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## **Report Name:** Grain and Feed Annual

**Country:** Senegal

**Post:** Dakar

**Report Category:** Grain and Feed

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### **Report Highlights:**

Senegal rice MY2025/26 area and milled rice production are both forecast to increase about seven percent to 245,000 HA and 645,000 MT, respectively. In addition, the 23 percent farm gate price increase since 2022 will probably continue to motivate farmers to plant more. MY 2025/26 imports are forecast further up at 1.66 million tons to cover Senegal's demand, with extended buying opportunities for broken rice from India. MY 2024/25 milled rice production is estimated to decrease about 42 percent. Senegal has revamped its official production data methodology with a new statistical reference base starting in MY 2024/25, resulting in a much lower production number. Senegal's new government issued a food sovereignty strategy (2025-2034) which includes plans for the development of irrigation system, increased access to agricultural equipment, water supply, and inputs.

## SENEGAL - RICE

### Production

Marketing Year (MY) 2025/26 area harvested is forecast at 245,000 HA. This is a seven percent growth from the previous marketing year, based on sufficient access to certified seeds, fertilizers, and rehabilitated land, especially in the south, and government-promised debt resolution in the north (see Policy section). MY 2025/26 milled rice production is also forecast to increase seven percent over the previous marketing year to 645,000 MT, factoring average rainfall and pest pressure.

MY 2024/25 area harvested is estimated at 229,000 HA and milled production at 600,000 MT. In December 2024, during the regional mechanism for the Prevention and Management of Food Crises (PREGEC) meeting, the Government of Senegal (GOS) reported this significant decline, amounting to 42 percent compared to the previous marketing year, for MY 2024/25 area harvested and milled rice production. The primary reason for this major adjustment is GOS's determination to provide more reliable agricultural statistics with a new statistical reference base starting in MY 2024/25.

Other factors for the decrease in area include the insufficient distribution of certified seeds that limited farmers' ability to plant and heavy rains that caused abandoned areas due to flooding, especially along the Senegal, Gambia, and Faleme rivers. This led to losses accounting for about 2,800 HA, especially in the Bakel, Matam, and Podor departments. Industry sources also reported numerous factors for a decrease in Casamance's production. They include: 1) competition from cashew production in certain zones; 2) encroachment of the salty tongue (where the river meets the sea); 3) silting up of valleys; 4) a reduction in available labor due to rural migration; and 5) the development of a red wild rice species infesting rice farms in the Casamance.

In MY 2024/25, GOS subsidized 22 varieties of certified seeds, subsidized at 87 to 90 percent. This results in a final cost to the farmers ranging from 60 FCFA/KG (\$0.10/KG) to 75 FCFA/KG (\$0.13/KG), depending on the first and second seed generations (R1 or R2). In the Casamance, the most planted varieties are Sahel 108 and NERICA L19 for the lowlands and the Anambé Basin. On the uplands, mainly the Nerica (4, 8, and 14) and the Sahel 108 are cultivated. GOS officials also noted the adoption of the new ISRI varieties that are reported to be more resistant to salinity. In the SRV, the NERICA 108, 134, and 210 are the most planted. The NERICA (New Rice for Africa) varieties, developed by the Africa Rice Center in the early 2000s, are characterized by early maturity and high yield potential under rainfed conditions.

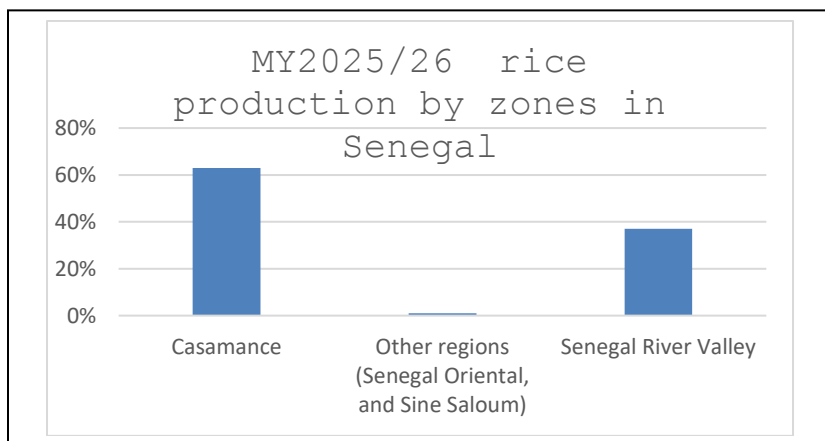
In MY 2024/25, prices for fertilizer such as urea dropped twenty percent due to increased government subsidies (from 12,500 FCFA/50 KG [\$21.10] in 2023 to 10,000 FCFA/50 KG [\$16.88] in 2024). The GOS also distributed foliar fertilizer free of charge to farmers. In MY 2024/25 50,000 L was distributed versus 2,124 L in MY 2023/24.

### *Regional Production*

In Senegal, rice is grown in the north along the Senegal River Valley (SRV) and in the south including the Casamance, Senegal Oriental, and Sine Saloum regions. Production remains quite stable in the north while it is increasing in the south, which accounts for about 62 percent of total production, with Casamance (Kolda, Ziguinchor, and Sedhiou) accounting for 90 percent of southern production. Local rice is produced in two seasons: the dry season (Feb/March-June/July) and the rainy season (June/Jul-Nov/Dec). In the Casamance, rice production is mainly rainfed compared to the SRV where it is mostly irrigated. 75,000 HA are irrigated in the SRV versus 4,000 HA in the Anambe Basin in Casamance. Farmers in the north prefer to plant during the dry season to avoid pest and wildlife problems, such as the red-billed quelea, a granivorous bird that reportedly consumes around 15 to 30 percent of the crop during the milky stage.

Farm sizes are typically larger in the SRV than in the Casamance. They range from 0.25 to two HA in the north compared to 0.5 to one HA in the highlands (40 percent) and between one and five HA in the lowlands (60 percent). Farmers in the north are equipped with more modern equipment (tractors, harvesters, milling machines) than in the Casamance, leading to higher yields and better quality of rice. However, over the last five years the Government of Senegal (GOS) distributed more equipment and increased access to certified seeds in the Casamance, which has helped progressively increase the area planted in the South.

**Graph 1: Senegal Rice Production by Region, MY2025/26**



*Source:* Government of Senegal data

Though production is higher in the Casamance than in the SRV, Casamance's milling rate is lower at 40 to 60 percent, compared to 68 percent in the SRV. This is due to the lack of industrial and semi-industrial millers. Yield in the Casamance is typically lower (between 2.0 - 3.5 tons/HA) than in the SRV (six tons/HA in the dry season and four tons/HA in the rainy season). In other regions such as Fatick, Kaolack and Sine Saloum rice production yields about two tons/HA.

## **Consumption**

MY 2025/26 rice consumption is forecast at 2.26 million MT, increasing about two percent compared to the previous marketing year, based on population growth and available supply. MY 2024/25 consumption is estimated at 2.22 million tons.

Senegalese prefer broken rice, which is considered the main staple food. Senegalese prefer to buy imported Indian rice which is less expensive than other import origins or local production. Senegal also imports fragrant rice (whole grain and broken), which is considered a luxury and reserved for special occasions or certain local dishes. Fragrant rice is mainly sold to high-income consumers who live in Dakar, Thies, and Kaolack. After rice, other cereals consumed include wheat, millet, and corn. Wheat and corn are mainly imported to be used in the food processing and feed industries to make wheat flour or be incorporated into animal feed.

The GOS is not involved in procuring or selling rice except for exceptional occasions when there is food insecurity in the country. The Commissariat de la Sécurité Alimentaire et à la Résilience (CSAR) is the competent authority to fight food insecurity, reduce poverty, eradicate hunger and malnutrition, and improve the population's resilience. CSAR is in charge of buying and distributing rice to vulnerable populations.

Farmers sell their rice to small- and large-scale processors. Rice importers and local industrial processors sell their rice to wholesalers and semi-wholesalers who sell to modern and traditional retailers. In the SRV, officials reported 43 industrial rice mills with average capacity of four tons/hour, totaling about 800,000 MT/year, as well as 458 rice hullers at the village level with an individual average capacity of one ton/hour. In the Casamance area, there are four industrial rice mills with an annual milling capacity varying between 7,000 tons to 10,000 tons each; two semi-industrial rice mills with a total annual milling capacity of about 2,000 tons each; and a large number of rice hullers located within communities. Given the fact that the milling rate is considered lower in the Casamance (40-60 percent) than in the SRV (68 percent), FAS Dakar concludes that the milled rice production for the entire country should be considered lower than reported by official sources.

In the south, most harvested rice is self-consumed, compared to the north where it is mostly commercialized. With most milling capacity located in the SRV, while northern production is diminishing relative to southern production, there has been no expansion of the number of millers. In fact, some millers even complain of not having enough paddy rice to operate all year.

## **Trade**

For MY 2025/26, milled rice imports are forecast at 1.66 million tons, up about seven percent from the previous marketing year on expected higher demand, good international prices, and population growth.

In TY 2024 (January-December), India and Thailand were the top rice supplying countries with 58 percent and 17 percent of the market share, respectively. They are followed by Brazil (11 percent) and Pakistan (7 percent). Most imported rice consists of broken rice.

MY 2024/25 milled rice imports are estimated at 1.55 million tons, an increase of 26 percent due to reduced available domestic supply because of a poor harvest and easier access to Indian broken rice. In February 2025, the Indian government extended the export of broken rice to Senegal, allowing shipments until February 28, 2025. (It was initially set to end January 31, 2025.) This decision follows a notification issued by the Directorate General of Foreign Trade. Since September 2022, the government of India has imposed a ban on the export of broken rice, but it made exceptions beginning in May 2023, permitting exports to countries like Senegal, where there is a need for food security support. For more information can be found in [media reporting here](#).

Rice export levels for MY 2025/26 are forecast at 50,000 MT based on available supply. MY 2024/25 exports are estimated at 80,000 MT based on available supply and regional demand. Trade Data Monitor (TDM) shows higher demand in the neighboring countries Mauritania, Guinea, and The Gambia in TY 2024 compared to the previous year.

The price for farmer's paddy rice is determined at the beginning of each season. All rice stakeholders including farmers, millers, and importers, who are mainly members of the Comité Interprofessionnel du Riz (CIRIZ), meet to discuss and set the paddy rice price. The parastatal agency SAED is also a member of CIRIZ. Since 2022, the government added an additional subsidy of 30 FCFA/KG (\$0.052) to the already set price of 130 FCFA/KG (\$0.22). Therefore, the millers' buying price is 160 FCFA/KG (\$0.28), in which the 30 FCFA/KG should be claimed back to the government.

Approximately 60-65 percent of total rice consumption is imported to fill the gap and meet Senegalese demand. There are about ten rice importers in Senegal. Officials have also reported that some boats (mainly originating from India) circulate at large off the coast close to west African countries with no determined destination. Once there is a demand, they can easily reduce the delivery time.

Since June 2024, the Senegalese Ministry of Industry and Commerce sets the maximum prices for several essential food products. Regarding rice, non-fragrant broken rice prices in the Dakar region are set as follows:

- Imported and ex-factory price: 375,000 FCFA/MT (\$647.95)
- Wholesale price: 379,000 FCFA/MT (\$654.86)
- Semi-wholesale price: 385,000 FCFA per MT (\$665.23)
- Retail price: 410 FCFA/KG (\$0.71)

For the other regions, prices are increased by a transport differential. However, on March 27, 2025, the National Consumer Council, the GOS, and all rice stakeholders involved in the rice distribution chain met to review the price of ordinary imported broken rice. GOS officially announced a retail price decrease on ordinary (non-fragrant) broken rice by 60 FCFA/KG (\$0.10) to cost 350 FCFA/KG (\$0.60) for consumers. This measure is effective on April 3, 2025.

**Stocks**

MY2025/26 and MY2024/25 ending stocks are both forecast at 200,000 MT. The GOS agency that regulates the market (ARM) monitors the stock held privately by traders. GOS determines a security stock of about 200,000 MT corresponding to a set safety threshold.

**Policy**

The new government of Senegal, in office since April 2024, continues to support the rice sector. On January 17-18, 2025, the Minister of Agriculture, Food Sovereignty, and Livestock, attended the national rice farming conference organized by the Société d'Aménagement et d'Exploitation des Terres du Delta du Fleuve Sénégal (Senegal River Delta Land Development and Exploitation Company; SAED) and its financial partners. He promised to definitively settle the debt of nine billion FCFA contracted by producers in the SRV, especially for farmers who suffered from the overflow of the Senegal river in the Bakel and Matam departments, and problems caused by birds. This conference aimed to discuss challenges in the rice sector and find solutions to increase rice production to contribute to food sovereignty and reducing reliance on imports.

GOS has developed a food sovereignty strategy (2025-34) to limit imports and increase production by distributing more certified seeds and equipment, to construct more warehouses and drying areas, and to develop land planning.

For tariffs on milled rice, Senegal implements the 2015 Economic Community of West African States member countries common external tariff (CET) which is set at 12.7 percent (customs duty of ten percent, statistical fees of one percent, and a solidarity community levy of 1.5 percent, 0.2 percent for the Senegalese Shippers' Council (COSEC)). There is an additional 18 percent value added tax (VAT). Since 2022, the GOS eliminated the value-added tax (VAT) on imported non-fragrant broken rice and reduced customs duties from ten percent to five percent.

## Rice, Milled: Production, Supply, and Distribution Table

Rice, Milled Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
Senegal	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	396	398	370	229	0	245
Beginning Stocks (1000 MT)	545	545	349	350	0	200
Milled Production (1000 MT)	1034	1037	1020	600	0	645
Rough Production (1000 MT)	1521	1525	1500	882	0	949
Milling Rate (.9999) (1000 MT)	6800	6800	6800	6800	0	6800
MY Imports (1000 MT)	1250	1230	1550	1550	0	1665
TY Imports (1000 MT)	1400	1345	1500	1550	0	1665
TY Imp. from U.S. (1000 MT)	35	35	0	1	0	0
Total Supply (1000 MT)	2829	2812	2919	2500	0	2510
MY Exports (1000 MT)	80	80	90	80	0	50
TY Exports (1000 MT)	85	89	90	80	0	50
Consumption and Residual (1000 MT)	2400	2382	2450	2220	0	2260
Ending Stocks (1000 MT)	349	350	379	200	0	200
Total Distribution (1000 MT)	2829	2812	2919	2500	0	2510
Yield (Rough) (MT/HA)	3.8409	3.8317	4.0541	3.8515	0	3.8735
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2025/2026 = January 2026 - December 2026						

1 USD=~577 Francs CFA

### Attachments:

No Attachments