplier networks and deepening product variety. The recommended market entry approach for this segment is for an exporter willing to start small with some pallets of products or small mixed containers offering a variety of products.

- **E-commerce:** There is also significant growth in E-commerce as a growing portion of the urban population has started ordering groceries online. In fact, about 60 e-commerce platforms have opened in Senegal in recent years. That growth is fueled by increasing Internet connectivity and use of smartphones, increasing consumer trust in online transactions, and the emergence of secure electronic payment solutions. Online food delivery services (e.g., Club Thiossane, Yassir, Sama Food) help link small producers and informal vendors to consumers. U.S. exporters looking for early-mover advantage should explore this emerging channel, especially for premium, novelty, or hard-to-find U.S. products that consumers are willing to order online.

IV.2. Food Processing

Food processing is gaining momentum in Senegal, backed by government incentives, a growing population and a food sovereignty policy. Most of the food processing sector is located around Dakar, due to proximity of the port, airport, and good road infrastructure.

Large food manufacturers produce the following for the local and regional market: tomato sauce/tomato paste, jams/jellies, bouillon, refined sugar, flour, biscuits, juice, soda, water, beer, milk powder, yogurts, milk drinks, melted cheese, confectionery products, and processed meat products. Peanut oil, juice, and canned fish are also produced locally and exported to international markets. A pervasive sentiment among consumers is imported processed foods are higher quality than what is produced domestically. Thus, most processed foods available in the market continue to be imported.

To grow their market and to improve the quality of their offerings, food manufacturers involved in dairy, juice, bakery, and snack products are actively looking for consistent-quality inputs such as milk powder, flavorings, whey, nuts, and grains. To tap into this segment U.S. exporters can explore with local food processors:

- **Co-packing arrangements** or **private label deals**
- Support in **technical training** or **product adaptation**
- Access to new **formulations** or **functional ingredients**

Leading Senegalese Food Manufacturers include: Senico, Patisen, Siagro, Nestle, CDA, La laiterie Du Berger (LDB), Poultrade, and Sodeca.

IV.3. Food Service - Hotels, Restaurants, and Institutions

Senegal's **food service sector** is also undergoing transformation, growing in both scale and sophistication, driven by increasing urban affluence, a rising middle class, evolving food habits, and a steady influx of tourists and business travelers.

While **luxury and tourist-oriented restaurants** once served mostly expatriates, today's patrons are increasingly **Senegalese middle- and upper-class consumers** with global travel experience. They represent 50 to 70 percent of regular clientele. Senegalese middle- and upper-class consumers are travelling more frequently for business, study, and leisure. When these consumers return to Senegal, they want to have the same international dishes that they experienced abroad. These consumers are willing to pay a premium for higher quality, more expensive foods and prefer international cuisine while dining outside the home, enjoying these foods at high-end restaurants and hotels. Dakar, Mbour, Saint-Louis, and Cap Skirring are important tourist destinations in Senegal and have the largest concentration of upscale hotels.

Though Dakar has long been the center of Senegal's upscale restaurant and hotel industry, the new hospitality corridor in Diamniadio, near the Blaise Diagne International Airport (AIBD), is quickly emerging as the country's next major hub. In addition, Diamniadio is home to the Abdou Diouf International Conference Center (CICAD), a state-of-the-art venue that regularly hosts major sub-regional and international summits. These high level meetings bring together heads of state, donors, multinational agribusinesses, and technical institutions, creating substantial demand for large-scale catering services and premium food offerings. Hotels near CICAD are under pressure to meet the expectations of global delegations, further driving demand for high-quality imported food products.

Two major developments are accelerating further demand for hotel food service and international cuisine:

1. **The 2026 Youth Olympic Games in Dakar:** As the first Olympic event ever hosted on African soil, this global competition is expected to attract thousands of athletes, officials, media professionals, and tourists. Preparations have led to a boom in hotel construction and foodservice readiness, especially in Diamniadio, which will host a large part of the Olympic village and events.
2. **The discovery and exploitation of oil and gas:** With Senegal officially becoming a hydrocarbon-producing country in 2024, the country is now attracting a growing number of international investors, contractors, and delegations. These visitors are primarily hosted in Dakar and Diamniadio, generating steady demand for business-class hotels, premium dining options, and institutional foodservice.

Most hotels and HRI establishments procure imported foods through a few large distributors (such as Sodial, Sofiex, and DPS Market) who offer proven cold chain capacity, product consolidation services, strong hotel and restaurant delivery networks, as well as food safety compliance. They are the gatekeepers to Senegal's HRI market and should be the primary point of contact for U.S. exporters seeking to access this segment. U.S. exporters that offer reliable, competitively priced, halal-compliant food products, particularly in processed meat, dairy ingredients, sauces, breakfast goods, and frozen cooked poultry, are well-positioned to serve this growing and internationally exposed clientele.

NB: FAS Dakar can help facilitate introductions to major retailers, processors, or specialized importers upon request.

SECTION V: AGRICULTURAL AND FOOD IMPORTS

V.1. Agricultural and Food Import Statistics

Information on U.S. agricultural exports to Senegal for all categories, including bulk, intermediate, and consumer-oriented products, may be found [here](#).

V.2. Best High-Value, Consumer-Oriented Product Prospects

Information on processed food exports from the U.S. to Senegal may also be found [here](#).

SECTION VI: KEY CONTACTS AND FURTHER INFORMATION

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[American Chamber of Commerce](#) in Senegal

[Chamber of Commerce, Industry and Agriculture](#) in Dakar

Attachments:

No Attachments