



MINISTRY OF AGRICULTURE AND RURAL EQUIPMENT FEED THE FUTURE SENEGAL AGRICULTURAL POLICY SUPPORT PROJECT

Report of the technical workshop

"Define possible areas of contribution to policies through the analysis of survey data under

PAPA Project"

Saly, 25–26 September 2017









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1. Context

The PAPA (*Projet d'Appui aux Politiques Agricoles*) Project, an Agricultural Policy Support Project, is an initiative of *Feed the Future* aiming at strengthening Senegal's agricultural policies and promoting an environment conducive to increased public and private investments in the agricultural sector through an efficient and sustainable system for the design, implementation and monitoring of agricultural policies. At country level, this project is implemented by the Ministry of Agriculture and Rural Equipment (MARE), in collaboration with the Michigan State University (MSU), the International Food Policy Research Institute (IFPRI) and *Africa Lead*. The activities of the project will be structured around the following components:

- Component 1: Improve national capacities in terms of research, analysis and communication on agricultural policies;
- Component 2: Promote inclusive dialogue on policies and their ownership by the actors;
- Component 3: Promote the formulation and implementation of evidence-based policies;
- Component 4: Facilitate the effective implementation and the monitoring and evaluation of the policies;
- Component 5: Ensure a good communication of the project results.

The technical approach of the project consists in establishing and ensuring a relationship between the three following elements: (i) a network of local centers of expertise in agricultural policy research and analysis; (ii) an inclusive dialogue and consultation platform on agricultural policies, and; (iii) an infrastructure and IT tools for knowledge management and M&E of agricultural policies.

The local expertise network for agricultural policy analysis (hereinafter referred to as the Network) is a structure composed of actors with proven expertise in agricultural policy research and analysis from State departments and agencies, universities, research institutions, producers' organizations and civil society organizations. It's a collaborative tool that will facilitate synergy between actors in providing services and support to MARE. The Network will be in charge of:

- meeting analysis and evaluation needs of MARE in the relevant areas (policies, programs, strategies);
- supporting MARE in the planning, implementation and monitoring of agricultural policies;
- contributing to data improvements, making analyses and disseminating the necessary technical information for the formulation and M&E of evidenced-based policies;

• supporting the capacity strengthening of MARE and other components of the Government in terms of policy analysis.

The activities of the Network aim at promoting agricultural policies based on quality data, through a rigorous evaluation of alternative policy options allowing to address immediate concerns of MARE. The activities include the analysis of key issues raised by the policy document of the agricultural sector on PRACAS (Accelerated Program for Agriculture in Senegal). These relevant issues include: efficiency of the subsidy policy used by the Government of Senegal (GoS) in the input sub-sector; competitiveness of cereal and horticulture sectors, and a study on private sector investments in the cereal and input sectors; and challenges and opportunities for intensifying investments.

Specifically, the Network will provide MARE with evidence-based options to formulate and successfully implement policies in priority areas identified by PRACAS. In this process, local resource persons, experts from MSU and IFPRI, are associated to experts from the Network to work in partnership on the identified research areas.

The technical workshop, which has been organized on September 25-26 in Saly, Senegal, is one of the first steps in the processing of available data. It served as a framework for discussing the potential research questions and the possibility of using field data to address the identified research questions. The specific objectives of the workshop were:

- To examine the progress of the surveys on the different research themes;
- To organize a brainstorming session on methods for analyzing the collected data and sharing the results in order to meets the expectations of the actors concerned by each of the themes;
- To examine the types of collaboration between members of the Network, the national experts who are not members of the Network, and IFPRI and MSU researchers.

Thirty-five participants worked on the different themes during these two days.

2. Proceedings of the workshop

The workshop was conducted in plenary sessions.

The welcoming address was given by Dr. Ousmane BADIANE, IFPRI Director for Africa. After thanking all the participants for responding to the invitation of PAPA Project, he recalled the importance of the present step in the analysis process of data collected by the Network through surveys conducted for MARE on 13 important themes. Indeed, this workshop, with the support of the experts, will provide orientations to address research and policy questions and improve the performance of the agriculture sector in Senegal.

After the welcoming address of the Director of IFPRI for Africa, the Coordinator of the PAPA Project, Dr. Mbène Dièye FAYE, took the floor to also welcome all the participants and thank them for their participation to the event. She restated the importance of this meeting which gathers famous national and international experts and which will benefit to MARE through the proposal of policy options based on the results of relevant analyses. She then proceeded to the official opening of the workshop.

After the opening of the workshop, the activities continued as follows:

- a presentation on the objectives and expected results of the workshop, and on the implementation status of the surveys (by PAPA's coordination unit);
- introductory presentations followed by discussions to exchange with the participants on research questions initially identified (by ISRA/BAME, DAPSA, CRES);
- presentations followed by discussions to exchange with the participants on the type of data collected (or to be collected) through the field surveys (by ISRA/BAME, DAPSA, CRES);
- a session to exchange on the methods and tools needed to answer the research and policy questions identified;
- an exchange session to form the teams composed of the members of the Network, national experts present as resource persons, and experts from IFPRI and MSU.

At the end of the workshop, the closing remarks of the workshop were delivered by Dr. Ousmane BADIANE and Dr. Mbène Dièye FAYE.

3. Results of the workshop

3.1. Implementation status of the surveys

The implementation status of the surveys - conducted on 13 identified themes - has been shared with the participants, the situation is summarized in the following Table.

Theme of the survey	Entity in charge of the implementation	Area/ localities	Size of the sample	Progress status
1. Production of dry cereals	DAPSA	All the departmental chief towns, except Dakar, Guédiawaye and Pikine	4680 households	Data collection carried out at 100%
2. Banana industry	ISRA/BAME	Regions of Tambacounda and Kédougou	800 households	Data collection carried out at 100%
3. Green bean, cherry tomato, processed tomato, potato, onion and melon industries	ISRA/BAME	Niayes area, Senegal River Valley (SRV), Center and South Regions	1200 households	Data collection carried out at 100%
4. Urban consumption survey	ISRA/BAME	19 cities, among which 14 regional capitals (plus Pikine, Guediawaye, Touba and Mbour)	2250 households	Data collection carried out at 100%
5. Water control survey	DAPSA	The 42 agr. departments of Senegal	333 hydro- agricultural installations	Data collection carried out at 100%
6. Survey on the production of irrigated rice	DRDR Saint Louis and DRDR Kolda	Regions of Saint Louis, Matam and Kolda	750 households	Data collection carried out at 100%
7. Survey on the continent-wide horticulture production	ISRA/BAME	All the regions except Dakar and Saint louis	468 collective perimeters and 196 individual perimeters	On-going data collection since September 6
8. Private investments in imports and distribution of fertilizers and agricultural equipment	CRES	Regions of Dakar, Saint louis, Tambacounda	28 identified firms to be surveyed	On-going data collection
9. Private investments in manufacture and maintenance of agricultural equipment	CRES	In 42 Departments	350 firms	On-going data collection
10. Step by step tracking of input subsidies (fertilizers, seeds, agr.	CRES	Dakar and sampling among the 42 agr. departments	630 producers, and seeds and fertilizers operators	Not yet carried out

equipment, phyto products)				
11. Survey on the processing of cereals, fruits and vegetables	ISRA/BAME	SRV, Anambé Basin, Niayes area, and in 14 regional capitals, plus Pikine, Guediawaye, Mbour and Touba	 333 (small scale) 65 (semi industrial, all industrial processors) 	Not yet carried out
12. Trade survey	ISRA/BAME	Urban area: 14 regional capitals, plus Pikine, Guediawaye, Mbour and Touba Rural area: 42 agr. department	2675 retailers 1000 wholesalers	Not yet carried out
13. Survey on consumption in rural areas	DAPSA	In the 42 agr. dept. of Senegal	4680 (same samples as in the dry cereal production survey)	Not yet carried out

3.2. Presentations and discussions on the research questions

(See Annex 1: Presentation of the research questions)

The objective of these presentations is to share the research questions initially identified by the Network in order to collect recommendations of the participants that will allow to improve and refine the research questions. The comments and recommendations to refine the research questions related to the themes covered by the Network's surveys are presented below.

3.2.1. Irrigated rice

- > Evaluate the adoption rate of improved seeds and the age of the adopted varieties;
- Analyze the trends in the evolution of processing capacities and quality of processed products in the local rice processing segment (see the characteristics and determinants of processing factories);
- Study the relationship between processors and producers (contracts, quality standards, etc.);
- Analyze the determinants of competitiveness of local rice, focusing on the quality of the local rice versus imported rice, on Senegalese people's eating habits, and on a comparison with the other rice-exporting countries (availability of the land, of the water, of labor in these countries, etc.);

- What are the actions to promote in order to have a strong processing sector producing a rice which quality is at least equal to the imported rice and which meets the needs of the Senegalese consumers?
- Analyze marketing practices (conditioning, labelling, certification, etc.);
- Analyze the constraints which limit the performance of rice (yield, quality of processing, trade, etc.) in the Anambé Basin despite the important possibilities (see how to increase the irrigated perimeters in these areas);
- Evaluate post-harvest losses and identify the actions to carry out in order to reduce these losses to the minimum;
- Analyze the evolution of the potential rice demand in the medium and long term, considering the different typologies (ex.: level of income).

3.2.2. Dry cereals (millet, sorghum, maize)

- What is the pricing policy needed to foster local production of dry cereals? Analyze the impacts of dry cereal value chains on food and nutrition security.
- Analyze the trends in the evolution of processing capacities and quality of processed products in the dry cereals processing segment.
- What are the research fields related to climate change issues (are the seed varieties adapted to climate change?).
- Analyze the competition for the allocation of production factors between the different cereals (millet, sorghum, maize, rice).
- Analyze the determinants of competitiveness of millet, sorghum, and maize value chains for the various segments of production, processing and trade.
- Analyze the trends and determinants of the marketing of dry cereals by households, in comparison with household consumption.
- Analyze the behavior of factories transforming products into cattle feed, in terms of input in local or imported products (characterization of the demand of processing factories, what actions are needed to help the local sector satisfy this demand?).
- Conduct product analyses (millet, sorghum, maize), taking into account the global interactions and dynamics).

3.2.3. Fruits and vegetables

- What are the impacts on local products (production, quality, competitiveness, etc.)? And what is the sustainability of the protection measures applied to onion and potato sectors?
- What are the trends in terms of (private and public) investments in infrastructure and storage and conservation material (cold-storage rooms, storage warehouses, etc.)?
- Analyze the practical use of herbicides and pesticides, the use of labor and the profitability of horticultural productions.
- Analyze the positioning of Senegal on the fruits and vegetables export markets, differentiating product and identifying the actions in order to improve this positioning.
- Analyze the positioning of Senegal's competitors on the fruits and vegetables export markets and their strategies compared with Senegal.
- > What is the place of organic horticulture?
- Analyze the factors favorable to success in horticulture sectors (production and exports).
- > Analyze the determinants of competitiveness of fruits and vegetable sectors.
- Analyze the contribution of the « big investors » in the success of the horticulture sectors.
- For continental horticulture, proceed to a mapping of the characteristics of the sector (production costs, transportation costs, processing costs, production, consumption, etc.) and conduct site and context analyses.
- Analyze the statistics of the re-exports of imported products, if these data exist.

3.2.4. Seed sector

- Mapping of the sector (actors of the chain, role of each actor).
- Analyze the current and future demand (quantity by level and by crop) and the level of satisfaction of the demand (quantify the seeds supply).
- Analyze the performances of the sector (productions by type and levels of seeds, control capacities, adoption rate of the seeds, age of adopted seeds, accessibility of the seeds for the producers).
- Analyze the determinants of the adoption of certified seeds.
- Study the role of non-formal sector (traditional seeds) in the seeds systems.
- Analyze the existing strategy (control system, marketing network, financial system, etc.).
- Evaluate the profitability and risk management related to the use of certified seeds, taking into account local contexts according to production areas (agro-ecological areas, etc.).

- Analyze the varietal map.
- Analyze to what extent seeds made available for producers must be aligned with seasonal forecasts.
- Evaluate seeds regulations in order to obtain optimal regulations clearly defining the roles of the various actors.

3.2.5. Fertilizers

- Integrate the structure of the soil in all the analyses of fertilizer use and see if the formulas that have been used for decades must be changed.
- Analyze the determinants of the use of fertilizers by producers.
- Evaluate alternative options for subsidies (fertilizers' price, price of the agricultural product, etc.).
- Analyze the effects of the fertilizer use on human health.
- ▶ How long-term storage can influence the quality and price of fertilizers?
- Analyze the demand for fertilizers in the medium and long term (quantity, types, etc.).
- > Analyze the situation of the local sector of fertilizer production.
- Is it necessary to continue to subsidize fertilizers or is it better to engage in a subvention of the farms?

3.2.6. Mechanization

- Analyze the demand (quantity, type, quality, etc.) and the adequacy of supply.
- Consider the distribution of tasks along the crop cycle, availability of labor and its cost, soil conditions, because these factors influence demand in terms of mechanization.
- The analysis must not be limited to the access to agricultural material, it should also consider the access to mechanization services (example renting). To which extent these service provisions can be developed?
- > What are the options for a better use of agricultural equipment and material?
- Consider gender in the analysis of the effects of access to agricultural material. For example, in some places, access to agricultural material has led men to engage into activities initially carried out by women.
- How to integrate in the analysis the aspect of the community use and what type of organization for a better access to agricultural equipment and material?

- Analyze the renewal mechanism of the material and the efforts to be made for the maintenance of the existing material.
- Analyze the substitution mechanisms of agricultural equipment related to cost of labor according to geographical areas, types of crops and periods.

3.2.7. Contract farming

- Consider the examples in the tomato and groundnut sectors and the experiences of ANIDA in the study of contract farming.
- > Evaluate the impacts of contract farming (production, quality and marketing of the products).
- Establish the situation of contract farming and identify the main challenges that producers and industrials are facing and the reforms needed for contract farming.

3.2.8. Agricultural insurance

- Analyze the existing insurance system (insurance institution, insurance products supply, costs, beneficiaries) and its adequacy to demand, identify what is working and what is not working.
- > What type of insurance for what type of actors?
- How to establish a database of producers (specially for small-scale producers) with all the characteristics related to risk, so that the insurance firms can offer their services to both smallholders and large producers.
- Organize grassroot awareness campaigns to explain the role of agricultural insurance and go towards specializations by types of corp.
- How can the agricultural insurance intervene to allow producers to adopt technologies, practices, that would be otherwise costly in terms of risk?
- Is it necessary to subsidize insurance programs and how can the opportunity cost of the subsidy be evaluated?
- ▶ How to draw from the experience of other countries for reforms in the insurance sector?
- What place for the agricultural insurance with respect to producers' risk diversification strategy? Is it contradictory or complementary?

3.2.9. Water control

- > Evaluate the potential of water resources (surface water, groundwater, runoff water, etc.).
- > Evaluate for each type the performance in terms of mobilization and use.
- Evaluate the profitability of the current models of hydraulic and hydro-agricultural installations.
- Reflect on the rehabilitation of the hydro-agricultural installations, on how to do the maintenance work, and what form of organization for a sustainable management of these hydro-agricultural installations.
- What forms of water control for the different areas of Senegal in relationship with the types of available water resources.

3.3. Presentation of the questionnaires

(See Annex 2: Presentation of questionnaires' summary)

The objective of these presentations was to share with the participants the information that had been collected (or that remained to be collected) during the surveys. Therefore, ISRA/BAME, DAPSA and CRES, which are the coordinating structures for data collection operations, presented for each theme a summary of the main variables of the different questionnaires. These presentations allowed participants who were not members of the Network to make the necessary links between the discussed researches and the type of information collected or to be collected, in order to answer the questions.

The presentation of the questionnaires' summary was focused on the following groups:

- Production of dry cereals (DAPSA)
- Production of fruits and vegetables (BAME)
- Production of irrigated rice (FASEG)
- Distribution of fertilizers and agricultural equipment (CRES)
- (Primary) processing of paddy rice (BAME)
- Processing of fruits and vegetables (CRES)
- Wholesale and retail trade of cereals (rice/millet/maize/sorghum) and fruits and vegetables (BAME)

After the presentations, the discussions allowed to bring clarifications on various aspects (methodology of the surveys, sampling, development of the surveys, etc.).

3.4. Discussions on the tools needed for data analysis

These discussions aimed at sharing methods and analysis tools that are suitable to answer the research questions identified based on the available or collected information and data. The following methods and analysis tools have been proposed for each discussed theme.

3.4.1. Analysis of competitiveness (cereals, fruits and vegetables)

For this theme, the following tools have been proposed:

- Policy Analysis Matrix (PAM)
- Analyses of efficiencies and determinants of productivity
- Analysis of comparative advantages
- Analysis of production frontiers
- Calculation of competitiveness indicators: import/export ratio, market share
- Costs and value added for each segment of the global sector
- Benchmarking
- Propensity score matching to evaluate the impacts
- Analysis of networks, including spatial dimension and gender dimension
- Analysis of frontiers (level of production)
- Analysis of transaction costs
- Quantitative analysis of consumption preferences compared with characteristics of the local supply
- "State variables" to analyze the reasons for the technological choices
- Mapping analysis of the characteristics of the sector (production, consumption, production costs, processing costs, transportation costs, etc.).
- Statistical relationship between poverty indicators, potential of the production factors, and indicators of food and nutrition security
- Draw from methodologies applied in Asia and Latin America in order to analyze postharvest losses and how they affect competitiveness

3.4.2. Seeds/fertilizers and mechanization sectors

- **Common analysis**: for these themes, the following tools have been proposed:
 - Step by step tracking of the subsidy: description of the expense circuit;
 - Identification of the actors in each step of the circuit;
 - Estimate of the share of the subsidy that reaches the producers;
 - Quantitative analysis of the perceptions;
 - Estimate of production functions and agricultural input demand functions of Nerlove type (short and long-term elasticity);
 - Simulation of the production increase if all or part of the subsidy reaches the producers;
 - Matching methods to define two homogeneous groups of beneficiaries and nonbeneficiaries of the subsidy;
 - Political economy of the subsidy;
 - Cost-benefit analysis

* Specific analysis

- 1) Seeds
 - Study the weight of formal sector compared to informal sector;
 - Study the frequency at which new seed varieties are available by type of crop and evaluate the rhythm at which the farmers change from one variety of seed to another;
 - What are the public policies (subsidies) needed to accelerate the adoption of new seed varieties and what role for the private sector (multiplication of the seeds) to be optimal?
 - See in the analysis, to which extent the adoption of seeds is conditioned by the adoption of fertilizers?
 - Clearly identify in the analysis the competition between farmers seed and certified seeds;
 - Launch the debate on technology and research on MGOs.
- 2) Fertilizers
 - Analyze public policies, conduct a cost-benefit study on subsidies;

- Identify the part of the subsidy that actually reaches the producers (identify the share taken by large producers, misuse of objectives, etc.);
- Do the mapping, analyze the profitability and the adoption rate;
- Evaluate the supply and demand of fertilizers and understand the distribution circuit;
- Integrate data on soil structure in the analysis (see the *Institut national de Pédologie*).

3) Mechanization

- Analyze equity problems linked to the subsidy of large equipment (only large producers have access to it);
- Think on an optimal way of subsidizing equipment (an alternative is to subsidize the service provision system);
- Analyze the competition between State and private sector in the distribution of equipment and see what part is left to the private sector;
- Collect data on service provision (specific survey).

3.4.3. Contract farming (for the rice and millet)

For this theme, the following tools have been proposed:

- Propensity score matching to evaluate the impacts of contract farming and types of contracts on incomes, quality, access to production factors, credit, etc.);
- Analyze the contribution of the practice of contract farming to the success of the horticulture sector comparatively to the other sectors.

3.4.4. Agricultural insurance

For this theme, the following tools have been proposed:

- Analyze the insurance needs compared to producers' demand (qualitative);
- Propensity Score Matching to evaluate the impacts of agricultural insurance;
- HPM for the analysis of the demand in terms of « willingness to pay ».

3.5. Composing the analysis teams

The following Table presents the teams constituted for the different themes.

Table N°2: Composing the data analysis teams

Note: Structures in bold are accountable to deliverables (documents) to PAPA

ANALYSIS THEMES	ANALYSIS TEAMS		
Competitiveness of local rice			
• Production	FASEG, BAME, DAPSA, ANSD, DRDR, IFPRI		
• Processing	BAME, DAPSA, MSU		
• Marketing	BAME, ANSD, MSU, DAPSA		
Consumption	BAME, DAPSA, ANSD, FASEG, MSU, IFPRI,		
Competitiveness of			
millet/maize/sorghum			
Production	DAPSA, FASEG, BAME, ANSD, DRDR, IFPRI		
Processing	BAME, DAPSA, MSU, IFPRI		
Marketing	BAME, ANSD, MSU, DAPSA, IFPRI		
Consumption	BAME, DAPSA, ANSD, FASEG, MSU, IFPRI,		
Competitiveness of fruits and			
vegetables			
Production	CRES, FASEG, BAME, DAPSA, ANSD, ENSA		
Processing	CRES, BAME, DAPSA, MSU, IFPRI, ENSA		
Marketing	BAME, ANSD, MSU, DAPSA, ENSA		
Exports	BAME, DAPSA, ANSD, FASEG, IFPRI, ENSA,		
Consumption	BAME, DAPSA, ANSD, FASEG, ENSA, MSU		
Seeds value chain in Senegal	BAME, UGB, ASPRODEB, MSU, DAPSA, FASEG,		
	DRDR, IFPRI		
Fertilizer sector in Senegal	CRES, DAPSA, BAME, DRDR, IFPRI		
Mechanization sector	CRES, DAPSA, BAME, DRDR, IFPRI, MSU		
Contract farming	BAME, UGB (SM), ENSA, DAPSA, MSU, IFPRI		
Agricultural insurance	DAPSA, UGB (SM), BAME,		
Water control	DAPSA, UGB, IFPRI		
Strategic options	CRES, BAME, FASEG, DAPSA		

The teams for the different categories are composed of Network members, national experts who are not members of the Network, and researchers from IFPRI and MSU. So, for each research theme,

the structures volunteered to collaborate in the analysis process and deliver to PAPA the planned documents for publications (see Annex).

4. Conclusion

During the closing ceremony, the IFPRI Director for Africa gave his thanks to all the participants for their important contributions to the success of the workshop. He also expressed his wish that this meeting be the first of a long series to put together national and international expertise in order to answer the research questions for the benefit of Senegalese agriculture.

The coordinator of PAPA Project also thanked all the participants for their involvement all along these activities. She recalled the importance of the present step which launches the data analysis process to generate policy options for MARE. She restated her hope that the expertise present at this workshop will contribute to the production of quality policy options.

ANNEXES

Annex 1 (PowerPoint presentation of the research questions—in French)

Annex 2 (PowerPoint presentation of the questionnaires' summary—In French)

Annex 3 (Types of PAPA publications)

Types de	Audience	Nombre	Contenu	Validation	remarque	Support
publication		page*			s	
0. Agriculture sénégalaise en chiffres	Personnel technique , décideurs B, A	4 - 6	 Résultats d'analyses descriptives de données 	Réseau local d'expertise en analyse des politiques	Lecture par des personne s ressource s	électroniq ue
1. Note politique	Décideurs A, B	4-5	 Etat des lieux Enjeux politiques Orientations stratégiques 	Plateforme de dialogue	Validation au sein du cabinet	électroniq ue
2. Note d'inform tion	Décideurs a B, A	10-15	 Etat des lieux Problématique Principaux Résultats Perspectives/ori entations 	Réseau local d'expertise en analyse des politiques	Lecture par des personne s ressource s	Impression limitée à 250
3. Documer t de travail	a Analystes et chercheur s	25 - 30	 Revue bibliographique Etat des lieux Problématique Approche méthodologique Résultats d'analyses Conclusions générales 	Comité de lecture scientifique	Rapport d'étape détaillé sur une thématiq ue donnée	électroniq ue
4. Rapport techniqu e	Large distributi on	50 - 60	 Revue bibliographique Etat des lieux Problématique Approche méthodologique Résultats d'analyses Conclusions générales 	Revue externe Atelier technique de validation	Documen t de travail amélioré et finalisé (documen t phare du projet)	Impression limitée à 100

5.	Publicatio		-		
	ns dans				
	des				
	revues/				
	journaux				
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Annex 4 (List of the participants to the workshop)

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