

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Senegal

### Cotton and Products Annual

#### 2015 West Africa Cotton and Products

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**Report Highlights:**

Most C3+2 countries [1] experienced a bad rainy season with delayed and intermittent rains. Nevertheless, the countries forecast MY2014/15 (Aug/July) seed cotton production at 3.5 million bales (1.8 million tons) representing 2 percent increase compared to USDA official numbers, and 14 percent increase over the previous year's. Burkina Faso remains the top cotton producer in West Africa with 690,000 tons followed by Mali (547,000 tons), Cote d'Ivoire (436,000 tons), Chad (130,000 tons), and Senegal (26,000 tons).

Post forecast MY2015/16 seed cotton production at 3.7 million bales (1.9 million tons). Farm gate and input prices have not yet been announced.

<sup>[1]</sup> C3+2: Burkina Faso, Chad, , Mali - Cote d'Ivoire, and Senegal

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## **Executive Summary:**

Despite a bad rainy season with delayed and intermittent rains in C3+2 countries, MY2014/15 seed cotton production is forecast at 3.5 million bales (1.8 million tons) representing 2 percent increase compare to USDA official numbers and 14 percent increase over the previous year production.

The countries forecast MY2015/16 seed cotton production at 3.7 million bales (1.9 million tons).

Most countries are still in the ginning process. Reported production numbers could change after the process ends but Post does not expect major changes except for Cote d'Ivoire which still maintains its initial forecast at 440,000 tons but believes that it could go higher. (See Table 1)

Farm gate cotton price and input prices are expected to be announced in late April or early May, 2015.

## **MY 2014/15 cotton update for selected West African countries and forecast for MY2015/16**

### **Burkina Faso**

MY 2014/15 seed cotton production for Burkina Faso is estimated at 690,000 tons (1,331 bales), which is similar to USDA official numbers. It represents 7 percent increase from the previous year's.

The total area harvested for MY 2014/15 is estimated at 660,592 hectares of which Bt cotton accounts for 69 percent (446,000 hectares).

Yield is estimated at 1.079 tons per hectare.

MY 2014/15 fixed prices for fertilizer and urea dropped five percent from 15,500 F CFA (\$31) per 50 kg bag in MY 2013/14 to 14,800 F CFA (\$29.6) per 50 kg bag in MY 2014/15. (See table 3)

Burkina Faso forecasts seed cotton production for MY2015/16 at 531,000 tons, a 20 percent decrease from the previous year's. Farm gate price for the MY2015/16 has not yet been announced. However, it is expected to be less than the previous year price because of the decreasing trend of the international price. Continuous declining cotton prices could discourage farmers from growing more cotton during MY 2015/16. Therefore, estimates have been lowered down.

In addition, subsidized input prices for in MY2015/16 could also be less than the previous year.

## **Mali**

Mali remains the second largest cotton producing country after Burkina Faso with 1,060 bales (547, 000 tons) of seed cotton in MY 2014/15 planted over 538,000 hectares. Yield is expected to reach 1,015 tons per hectare. This production number is the same as USDA official number, representing a 24 percent increase from the previous year.

The *Compagnie Malienne pour le Développement des Textiles* (CMDT) anticipates seed cotton production for MY2015/16 at 650,000 tons, a 9 percent increase compared to the previous year amount.

Similar to other countries, Mali has not yet announced farm gate and input prices for MY25015/16.

## **Cote d'Ivoire**

Cote d'Ivoire forecasts MY 2014/15 seed cotton production at 841,000 bales (436,000 tons) which is the initial target but the *Association Interprofessionnelle de la Filiere Coton* (INTERCOTON), in charge of organizing the cotton sector, believes that production numbers will exceed the established target since they haven't yet completed the ginning process.

So far, MY2014/15 seed cotton production represents 8 percent increase compared to the previous year production and 4 percent decrease compared to USDA official numbers.

Cote d'Ivoire expects to harvest 414,000 hectares of seed cotton in MY 2014/15, with expected yield of 1,036 tons per hectares.

## **Senegal**

MY 2014/15 seed cotton production in Senegal is estimated at 50,000 bales (26,000 tons), representing 25 percent increase compared to USDA official numbers, and 10 percent decrease compared to the previous year.

This decrease is due to a bad rainy season comprising of late start and intermittent rains. Nevertheless, yield is expected to reach 1,059 tons per hectare compared to 0.850 tons per hectare are initially forecasted.

Area harvested is estimated at 25,000 hectares.

Senegal has not yet announced its forecast for MY2015/16, but Post forecasts 58,000 bales (30,000 tons) assuming the rainy season is favorable.

## Chad

Chad's seed cotton production continues to increase since the beginning of the new company Cotontchad SN.

For MY 2014/15 seed cotton production is expected to increase by 58 percent compared to the previous year with 250,000 bales (130,000 tons). The data was confirmed by the Marketing Director of Cotontchad.

This growth represents 25 percent increase compared to USDA official numbers.

Area harvested reached 256,000 hectares with a yield of 0.509 tons per hectares.

Cotontchad SN forecasts to produce 216,000 tons of seed cotton for MY2015/16.

**Table 1: Seed Cotton Production: MY 2013/14 – MY 2015/16 (Aug-Jul)**

Selected Countries	2013/14	2014/15	2015/16	2013/14	2014/15	2015/16
	Post Updated Data Production	Post Updated Data Production	Post Forecasted Data Production	Post Updated Data Production	Post Updated Data Production	Post Forecasted Data Production
	(000 Bales)	(000 Bales)	(000 Bales)	(000 Tons)	(000 Tons)	(000 Tons)
Burkina Faso	1,249	1,331	1,100	647	690	572
Mali	850	1,060	1,255	440	547	650
Cote d'Ivoire	782	841	850	405	436	440
Chad	158	250	417	82	130	216
Senegal	56	50	58	29	26	30
<b>Total</b>	<b>3,095</b>	<b>3,532</b>	<b>3,680</b>	<b>1,603</b>	<b>1,829</b>	<b>1,908</b>

(Source: FAS Dakar estimates and official country data)

\*1 Bale = 480 lbs

**Table 2: Official Farm Gate Price for First Quality Seed Cotton\*:  
MY 2011/12 – MY 2014/15**

<b>Selected Countries</b>	<b>Official 2011/12 Farm Gate Price for First Quality (F CFA)</b>	<b>Official 2012/13 Farm Gate Price for First Quality (F CFA)</b>	<b>Official 2013/14 Farm Gate Price for First Quality (F CFA)</b>	<b>Official 2014/15 Farm Gate Price for First Quality (F CFA)</b>
Burkina Faso	274 (\$0.44)	253 (\$0.401)	245 (\$0.39)	225 (\$0.36)
Mali	275 (\$0.44)	255 (\$0.41)	250 (\$0.40)	235 (\$0.38)
Cote d'Ivoire	265 (\$0.43)	265 (\$0.43)	254.5 (\$0.41)	230 (\$0.37)
Chad	215 (\$0.35)	215 (\$0.35)	240 (\$0.39)	240 (\$0.39)
Senegal	255 (\$0.41)	255 (\$0.41)	255 (\$0.41)	255 (\$0.41)

\*(Source: Official sources; \$1= 620 F CFA; F CFA per kg)

**Table 3: Official Input Price (Fertilizer and Urea) MY 2012/13 – MY 2014/15\***

<b>Countries</b>	<b>Official 2012/13 Input Price (F CFA)</b>	<b>Official 2013/14 Input Price (F CFA)</b>	<b>Official 2014/15 Input Price (F CFA)</b>
Burkina Faso	Fertilizer: 13,500 F (\$21.77) Urea: 15,500 F (\$25).	Fertilizer: 15,000 (\$24.2) Urea: 15,500 F (\$25).	Fertilizer: 14,800 (\$23.9) Urea: 14,800 (\$23.9)
Mali	Fertilizer: 12,500 F (\$20.2) Urea: 12,500 F (\$20.2)	Fertilizer: 12,500 F (\$20.2) Urea: 12,500 F (\$20.2)	Fertilizer: 11,000 (\$17.8) Urea: 11,000 F (\$17.8).
Cote d'Ivoire	Fertilizer: 14,000 F (\$22.6) Urea: 12,800 F (\$20.64)	Fertilizer: 13,330 F (\$21.5) Urea: 11,500 F (\$18.54)	Fertilizer: 14,495 F CFA (\$23.4) Urea: 13,310 F CFA (\$21.46)
Chad	Fertilizer: 15,000 F (\$24.2) Urea: 14,000 F (\$22.6)	Fertilizer: 16,000 F (\$25.8) Urea: 15,000 F (\$24.2)	Fertilizer: 16,000 F (\$25.8) Urea: 15,000 F (\$24.2)
Senegal	Fertilizer: 9,000 F (\$14.5) Urea: 9,000 F (\$14.5)	Fertilizer: 9,000 F (\$14.5) Urea: 9,000 F (\$14.5)	Fertilizer: 12,500 F (\$14.5) Urea: 10,500 F (\$14.5)

\*(Source: Official sources; \$1= 620 F CFA; F CFA per kg)

**Production, Supply and Demand Data Statistics (1000 Hectares (HA), 1000 480 lb. Bales, PERCENT, KG/HA)**

<b>Cotton</b>	<b>2013/2014</b>		<b>2014/2015</b>		<b>2015/2016</b>
<b>Market Begin Year</b>	<b>Aug 2013</b>		<b>Aug 2014</b>		<b>Aug 2015</b>
<b>Burkina</b>	<b>USDA Official</b>	<b>New post</b>	<b>USDA Official</b>	<b>New post</b>	<b>New post</b>
<b>Area Harvested</b>	645	647	640	660	572
<b>Beginning Stocks</b>	270	270	245	254	380
<b>Production</b>	1,240	1,249	1,325	1,331	1,100
<b>Imports</b>	0	0	0	0	0
<b>MY Imports from U.S.</b>	0	0	0	0	0
<b>Total Supply</b>	1,510	1,519	1,570	1,585	1,480
<b>Exports</b>	1,250	1,250	1,175	1,190	1,265
<b>Use</b>	15	15	15	15	15
<b>Loss</b>	0	0	0	0	0
<b>Total Dom. Cons.</b>	15	15	15	15	15
<b>Ending Stocks</b>	245	254	380	380	200
<b>Total Distribution</b>	1,510	1,519	1,570	1,585	1,480

<b>Cotton</b>	<b>2013/2014</b>		<b>2014/2015</b>		<b>2015/2016</b>
<b>Market Begin Year</b>	<b>Aug 2013</b>		<b>Aug 2014</b>		<b>Aug 2015</b>
<b>Chad</b>	<b>USDA Official</b>	<b>New post</b>	<b>USDA Official</b>	<b>New post</b>	<b>New post</b>
<b>Area Harvested</b>	205	205	255	256	430
<b>Beginning Stocks</b>	38	38	35	35	75
<b>Production</b>	152	158	220	250	417
<b>Imports</b>	0	0	0	0	0
<b>MY Imports from U.S.</b>	0	0	0	0	0
<b>Total Supply</b>	190	196	255	285	492
<b>Exports</b>	145	151	180	200	382
<b>Use</b>	10	10	10	10	0
<b>Loss</b>	0	0	0	0	10
<b>Total Dom. Cons.</b>	10	10	10	10	10
<b>Ending Stocks</b>	35	35	65	75	100
<b>Total Distribution</b>	190	196	255	285	492

Cotton	2013/2014		2014/2015		2015/2016
Market Begin Year	Aug 2013		Aug 2014		Aug 2015
Cote d'Ivoire	USDA Official	New post	USDA Official	New post	New post
Area Harvested	357	445	386	414	456
Beginning Stocks	178	178	224	200	291
Production	796	782	877	841	850
Imports	0	0	0	0	0
MY Imports from U.S.	0	0	0	0	0
Total Supply	974	960	1,101	1,041	1,141
Exports	700	710	725	700	740
Use	50	50	50	50	50
Loss	0	0	0	0	0
Total Dom. Cons.	50	50	50	50	50
Ending Stocks	224	200	326	291	351
Total Distribution	974	960	1,101	1,041	1,141

Cotton	2013/2014		2014/2015		2015/2016
Market Begin Year	Aug 2013		Aug 2014		Aug 2015
Mali	USDA Official	New post	USDA Official	New post	New post
Area Harvested	480	450	570	538	650
Beginning Stocks	246	246	271	271	356
Production	850	850	1,000	1,060	1,255
Imports	0	0	0	0	0
MY Imports from U.S.	0	0	0	0	0
Total Supply	1,096	1,096	1,271	1,331	1,611
Exports	800	800	700	950	1,200
Use	25	25	25	25	25
Loss	0	0	0	0	0
Total Dom. Cons.	25	25	25	25	25
Ending Stocks	271	271	546	356	386
Total Distribution	1,096	1,096	1,271	1,331	1,611



<b>Cotton</b>	<b>2013/2014</b>		<b>2014/2015</b>		<b>2015/2016</b>
<b>Market Begin Year</b>	<b>Aug 2013</b>		<b>Aug 2014</b>		<b>Aug 2015</b>
<b>Senegal</b>	<b>USDA Official</b>	<b>New post</b>	<b>USDA Official</b>	<b>New post</b>	<b>New post</b>
<b>Area Harvested</b>	32	32	25	25	29
<b>Beginning Stocks</b>	12	12	13	13	13
<b>Production</b>	56	56	40	50	58
<b>Imports</b>	0	0	0	0	0
<b>MY Imports from U.S.</b>	0	0	0	0	0
<b>Total Supply</b>	68	68	53	63	71
<b>Exports</b>	50	50	35	45	50
<b>Use</b>	5	5	5	5	5
<b>Loss</b>	0	0	0	0	0
<b>Total Dom. Cons.</b>	5	5	5	5	5
<b>Ending Stocks</b>	13	13	13	13	16
<b>Total Distribution</b>	68	68	53	63	71