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Global Agricultural Information Network

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Retail Foods

Retail Food Sector 2012

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Report Highlights:

In 2012, retail space and new products offerings exploded with the opening of six *Citydia* supermarkets and new boutiques that import U.S. food products. In 2011, total retail food sales reached \$2.3 billion, up 29 percent from the previous year. This is promising for consumer-oriented foods given the rate of urbanization, sizeable expatriate community, and reliance on imports. However, the U.S. share is perhaps two percent as European products dominate the market, followed by Asia, South America, and other African countries.

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Section I. Market Summary

Senegal, a semi-arid country on the westernmost tip of Africa, has a population of 13 million of which 77.5 percent of the labor force is engaged in agriculture^[i]. Even so, Senegal must rely heavily on imports to meet food needs, with imports accounting for up to 70 percent. Staples such as rice, wheat, dairy and vegetable oil are imported for processing or packaged for retail trade. In 2011, Senegal imported \$900 million of these commodities, 32 percent greater than in 2010, to supplement local food production.

Senegal's total retail food market for 2011 was valued \$2.3 billion, a 29 percent increase over the previous year^[ii]. Senegal experienced poor harvests in 2007, and commodity prices rose dramatically at the end of 2007 and well into 2008. The global food price crisis of 2008 was felt quite sharply in Senegal, causing the government to institute such temporary measures as removing all import duties for rice and setting a price cap in order to ease the burden on consumers. Therefore, Senegal's total food retail in 2008 was a record compared to the three previous years (2005-2007). Food imports declined in 2009 and 2010, but rebounded in 2011. (See table 1). Retail food trade remains bright due to population growth and a high rate of urbanization.

Table 1: Senegal's Retail Food Sales

	2005	2006	2007	2008	2009	2010	2011	Jan-Sept 2012
Value in \$ billion	1.6	1.6	2.2	2.7	2.0	1.8	2.3	1.9
Annual percent Growth		-2	38	25	-25	-12	28	-19

(Source: FAS Dakar estimates derived from various trade sources)

The formal food retail sector has exploded with the rise of supermarkets and grocery chains changing with the purchasing habits of a wide base of Senegalese urban consumers. There is a potential for U.S. products, especially for red meat, rice, food preparation and beverages but they are highly sensitive to prices.

The retail food sector is dominated by:

- hypermarkets and conventional supermarkets (2 percent ~ 250 to 300) found almost exclusively in Dakar
- grocery and convenience stores including gas marts (8 percent ~1,000 to 1,500) in Dakar and in largest cities
- thousands of small boutiques, kiosks, and traditional open air markets (80 percent~10,000 to 15,000) in rural and urban areas

Up to 20 percent of the population is concentrated in and around Dakar while Thies the next largest city, has about 13 percent of the population.

Dakar is the focal point of imported consumer-oriented foods in Senegal. Not only is it home to 20 percent of Senegal's population, it is also the seat of Senegal's sizeable expatriate community (mostly European) and at least a quarter of high-income consumers. Dakar is also the city with the greatest concentration of conventional supermarkets and outlets likely to carry imported consumer-oriented foods and beverages. Hypermarkets and conventional supermarkets might have U.S. brands on shelves (i.e., Coca-Cola, Kraft Foods, Kellogg's, Mars, PepsiCo, and Procter & Gamble), but they are not manufactured in the United States. Only a few local importers/retailers import directly from the U.S. and those are mainly seasonings, snacks, and beverages from Campbell's, Quaker, Del Monte, McCormick, Welch's, Hershey's brands. Unfortunately, these local importers have a limited financial capacity and can only import a small quantity at a time. Their products and location are not well known by the consumers since they do not advertise their products. Consumers are at the mercy of their prices because competition is lacking. According to retailers, condiments, seasonings, snacks, chewing gum, pancakes and other baking mixes are well appreciated by Senegalese and American communities living in Dakar.

Senegal has only one Hypermarket named *Hypermarché Exclusive* launched in November 2010 in Dakar on one of its main auto routes, the *Voie de Degagement Nord* (VDN). It is 1,400 sq. meters with two levels offering more than 25,000 products and a large variety of brands and food, particularly Asian. (See Picture 1) The first level is dedicated to retail food, cosmetics, and household products, and the second is for apparel, electronics, luggage, and cookware etc. The most common food brands are Natco, Belle France, and Netto. Most of the food originates from the United Kingdom and France. The store sells U.S. brands but not originated from the States. The owner of *Hypermarket Exclusive* opened a supermarket in the residential neighborhood, *Point E*, and is planning to launch a new hypermarket in 2013 in Dakar. (See Picture 1)

There are two large conventional supermarket franchises in Senegal located mainly in Dakar and representing 2 percent of the retail outlets:

1. *Casino* is a French supermarket chain (See Picture 2) with seven franchises in the Dakar region, and one located in the resort town of Saly (Mbour) in the Thiès region. The stores tend to be located in small malls of 5-10 stores that are typically European or U.S.-franchised sporting goods, fast-food restaurants, or clothing stores. *Casino* supermarkets have a deli with ready-to-eat foods, which is a novelty in Senegal, but reflects a growing trend of eating out for a small segment of the population. In 2010, *Casino* opened its largest store (~ 1,400 sq. meters) at the new commercial center, *Sea Plaza Mall*, next door to the *Radisson Blue hotel*, Dakar's latest 5-star hotel. *Casino* has three other large format supermarkets located in *Les Almadies*, a neighborhood with a high concentration of expatriates, in Route de Ouakam, close to the

Senegalese middle class, and lastly serving downtown Dakar.

1. *Citydia* is a franchise of the Spanish supermarket chain, *Distribuidora Internacional Alimentacion, S.A. (Dia)*, which opened its first store in January 2012 and expanded to six other locations throughout 2012, all of which are located in the neighborhoods of Dakar. *Citydia* mostly sells Dia brand products at a very affordable price. The international group has more than 6,000 stores, 40 quality laboratories located worldwide and works with 48,000 partners (See **Picture 3**).

The only wholesale and sub-wholesale supermarket, *King Cash*, was launched in 2008 in Dakar (See **Picture 4**). It is the only warehouse cash and carry store with more than 2,000 products originated from the French brand name *Leader Price* that sells quality discounted products. Local products are also available and products are generally pre-packaged foods.



Picture 1: *Hypermarche Exclusive*



Picture 2: *Casino supermarket in Les Almadies*



Picture 3: An outside view of *Citydia*



Picture 4: An outside view of *King Cash*

Table 2: Retail Food Outlets in Dakar

	Outlets	Average Size (sq meter)	Number of Outlets	Product Line
1.	Hypermarket, supermarkets and grocery stores	≥ 10 and $< 2,500$	~ 30	Full service; diverse with meat, dairy, fruits & vegetables, pre-package foods
2.	Convenience stores	< 10	~ 300	Limited; everyday staples, fruit & veg.
3.	Boutiques and kiosks	< 10	~ 10,000 - 15,000	Limited; everyday staples, fruit & veg.
4.	Open-air markets	Clusters of 10-100+, 5 - 10 stalls in a large open area	~ 50 – 100	Meat, vegetables, fruits, cereal grains, limited pre- packaged goods

(Source: Trade sources and Post estimates)

Grocery stores are mainly owned by French or Lebanese expatriates, with a sprinkling of Senegalese entrepreneurs (*Pridoux, le parcours* (Hoballah), *Fili Fili...*). The *Pridoux* is a mid-sized grocery store located mainly in Dakar. It was the first franchised store in Senegal. However, with the boost of new supermarkets, the number of stores shrunk from 11 to 6.

Senegal has a number of convenience stores (stand alone or with gas stations) representing 8 percent of the retail food outlets. The number of conventional store is increasing rapidly in Senegal as traditional boutiques are converting into it. Since the advent of gas-station convenience stores in Senegal in 1995, its numbers have grown rapidly as consumers valued their proximity and quick service, even though prices are generally higher than in larger grocery stores (*Eden, Select, My Shop...*).

Together, conventional supermarket and grocery stores provide the highest concentration of high-value imported products. Consumers are generally expatriates or affluent Senegalese or Lebanese residents.

There are a limited number of convenience stores offering food products originating from the States. These stores are owned by Senegalese businessman who live or used to live in the U.S. for many years. They offer products such as seasonings, cereals, condiments, juice, snacks from brands like Quaker, Campbell's, Del Monte, McCormick, Welch's, and Hershey's. *Diordiarama*, located on the VDN and launched in 2010, is frequented by a majority of Americans living in Senegal. *American Shop* is another store which offers also a limited U.S. brand products. However, *Food Store & Equipment* is a convenience store located in Dakar along the VDN which supplies food products (seasonings, fruit and vegetable canned food, juices...) in bulk, principally to hotels and restaurants, along with equipment to restaurants (See picture 5 and 6).



Picture 5 and 6: An inside view of *Food Store & Equipment*

In Senegal, as in much of Africa, a sizeable share of trading activity occurs in the informal sector. As noted earlier, Senegal has a system of boutiques which, together with traditional open-air markets and kiosks, account for as much as 80 percent of retail food outlets. Boutiques are informal structures, on or by the roadside, that are found throughout residential neighborhoods and by major thoroughfare. They are generally independently owned and carry food products and household necessities in small quantities or sizes, which are particularly suited to that large segment of the population with lower purchasing power. Their share of the food market is difficult to quantify due to their informal nature, but it may well be as high as 50 percent of retail food sales. Very little high-value imported consumer-oriented foods are likely sold through these outlets, however.

In recognition of the significance of these informal outlets to the retail sector, the Government of Senegal (GOS) launched a project in January 2009 with a long-term goal to establish 10,000 government-sanctioned boutiques nationwide. GOS will have a 60 percent controlling share in these outlets to be known as “easy boutiques,” which are to be more tightly controlled and help regulate the market by fighting price speculation and controlling the quality of products sold to consumers. Such staples as rice, milk, cooking oil and sugar are to be sold at standardized prices that beat prices in the regular boutiques. In 2011, there were 110 easy boutiques located in Dakar and Kaolack regions.

In February 2010, Senegal launched another project, *Produits Africains Normalises et Accessibles pour un Developpement Local et Environnemental* (PANALE) network, which is a group of boutiques that sell locally processed cereals, fish, vegetables and fruits. Four boutiques are located strategically near post offices in Dakar. PANALE organizes women, with good knowledge of local food processing, to realize their vision of producing local high-quality value-added products. The project is implemented by women’s cooperative that Oxfam has established. The cooperative represents 30 groups of women leaders who are part of the processing networks with 2,500 direct beneficiaries.

Senegal also has five duty free stores in Dakar *Senegal Free Store* (SFS), *Compagnie Senegalaise de*

Negoces Alimentaires (CSNA), Thoumas M.N, Dakar Catering, and l'Archipel for exclusive access of the diplomatic, consular and sizeable international aid communities. These stores carry imported consumer-oriented foods and beverages and are good sources for a wide selection of wines and liquor at somewhat lower prices.

Table 3: Advantages and challenges facing U.S. products in Senegal

Advantages	Challenges
<ul style="list-style-type: none"> • Sizeable expatriate community and growing middle class with a penchant for imported foods and beverages. • High rate of urbanization (42 percent) with an estimated 2.53 percent annual growth rate in 2012 leading to increasing demand and growing retail food sector. • Dakar has an improved port system and is a transportation and telecommunications hub in West Africa. • Senegalese are generally well disposed towards Americans and actively seek U.S. trade and investment. • Opportunities exist for U.S. products like processed foods, beverages, rice and red meat targeting niche markets and a regional approach. Growing interest from U.S. Wheat Associates, U.S. Rice Federation, <i>World Initiative for Soy in Human Health (WISHH)</i> and <i>U.S. Soybean Export Council (USSEC)</i>. • Common external tariffs for imports and elimination of tariffs between the 8 countries of the <i>West African Economic and Monetary Union (WAEMU)</i>. 	<ul style="list-style-type: none"> • Strong French influence; biggest trade partner supplying 18 percent of all trade and high proportion of agricultural products (20 percent) in 2011. • High port fees and customs duties. Senegal also adds 18 percent VAT on imports. • High rate of unemployment (48 percent) with 54 percent of the population below the poverty line. Per capita income (2011) is estimated at \$2,000. • Lack of U.S. brand recognition • Lack of U.S. interest due to relatively small market size. French and Asian domination of the market as well as some competition from cheaper and lower quality food products from Asia and Turkey. • Higher freight rates, product prices, and longer transit time from the U.S. than from Europe, Asia or South America.

Section II. Road Map for Market Entry

The importer-distributor is the first contact for entry into the Senegalese market. The major players for

distribution of imported food products in Senegal are:

- Importer-distributors
- Agents/Sole Representatives
- Wholesalers
- Sub-Wholesalers/ Super retailers
- Retailers

Following are approaches for new-to-market exporters to consider for entry into Senegal's retail food sector:

- Conduct market research, particularly for product testing, price comparisons, identifying competitors and market size.
- Review export statistics for the previous 5 years.
- Take the time to understand the dynamics of the market and consumers' preferences.
- Consult with importer/distributors who know customers' tastes and preferences as well as feasible quantities.
 - Contract the services of an agent and appoint a distributor or dealer, and/or establish a direct sales branch or subsidiary.
 - The agent or distributor should be a local firm, fluent in French and knowledgeable about Senegal's business practices.
 - Choose a local partner (importer/agent), well versed in handling Senegal's entry requirements for new imports; this can be quite involved.
- Commodity imports are subject to phytosanitary inspection by the *Directorate of Plant Protection* (DPV) and the Ministry of Commerce.
 - Sample tests from each shipment may be performed while the agent continues with the registration approval process.
 - It is vital to send the bill of lading and phytosanitary clearance documents to the agent/importer prior to shipping your products.
- Provide brochures, marketing literature, and business cards in French.
- U.S. firms opening an outlet in Senegal will need legal counsel and notary services for all formalities associated with establishing an office here.
 - The U.S. Embassy has a list of experienced lawyers and notaries.
 - Seek out a firm specializing in financial and tax advisory services. Senegal has representatives of major U.S. and international auditing and business consulting firms.
- Senegal organizes an international trade fair every year in Dakar.
 - Try to attend if feasible
 - Rent space/booth to advertise your products

- Network and make business contacts with local partners and others from across West Africa.
- Importers in Senegal tend to have a preference for consumer-oriented food products with the following characteristics:
 - Relatively small-sized packaging; quantities packaged for affordable one-time use.
 - Bulk, intermediate products and consumer products for local re-processing and packaging.
 - Mixed-containers of high-value products and brands or types of products authorized for import.
 - Perishable food products processed and packaged for long shelf-life without refrigeration.

Market Structure

A. Wholesalers, sub-wholesalers, and supermarkets' procurement and distribution

The key players for distribution of imported consumer-oriented foods in Senegal are the importer-distributors, wholesalers, sub-wholesalers and retailers. The importer-distributor category includes agents/sole representatives and supermarkets like *Casino*, *Citydia*, and *Hypermarket Exclusive* that import containers of consolidated groceries for their own outlets. Some wholesalers may also be retailers. Most importers and wholesalers are located in Dakar. There are about 150 importers and 300 wholesalers. Wholesalers tend to have a smaller profit margin or mark-up (2 – 5 percent) than sub-wholesalers (3 – 7 percent) and retailers (20 – 25 percent) while importers earn the highest (30 to 50 percent).

Distribution Flow Chart for Supermarket

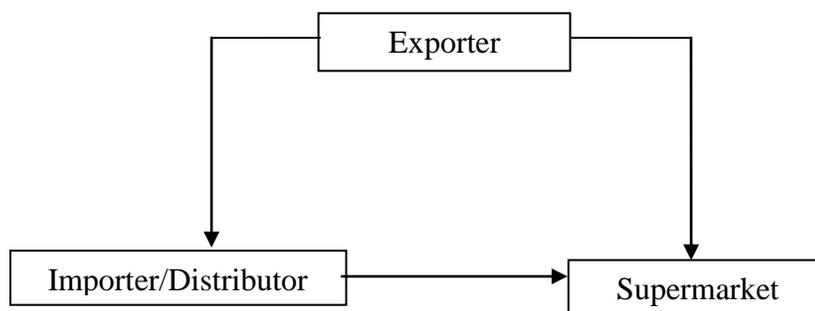


Table 4: Company profile for selected conventional supermarkets and wholesalers

Name and Outlet Type	Ownership	Outlets	Location	Purchasing Agent type
<i>SOFIEX</i> (Importer/distributor)	Lebanese	1	Dakar	Importer

Fournisseur Libre Service (FLS) (Importer)	Senegalese	1	Dakar	Importer
ETS Bocar Samba Dieye (wholesaler)	Senegalese	1	Dakar	Importer/wholesaler
Saprolait (distributor)	French	1	Dakar	Importer/wholesaler
King Cash (discount supermarket)	Lebanese	2	Dakar	Importer/wholesaler/sub-wholesaler/retailer
Hypermarket Exclusive (Hypermarket)	Indian	1	Dakar	Importer/retailer
Casino (supermarket)	French	7	Dakar	Importer/retailer
Citydia (supermarket)	Lebanese	6	Dakar	Importer/retailer
Chaîne de Distribution Alimentaire (CAD) (wholesaler)	Lebanese	1	Dakar	Importer/wholesaler/ retailer

(Source: FAS Dakar and trade sources)

B. Convenience Stores/Gas Marts, kiosks procurement and distribution

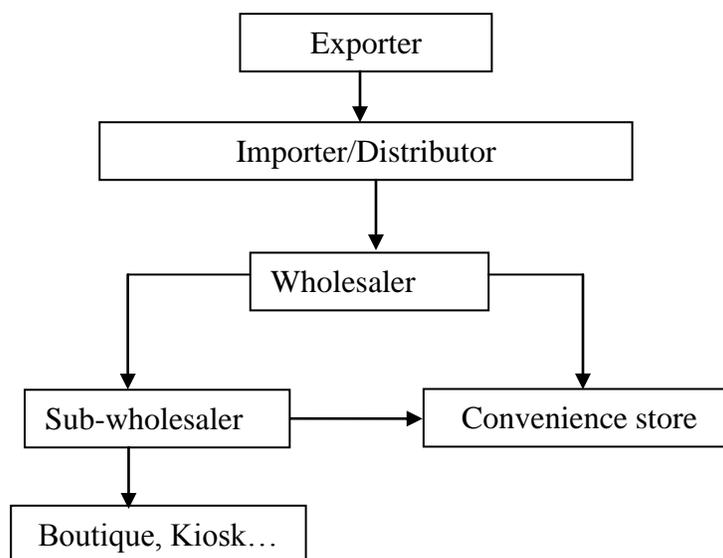
- Retail outlets in this category include convenience stores, mini-marts, gas marts, *boutiques*, *kiosks* and roadside stalls. As much as 80 percent of retail food outlets are in this category.
- Outlets in this category tend to be small. Most buy their products from sub-wholesalers. Only a few of the larger stores or chain stores in this category tend to source merchandise directly from wholesalers.
- Gas marts have limited food sales. Product prices are usually much higher than in convenience stores or *boutiques*.
- Most small convenience stores and *boutiques* do not carry frozen foods due to frequent power outages and lack of own generators.

Table 5: Company profile for selected convenience stores, groceries and kiosks

Name and Outlet Type	Ownership	Outlets	Location	Purchasing Agent type
Bonjour (gas mart - Total)	French	24	Dakar and Thiès	Retailer
Eden's (gas mart - Elton)	Senegalese	9	Urban (nationwide)	Retailer
Select (gas mart - Shell)	French	24	Urban (nationwide)	Retailer
My Shop (gas mart - Oilybia)	Libyan	18	Urban (nationwide)	Retailer
Le Parcours (convenience)	Lebanese	1	Dakar	Retailer
Pridoux (Grocery store)	Senegalese	11	Dakar, nationwide	Importer/wholesaler/retailer
Fili Fili (convenience)	Lebanese	1	Dakar	Retailer

(Source: Post and trade sources)

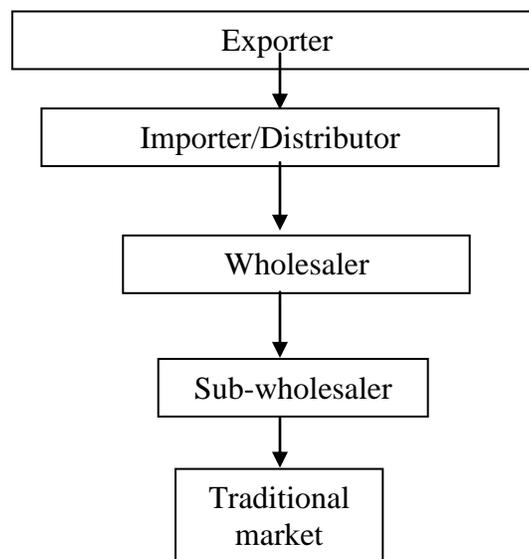
Distribution Flow Chart for Convenience Stores



C. Traditional Markets

- Traditional markets typically have a cluster of small stalls under a single roof or in an open-air location in urban and rural areas nationwide.
- Market vendors buy their goods from wholesalers or sub-wholesalers, who are often also located in the traditional market area or in buildings nearby.
- Retail prices tend to be less than in supermarkets and are usually negotiated. Customers are most often women of lower economic class or household staff shopping for daily needs.
- Products for sale are generally locally produced, processed or packaged and tend to be staple cereals, fresh fruits, vegetables, meat or fish.

Distribution Flow Chart for Traditional Market



Section III: Competition

As noted earlier, Senegal imports up to 70 percent of its food needs. The market is dominated by Europe, in particular France (19 percent) followed by the Netherlands (4 percent). Though France remains a major source for certain categories like wheat, milk and cream, cheese and snacks, the import market includes Asia (i.e. Thailand – 13 percent), South America (i.e. Brazil– 10 percent) and African neighbors (i.e. Cote d’Ivoire – 7 percent) . The U.S. market share is quite small 2 percent or \$15-16 million ^[1], but there is potential for growth if there is effective sensitization of U.S. brands and product lines. Typically, U.S. exports consist mainly of rice, soy meal and oil, beverage-based sugars and

sweeteners, mayonnaise, and beef offals. Consumer oriented U.S. products lines and brands are present, but they are often manufactured outside the United States, i.e. European Union. Only few convenience stores import U.S. food products directly from the States (Dior Diarama, American Shop, and Food Store & Equipment). A visit to Casino, Citydia, and Hypermarket Exclusive where customers tend to be expatriates and Senegalese professionals who can afford U.S. products, sell European products.

Senegal is a member of the *West African Economic and Monetary Union* (WAEMU) or UEMOA (*Union Economique et Monétaire Ouest Africaine*) which includes eight countries sharing a common tariff rate and currency. Thus, once goods enter in one country they can be shipped to any of the other countries without further taxes or duties imposed. The eight countries of WAEMU are Senegal, Cote d'Ivoire, Togo, Mali, Burkina Faso, Guinea Bissau, Niger and Benin.

Competition from local industries is not significant for most imported foods given the reliance on imports, even in the local processing industry. The fisheries sector may be one area, however, where this would not be true, particularly for fresh/chilled/frozen fish. Senegal harvests a significant quantity of seafood and saltwater fish, both for local consumption and export. In 2011, Senegal exported \$300 million in fish and seafood products, with about \$143 million in fresh, chilled and frozen fish and \$23 million in shrimp and prawns, including in shell and frozen.

The table below offers a view of Senegal's major food imports for 2009-2012 by sector and also identifies the top sources for these products. The Netherlands remains the major source for imported fresh vegetables, with about half of the total in this sector being onions and shallot, almost all of which came from the Netherlands. France continues to have a 17 percent share of total consumer-oriented foods, and is still sourcing a fourth of the dairy sector and over 55 percent of imported cheese.

Table 6: Senegal's Principal Food Imports for 2009, 2011, and Jan-Sept 2012

Products	2009 Total Value	2010 Total Value	2011 Total Value	2012 (Jan- Sept)	2011 Primary Source	2011 Market Share in percent
	\$ million	\$ million	\$ million	\$ million		
Dairy	133.1	120.9	113.5	70.0	France	22
					New Zealand	21
					Argentina	17
Red meat	17.8	14.5	13.3	10.8	India	55
Snack foods	15.5	12.6	15.3	9.6	Turkey	22
Fresh vegetables	33.2	33.0	42.0	24.8	Netherlands	69
Fresh fruits	20.4	21.0	20.4	13.8	Cote d'Ivoire	36
					South Africa	23
					France	16
Sugar/sweeteners/ beverage base	55.9	83.6	116.3	72.0	Brazil	61
					Thailand	21
Wine & beer	10.4	9.3	10.4	8.9	Spain	44
					France	25
Total Consumer-oriented foods	508.4	459.7	550.9	426.6	France	17 11
					Netherlands	
Rice	335.7	271.2	364.9	299.1	Thailand	39
					Vietnam	29
Wheat	110.2	123.4	168.3	134.9	France	75
Vegetable oils	132.0	103.9	154.2	137.2	Cote d'Ivoire	56
					Malaysia	15

(Source: Global Trade Atlas)

Section IV. Best Products Prospects

In general, bulk staple commodities have the greatest market share and best prospects. There are, however, many other products that may have good market potential here, given the right promotion and marketing. Below is a list of products categorized by their market presence and potential.

A. Products present in the market with good sales potential

- dairy products
 - powdered and liquid milk: bulk whole fat and skimmed milk powder; liquid milk (UHT), pre-packaged 1-liter cartons of fresh or UHT milk.
 - cheese
 - butter and margarine
- vegetable oils
 - crude soybean
 - crude and refined palm oil
 - refined peanut oil
 - bottled vegetable oil: all varieties
- rice
- wheat
- onions
- fresh fruits: apples, grapes, pears, citrus
- tea and coffee
- fruit juices: orange, apple, pineapple
- pasta products
- Salad dressing
- Seasonings
- beer and wine
- spirits, liqueurs
- canned fruits and vegetables

B. Products not present in significant quantity, but with good potential

- snack foods (biscuits, chips, crackers etc)
- poultry meat
- red meat
- offal
- potatoes
- table grapes, apples, pears
- breakfast cereals
- condiments
- baking mixes

C. Product with strong domestic demand, but too few suppliers.

- tomato paste/ketchup
- fruit preparations and juices
- confectionery (candies, gums etc)

- mayonnaise and salad dressing
- spices and sauces including soy sauce
- potatoes
- onions and garlic
- pasta products

Section V. Post Contact and Further Information

FAS Office

The FAS office in Dakar, Senegal has regional coverage for much of francophone West Africa and some neighboring countries; namely, Senegal, Mali, Burkina Faso, Niger, Chad, Cote d'Ivoire, and the Gambia. Following is the contact information for the office:

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Useful Reports:

The following links are for reports of particular relevance to trade with Senegal. For further information and data, please also visit FAS' website at www.fas.usda.gov.

[2012 Senegal FAIRS Country Reports](#)

[2012 Senegal Exporter Guide](#)

^[i] <https://www.cia.gov/library/publications/the-world-factbook/geos/sg.html>

^[ii] FAS Dakar estimates and Global Trade Atlas Navigator <http://www.gtis.com/gta/usda/>

^[1] Using three year Olympic average of U.S. exports (Jan-Dec)