

The « New Alliance for Food Security and Nutrition » in Senegal



First Progress Report - 2013/2014



NEW ALLIANCE
for Food Security & Nutrition

SUMMARY

| | |
|--|----|
| LIST OF ABBREVIATIONS AND ACRONYMS | 2 |
| EXECUTIVE SUMMARY | 4 |
| 1. INTRODUCTION..... | 7 |
| 1.1 Development of the macro-economic environment and the agricultural sector..... | 7 |
| 1.2 NAIP: Planning Framework for the New Alliance’s Commitments | 8 |
| 1.3 Joint Agricultural Sector Review..... | 10 |
| 2. REVIEW OF COMMITMENTS..... | 12 |
| 2.1 Review of the government’s commitments..... | 12 |
| 2.2 Review of the technical and financial partners’ commitments | 19 |
| 2.3 Review of the private sector’s investment intentions | 23 |
| 2.4 Joint commitments..... | 25 |
| 3. CIVIL SOCIETY’S POSITION ON A FAVOURABLE BUSINESS ENVIRONMENT, RESPONSIBLE INVESTMENT AND GROWTH..... | 27 |
| 3.1 Progress noted by civil society | 27 |
| 3.2 Issues and challenges related to a favourable business environment, investment and growth..... | 28 |
| 4. PROFILES | 29 |
| 4.1 Locafrique..... | 29 |
| 4.2 Les Mamelles Jaboot | 29 |
| 4.3 SEDAB | 30 |
| 5. CONCLUSIONS AND RECOMMENDATIONS | 31 |
| | |
| ANNEX A : MACRO ECONOMIC AND AGRICULTURAL SITUATION IN SENEGAL..... | 33 |
| ANNEX B: CURRENT IMPLEMENTATION STATUS OF THE LETTERS OF INTENT SIGNED BY THE PRIVATE SECTOR | 34 |
| ANNEX C : CONSULTATION WORKSHOP WITH THE PRIVATE SECTOR | 44 |
| ANNEX D : CONSULTATION WORKSHOP WITH POS AND CSOS..... | 48 |
| ANNEX E : VALIDATION WORKSHOP OF THE PROGRESS REPORT | 52 |

LIST OF ABBREVIATIONS AND ACRONYMS

| | |
|--------|--|
| ADECOR | Appui à l'auto développement des collectivités rurales |
| ADUPES | Aménagement durable des pêcheries du Sénégal |
| ANIDA | Agence nationale d'insertion et de développement agricole |
| APIX | Agence pour la promotion des investissements et grands travaux |
| AfDB | African Development Bank |
| BIC | Bureau d'information sur le crédit |
| BNDE | Banque nationale pour le développement économique |
| WADB | West African Development Bank |
| ECOWAS | Economic Community of West African States |
| CNAAS | Compagnie nationale d'assurance agricole du Sénégal |
| CFS | Committee on World Food Security |
| DAPSA | Direction de l'analyse, de la prévision et des statistiques agricoles |
| DCA | Development Credit Authority |
| DIEZ | Zone économique spéciale intégrée |
| EFE | Entreprise Franche d'Exportation |
| ENDA | Environment and National Development in Africa |
| FAO | Food and Agriculture Organization of the United Nations |
| CFAF | African Financial Community franc |
| FNDASP | Fonds national de développement agro-sylvo-pastorale |
| FODDE | Forum pour le développement durable endogène |
| FONGIP | Fonds de garantie des investissements prioritaires |
| FONSIS | Fonds souverain d'investissement stratégique |
| EIG | Economic interest grouping |
| HKI | Helen Keller International |
| IED | Institution pour l'Environnement et le Développement |
| JICA | Japanese International Cooperation Agency |
| LOASP | Loi d'Orientation Agro-Sylvo-Pastorale |
| MAER | Ministry of Agriculture and Rural Equipment |
| NAFSN | New Alliance for Food Security and Nutrition |
| OECD | Organisation for Economic Co-operation and Development |
| OIE | World Organisation for Animal Health |
| MDGs | Millennium Development Goals |
| NGO | Non-governmental organization |
| PO | Producer organization |
| CSO | Civil society organization |
| PADAER | Programme d'appui au développement agricole et à l'entrepreneuriat rural |
| PAFA | Project to Support Agricultural Sector Supply Chains |
| PCE | Economic growth program |
| CAADP | Comprehensive Africa Agriculture Development Program |

| | |
|---------|--|
| PDIDAS | Projet de Développement Inclusif et Durable de l'Agrobusiness au Sénégal |
| IP | Investment plan |
| PNDE | Plan national de développement de l'élevage |
| NAIP | National Agricultural Investment Program |
| P3 | Public-private partnership |
| PRAO | Programme régional des pêches en Afrique de l'Ouest |
| PRODAM | Projet de développement agricole de Matam |
| PSE | Emerging Senegal Plan |
| TFP | Technical and financial partner |
| PLC | Public limited company |
| SEDAB | Société Sahélien d'entreprise de distribution et d'agro-business |
| SMS | Short message service |
| SNCDS | Société nationale de conserverie du Sénégal |
| SOPASEN | Société de pêche et d'armement sénégalais |
| VAT | Value-added tax |
| EU | European Union |
| USAID | United States Agency for International Development |
| USD | US dollar |

EXECUTIVE SUMMARY

Senegal joined the New Alliance for Food Security and Nutrition (NAFSN), which is in line with the priorities of the National Agricultural Investment Program (NAIP), mainly to attract and mobilize national and international private investment to stimulate and support sustainable development in the agricultural sector. To achieve this, the Government of Senegal, civil society, the private sector, producer organizations and development partners developed and established an NAFSN cooperation framework that was launched on November 12, 2013, under the responsibility of the Prime Minister of Senegal.

This is Senegal's first progress report on the commitments made by the various stakeholders. It was prepared following a series of meetings with stakeholders (state actors, TFPs, the private sector and civil society organizations) and was validated at the national level before it was presented to the leadership council overseeing the NAFSN initiative.

On the whole, adequate progress has been made on fulfilling the commitments, although certain improvements are still needed to achieve more effective results.

Under the cooperation framework, the Government of Senegal committed to taking action to i) create an incentive-based business environment in order to increase private investment in the agricultural sector and nutrition, ii) improve supply chain productivity and competitiveness to ensure food security, and iii) reduce the prevalence of stunted growth and emaciation in children under the age of five.

In this regard, the government has been taking a number of steps to improve the business environment, such as reducing taxes on farm inputs and equipment and cutting red tape for opening businesses and accessing public services. With respect to land tenure, the government is currently developing tenure management models with a view to their widespread implementation. As for macroeconomic policies, the Emerging Senegal Plan (PSE), which becomes the single planning framework for government initiatives, was adopted. The six new growth drivers identified in this framework include agriculture, fishery, livestock and agro-businesses. Regarding the various sectors, with the exception of the national livestock development plan (PNDE)¹, most of the sectoral policy briefs are not up to date and are currently being reviewed/finalized: agriculture, offshore fishery, inland fishery and nutrition. Except for the pastoral code², the situation is similar for the regulatory frameworks: the forestry code, the environment code, the offshore fishery code and the codex alimentarius. However, the process for developing and reviewing these policy briefs and legal instruments needs to be improved in order to be more inclusive of all stakeholders as well as shorten approval times. It would also be desirable to improve communication so that the reforms are better understood and interpretations that are often detrimental to the private sector are avoided.

Regarding the private sector, effective cooperation with the government was expected in order to establish and strengthen businesses and initiatives that will have a major impact on reducing poverty across the country and to boost economic growth under the NAIP pact. With regard to

¹ Adopted by Cabinet on July 4, 2013

² A code has been drafted and will soon be tabled in the National Assembly.

cooperation, the private sector had also signalled its intentions to invest in Senegal's agricultural sector in support of food and nutrition security.

To date, 36 businesses have signed letters of intent, yielding total investment intent of US\$470 million. Of these, 21 have already begun operations and invested \$126 million. These investments have already created 1,990 jobs and helped almost 68,000 rural producers, many of them smallholder farms. That said, the private sector has pointed to the following persistent constraints hindering the realization of their investment potential: excessive red tape, insecurity and difficulties accessing tenure, taxes on farm inputs and machinery, the relatively high cost and unreliability of energy, barriers to financing, inadequate infrastructure, and skills shortages.

The technical and financial partners mainly undertook to align assistance to the sector with the programs and priorities identified in the NAIP agenda, increase their support by 2015 in order to contribute to the investment costs of the identified programs, and indicate future assistance to the sector on a multi-year basis to allow better predictability for its inclusion in Senegal's budget.

In this regard, the technical and financial partners have decided to align their NAIP support. However, improvements need to be made in releasing figures on future support to be provided to the agricultural sector, within the broader policy framework for cooperation with development partners, especially where dialogue and coordination principles and mechanisms are concerned.

In addition to the commitments made by the various stakeholders, other commitments are shared by all stakeholders. These mainly involve i) preserving the natural foundations of agricultural, forestry, livestock, and fishery production, ii) complying with national regulatory provisions and the international agreements signed by the Government of Senegal, iii) aligning with the voluntary guidelines on the responsible governance of land tenure in the context of the national Committee on Food Security meeting of May 2012; and iv) fulfilling global commitments, particularly those relating to the marketing of breast-milk substitutes and to infant and young child nutrition.

The review of what has been done since November to implement the cooperation framework revealed the urgent need to focus on preserving production bases by preparing reference material such as regional resource development master plans, as well as on securing government approval for them to be considered governance tools. The technical and financial partners are encouraged to dedicate greater resources and attention to this. As for taking stock of past experience with food and nutrition security, little progress has been made. The commitment involved taking stock of experiences throughout the country in the areas of improved nutrition, promotion of rural youth employment, rural women's economic empowerment and increased investments in smallholder farming, particularly for women. Lastly, regarding the gender equality aspect, more specific measures must be identified and implemented; a review of experiences in this area will provide some insight.

Although civil society organizations are not directly involved in the cooperation framework, they are still full stakeholders in its implementation, since they are signatories of the NAIP pact and were consulted as part of this report. Their opinions and recommendations focused particularly on the need to meet deadlines, particularly those for developing or reviewing sector policy briefs and regulatory frameworks, as well as their greater inclusion right from the start of the process. These organizations also stressed the need to focus on developing and approving the natural resources management framework. They urged the government to find a solution to the land

tenure issue by making smallholder farming more secure and by supporting producers in their efforts to find more effective forms of organizing, such as cooperatives.

Issues and challenges are identified, and recommendations are made, for NAFSN's successful implementation. Among other things, this means:

- supporting rural organizations and certified-seed producers by establishing a government policy that does not hinder initiatives by cooperatives and other privately owned concerns to produce and disseminate selected seeds within the sector,
- supporting the capacity building and professionalization of producers' organizations; expediting the exemption of agricultural equipment from VAT,
- training and building the capacities of workers in the agricultural sector; promoting research and development through agricultural value chains,
- increasing efforts to provide training in agricultural production techniques,
- strengthening the mechanism for tripartite dialogue (government, private sector, TFPs and CSOs) on governance of the sector,
- and making proposals for better coordination of various initiatives.

1. INTRODUCTION

Senegal joined the New Alliance for Food Security and Nutrition (NAFSN), which is in line with the priorities of the National Agricultural Investment Program (NAIP), mainly to attract and mobilize national and international private investment to stimulate and support sustainable development in the agricultural sector. To achieve this, the Government of Senegal, civil society, the private sector, producer organizations and development partners developed and established an NAFSN cooperation framework. This framework specifies the commitments and intentions of the various stakeholders. It was launched on November 12, 2013, under the responsibility of the Prime Minister of Senegal.

This is Senegal's first progress report on the commitments made by stakeholders. It was prepared following a series of meetings with all stakeholders (state actors, TFPs, the private sector and civil society organizations). It was validated at the national level, in a participatory and inclusive manner, before it was presented to the leadership council overseeing NAFSN worldwide.

1.1 Development of the macro-economic environment and the agricultural sector³

Senegal's macro-economic environment has not undergone any significant changes between the periods before and after the signing of the NAIP pact (2010). Economic growth was relatively stagnant between both periods (3.4% in 2006-2009 and 3.1% in 2010-2012) and remained lower than 5.1%, the target rate for 2010-2020.

The NAIP results framework includes three main indicators for evaluating progress toward achieving Comprehensive Africa Agriculture Development Program (CAADP) objectives: agricultural spending as a share of total government spending, the agricultural GDP growth rate and the national and rural poverty rates.

In Senegal, the Maputo ratio, that is, the agricultural budget's share of the total budget, exceeded the target of 10% for the period 2006-2009, averaging 12% for the same period, despite a slight drop in the 2010-2013 sub-period. Nevertheless, the agricultural budget increased by an average of 8.6% per year between 2006 and 2013. However, the overall budget grew more rapidly, which explains the slight drop in the Maputo ratio. Effective agricultural spending increased less rapidly than the appropriated budget over the same periods. The ratio of government agricultural spending over total government spending is 11.8% (higher than 10%) for the 2006-2009 sub-period, but was down for the 2010-2012 sub-period, for an average of 9.3%, slightly under the target of 10%.

The annual agricultural growth rate sharply varied from -15% to 19% between 2006 and 2012. This high volatility in economic activity in the agricultural sector can be explained by its high dependence on weather conditions.

³ For further details, see the table in Appendix 1.

Poverty rates did not vary significantly between 2006 and 2011, given the poor economic growth and agricultural growth, particularly in rural areas. National and rural poverty rates dropped by roughly 1.6 and 1.7 percentage points, respectively.

The other impact indicators, such as food insecurity, improved slightly between 2011 and 2013. The ENSAN 2013 (enquête sur la sécurité alimentaire et la nutrition) results indicate that global acute malnutrition decreased from 10% in 2010 to 9% in 2013, stunting decreased from 26% in 2010 to 14.8% in 2013 while food insecurity in rural areas increased from 15.1% in 2010 to 25.1% in 2013. The impact of the agricultural production crises of 2011-12 has most likely not yet entirely dissipated despite the improved production levels in 2012-13.

It is worth noting that the degree of coverage of food requirements is slightly under 100%, meaning that work is still needed to guarantee that everyone has access to enough food to meet their needs.

1.2 NAIP: Planning Framework for the New Alliance's Commitments

Senegal developed its National Agricultural Investment Program (NAIP), which represents the single framework for planning and implementing rural development policy activities. It implements the ECOWAS Common Agricultural Policy (ECOWAP) and the Comprehensive Africa Agriculture Development Program (CAADP). This process led to a round table during which all the stakeholders, including the technical and financial partners (TFPs), adopted the program and undertook commitments outlined in a multi-actor cooperation framework (the Pact) to facilitate implementation.

Under the CAADP Pact, Senegal committed to (i) promoting economic and social development, (ii) supporting private sector development, (iii) achieving and exceeding the CAADP's targeted growth rate of 6% by 2015, (iv) allocating at least 10% of its budget to the agricultural sector, (v) striving to ensure that sector resources and government spending, in accordance with its public financial management options, are used to maximum effectiveness, and (vi) engaging in dialogue, coordination, mutual review and mutual accountability channels and mechanisms specified in its policy of cooperation with development partners.

An Investment Plan (IP), with an overall cost of 1,632 billion CFAF covering the period 2011-2015, was developed to operationalize the program, which is designed to accelerate growth, achieve food security and reduce poverty.

Senegal signed onto the NAFSN, which is in line with NAIP's priorities, to "attract and mobilize national and international private investment to stimulate and support sustainable development of the agricultural sector."⁴ To achieve this, the stakeholders (the Government of Senegal, civil society, the private sector, producer organizations and development partners) developed and adopted an NAFSN cooperation framework.

⁴ NAFSN Cooperation Framework

In the New Alliance cooperation framework, adopted on November 12, 2013, the government pledged:

- (i) to engage in dialogue, coordination and mutual review with stakeholders;
- (ii) to establish a secure business environment that will motivate both the national and international private sectors;
- (iii) to implement community infrastructure to improve market access, storage, and crop, livestock and fishery production;
- (iv) to improve and expedite reforms to encourage the private sector to invest in the agricultural sector, reaffirming its intention to increase the share of bank loans set aside for agriculture by implementing the FONGIP [priority investment guarantee fund], increasing the leasing of agricultural equipment, adopting legislation on private financial information offices (credit bureaus) and also promoting farm insurance;
- (v) to reduce the budgetary costs of input subsidies from 0.5% to 0.3% of GDP over three years; and
- (vi) to promote women's economic empowerment in the agricultural and rural sector and ensuring respect for the environment.

The private sector pledged:

- (i) to cooperate effectively with the government to establish and strengthen businesses and initiatives that will have a major impact on reducing poverty across the country and boosting economic growth;
- (ii) to indicate its intent to invest in Senegal's agricultural sector to support food and nutrition security by signing investment letters of intent, with this signing continuing throughout the NAFSN period; and
- (iii) to establish internal consultation frameworks that will foster greater ownership of NAFSN objectives.

Development partners pledged :

- (i) to align assistance to the sector with the programs and priorities identified in the NAIP agenda and, by 2015, increasing their support to contribute to the investment costs of the programs identified; and
- (ii) to indicate future assistance to the sector on a multi-year basis, to allow better predictability, planning, budgeting and implementation and providing this assistance and related technical support, in accordance with the modalities and principles specified in the policy of cooperation with development partners, including the principles and mechanisms of dialogue, coordination, mutual review and reporting.

In addition to these commitments, the Government of Senegal, private investors and the technical and financial partners (TFPs) made a joint commitment:

- (i) to preserve the natural foundations of agricultural, forestry, livestock, and fishery production;
- (ii) to comply with national regulatory provisions and the international agreements signed by the Government of Senegal;
- (iii) to align with the voluntary guidelines on the responsible governance of land tenure in the context of the national Committee on Food Security meeting of May 2012;
- (iv) to fulfill global commitments, particularly those relating to the marketing of breast-milk substitutes and to infant and young child nutrition;
- (v) to take stock of experiences in Senegal in the areas of improved nutrition, promotion of rural youth employment, rural women's economic empowerment, and investments in smallholder farming, particularly for women; and
- (vi) to conduct an annual evaluation process within the broader context of the joint monitoring/evaluation of NAIP implementation and the joint review of the agricultural sector.

1.3 Joint Agricultural Sector Review

Senegal conducts several agricultural sector reviews, including the annual agricultural report (RAA) on the implementation of the Loi d'Orientation Agro-Sylvo-Pastorale (LOASP) [agricultural, forestry and livestock act]. This report is developed by a multi-sectoral task force, adopting a participatory and interactive approach, based on nine themes identified for LOASP monitoring purposes.

In 2014, as a pilot project, Senegal conducted its first joint agricultural sector review, according to the process established by the CUA, NEPAD and ReSAKSS. This pilot project aimed to identify the challenges to be met for the 2015 joint review. The lessons learned from this initial endeavour concerned a variety of issues: involving all stakeholders in every stage of the process, regular review of all the commitments made by the actors included in the key cooperation frameworks, following up review recommendations, etc.

The actions below are thus proposed to strengthen the joint agricultural sector review process in Senegal:

- Revise the order to create a committee that will oversee implementation of the LOASP and set out its organization and operations to make it responsible for overseeing the JASR.
- Set up (i) a secretariat to coordinate and carry out the JASR work program and (ii) a technical committee to oversee specific studies contributing to the review, incorporating leaders from the issue groups.
- Consolidate/group all agricultural sector review processes.

- Develop an annotated plan for preparing the review report and summary document setting out the main conclusions, the recommendations and the plan for following up on them, and define a format for presenting review findings: validation/dissemination workshops, presentation to senior officials, on-site visits, electronic formats, posters, etc.

Also, in keeping with the provisions of the NAFSN cooperation framework and the recommendation made at the CAADP Partnership Platform meeting in May 2004, the New Alliance's implementation will be monitored through an annual evaluation process conducted within the broader framework of the CAADP joint sectoral review, starting in 2015.

2. REVIEW OF COMMITMENTS

For this first progress report, the analysis of progress in meeting the various parties' commitments covers all activities that helped to achieve objectives, and thus is not strictly limited to the period from November 2013 to June 2014. The information presented in this initial report will thus be used as a basis for comparison in evaluating progress made next year (2014/2015).

2.1 Review of the government's commitments

The table below shows an overall assessment of the government's commitments. In terms of the 3 results to be achieved by June 2014, the final objectives have not yet been reached, but some progress is being seen. As for the 14 results to be achieved after June 2014, progress has been made on 8 of the 14 planned political actions, 5 have not been implemented and 1 has been carried out.

Table 1: Progress achieved in regards to policy actions pledged by the government

| | No progress | Some progress | Done | TOTAL |
|---------------------------------------|-------------|---------------|----------|-----------|
| Result to be achieved by June 2014 | 1 | 1 | 1 | 3 |
| Result to be achieved after June 2014 | 4 | 10 | 0 | 14 |
| TOTAL | 5 | 11 | 1 | 17 |

The table below shows the progress made with regard to the government's commitments as part of the Cooperation Framework for the New Alliance.

Table2: Progress achieved on government commitments

| Planned Political Actions | Projected Timeline | Current Status and Description | Limitations |
|--|--------------------|--|--|
| Objective 1: Create an incentive-based business environment in order to increase private investment in the agricultural sector and in nutrition | | | |
| Increase the share of bank loans set aside for the agricultural sector from 3% to 8% by 2015 | Dec. 2015 | <ul style="list-style-type: none"> • Adoption of the regulatory framework for BICs [credit information bureaus] (uniform act no. 2014-02) and implementation of the credit information system are under way. • The FONGIP [priority investment guarantee fund] has been established. • The FONSIS [sovereign strategic investment fund] has been established. • The BNDE [national bank for economic development] has been established and is operational. • The agricultural sector’s funding framework has been improved by establishing a fiscal framework for leasing, venture capital and Islamic finance to promote alternative tools to access credit. | No consensus within WAEMU member states |
| Reduce the budgetary costs of input subsidies from 0.5% to 0.3% of GDP over three years and better target recipients | Dec. 2015 | <ul style="list-style-type: none"> • The budgetary cost of subsidies as a percentage of GDP was 0.4%, or 32.249 billion CFAF, in 2013. • Targeting policy under way in two agro-ecological zones (peanut basin and Senegal River valley): SMS program (e-inputs) with codification of 250,000 producers out of an expected 350,000 in 2013. • Development of a crop year management module for better targeting of recipients and better traceability of subsidized inputs (effective used that could have a positive impact on agricultural productivity) | |
| Implement tax incentives for agricultural investment | Dec. 2013 | <ul style="list-style-type: none"> • VAT suspension in effect for agricultural equipment • Regulatory framework for the VAT exemption for agricultural equipment is being finalized (list of eligible agricultural equipment to be developed by MAER) | Slow approval process for regulatory provisions under the General Income Tax Code as |

| Planned Political Actions | Projected Timeline | Current Status and Description | Limitations |
|---|--------------------|--|--|
| | | | regards the VAT exemption regime. |
| Define and implement land reform measures for responsible agriculture | Dec. 2014 | <ul style="list-style-type: none"> • Implementation of new government land intermediation tools and schemes through programs like PDIDAS. This approach guarantees the interests of the various parties (local communities, populations, investors, government). • National committee and theme group on land established but not operational • Compendium of land, estate and cadastral texts being developed (DGID) | Lack of communication about the Commission's activities and probable results |
| Objective 2: Improve supply chain productivity and competitiveness to ensure food security | | | |
| Continue implementing agriculture modernization measures (structures, equipment, infrastructure, etc.) | Dec. 2015 | <ul style="list-style-type: none"> • Construction projects continue through the national infrastructure network for storing and preserving agricultural products project. • Program for equipment in rural areas is under way. • Implementation of agri-business centres for automated service delivery: feasibility study under way. | |
| Define and implement a seed capital replenishment policy | Dec. 2014 | <ul style="list-style-type: none"> • Continuation of the national seed capital program (certification underway of 2013 production estimated at over 63,000 tonnes of seed, all enterprises and levels combined) • Senegal nominated for OECD certification • Publication of Regulation C /REG.4/05/2008 respecting the harmonization of rules for quality control, certification and marketing of plants and plant seeds in the ECOWAS zone, in JORS, January 25, 2014, under No. 57 71 | Quality and quantity of human resources not enough to run this program, and lack of equipment and laboratories |

| Planned Political Actions | Projected Timeline | Current Status and Description | Limitations |
|--|--------------------|---|--|
| <p>Implement the national livestock development plan</p> | <p>Dec. 2016</p> | <ul style="list-style-type: none"> • Combating animal diseases and securing livestock <ul style="list-style-type: none"> - Program to improve animal health protection underway - Proposed livestock code legislation available (pending vote in the National Assembly) • Strengthening infrastructure and equipment for raising livestock and for processing and marketing animal products - Projects and programs established: <ul style="list-style-type: none"> - Brazilian agricultural and livestock material and equipment project (underway) - Slaughterhouse construction and rehabilitation program (underway) - Project to build a national slaughterhouse in Diamniadio (underway) - Project developed to build and rehabilitate vaccination yards (in search of funding) • Improving breeding practices and sectoral organization <ul style="list-style-type: none"> - Funding of four major projects/programs under the Emerging Senegal Plan (PSE) by strengthening current government activities: - Establishment of an association for stakeholders in the poultry sector to make it more competitive - Institutionalization of a wintering milk collection campaign to enhance the value of local production | <p>Sector's funding level still low in relation to its potential and expressed needs</p> |
| <p>Implement the defined strategies to prevent and combat livestock theft to better secure herds and to minimize the risk of investing in livestock</p> | <p>Dec. 2013</p> | <ul style="list-style-type: none"> • Integrate harsher penalties for livestock theft into the criminal code and the code of criminal procedure. • Implement, through a partnership between Microsoft and the Government of Senegal, an application with a "web-sms" platform named "Daral" to identify and trace livestock; the platform allows effective communication among the various stakeholders via SMS alerts and notifications. | |

| Planned Political Actions | Projected Timeline | Current Status and Description | Limitations |
|--|--------------------|---|--|
| <p>Continue implementing measures to ensure the sustainable management of fisheries resources as outlined in the policy brief for aquaculture and fisheries</p> | <p>Dec. 2016</p> | <ul style="list-style-type: none"> • Develop and implement management measures in the fisheries and fisheries development sector (ADUPES) [Senegalese sustainable fisheries development project] and finalization of sub-projects dealing with the traditional fishery co-management level, PRAO-SEN) • Mastery of capacity and regulations for access to fisheries resources: finalization of the Programme national d'immatriculation (PNI) [national licencing program] (scope of order 006397, August 29, 2012). • Monitoring, control and surveillance of fisheries: Regular inspections and controls carried out at the docks, in processing plants and on the water, and finalization of the national plan to combat illegal, unreported and unregulated fishing (IUU). • Protection and safety of the traditional fishery: <ul style="list-style-type: none"> - Decision of His Excellency the President of the Republic to implement a disaster fund for the traditional fishery to combat the loss of human life and equipment for traditional fishers. - Improving the strategic and legal frameworks through the update to the Nutrition Policy Brief under way, the review of the offshore fishing code under way, and the finalization of the inland fisheries code. | <p>Weak regulations for access to fisheries resources Weakness in system for monitoring the resource and surveillance for offshore fishing Delays in reviewing the offshore fishing code (going through administrative channels for over a year)</p> |
| <p>Improve competitiveness of small-scale and industrial fish product processing sector</p> | <p>Dec. 2016</p> | <ul style="list-style-type: none"> • Maintaining the agreement: For exports to the EU: implementation of an action plan to correct the deficiencies identified during the EU's Food and Veterinary Office's (FVO's) mission. • Regular controls and inspections of boats and land facilities . • Rebuilding the fishing industry: re-launching the SNCDS [national conservation society of Senegal], developing a strategic guide for industry redeployment; finalizing two studies which address industries and adding value to processing by-products. | <p>Weakness of controls and regulations for post-harvest activities for traditional fishing Lack of appropriate measures governing the authorization and establishment of processing units for fish</p> |

| Planned Political Actions | Projected Timeline | Current Status and Description | Limitations |
|---|--------------------|---|--|
| | | | products |
| Continue to establish the infrastructure needed to develop aquaculture, inland fishing and fish products | Dec. 2016 | <ul style="list-style-type: none"> • Reducing post-harvest losses: finalization of a funding agreement for phase two of a cold-storage program with India to establish 19 refrigerated facilities: • Aquaculture: program to establish four government fish hatcheries: Richard-Toll, Kolda, Ziguinchor and Fatick. • Implementation of a seaweed farm: establishment of facilities at sea for growing seaweed and construction of concrete pools. • Acceptance of rehabilitation work for the Kaolack central market. Rehabilitation of the Guidick fishing centre; (v) development of two ponds in the Tambacounda region (Ghanin Koye, Padan) and development of two ponds stocked with fish in the Kolda region (Nama, Vélingara Pakane). | Difficulties in managing infrastructure returned to stakeholders |
| Continue to implement the program to combat deforestation and soil degradation through sustainable and integrated management of forest stands and soil | Dec. 2015 | <ul style="list-style-type: none"> • Sustainable development and management of forest stands: <ul style="list-style-type: none"> - Repatriation of all charcoal production in developed areas. - Accountability of local producers in logging and forest management. - Reforestation program, with emphasis on reforesting, Assisted Natural Regeneration (ANR) and prohibitions. - Soil conservation program, restoration of degraded soil and efforts to combat soil salinity - The program to fight bush fires achieved the following in 2013: 3,021 km of firebreaks opened, compared with the 2,300 km anticipated; 3,631 km of firebreaks maintained, compared with the 3,500 km expected; and 423,283 ha of preventive burning. | Lack of consideration for the environment and natural resources by other sectors; Difficulty for the private sector to adapt to the procedures in the environment code; Insufficient coordination of focal points in international agreements. |
| Objective 3: Reduce the prevalence of stunted growth and emaciation in children under the age of five | | | |
| Update the Nutrition Policy Brief (NPB) | Mar. 2014 | <ul style="list-style-type: none"> • The process to update the NPB is under way: the Prime Minister has given instructions to the Minister responsible for the plan to review the NPB. | |

| Planned Political Actions | Projected Timeline | Current Status and Description | Limitations |
|---|--------------------|--|--|
| | | <ul style="list-style-type: none"> The terms of reference for the NPB review are being finalized. | |
| Implement the Nutrition Policy Brief | Dec. 2016 | <ul style="list-style-type: none"> Implementation will come into effect when the revised NPB is validated by the Primature. | NPB has not yet been updated (under way) |
| Implement the policy brief on infant and young child feeding. | Dec. 2016 | <ul style="list-style-type: none"> IYCF policy document was validated by the Minister of Health and implementation is underway. | |
| Review the Code of Marketing of Breast Milk Substitutes and the Codex Alimentarius | Dec. 2015 | <i>Information not available</i> | |
| Apply the Code of Marketing of Breast Milk Substitutes and the Codex Alimentarius | Dec. 2016 | <i>Information not available</i> | |

2.2 Review of the technical and financial partners' commitments

Table 3: Financial commitments of G8 members and other technical and financial partners (TFP) to support the NAIP and the objectives of the New Alliance for Food Security and Nutrition

| Country | Length | Commitment (M = million) | Disbursements until March 2014 | Actions required to meet the commitment | Comments (areas of intervention) |
|----------------|-----------|---|--|--|--|
| USA | 2013-2015 | 300,25 M USD | 84 M USD | | Support the development of value chains for rice, millet, maize and fishery products, policy reform, private-sector investment, training, research and nutrition. |
| Canada | 2013-2017 | 80 M CAD (72,52 M USD) | 11,88 M CAD (10,74 M USD) | | Support rural economic development, improve access to credit, increase production, support value-added and marketing of agricultural products, and support nutrition. Initiatives will particularly focus on challenges & opportunities for women in rural economies. |
| European Union | 2014-2017 | <i>TBD based on the total GDP envelope of 350 M EUR (480 M USD)</i> | <i>Implementation contracts for the 11th EDF being developed. No disbursement in 2014.</i> | Signature of PID by Government of Senegal | Help to combat malnutrition, improve the food crisis management system, preserve / restore production factors, implement agricultural infrastructure and opening up of remote areas, provide electric power to rural areas, develop promising sectors, strengthen governance of the agricultural sector and marketing of agricultural products. |
| France | 2014-2017 | 75 M EUR (102,74 M USD) | 31,5 M EUR (43,15 M USD) | Funding agreements signed on March 21 for a project to support irrigated agricultural and economic | Develop core infrastructure to improve conditions for growing and marketing agricultural products; promote diversified, competitive and sustainable irrigated agriculture (soil restoration, employment of women and youth, marketing and processing); build ownership capacities of rural communities (natural and land resource management); promote local economic development; sustainably improve the productivity of rain-fed agriculture (resilience of |

| Country | Length | Commitment (M = million) | Disbursements until March 2014 | Actions required to meet the commitment | Comments (areas of intervention) |
|---------|-----------|---------------------------|--------------------------------|---|--|
| | | | | development in rural areas near Podor | production systems). Two projects are under way in the Senegal River Valley and the upper Casamance region. Funding for these two projects will allow the remaining funding committed to be mobilized by 2017. |
| Japan | 2013-2016 | 1 647 M JPY (16,03 M USD) | 699 M JPY (6,8 M USD) | | Help to improve the rural economy (rice growing, agro-ecology), promote sustainable fisheries, support nutrition for maternal and child health, and promote the private sector (crafts). Commitment being met. Nothing to report. |
| Spain | 2013-2017 | 32.5 M EUR (44,52 M USD) | 3,06 M EUR (4,19 M USD) | Calls for nomination for NGOs have been launched and are being tallied. Budget committed for 2014 (€3.58 M) | Build the capacity of vulnerable communities to prevent and respond to food and nutrition crises. Improve food diversity. Sustainably increase the production and productivity of the agricultural and livestock breeding sectors, and help to achieve food sovereignty and self-sufficiency. Increase the income of rural communities and their access to food. Promote economic processes that revitalize Senegal's rural areas and contribute to resilience in crisis situations. |
| Italy | 2013-2017 | 50,5 M EUR (69,18 M USD) | 5,5 M EUR (7,53 M USD) | Launch of activities through competitive bidding for: - Implementation of drip irrigation areas - Rehabilitation of hydraulic works | Help to sustainably increase grain and market vegetable production through effective use of natural resources in central Senegal and Middle Casamance. Improve governance in managing production factors and marketing products for small- and medium-scale farmers, especially women. |

| Country | Length | Commitment (M = million) | Disbursements until March 2014 | Actions required to meet the commitment | Comments (areas of intervention) |
|-------------------|--------------------------------|--|--------------------------------|---|---|
| | | | | for valleys in Middle Casamance | |
| Israël | <i>No financial commitment</i> | | | | Help build agricultural technical capacity and implement small scale irrigation systems. |
| South Korea | 2014-2017 | <i>No financial commitment in framework</i> - <i>New commitment of 6 M USD</i> | - | | US\$3 million project to improve rice and onion production in the Saint-Louis region (2014-2017) : share knowledge and experience in producing rice and onion seeds, conducting research, giving producers access to climate change adaptation strategies (soil salinity and off-season cold), and building the capacities of rice / onion producers in the Senegal River valley. US\$3 million project to rehabilitate and equip the Centre d'Initiation Horticole (CIH) in Saint-Louis (2014-2017): Rehabilitate (build, repair) the Centre d'Initiation Horticole (CIH) in Saint-Louis, properly equipping this agricultural training centre, improving the training program and building the institutional capacities of the CIH in Saint-Louis. |
| China | <i>No financial commitment</i> | | | | Support agricultural technical training and the development of adapted seeds (rice and vegetables). China remains prepared to receive and carefully consider any request from the Government of Senegal to improve the performance of the agricultural and nutrition sector. |
| African Dev. Bank | 2014-2017 | 10,77 M AU + new commitment of 30 M AU | <i>n.d.</i> | | Sustainably increase agricultural, forestry, livestock and fishery productivity and production by promoting hydraulic works for agricultural and livestock purposes (small-scale irrigation, enhancement of surface water), preservation and enhancement of |

| Country | Length | Commitment (M = million) | Disbursements until March 2014 | Actions required to meet the commitment | Comments (areas of intervention) |
|------------|--------|--------------------------------|--------------------------------|---|---|
| | | (62,83 M USD) | | | productive capital (water, soil, forests) and integrated natural resource management, capacity building of producers and public/private/community-based rural development institutions. Make families less vulnerable to food and nutrition insecurity and strengthen their resilience. Develop the agricultural and livestock sectors and infrastructure (production, storage, processing, marketing) to increase market access for producers. Joint funding with GAFSP (25.97 AUm) and GEF (0.85 AUm) |
| World Bank | - | <i>No financial commitment</i> | | | Increase the production and improve the productivity of high-value-added crops, to support the replenishment of the seed capital, and to support rice growing and livestock breeding in the Senegal and Anambé river valleys |

TFPs made two commitments: to align aid with Senegal's priorities and to inform Senegalese authorities of their budget planning.

For the alignment of aid, all the TFPs decided to fund the agricultural sector through the NAIP. This was reflected in the Emerging Senegal Plan (PSE), the new framework for planning the government's macro-economic activities.

For providing information about future planning by TFPs, improvements are necessary to make it easier to plan and budget for the expenses of the sectoral ministries concerned. To this end, coordination must be improved between technical ministries and TFPs, and ways and means must be defined to collect and process the information expected from TFPs.

2.3 Review of the private sector's investment intentions

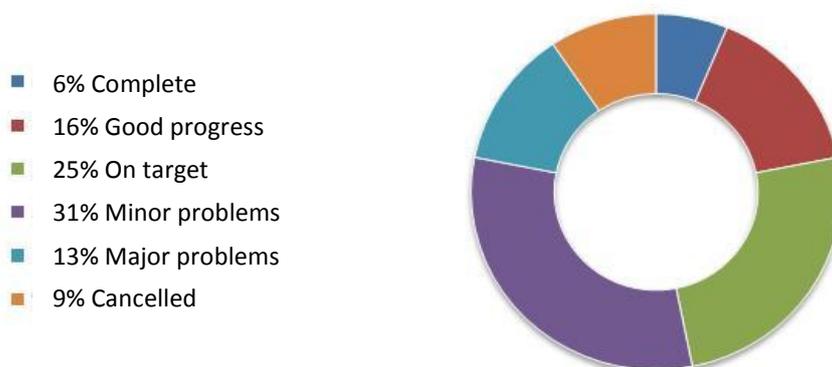
The complete progress report for private sector investments is in Annex B.

Table 4 : État d'avancement des investissements du secteur privé : Chiffres Clés de l'Année 2013

36 companies signed Letters of Intent (LOIs)

Total investment valued at US\$470 million

CURRENT IMPLEMENTATION STATUS ⁵

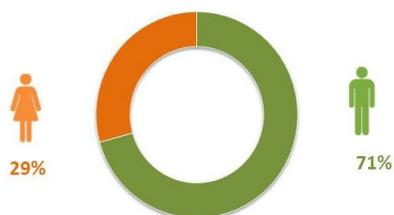


US\$126 million investment in 2013⁶:

- US\$15 million spent on operating expenses
- US\$111 million spent on additional capital expenses

RESULTS ACHIEVED IN 2013⁷

1 990 jobs created



67,773 small-scale producers affected



3,005 benefited from a service

48,392 had production contracts

58,217 had direct purchase/supply

3,636 benefited from training

⁵ 32 of 36 companies provided data

⁶ 29 of 36 companies provided data

⁷ 29 of 36 companies provided data, 100% sex-disaggregated

To date, 36 companies have signed LOIs to invest in the agricultural sector in Senegal through investment priorities identified in the NAIP, defined under the Comprehensive Africa Agriculture Development Program (CAADP). Of these 36 companies, 29 were evaluated, 4 did not provide information and 3 cancelled their LOIs for various reasons.

Of the 29 companies whose LOIs were evaluated, 21 have in fact begun their activities, and their planned investments have been entirely or partially made. The investments made to date have been made at all stages of the agricultural production value chains, from supplying production inputs (seed, livestock feed, agricultural equipment) to processing/marketing the final products (rice, cotton, dairy products, fish products, white meat), through to land use and diversified agricultural production. For companies that have not yet begun their activities, various reasons were given: difficulties accessing land (6 companies), water (1) and funding (1).

Contraintes à l'investissement

The companies emphasized certain limitations they encountered as regards their investments. If solutions are implemented, they could reinforce a supportive environment and pave the way for new investment. The limitations are as follows:

- **Lack of clarity in land management policy and administrative delays:** lack of clarity in land management policy (availability of land, land acquisition process) causes delays in starting up certain large-scale activities in Senegal. Administrative delays were also encountered. Clarity was also lacking in terms of reform measures and how they would be applied on the ground, as well as non-delivery of fishing licences to companies that had already made their investments. Furthermore, several companies shared their negative experiences with environment code restrictions, lack of response to inquiries regarding Free Export Enterprise (FEE) status, non-recovery of VAT on energy investments, and exorbitant customs duties.
- **Access to funding:** the high cost and small number of medium- and long-term loans and the limits of guarantee funds were cited by the companies as being the main obstacles to funding investments and working capital. The deficit in management and expertise capacities was an obstacle to properly preparing loan applications for financial institutions. Initiatives such as the BNDE [national bank for economic development] and the FONGIP [priority investment guarantee fund] were put in place to address the funding limitations, which was the second-largest challenge identified by the companies.
- **Lack of infrastructure:** According to the companies, the lack of infrastructure affected farmers' access to various markets in the country. The road network is inadequate in terms of both quality and quantity, and there are not enough storage and processing facilities, which contribute to significant post-harvest losses for small producers.
- **Energy:** Energy was a key concern for companies, especially for storage facilities that consume a great deal of energy. However, the government is in the process of actively developing its mixed-energy strategy to reduce the cost of energy and improve the quality.
- **Difficulty in securing supplies:** all the companies working in the agri-food sector highlighted the difficulty in obtaining good-quality supplies. It was recommended that buying groups be implemented. With investors responding to the government's call to

establish processing facilities, primary production should expand as well, owing to improved performance and fewer post-harvest losses, which will increase the security of supply.

- **Lack of qualified staff:** the lack of qualified employees had a considerable impact on productivity. Improving competencies had a real impact on the agricultural value chain. Young agri-entrepreneurs must be trained to ensure the extension of knowledge and technology transfer.

Summary of discussions with the private sector

A meeting was held with the private sector, primarily the organizations that had signed LOIs. Government representatives and TFP representatives (USAID and Canadian Cooperation) attended. A progress report was given on the government's commitments and on measures to create an incentive-based business environment to increase private investment in the agricultural sector. These two presentations were followed by discussions between the companies that signed letters of intent for NAFSN and the government representatives. *The complete report for this meeting is in Annex C.* The following points were raised by stakeholders in the private sector:

- The implementation of the VAT exemption for agricultural equipment must be reviewed and the rules for what agricultural equipment qualifies must be simplified.
- Actions to improve access to reliable electricity and to reduce taxes on fuel for agricultural purposes were raised as areas that could be addressed through the cooperation framework.
- To promote "buying locally," it was proposed that the government take an active role in promoting local products such as millet and local rice. This role might include reducing VAT on processed local products (millet couscous) and focusing some input subsidies on partnerships. Progress was seen on joint commitments made by the Government of Senegal, private investors, and TFPs, and between industry and small-scale producers.
- The need for the Government of Senegal to focus on protection and support measures to increase access to highly competitive and strategic sectors, such as rice and processed agricultural products.
- Including the Government of Senegal's request for approval as regards compliance with OECD standards for seed certification in the NAFSN monitoring framework.
- Request that the monitoring of NAFSN commitments be divided into sectorial groups to resolve specific issues, such as the VAT exemption rules for equipment, seed certification, targeted input subsidies, etc.

2.4 Joint commitments

Progress was seen on joint commitments made by the Government of Senegal, private investors, and TFPs:

- (i) *Preservation of the natural basis of agricultural, forestry, livestock and fishery, through compliance with national provisions and international conventions signed by the Government of Senegal.* For the government, the key problem is still the delayed revision of statutory and regulatory frameworks (the sectoral policy brief on nutrition, the

environmental code), but also related cost constraints , such as the cost of conducting impact assessment studies as prescribed by the environmental code. In other cases, the constraint mentioned is delayed approval of the framework, such as the Great Coast master development plan. Some TFPs mentioned their contribution to funding programs that help to meet this commitment. Others did not respond to this question. This item must generally be monitored more closely starting in 2015. A baseline could be established before reviewing the cooperation framework in November 2014.

- (ii) *Alignment with the Voluntary Guidelines on the Responsible Governance of Tenure and the Principles for Responsible Agricultural Investment.* At this stage, while all parties confirm their willingness to meet such a commitment, its degree of implementation cannot be assessed based on the current status of the process. In light of the preceding item, and with a view to the development of the performance measurement framework for the process and the planned review of the cooperation framework in November 2014, the next progress report will better document and assess whether this commitment has been met.
- (iii) *Meeting of overall commitments, especially those related to the International Code of Marketing of Breast-Milk Substitutes, as well as international and regional resolutions on the health and nutrition of young children.* Most TFPs do not have a specific program to improve nutrition and were unable to answer this question. However, some mentioned that their institutions generally meet these commitments. TFPs could help to raise the level of nutrition support and thus better to ensure that this commitment is universally met.
- (iv) *Assess experience throughout Senegal in the areas of employing young people, promoting the empowerment of women and investing in family farms.* Little progress has been noted. Despite the importance attached to these exercises, only the implementation schedule has been developed and coordinators have been identified. The next steps – developing terms of reference, seeking and mobilizing funding, selecting implementation teams – should begin very quickly, so that this commitment can be met.

3. CIVIL SOCIETY'S POSITION ON A FAVOURABLE BUSINESS ENVIRONMENT, RESPONSIBLE INVESTMENT AND GROWTH

A consultation session was held with a broad cross-section of civil society: rural consultative groups, apex organizations of women, farmers, fishers and rural producers, peasant associations, NGO federations, women's advocacy groups, the co-operative movement, cooperative organizations, and civil society and international NGO platform organizations. Government and TFP representatives attended this meeting. *The complete report for this meeting is in Annex D.*

The introductions from the Ministry of Agriculture and Rural Equipment regarding the government's progress in carrying out its commitments (see Chapter 2) and from the APIX [investment and major development promotion agency] regarding improvements to the business environment elicited a variety of responses from the participants in the plenary session. They included comments on:

- (i) the delay in meeting some commitments, primarily the development of the Nutrition Policy Brief, the resolution of the land tenure issue and the persistence of limited access to credit for family farming operations;
- (ii) the lack of commercial infrastructure to encourage marketing of fruit, produce and fish, as well as the difficulty in entering agricultural markets; and
- (iii) the difficulties in applying community rules on applications for immediate registration from producer organizations and the organization of co-operatives; the latter appear to be an alternative to current producer groups.

3.1 Progress noted by civil society

Civil society noted certain progress since November 2013, including:

- The principles and directives on responsible and inclusive investment were pointed out and the stakeholders informed about them.
- Construction of new storage infrastructure (onions and grains)
- Implementation of road infrastructure programs
- Launch of new major projects such as PADAER, the Casamance Development Pole Project, the agreement to fund renewal of rain-fed rice cultivation financed by JICA (Sine Saloum and Casamance), the Scaling Up Nutrition (SUN) Program, the West African Power Pool (WAPP) and the FNDASP [national agriculture, forestry and livestock development fund].

3.2 Issues and challenges related to a favourable business environment, investment and growth

The major issues and challenges relate to:

- implementing policies and strategies (e.g. PSE);
- the development and approval of regulatory frameworks governing natural resource management (forestry codes, environmental laws, etc.);
- establishing a strategy for granting funding appropriate to POs, family farms and agri-businesses, and bringing the FONGIP, BNDE and FONSIS online to provide easier access to agricultural funding;
- issuing fishing licences to domestic private actors for non-threatened species;
- promoting fair access to productive resources (land and water) for all actors;
- improving the organization of agricultural producers: cooperatives or EIGs;
- regenerating soils and implementing an agricultural land management plan;
- setting out a government seed subsidy policy that does not inhibit cooperatives' initiatives to produce and disseminate selected seeds, and other private initiatives in this area;
- developing and approving sectoral policies in a concerted manner;
- promoting nutrition-oriented agriculture;
- strengthening the role of family farms in food security;
- increasing investment in nutrition and bio-fortification; and
- harnessing and developing hydroelectric power to irrigate valleys.

Typical interventions by POs and CSOs under NAFSN

- Projects to fight malnutrition undertaken by HKI: nutritionally oriented agriculture project in Guédiawaye, addressing acute malnutrition in Pout and Guédiawaye, infant and young child food in Dakar, Senegal vitamin A
- ENDA Pronat fight against poverty: Fight for and defence of land tenure for small producers, Peasant workshops on land tenure reforms
- The accountability support program for agricultural investment of Africa's environment and development institution (IED)
- Establishment of a fish farm in Pata by the NGO FODDE [forum for endogenous sustainable development]
- Support for women to establish self-financing funds from ADECOR [rural community self-development support]

4. PROFILES

4.1 Locafrique: *Increasing access to agricultural equipment for agricultural businesses and small operators through leasing*

Founded in 1977, Locafrique is now one of two leasing companies in Senegal. It has a relatively high-quality portfolio, and 20% of it is agricultural. Locafrique plans to grow its market presence in agricultural equipment by at least 10% annually.

Locafrique uses leasing to enable businesses and individuals to finance the use and procurement of agricultural machines, equipment and vehicles. Given the increased importance of the agricultural sector in Senegal, Locafrique is taking advantage of financing opportunities throughout the agricultural value chain and so helping boost financing to develop the rice value chain in the Senegal River Valley and the maize value chain in the central region. Its gross leasing portfolio is 10 billion CFAF (\$19.7 million) with 150 clients and an average of 100 million CFAF (\$197,000) in the agricultural sector.

In 2013, Locafrique established collateral to strengthen its leasing capabilities and thus increase access to financing for agricultural equipment by \$5.6 million over 10 years. The goal was to support the value chain, spur economic growth and promote food security in Senegal.

This is the first collateral portfolio developed in Africa and devoted to leasing and also the first time that a host country government has funded a Development Credit Authority (DCA) mechanism, allowing for the doubling of the portfolio in question. The Government of Senegal's contribution of €150,000 was made possible by funding from the Italian Development Cooperation and has served to pay for part of the DCA collateral grant.

This collateral is an important tool for agri-business and financial institutions to invest in the agricultural sector and help the Government of Senegal meet its NAFSN commitments to make reforms that increase loans to the agricultural sector and promote leasing as a way to fund investment in the sector.

4.2 Les Mamelles Jaboot: *Good nutrition for a good education*

This family food processing business was established in 1997 and became an industrial-sized PLC located in the outskirts of Dakar in a facility measuring over 1,500 m² and employing 65 permanent and 20 contract staff. The company initially produced between 50 kg and 300 kg per day, but today produces more than 12 tonnes a day. In 2012, it had sales of over 1.6 billion CFAF. The company's main goals are to satisfy strong social demand for improved curdled milk products (stirred and flavoured yogurt) that balance out family diets and to improve production, processing and marketing of local dry grains (millet, sorghum, maize, fonio, rice, etc.) by encouraging their consumption and thus developing rural resources.

Mamelles Jaboot was thus able to help increase local grain production by contracting and financing producers' inputs in return for in-kind repayment at an attractive price for the producer. The company also processes grains (millet, maize and sorghum) into finished staple food products using techniques developed by women. Since 2012, Mamelles Jaboot established a

school food program with millet in the Kaolack region (in the southern central part of Senegal's "peanut basin"). The program extended to nearly 45 villages in 2013 and involved 500 producers, including 150 women. The company also signed 40 production contracts with farmers. These efforts have created consistent incomes for rural women, increased their resources and led people to take charge of their children's education and provide adequate amounts of nutritious food—hence the motto "Good nutrition for a good education."

The company specializes in producing, processing and marketing dairy products. It distributes a wide range of dairy products, local grains and fruit juices under the Jaboot brand.

Mamelles Jaboot works to develop agriculture, improve food security and fight poverty.

4.3 SEDAB: *Increasing small operators' access to agricultural inputs (fertilizer and seeds)*

Established in 1985, the Société Sahélien d'entreprise de distribution et d'agro-business (SEDAB), PLC, is a private-sector company that distributes agricultural inputs (fertilizer, seeds, etc.). It operates throughout Senegal's agricultural regions. The company worked on maize seed multiplication programs in several regions of Senegal.

SEDAB has field officers experienced in preparing for and undertaking maize growing. In 2011–2012, SEDAB implemented a major test program consisting of 1,003 hectares of maize in Kolda, Fatick and Sédhiou by contracting with 70 entities encompassing 670 small producers.

In 2012–2013, SEDAB extended the program and strengthened the seed multiplication component for various maize varieties in the production regions of Kaolack, Kolda and Sédhiou. Over 2,000 small producers benefitted from production contracts, and more than 4,000 tonnes of rice and maize seeds were purchased from small producers. In 2014, SEDAB established a processing centre for the entire southern region. The facilities, located on the outskirts of the town of Kolda, have an annual capacity of over 5,000 tonnes. This should improve producers' access to certified seeds, primarily the improved varieties of rain-fed rice and other grains, including maize. A 4,000 tonne storage facility will be built. In 2015, SEDAB will set up a bulk-blending unit for fertilizer to serve small grain and peanut producers in Senegal and the sub-region.

SEDAB's goal is to provide high-quality fertilizer and seeds for the nation's small grain producers.

5. CONCLUSIONS AND RECOMMENDATIONS

Senegal joined NAFSN to attract and mobilize private, domestic and foreign investment in order to stimulate and support sustainable agricultural development. In pursuit of this goal, the Government of Senegal, civil society, the private sector, producer organizations and development partners developed and adopted a cooperation framework that supports NAFSN. One of the functions of this framework is to specify the commitments or intentions of each stakeholder.

Although Senegal officially launched its cooperation framework only last November, satisfactory progress has been made in implementing and meeting its commitments, though improvements are still needed to better achieve results.

Achievements are generally seen, but there is still work to be done. The following issues and challenges are raised in consultations (Report in Annex E) in this regard.

For civil society :

- Operational strategies must be defined to provide adequate funding for POs, family farms and agribusiness, and the FONGIP, BNDE and FONSIS must be practically established to allow easier access to agricultural funding.
- Rural organizations and certified seed producers must be supported by establishing government policies that do not hinder cooperatives and other privately owned concerns from producing and disseminating selected seeds in the sector.
- The government should support the capacity building and professionalization of producers' organizations (cooperatives, economic interest groups, apex organizations and so on) to contribute more to achieving NAFSN's expected results.

For the private sector :

- Improve file response/processing time:
- Establish and implement a joint government/private-sector committee to define procedures and strict deadlines.
- Create an independent window to handle claims by private-sector firms.
- Implement VAT exemption of agricultural equipment as soon as possible by publishing the order respecting procedures for its application.
- Involve private-sector firms in defining curricula and funding agricultural and agri-food training, by strengthening hands-on training of professionals and technicians at the grassroots level, with a technician's licence or higher technician's licence, in the agricultural and agri-food sector.

For the government :

- Train and build the capacities of workers in the agricultural sector.
- Promote research/development throughout agricultural value chains.

For donors :

- Increase technical training efforts (agricultural training centres)
- Strengthen the mechanism for tripartite dialogue (government, private sector, TFPs, CSOs) on governance of the sector, and make proposals to coordinate various initiatives more effectively.

ANNEX A : MACRO ECONOMIC AND AGRICULTURAL SITUATION IN SENEGAL

| | 2006 | 2007 | 2008 | 2009 | 2006-2009 | 2010 | 2011 | 2012 | 2013 | 2010-2012 | Augmentation entre 2006-2009 et 2010 2012 ⁴ | | Cible | Sources |
|--|--------|--------|--------|--------|-----------|--------|--------|--------|------|-----------|--|-----------------------|-------|--------------|
| | | | | | | | | | | | sur la période (%) | en moyenne par an (%) | | |
| Taux de croissance du PIB (%) | 2.5 | 4.9 | 3.7 | 2.4 | 3.4 | 4.2 | 1.7 | 3.4 | | 3.1 | -0.3 | | 5.1 | ANSD |
| Taux de croissance du PIB agricole (%) | -8.6 | -5.5 | 19.4 | 12.9 | 4.55 | 6 | -15 | 9 | | 0 | -4.55 | | 7.4 | ANSD |
| Budget agricole voté en milliards de FCFA | 171.85 | 177.15 | 121.18 | 194.14 | 166.08 | 193 | 211 | 269 | 251 | 231 | 39.1 | 8.6 | | DCEF |
| Part du budget agricole dans le budget total (%) ¹ | 12.0 | 10.6 | 10.4 | 14.1 | 12.0 | 11.4 | 10.5 | 13.0 | 11.1 | 11.5 | -0.5 | | 10 | |
| Dépenses agricoles en milliards de FCFA | 91.35 | 112.77 | 108.26 | 153.60 | 116.49 | 132.04 | 143.52 | 190.73 | | 155.43 | 33.4 | 7.5 | | DCEF |
| Part des dépenses publiques agricoles dans les dépenses totales (%) ² | 12.1% | 10.6 | 10.4 | 14.1 | 11.8 | 8.4 | 7.9 | 11.7 | | 9.3 | -2.5 | | 10,0 | |
| Incidence de la pauvreté nationale (%) ligne de pauvreté nationale | 48.3 | | | | | | 46.7 | | | | -1.6 | -0.7 | 25,6 | ANSD |
| Incidence de la pauvreté Rurale (%) | 58.8 | | | | | | 57.1 | | | | -1.7 | -0.6 | 36,4 | ANSD |
| Incidence de l'insécurité alimentaire | | | | | | | 22.0 | | 18.8 | | | | | ANSD et CNSA |
| Incidence de l'insuffisance pondérale enfants<5ans | | | | | | | 18.0 | | 16.0 | | | | | ANSD |
| Incidence du retard de croissance enfants<5ans | | | | | | | 26.0 | | 19.0 | | | | | ANSD |
| Incidence de l'émaciation enfants<5ans | | | | | | | 10.0 | | 9.0 | | | | | ANSD |
| Taux de couverture des besoins alimentaires ³ | | | | | | | 94.0 | | | | | | | CNSA |

1 somme du budget agricole voté sur la période/somme du budget général voté sur la période) ; budget général voté correspond à Total crédits ouverts (autorisation d'engagement)

2 somme des dépenses publiques agricoles sur la période/somme des dépenses publiques totales sur la période) ; les dépenses publiques totales correspondent à Total crédits ordonnancés (autorisation d'ordonnement)

3 Calculé à partir du bilan alimentaire 2011/2012 publié par le Conseil National de Sécurité Alimentaire (CNSA) sur la base de disponibilités apparentes de 2349 Kcal par personne et par jour par rapport à un besoin de 2500 Kcal pour un adulte de sexe masculin travaillant 8 heures par jour. Toutefois, la disponibilité apparente semble être calculée par rapport à la population totale et non par rapport à la population en équivalent adulte. A vérifier!

4 Cette augmentation concerne les périodes 2006-2009 vs 2010-2013 et les années 2006 vs 2011 pour respectivement le budget voté et l'incidence de la pauvreté

ANNEX B: CURRENT IMPLEMENTATION STATUS OF THE LETTERS OF INTENT SIGNED BY THE PRIVATE SECTOR



I. LETTERS OF INTENT

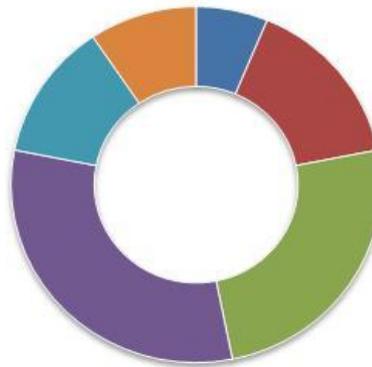
Key figures of the 2013 year

36 companies signed Letters of Intent (LOIs)

Total investment valued at US\$470 million

CURRENT IMPLEMENTATION STATUS ⁸

- 6% Complete
- 16% Good progress
- 25% On target
- 31% Minor problems
- 13% Major problems
- 9% Cancelled



US\$126 million investment in 2013⁹:

- US\$15 million spent on operating expenses
- US\$111 million spent on additional capital expenses

RESULTS ACHIEVED IN 2013¹⁰

1 990 jobs created



67,773 small-scale producers affected



3,005 benefited from a service

48,392 had production contracts

58,217 had direct purchase/supply

3,636 benefited from training

⁸ 32 of 36 companies provided data

⁹ 29 of 36 companies provided data

¹⁰ 29 of 36 companies provided data, 100% sex-disaggregated

II. SPOTLIGHT

Locafrique: Increase the access of agricultural companies and small farmers to agricultural machinery through leasing.

Locafrique founded in 1977 is currently one of the two leasing companies in Senegal. The importance of its portfolio is now relatively high and 20% of it is concentrated on the agricultural sector. Locafrique is aiming at increasing its agricultural machinery market share up to 10% per year.

It uses the leasing mechanism to enable companies and individuals to fund their use and purchase of agricultural machinery, equipment, and vehicles. Given the increased importance of the agricultural sector in Senegal, Locafrique seizes funding opportunities through agricultural value chains and thus contributes to increase the mobilization of funds for the development of the rice value chain in Senegal river valley, and the maize value chain in the central part. Its gross leasing portfolio is 10 billion FCFA (USD 19.7 million), with 150 clients and an average of 100 million FCFA (USD197, 000) in the agricultural sector, with an average tenor of 26 months.

In 2013, in collaboration with USAID, Locafrique established warranties that strengthened its leasing network in order to increase access to agricultural machinery financing amounting USD 5.6 million for a period of 10 years to boost the value chain, the economic growth, and promote food security in Senegal.

That was the first warranty portfolio developed in Africa and dedicated to leasing and also the first time for a host government to provide funding to a DCA (Development Credit Authority) mechanism, thus making easier the doubling of the given portfolio. The contribution of 150,000 Euros from the Senegalese Government was made possible thanks to a source of funding from the Italian Development Cooperation and helped to pay one part of the subsidy from the DCA warranty.

This warranty is an important tool for agro-industrial companies and financial institutions to invest in the agricultural sector and assist the Senegalese Government to achieve its commitments for the New Alliance on reforms to increase loans for the agricultural sector and encourage leasing as a means to finance the agricultural sector investment.

Les Mamelles Jaboot: Healthy food for a better education

This family processing business set up in 1997 has become a private company on an industrial scale, that stretches over 1500 m² (square meters) on the outskirts of Dakar and employs 65 permanent staff and 20 contractors. From an initial production of 50 to 300 kg per day, the company is now producing more than 12 tonnes per day and achieved a turnover of over one billion six hundred million FCFA in 2012. The primary objectives of Mamelles Jaboot are: (1) to satisfy a strong demand for improved curd (brewed, flavoured yogurt), ensuring a balanced diet for the family; (2) boost the production, processing and marketing of dry local cereals (millet, sorghum, maize, fonio, valley rice, etc..) by boosting their consumption, and thereby participating in the promotion of rural areas resources.

With support from USAID/PCE (Economic Growth Project), Mamelles Jaboot helped to increase the production of local cereals through the formalization by contract and the financing of inputs for the producers against repayment in kind at an interesting producer price. The company is also involved in the processing of cereals like millet, maize, sorghum into common consumer products through techniques used by women. Under the programme “Feed the Future” Mamelles Jaboot has implemented since 2012 a “school feeding” programme with millet based in the Kaolack region (Central South of the Senegalese Groundnut Basin) which affected about 45 villages in 2013 and 500 producers including 150 women. The company also signed 40 production contracts with producers. The impact of this activity is the creation of sustainable income for women in rural areas, the increase in their resources and the support for the education of their children and a complete and sufficient diet hence the label “Healthy food for a better education”.

Specialized in the production, processing and marketing of dairy products, the company supplies a range of dairy products, some local cereals and fruit juice under the brand name Jaboot.

Mamelles Jaboot is involved in the development of agriculture, food security and the fight against poverty.

SEDAB: Increase small producers' access to agricultural inputs (fertilizers and seeds)

SEDAB-SARL, set up in 1985, is a private company operating in the distribution of agricultural inputs (fertilizers, seeds). It has branches across all the agricultural regions in Senegal. The Company implemented programmes of maize seed development with some FAO Projects in 1987/1988 and with the Ministry of Agriculture through the Autonomous Seed Project and the marketable maize production programmes in the regions of Kolda, Kaolack and Tambacounda.

It has got experienced field staff in the management and monitoring of maize growing. In 2011-2012, in partnership with the USAID/Economic Growth Program (ECP) programme, SEDAB launched a major test programme of 1003 ha of maize in Kolda, Fatick and Sédhiou by contracting with 70 organisations attracting 670 small producers.

For 2012-13, SEDAB expanded the programme and strengthened the component seed multiplication for different varieties of maize: in the production regions of Kaolack, Kolda and Sédhiou. More than 2,000 small producers benefited from the production contracts and more than 4,000 tons of rice and maize seed were purchased from those small producers. For 2014, in partnership with USAID/PCE, SEDAB set up a processing unit to cover the entire southern zone. Facilities established on the outskirts of the urban area of Kolda have an annual capacity of more than 5,000 tons. This will give producers easy access to certified seeds, mainly for the improved rainfed rice varieties and other cereals like maize. A storage unit of 4,000 tonnes will be built. For 2015, SEDAB will set up a fertilizer “bulk-blending” plant to serve small producers of cereals and groundnuts in Senegal and also in the sub-region.

SEDAB objective is to provide quality fertilizers and seeds to small grain producers in the country.

III. CONSTRAINTS

Companies have highlighted the following constraints faced by their investments. If solutions are found, they could make the environment better and create new investments.

Impact of administrative delays and land policy: the first and greatest challenges raised by companies are access to land and administrative delays (lack of transparency on reforms and their applicability in the field). The lack of transparency on the land policy (the land availability, the land acquisition process) is for some big companies in Senegal, a source of delay in starting some of their activities. Administrative delays were also noted in not issuing fisheries licenses to some companies that have already made their investments. In addition, several companies have issued complaints on the Environmental Code restrictions, the lack of response to requests related to the EFE status (problem of understanding the new tax code with companies which were formerly benefiting from that EFE status). At the tax level, companies still complain about the non recovery of the VAT on investment and energy as well as exorbitant customs duties on imports.

Access to financing: agriculture, especially the primary production, continues to be perceived as very risky in Senegal, making it difficult to have access to financing. The high cost of credit, low volume of medium and long-term credits and the limits of warranty funds were pointed out by companies as being the main obstacles to investments and working capitals financing. The lack of management abilities and expertise is an obstacle for a good preparation to request loans from financial institutions. To address the financing constraint which is the second biggest challenge raised by companies, initiatives such as the creation of the National Bank for Economic Development (BNDE) and the Priority Investment Warranty Fund (FONGIP) are a response to it.

Lack of facilities: According to companies, the lack of facilities has affected producers' access to different markets across the country. The poor quality and low density of the road network, combined with the lack of storage and processing facilities keep on generating significant post-harvest losses incurred by small producers. Such a situation is still an obstacle to the development of the agricultural sector and the emergence of a private sector willing to invest in the rural areas, which remain underdeveloped despite an increase in the number of government initiatives.

Energy: Energy is a very strong constraint for companies especially for storage facilities that are energy-intensive. Nevertheless, the government is actively developing its strategy of energy mix to reduce cost in the long run, and improve quality.

Difficulty in the supply security: All companies operating in food-processing have raised their difficulties in the supply of good raw material. The setting up of purchasing centers has been advocated. With some investors responding to the government invitation for the creation of processing facilities, the primary production should move forward with improved yields and reduced post-harvest losses to increase supply security.

Lack of qualified staff: The lack of qualified staff has a significant impact on the productivity of companies. Improving the skills has a real impact on the agricultural value chain. Training needs for young Agri-Entrepreneurs have been pointed out in the food-processing industry to ensure the dissemination of knowledge and technology transfer.

IV. STATEMENTS ON THE IMPLEMENTATION STAGE OF THE LETTERS OF INTENT SIGNED BY THE DIFFERENT COMPANIES IN SENEGAL IN 2013

To date, 36 companies have signed letters of intent to invest in the agricultural sector in Senegal. Among those 36 signatories, 29 responded to the questionnaires. We are awaiting response from 4 of them and 3 have cancelled their letters of intent for various reasons.

| Name of Company | Objectives | Achieved progress |
|---|---|---|
| AGROPHYTEX | For the development of Public-Private Partnership for inputs distribution on the Senegalese market Agrophytex undertook to: <ul style="list-style-type: none"> - build a fertilizer formulation unit - acquire a seed processing and packaging unit with a capacity of 6 tons per hectare; - finance the working capital for the maize production and get a maize Sheller | Activities started with a little delay. Funding to start the production of hybrid maize seeds on 230 hectares has been achieved; <ul style="list-style-type: none"> - Then 1,324 Tons of seeds were purchased on the domestic market. - More than 15,000 small producers have been reached. |
| AGROSEED | Increase small producers' access to inputs and markets, as well as training, AGROSEED undertook to: <ul style="list-style-type: none"> - get truck farming seeds production over an area of 20 hectares; - create a network of training and dissemination centers in partnership with the National Integration and Agricultural Development Agency (ANIDA); - install central nurseries to supply fruit seedlings and vegetables to small producers. | <ul style="list-style-type: none"> - The signature of partnership agreements with some partners is in progress - The financing of activities is not yet available and has therefore prevented the effective start of operations. - Trail tests on truck farming have begun just recently |
| COMPAGNIE AGRICOLE DE SAINT-LOUIS (CASL) | Contribute to the production of rice in Senegal through: <ul style="list-style-type: none"> - The Development of rice paddies of 4,500 hectares; - The construction of storage and drying silos for 36,000 tons of paddy; - the setting up a processing unit with a capacity of 16 tons per hour and - The signing of farming contracts for 1,500 hectares | <ul style="list-style-type: none"> - Over 40 billion FCFA are being invested by the company for the project implementation; - 32 hectares of rice production achieved - 7 km of channels and many hydro-agricultural facilities for the irrigation system already in place. - Fifty jobs created - 100 hectares developed - |
| COMPTOIR COMMERCIAL MANDIAYE NDIAYE (CCMN) | Contribute to the production of rice and cattle feed by setting up: <ul style="list-style-type: none"> - a rice-processing factory with a capacity of 60 tonnes per day; - a cattle feed processing unit of 240 tonnes per day; - 5 storage rooms with a total capacity of 10,000 tons | <ul style="list-style-type: none"> - Nothing has been set up because no location was made available (land) |
| CCBM'S CODERIZ | Agricultural activities growth with: <ul style="list-style-type: none"> - The development of 800 hectares (channel work, irrigation canals and equipment purchase) | <ul style="list-style-type: none"> - The programme is delayed due to a water access issue. |

| Name of Company | Objectives | Achieved progress |
|--|---|--|
| COUMBA NOR THIAM (CNT) | Agricultural activities growth by setting up: <ul style="list-style-type: none"> - a pumping station as hydraulic facilities with an irrigation capacity of 2,000 hectares; - storage rooms with a capacity of 1,200 tons | <ul style="list-style-type: none"> - Operations are fully set up and investment made. - More than 6,000 small producers have been reached - |
| ETS ADIOU SENE | Contribute to the development of the groundnuts and cereal value chains and invest in truck farming and livestock farming by: <ul style="list-style-type: none"> - developing 100 hectares for agriculture, truck farming and livestock farming; - setting up a groundnut-processing plant | <ul style="list-style-type: none"> - Over 7 million F CFA have been invested; - More than 3,000 tonnes of products including groundnut, cowpea and sesame have been purchased on the domestic market. - 33 full-time jobs have been created. - 860 small producers have been reached |
| GENERAL ALIMENTAIRE AFRICAINE (GAA) | Contribute to the development of local rice in the Senegal River Valley by: <ul style="list-style-type: none"> - setting up a rice complex (rice processing and development of rice by-products); - setting up a poultry complex; - implementing a project to process plant products. | <ul style="list-style-type: none"> - No activity has been implemented due to a lack of financing |
| LA PIROGUE BLEUE | Contribute to the processing, marketing and export of deep-frozen seafood products by: <ul style="list-style-type: none"> - introducing new freezing tunnels; - setting up new storage rooms; - setting up a wastewater treatment plant | <ul style="list-style-type: none"> - The installation of new freezing tunnels is in progress and over 57 million FCFA have been invested. - For the processing of fishery products 35 full-time jobs have been created. |
| MAMMELLES JABOOT | Contribute to the development of agriculture, food security and the fight against poverty by: <ul style="list-style-type: none"> - Financing the agricultural cooperative of Wakh Ngouna producers for the purchase of inputs; - setting up an agro-industrial platform in the region of Thiès. | <ul style="list-style-type: none"> - The agricultural cooperative of Wakh Ngouna producers fully financed and the setting up of the agro-industrial platform of Thiès in progress. - 34 full-time jobs among which 58% are for women have been created. |
| NOUVELLE MINOTERIE AFRICAINE (NMA) | Contribute to agricultural development by: <ul style="list-style-type: none"> - acquiring 1,000 hectares for the development of organic soya and groundnut seeds | <ul style="list-style-type: none"> - The activity has not yet started due to lack of land |
| NEGODIS | contribute to agricultural development by: <ul style="list-style-type: none"> - setting up a factory that manufactures small agricultural machinery | <ul style="list-style-type: none"> - Activities are in progress but the site has not yet been allocated (negotiations are in progress for land access) |

| Name of Company | Objectives | Achieved progress |
|--|--|---|
| PATISEN | Collaborate with producers of consumer goods in small quantities and invest in the entire value chain by setting up: <ul style="list-style-type: none"> - several industrial units in Dakar and Mbao (acquisition of 100 to 200 hectares); - Formalization by contract with selected farmers to supply agricultural products; 10,000 tons per year of good quality edible groundnuts and 100,000 tons of sea salt. | - The activity has not yet started due to lack of land |
| SEDIMA | Collaborate with broiler chicken farmers in small quantities and invest in the value chain by: <ul style="list-style-type: none"> - setting up a slaughterhouse with a capacity of 2,500 chickens per hour; - setting up a flour processing factory; - sowing 300 hectares for maize production. | - Activities are in progress: <ul style="list-style-type: none"> - 6 billion FCFA have already been invested in the development of the slaughterhouse; - a delay has been noticed as regards the land allocation for maize production. |
| SENTENAC GROUP | contribute to the agricultural development by: <ul style="list-style-type: none"> - processing fishery products through the creation of a fish processing factory; - setting up a micro-packaging unit - extending the poultry and cattle feed processing factory | - The activities of fish processing and tomato micro packaging are in progress and more than 590 million FCFA have been invested. <ul style="list-style-type: none"> - Extension for the processing of poultry feed has not started |
| SHAM | contribute sustainably to the agricultural development by: <ul style="list-style-type: none"> - developing fruit and grain growing and livestock farming. - setting up poultry, cattle and sheep farms; - setting up a packaging centre and an industrial processing plant | - Fruit and cereal farming, and livestock farming are in progress with a group of 60 producers; <ul style="list-style-type: none"> - The land is not yet available for farms; - Acquisition of 50 hectares in Nguéniène under development |
| SODEFITEX | contribute to the agricultural development through the expansion and consolidation by: <ul style="list-style-type: none"> - Renovating and modernizing 5 cotton ginning plants; - Renovating and modernizing the plant processing cotton seed; - building cotton balls storage units; - Promoting maize, rice, millet and sorghum growing; - Promoting product processing | - Activities are in progress and the sum of 22 million FCFA have been invested in the renovation and modernization of facilities <ul style="list-style-type: none"> - 31,454 tonnes of cotton seed purchased from small producers for processing |
| GENERAL D'INVESTISSEMENT ET DE COMMERCE (GIC) | Development of cereal processing activities by: <ul style="list-style-type: none"> - setting up a business plan and purchasing agricultural machinery - | - Activities are in progress and 340 tons of raw materials such as millet, maize and sorghum have already been purchased and processed. |
| SOPASEN | Contribute to the development of the fish value chain by: <ul style="list-style-type: none"> - building five freezing tunnels with a capacity of 10 tonnes per day and a cold | - 740 million FCFA have already been invested; <ul style="list-style-type: none"> - 4 freezing tunnels have been achieved; - Achievement of the cold storage room |

| Name of Company | Objectives | Achieved progress |
|---------------------------|--|--|
| | <p>storage room with a capacity of 500 tons;</p> <ul style="list-style-type: none"> - The acquisition of five tuna fishing vessels | <p>with a capacity of 500 tons; actually its capacity has been increased to 800 tons;</p> <ul style="list-style-type: none"> - Purchase of a pelagic fishing vessel which is still waiting for a license; - Investment of 740 million FCFA. |
| TEYLIOM | <p>Contribute to agricultural development by:</p> <ul style="list-style-type: none"> - land development for the farming of cereals, the double-cropping rice cultivation; - the setting up of a cereal processing factory | <ul style="list-style-type: none"> - Activities have started and around 632 million FCFA have been invested at the project planning stage, including the feasibility study. |
| TROPICASEM | <p>Contribute to the development of horticulture by:</p> <ul style="list-style-type: none"> - The construction of two cold storage rooms to keep seed; - The acquisition of 50 hectares of land for the establishment of a new research centre; - The establishment of a phytopathology laboratory | <ul style="list-style-type: none"> - Building activities for the two cold storage rooms are underway; - The acquisition of 60 hectares of land for the establishment of the new research centre was completed |
| VITAL | <p>Contribute to the development of the rice value chain by:</p> <ul style="list-style-type: none"> - setting up a new production unit; - installing 2 additional silos for Paddy storage with a capacity of 3,000 tons and installing a pivot irrigation system and purchasing agricultural machinery. | <ul style="list-style-type: none"> - Activities are in progress and 460 million FCFA have been invested for the start of the new production line and more than 3.5 billion have been mobilized for the purchase of 27,573 tons of paddy rice for processing |
| ZENA EXOTIC FRUITS | <p>Contribute to the development of processing and promotion of fruits and vegetables with:</p> <ul style="list-style-type: none"> - the implementation of food security standards; - the increase and restructuring of the production capacity; - The creation of a line of organic products, dried fruits and natural fortified beverages | <ul style="list-style-type: none"> - The implementation of food security standards has enabled the export of finished products. - More than 90 million FCFA have been invested to increase production capacity; - 42 full-time jobs have been created |
| AFRICA GRAINES | <p>Contribute to agricultural development by:</p> <ul style="list-style-type: none"> - putting in place a network of producers through the development of a pilot operation of 100 hectares with the purchase of agricultural machinery and construction of cold storage rooms; - support in growing a variety of maize, sunflower, dwarf and RAM beans, lettuce, radishes, tomatoes, onions, eggplant seeds, production of guar | <ul style="list-style-type: none"> - the network of producers have been created and 1,186 small producers have been reached; - 32 hectares of land have been acquired for the operation; - More than 300 million FCFA have been invested |
| LOCAFRIQUE | <p>Contribute to the development of agriculture by:</p> <ul style="list-style-type: none"> - setting up a leasing agreement for the acquisition of agricultural machinery by the producers (offset tractors, combine harvesters, husking units) | <ul style="list-style-type: none"> - The activity has been carried out and the leasing implemented. |
| COFISAC | <p>Contribute to the development of agriculture with:</p> <ul style="list-style-type: none"> - The manufacture of woven | <ul style="list-style-type: none"> - All activities of an investment nature with the aim of improving production capacities have been carried out. |

| Name of Company | Objectives | Achieved progress |
|-----------------|---|--|
| | polypropylene packing for the packaging of various agro-industrial products (rice, corn, salt, sugar, animal feed etc...) and agricultural products (groundnut, paddy, millet, etc.) | |
| VALNOVEL | Contribute to the development of the rice value chain with: <ul style="list-style-type: none"> - The development of a joint venture as part of a collaboration and partnership with the Government of Senegal. - The PPP covering a surface area of 22,500 hectares for an annual production of 6,000 tons of certified seeds and 100,000 tons of white rice. - The supervision of rice growing SMEs for a production of 75,000 tons of paddy. - The annual machining of 225, 000 tons of paddy and the marketing of 150,000 tons | <ul style="list-style-type: none"> - Activities have not actually started; - 30 million FCFA have already been invested in early 2014 for field visits and partnership negotiations |
| COPEOL | Contribute to the development of grinding up groundnut seeds and the marketing of oil and oil cakes with : <ul style="list-style-type: none"> - The expansion of its industrial grinding up plant of 100,000 tons per year; - The installation of a solvent extraction plant with a capacity comprised between 600 tons / day and 1000 tons / day; - The installation of a detoxification groundnut oil cakes with a capacity of 300,000 tons | <ul style="list-style-type: none"> - Production activities are underway but those relating to the expansion have not started yet. - More than 4 billion FCFA have been invested in the production of oil and oil cake; |
| SEDAB | Contribute to the development of agriculture with: <ul style="list-style-type: none"> - The construction and installation of a plant for the processing of seeds; - The installation of a “bulk blending” plant for fertilizers to serve small producers | <ul style="list-style-type: none"> - Activities are underway and the seed processing unit has already been set up. - 200 millions FCFA have been invested and 10 billion turnover have already been made |

V. THE 4 LETTERS OF INTENT LISTED BELOW ARE STILL CURRENT BUT WE HAVE NOT YET RECEIVED THEIR PROGRESS REPORT IN 2013

| Nom de l'entreprise | Objectifs |
|--|---|
| LA LAITERIE DU BERGER | Contribute to the development of milk production with: <ul style="list-style-type: none"> - the doubling of the production capacity of its plant in Richard Toll (production target of 4,000 tons per year by 2016); - the creation of a pilot farm (300 cows by 2015 and 1,250 by 2025) ; - the creation of a partnership with GRET for a water infrastructure project. |
| LES GRANDS MOULINS DE DAKAR (GMD) | Contribute to the development of the cereal production and cattle feed with: <ul style="list-style-type: none"> - An extension of the surfaces for its plants regarding the production of cereals and cattle feed. - An increase in the storage capacity (silos) |

| | |
|----------------|---|
| SUNEOR | Contribute to the manufacture and marketing of processed food products with: <ul style="list-style-type: none"> - the intensive production through irrigation of groundnut seeds over an area of 20,000 hectares; - the production of crude oil, groundnut oil cakes and shelled seeds; |
| SOLDIVE | Contribute to the development of the Melon production in the north of Senegal with: <ul style="list-style-type: none"> - The construction of a packaging center; - The increase of farming areas |

ANNEX C : CONSULTATION WORKSHOP WITH THE PRIVATE SECTOR

Meeting of April 30, 2014

1. Participants

Chairperson: Fallou Dièye, Prime ministry office

- Dr Ibrahima MENDY, MAER/DAPSA;
- Amadou SANO, APIX
- Guy A. BANVILLE, Embassy of Canada
- Anne WILLIAMS, USAID
- Representative (s) of private company signatories (list attached)

2. Agenda

- i) Information on the implementation process of the NASAN
- ii) Commitments of stakeholders
 - a. Commitments of the Senegalese Government
 - b. Business environment in the agricultural sector
 - c. Exchanges
- iii) Preparation of the NASAN annual magazine

3. Minutes of the meeting

i) Information on the implementation process of the NASAN

The meeting was opened by Mr. Fallou DIEYE from the Senegalese Government and Mr. Guy BANVILLE. From the outset, Mr. DIEYE reminded people of the strategic challenge posed by the agricultural sector in Senegal, which represents 14% of GDP and directly affects 55% of households in the country. In this context it is critical to increase the productivity of the primary sector and involve both the small producers and the private sector in a growth dynamic of value chains. Speeches reminded the context of the NASAN which is in line with the continuity of the PPDA and the PNIA which operationalization is placed by the Government of Senegal in the Emerging Senegal Plan in and PRACAS. NASAN provides an integration framework for the private sector in such initiatives in a partnership approach with authorities. Under this framework, the Government of Senegal and its Partners have set themselves reporting and follow-up obligations of respective commitments from partners. This meeting is therefore part of a dialogue process between public and private partners to ensure the implementation of commitments in the framework of the NASAN.

ii) Commitments of stakeholders

a. Commitments of the Senegalese Government

The presentation made by the DAPSA / MAER about commitments of the Senegalese Government in the frame of the NASAN noted the following highlights:

- In the frame of the cooperation with development partners, the existence of joint review frameworks: Agriculture Annual Report, SNDES Review, Report on the implementation state of the PNIA and the RCSA being finalized.
- Under the creation of a favorable business environment, recommendations have been made under the Presidential Council on investment and the updating of the General Tax Code provides an exemption of VAT on agricultural equipments.
- As part of support to the agricultural sector, let's note the law 2014-09 on PPPs and the signature of transfer agreements and retrocession facilities to local communities (seeds and cold storage plants); the national rural roads program aiming the construction of 1,000 km tracks per year; the equipment program of the rural world for the construction of warehouses and processing plants for agricultural products.
- Under incentives of the private sector investment, the setting up of the Land Reform Commission, the thematic group on the land of the LOASP and the adoption of land intermediation patterns.
- As part of the increase in the share of bank credits allocated to agriculture, an annual budget allocation of 5 billion FCFA from the FONGIP, the operationalization of the National Agricultural Insurance Company (CNAAS) and the drafting underway of an agricultural insurance program with the World Bank and BOAD; the law on credit information offices.
- As part of the weight reduction of subsidies, the reduction of fiscal burden of subsidies to 0.4% in 2013; a targeting system subsidies beneficiaries by codification via SMS (target 350,000 producers identified), suspension of the VAT on agricultural equipments and machinery; VAT exemption on inputs for food fortification still under consideration.
- As part of the nutrition, the updating of the Sectoral Policy Letter on Nutrition was launched and the terms of reference are being developed.
- As part of the promotion of women's empowerment in the agricultural sector, PAFA programs PADERBA, PROMER, PRODAM Migro-jardins include capacity building actions in management and production techniques, some support in processing equipment, the setting up of savings and credit funds, the creation of micro and small rural enterprises; an allocation of quotas on subsidized inputs to women heads of household.
- As part of the environmental dimension, the review of the Environmental Code is underway, environmental and social management plans are being prepared and a decree on the development of the deep basin plan has been adopted.

b. Business environment in the agricultural sector

The presentation made by APIX on the business environment reminded that the cumulative amount of the 37 companies' letters of intent from the private sector in the frame of the NASAN totaled USD 490.1 million. The following highlights have been noted:

- Confirmation of the weight stabilization of the subsidy on inputs at 0.5% and refinement of targeting towards the poorest populations.
- The ongoing validation of the order setting the terms of the VAT exemption on agricultural machinery and the implementation of tax credits for regions outside Dakar.
- The setting up of seven committees dedicated to rural and agricultural land and to the promotion of a land intermediation scheme in the frame of the PDIDAS.
- A media communication campaign on reforms implemented in 2013.
- The implementation of automatic procedures for business creation, for online tax filing and application for building permit.
- The Order No. 17870 from the prime ministry setting up the creation and organization of one stop shop.
- The decrease in the minimum capital to start an SARL at 100 000 FCFA.
- The promulgation of the Law on PPPs and the creation of the National Railways Agency with priority lines between Dakar Int Airport B. DIAGNE and Dakar-Bamako.
- The updated business plan of the DISEZ.
- The adoption of land intermediation scheme in the Council of Ministers.
- The extension of the new status of cooperatives

c. Exchanges

These presentations were followed by discussions between the company signatories of the NASAN and Government representatives. The following issues have been raised by the private sector:

- Making operational the VAT exemption on agricultural machinery should be reviewed to take into account the particularities of certain financing mechanisms such as leasing in order not to penalize investors using this newly method introduced in the agricultural sector. In general, actors requested the simplification rules of exemption of agricultural machinery or the removal of the suspensive procedure requiring further confirmation.
- The importance of access to competitive energy was raised as a critical element of competitiveness that should be specified in the frame of the monitoring of the NASAN. Actions in improving access and quality of electric power as well as the alleviation of fuel taxation for agricultural production have been raised as intervention areas that can be monitored through cooperation.
- In terms of promoting local consumption, it has been proposed from the Government to take an active part in the promotion of local products such as millet and local rice. These actions could take the form of eliminating VAT on local processed products (millet couscous) and targeting a portion of input subsidies on partnerships between industrial and small producers.
- The need for the Government of Senegal to focus on the protection and support measures in order to enable the emergence of highly competitive and strategic sectors such as rice and processed agricultural products.
- The inclusion of the monitoring NASAN framework following up the agreement application for the approval of the Government of Senegal in the compliance with the certification of seeds under OECD standards.

- Stakeholders have suggested the follow up of commitments under the NASAN to be subject to sectoral groups aiming at solving specific issues, including the issue of rules of VAT exemption on equipment, seed certification, targeting of input subsidies etc.

iii) Preparation of the NASAN annual magazine

Mr. BANVILLE introduced the framework for preparing the NASAN annual magazine. It is for Senegal to prepare a document that will contribute to the annual report consolidating the achievements of ten member states of the alliance.

The date to submit the annual report for Senegal is set to June 30, 2014. In anticipation of meeting this deadline, the following decisions have been taken:

- USAID-Senegal will coordinate the preparation process for the contribution of the private sector to the process.
- Making appointments in 15 days by a consultant with signatory companies to complete the questionnaires with a deadline of May 15, 2014.
- Organization of a follow-up meeting in early June
- Production of a draft national report for approval by June 17, 2014
- Submit the annual report by June 30, 2014.

Consider creating with APIX and USAID a public-private dialogue group to hold quarterly follow up meetings with the private sector as well as the creation of sectoral working groups.

ANNEX D : CONSULTATION WORKSHOP WITH POS AND CSOS

On 20th May 2014 was held at the Hotel Ngor Diarama the consultation workshop of Producer Organizations (POs) in sectors such as agriculture, livestock, fisheries and truck farming and Civil Society Organizations (CSOs) including Non-Governmental Organizations (NGOs).

I. PRESENT PEOPLE: cf. detailed list of the 77 participants

This consultation has seen a strong presence of the following stakeholders in the process of the NASAN:

- the rural consultation committee representing all forms of organizations of rural producers (CNCR), umbrella organizations of breeders, fishermen and rural producers, farmers' associations, women umbrella organization;
- NGO federations, female promotion organizations, the cooperative movement, cooperative organizations, organizational platforms from the civil society, international, Panafrican and individual NGOs;
- The Prime Ministry, MEF / DCF, representatives of sectoral ministries involving Agriculture, APIX, ISRA-BAME, CONACILS, the National Unit Directory of ECOWAS / MAESE ;
- FTPs: Canadian Cooperation (Leader of FTPs in Senegal for the NASAN), USAID (the world leader of the NASAN), the Embassy of Israel, UNICEF.

II. CONDUCT OF DISCUSSIONS

Deliberations went through three main stages that are:

The opening ceremony of deliberations: It was chaired by the Special Adviser (SA)^oto the Prime Minister (PM) in agriculture, M.Fallou DIEYE and marked the one hand, by the presence of USAID, the Canadian cooperation, the CNCR on behalf of civil society. The SA in agriculture of the PM has beside him, Mr. Moustapha LY, representative of the Director of USAID, world leader of the NASAN, Mr. Guy BANVILLE representative of the Embassy of Canada, leader of TFP in Senegal for NASAN, Mr. Saliou SARR member of the CNCR and representative of POs and CSOs.

SPEECHES: They were made by:

i) - Mr. Guy BANVILLE, Deputy Director for the Senegal Programme and First Secretary (Development) who dwelled on the role of Canada, the process of reporting that encourages States in developing progress reports. The report must involve:

- the progress made
- the scheduled actions ²
- the issues

ii)- Mr. Saliou SARR from the CNCR on behalf of POs and CSOs especially welcomed the initiative preparing a progress report with the actors as an important break in the implementation of the program. This initiative was very much welcomed by the civil society.

iii) Mr. Fallou DIEYE, SA of the PM in Agriculture, reminded the steps taken in the implementation process of the NÁSAN, the government's commitment, inter alia, to promote economic and social development in the long term in order to reduce poverty and eventually

achieve food security, as defined in the LOASP and stated in the SNDES which guidelines are strengthened in the PSE. He invited participants to speak without anything to hide to help the Government to understand their point of views and feelings in making operational the cooperation framework of the NASAN.

III. INTRODUCTORY PRESENTATIONS TO DISUCSSIONS

Two presentations have been made by DAPSA and APIX to report on the progress made by the Government in the implementation of its commitments. They rose in plenary various interventions from participants, including:

- the delay noted in the preparation of the Sectoral Policy Letter on Nutrition which approach does not still appear inclusive enough ;
- the involvement of agricultural cooperatives in the implementation process of the NASAN welcomed particularly since these can help to solve various difficulties in rural areas (land, women empowerment, conflict resolution, etc.);
- the request for a participatory review regarding the application of existing management plans before talking about new development plans;
- noticing a shy progress related to the implementation of the NASAN which should be seen as a warning for the Government even if the process has only experienced six (6) months;
- the necessary concerted revision of the land issue in terms of the implications of Act 3 of the decentralization;
- the lack of visibility in approaches within achievements of investment intentions in the private sector;
- the continuing difficulties related to access to credit for farmers including those from the family and the women;
- the lack of market facilities to promote the marketing of fruit, vegetables and fish products productions;
- the difficulties related to access to agricultural markets;
- the difficulties associated with direct registration applications of producer organizations.

The following answers have been given to these questions regarding:

- the implementation by the Government of a national construction program for rural roads and community roads;
- the project construction of a warehouse, with the support of the WAEMU among others;
- the availability of TORs for the development of LPSN at the Ministry of Planning;
- land issues requiring some preliminaries while NASAN has just started six months ago;
- the setting up of the National Commission on the effective land to relaunch the issue;
- the gap in the lack of information on the procedures of financial institutions to have access to credit will be increasingly made up;
- the registration issue of POs from the cooperative sector, the Special Adviser from Prime Ministry promised to refer to the Minister of Justice about the issue.

IV. RESULTS OF GROUP WORKS

It was difficult to give a statement of results for POs and CSOs because of a lack of a detailed investigation or through a survey, but it is still possible to show what they consider as progress and identify challenges for information only and for warning.

a) Progress made in general since November 2013

- Principles and guidelines for responsible and inclusive investment have been defined by NASAN and discussed between stakeholders;
- The Periodic stop of potato imports after consultations with actors in the sector (Memo from the ARM for 2 months)
- The contribution of the Government in the subsidy of fertilizers for truck farming
- The continuation of construction storage facilities (warehouses for onion, cereals) in Zone des Niayes and elsewhere funded by FTP
- The implementation of the road infrastructure Programme (Rehabilitation of RN6 which may have impacts on the development of agriculture and community tracks).

- The start of new structural projects such as: PADAER in regions of Tambacounda Kédougou, Kolda and Matam, the project “Pôle de Développement de la Casamance” (Casamance Development Pole Project), the Agreement for financing the revival of rainfed rice funded by JICA (Sine Saloum and Casamance), the Programme SUN, the advocacy component for nutrition underway and many projects in progress in the framework of the micro nutrition initiative, WAPP defined for the implementation a policy for the recovery of seed capital, the National Fund for Agro-forestry-pastoral development (FONDASP) set up, the start of a management plan for the management of resources at the industrial and artisanal level. 3 management plans to date.

b) Challenges related to a favorable environment, to investment and growth: The major challenges are:

- the consistent and timely implementation of Guidelines from ECOWAS;
- the implementation of policies and strategies (PSE);
- The collaborative drafting and approval of sectoral policies;
- The development and approval of a regulatory framework
- defining the operational strategy of adequate funding to POs, family farms and agribusiness
- The promotion of national private companies in the granting of fishing licenses
- promoting more equity between family farms and agribusiness for investment and growth
- The promotion of equitable access to productive resources for different actors (land and water)
- The promotion of an agriculture responsive to nutrition
- Improving access to production factors (inputs) for peri-urban agriculture to develop;
- strengthening the role of family farms in achieving Food Security (FS)
- The implementation of lines of credit adapted to the situation of family farms;
- Increasing investments in nutrition and bio-fortification (Dissemination of information in relation to bio-fortification)
- Improving organizational forms of agricultural producers. Cooperative or GIE (associations for developing commercial interests)
- The management and development of water potential for the irrigation of valleys
- The soil regeneration and the implementation of a management scheme for agricultural land;

- The definition of a policy for subsidizing seeds by the Government does not prevent initiatives from cooperatives to produce and disseminate improved seeds and other private initiatives in the sector;
- Making operational FONGIP, BNDE and FONSIS for easy access to agricultural finance;
- Making operational FDASP, launched in March 2014.

V. Few examples of typical intervention of POs and CSOs in the context of the NASAN

Resumption project of fish farms in Diama by some companies (SOPASEN) in partnership with ANIDA

- **Projects to fight against malnutrition implemented by HKI:**
 - Project for an agriculture responsive to nutrition in Guédiawaye for 3 years
 - Project to fight against severe malnutrition in Pout and Guédiawaye
 - Project for Infant and young child diet in Dakar
 - Senegal vitamin A Projects
- **Fight against poverty by ENDA Pronat**
 - Control and protection of the Land for small producers
 - Farmers Workshops for proposed land reforms since March 2014
- Support program for accountability in the context of agricultural investments by IED Africa
- Setting up of a fish farm in Pata by the NGO FODDE
- Support women to develop self-financing funds by ADECOR

**Summary of working groups
Dakar, June 17th 2013, King Fahd**

I. PRIVATE SECTOR WORKING GROUP

1.1. CHALLENGES

VAT exemption on agricultural machinery

- Publication of the Decree governing terms implementing the VAT exemption: Term 3 months (September 2014)
- Due to administrative delays in handling application files, it has been proposed the setting up of a commission State-Private Sector to define procedures and set deadlines
- Creating an independent window for the management of claims from private sector companies.

Training of skilled personnel in agriculture

Involvement of the private sector companies in:

- defining curriculum
- the development and strengthening of practical training sessions for professionals and technicians at the base (level Technical Certificate and qualified technician) in agriculture and food-processing industry
- the promotion of national languages for basic training sessions

II. WORKING GROUP CIVIL SOCIETY SECTOR (CSOs AND POs)

2.1.- On the progress recorded since November 2013

- progress should be measured according to a reference situation to define
- Some activities mentioned in the report are prior to the official launch of the NASAN in the formulation of progress, it would be better to mention “in the context of the implementation of the NASAN”
- It is important to specify the location for infrastructure achievements and their number

2.2.- On the challenges relating to favorable environment, investment and growth

- The different existing laws should be harmonized to promote their efficiency
- Issuing fishing licenses to industrial Senegalese companies does not support the interests of the local artisanal fisheries.
- The nutrition component of the NASAN must be well supported with the introduction of hygiene and quality standards in the process of production, processing and consumption of local agricultural products.

- There must be a committed support policy for family farms to support their efficient contribution to the achievement of the NASAN objectives. This support may take the form of:
 - There must be land tenure security to encourage investments for the modernization of equipments
 - vocational training for producers to promote the professionalism from producers and recognition of jobs in agriculture
 - Supporting the organization and structuring of Producer Organizations (cooperative, GIE and others) to help them to back and effectively support the implementation process of the NASAN
 - implementing a coherent and committed approach in the Management of Natural Resources to increase agricultural production
 - supporting the distribution and sale of the production with the construction of facilities and the implementation of support funds for the marketing to avoid selling off products by producers who face social or religious imperatives
 - The current seed policy requires more consistency by the Government support to the strategy of Farmer's Organizations gathered into cooperatives for the production of certified seeds, and stop the distribution of run-of-grains from populations as seeds.

II. WORKING GROUP FTPs

3.1. Financial commitments

- Some projects being developed but no disbursements planned in 2014, the information will be completed no later than Thursday 19, June 2014
-

3.2. Non financial commitments :

- Additional Information are certainly to be included for this report or recommendations for the next progress report
- The availability of information on the future of programming is generally subject to the provisions in terms of cooperation and agreement with the Government. Responsibility is shared due to the fact that FTPs consider the MEF (DCEF) as the main contact
- Compliance with shared commitments should be subject to prepared proposed instrument to follow-up these commitments.

General comments on the report

- Reporting on the level of achievement of certain objectives has questionable sections and not easy to credit NASAN with in particular about land and environment sector.
- Recommendation to add in the matrix a column for comments to contextualize progress
- Develop for the next NASAN report objectives to implement compared to the schedule in order to have a reference base.

3.3. Challenges and solutions suggested by FTPs

Training

- The need for a better qualification and professionalization of actors in order to increase productivity and increase of investments in agriculture,
- Increase efforts in the field of training (Centers for Agriculture)
- Start Strategic Thinking, set specific targets for training and implementation given the needs for qualified staff.

Governance and Sectoral Dialogue

- Need to strengthen the tripartite dialogue operation (State, SP, FTPs and CS) around the Governance of the sector and to make proposals for better coordination of different initiatives
- Set goal to give to the GOS and a better coordination of the various programmes calling for greater inclusion through provisions and governance instruments

III. WORKING GROUP GOVERNMENT

4.1 Information to add

- Food Security and Nutrition (prevention of crisis and early alert system)
- Align the process of seed certification to standards of the OECD
- Commitments and achievements made by the Government in addition can be involved in the Framework NASAN (Livestock and Commerce)
- Current state of the development process LPS Nutrition

4.2 Comments

- Access to land (type)
- Storage facilities (underway and upcoming)
- the development and production tracks (Directorate of Roads)

4.3. Challenges

- Training and capacity building in the ASP sector
- Research and development throughout the value chain

4.4 Recommendations

- Adapt curriculum to the needs of the market and agro-ecological areas
- initiate and / or implement reforms in the educational system
- Create an incentive and attractive framework to promote investments in the entire agro-forestry-pastoral value-chain



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