



OVERVIEW OF SPS NEEDS AND ASSISTANCE IN SENEGAL

Background paper
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A. OVERVIEW OF SPS SITUATION

1. The SPS system in Senegal has been subject to various evaluations as part of technical cooperation projects such as the FAO/UEMOA project (PSRSA) or TCP/FAO/SEN/2907 (2003-2004) which aimed at controlling pesticides residues in export oriented fruits and vegetables.

2. An evaluation of veterinary services has been conducted using the PVS tool. Likewise, the phytosanitary system has been assessed using the PCE tool. Reports of these evaluations are not available. The DTIS study for Senegal was validated in 2003. Limited attention was given to SPS constraint in the evaluation of agricultural export performance although quality and standards issues were recognized as major axis of intervention to enhance agricultural productivity and export output.

3. Although agriculture contributes less than 20% to GDP, it employs over 60% of the labour force and represents the main income source for the majority of rural households. The sector faces outstanding problems such unavailability of input and lack of access to rural credit to finance production cycle; overuse and deterioration of land; non-availability of good-quality seeds in sufficient quantity (especially apparent in the groundnut segment); obsolescence of farming equipment; urban drift and the resultant aging of farm operators, notably in the groundnut basin; inadequate freight capacity for horticultural products; insufficiency and poor quality of growers' roads, and lack of infrastructures for storage and processing.

4. Over one third of the value-added from Senegalese agriculture is attributed to livestock both for subsistence and commercial purposes. Senegal's Second Poverty Reduction Strategy Paper (PRSP II), covering 2006-10 recognizes the importance of addressing issues behind low productivity of cattle and outlines strategic axes to overcome the obstacles to livestock development identified:

- animal feed insecurity resulting from the extensive method of cattle raising based on natural pastures subject to the variations of rainfall, brush fires, and encroachment of farming;
- the threat of emerging and re-emerging transboundary animal diseases;
- under-equipped producers lacking technical sophistication;
- rudimentary guidance and training of livestock producers;
- the existence of numerous intermediaries in the animal marketing system, resulting in higher prices for meat;
- lack of reliable statistics on livestock raising;
- absence of an adequate industrial fabric for processing animal products;
- absence of land security for stock raising activities; and
- inadequate energy available for preserving and processing stock raising products. OIE's Animal Health Information Database reports the presence of several animal diseases in Senegal. These include African Swine Fever, African horse sickness, Foot and Mouth Disease, Anthrax, blackleg, Lumpy skin disease, Newcastle disease, Rabies, Trypanosomosis, Peste des Petits Ruminants, Haemorrhagic septicaemia etc.

5. The main crops are groundnuts, drought-tolerant staples such as sorghum, millet and cassava, and other cereals such as rice and maize. Production of industrial crops is limited to sugarcane. SPS problems limit groundnut exports as cake for livestock. Fruits and vegetables are produces for local

consumption with a small share destined for export . Senegal's fruit production is estimated at around 120,000 tons. The main fruits produced in Senegal are banana, mango, papaya, citrus (orange, clementine, lemon, grapefruit), avocado, water melon, melon and pineapple. Melon exports increased 50% between 2000 and 2006 from 500 tons to over 760 tons. 88% of melon exports are destined to France and Spain, representing respectively 56% and 32% of exports. Several important fruit flies of cucurbits occur in Senegal including *Bactocera cucurbitae*, *Dacus vertebratus*, *Dacus bivittatus*, *Dacus ciliatus*. In 2006, national estimated average loss in fruit productions due to fruit flies attack was estimated to 60%, the loss reached 80% in some regions such as in Casamance, considered as the food basket of Senegal.

6. Mango production and export in Senegal is threatened mainly by one specie of fruit fly *Bactocera invadens*. The main recipient of Senegalese mangoes is Benelux with 55% of export, followed by the United Kingdom (29%) and by France (11%). Mango export progressed from 1600 tons to over 7000 tons per year between 2002 to 2006. Operators remain convinced that losses due to the fruit fly have prevented them from reaching the 10,000 tons objective that they have fixed for the 2006 campaign. Losses due *B. invadens* in the Niayes zone, which produces over 60% of mangoes exported from Senegal have been estimated between 20 and 60%. Losses in two other main production zones of mango are typically higher due to the type of orchards, they average between 50 and 85 %, and in extreme cases reaching 100% in the Petite Côte and Bas Saloum region and they range between 50 and 75% in the Casamance region. According to the data recorded by the European Commission's Food and Veterinary Office (data at end of 2008), 6 and 15 phytosanitary interceptions of mango consignments were made in the EU in 2006 and 2007, respectively. Most of the seizures were made in France.

7. Senegal's agricultural exports are dominated by groundnut oil and cake, the latter used for animal feed. Other relatively significant agricultural exports are fresh fruit and vegetables export (which grew 41% in volume terms between 1998 and 2001), hides and skins, cotton, and tobacco products. The growth in fresh fruit and vegetable export is largely attributable to the momentum generated by the Agricultural Export Promotion Project (AEPP) of the World Bank (1997-2004, US\$ 8 million) and to the subsequent renewed interest by several international companies in investing in aspects of the Senegalese supply chain.

8. To sustain increases in crop export and enhance incomes throughout the export supply chain, Senegal will need to overcome a number of constraints and begin to broaden market destinations beyond the current focus on the French and Belgian markets. Challenges that need to be dealt with in such a strategy include: (i) alleviating infrastructure bottlenecks and developing the export cold chain; (ii) improving quality and meeting product and process standards in importing countries; (iii) diversifying the areas of production; and (iv) improving managerial capabilities within the sector and specialized business support services.

9. To improve the quality of export produce, the DTIS identified the need to put in place systems for total quality management which will embrace the application of 'good agricultural practices' (GAP), the development of sound record-keeping systems (to facilitate traceability), the implementation of Hazard Analysis Critical Control Point (HACCP) principles throughout the supply chain, strict adherence to pesticide-related regulations, and dedicated quality control arrangements for different products. Establishing a third party certification system is also necessary to help companies benefit from upgrading their quality assurances systems.

10. Further assistance is needed to overcome SPS issues such as fruit flies and fungi and to reduce misuse of pesticides by producers.

11. The fisheries sector has long been a promising economic growth engine for Senegal. It contributed up to 11% of the GDP in 2005. However, the sector is facing challenges from the depletion of fisheries resources due to over-fishing. Total fish production was estimated at 405,265

metric tons in 2005. Fish and fish products constitute the largest export category in Senegal, contributing to an average of around 37 percent of total exports between 1996-2000. Total seafood export value reached US\$251m in 2005.

12. Frozen fish makes up by far the largest component of fish exports, followed by fresh fish and processed fish. Artisan fishermen are responsible for 90% of Senegal's harvest, especially small pelagics and sardines.

13. Concerning sanitary conditions of fishery products, the last mission of the FVO of the EC undertaken in April 2007 has noted the persistence of shortcoming related to compliance with EU regulation and hygiene. Issues noted concern inadequate storage temperature for fresh product in artisanal boats, landing sites and ice factories. Needs related to lack of staff training of the Competent Authority and absence of accredited laboratory for analyses were highlighted.

B. OVERVIEW OF SPS-RELATED TECHNICAL COOPERATION

14. According to Senegal's Triennial Public Investment Programme (PTIP) for the period 2007-09, donors were supporting 75 ongoing projects in agro-based private sector development in 2007. Including aid for basic economic infrastructure development, donor support to this area is estimated at US\$332m (on commitment basis). At enterprise/farm level, assistance reached US\$4m (on commitment basis). Other support to agricultural production, processing and marketing is valued at US\$27.3m.

15. The main on-going SPS related project (US\$60m) is the Agricultural Markets and Agribusiness Development Program (2006-11). The programme aims to increase non-traditional agricultural exports and farm revenues for project producers. It is composed of four components, two of which have an SPS focus: improving food safety and the performance of the domestic distribution channels for crop and livestock products and expanding non-traditional agricultural exports (i.e., horticultural products, confectionary nuts, essential oils and spices, and processed foodstuffs) by leveraging the results achieved under the pilot AEPP mainly in terms of quality management

16. Senegal is benefiting from various multi-country projects and mainly those aiming at prevention, preparedness and control of HPAI programmes in Africa implemented mainly by FAO (see Annex I above).

17. At a regional level, Senegal is one of the beneficiaries of the UEMOA Quality phase II programme (2007-2010, total value US\$599,000). FAO's field school programme on Integrated Pest Management for Africa covers also Senegal (2006-2010, total value of US\$ 9.5m). At ACP level, Senegal was one of the target countries of the EC funded COLEACP-PIP project (see Annex IV above).

18. Senegal is also benefiting from projects which do not have SPS as main objective but which may include SPS related activities as part of value chain support or export promotion oriented assistance such as Senegal Accelerated Growth and Increased Competitiveness (SAGIC) funded by USAID (2005-2010, total value of US\$0.5m). The project seeks to support the Government of Senegal and help stimulate accelerated growth, competitiveness and trade. The project comprises activities focusing on expanding the value chain for a variety of products produced in Senegal, including cashew nuts, mangos, bissap syrup, fonio (a local grain), fish, textiles, milk products and horticulture.

19. Another value chain support project is the IF funded project on peach export development and the AfDB funded Promotion d'une Agriculture Compétitive et Durable (PACD, total value of €3.5m).

20. Larger rural development and poverty alleviation programmes possibly containing SPS related activities include Agricultural Services and Producers Organizations (PSAOP2), total value of US\$47m, and the World Bank funded West Africa Agricultural Productivity Program (WAAPP) Support Project (2007-2011, total value of US\$51m).

C. STDF ACTIVITIES IN SENEGAL

21. At a regional level Senegal is also one of the beneficiary countries of the STDF funded project on fisheries (2008-2010, total value US\$469,000), under implementation by FAO.