



सत्यमेव जयते

Economic Diplomacy Division  
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सत्यमेव जयते

EMBASSY OF INDIA  
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भारत का राजदूतावास  
डाकार

# THE TEXTILES SECTOR IN SENEGAL AND BUSINESS

## Opportunities for Indian Industries



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## Acronyms and Abbreviations

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ADEPME	Small and Medium Enterprises Development and Management Agency
AGOA	African Growth and Opportunities in Africa Act
AGS	Accelerated Growth Strategy
APIX	Investment Promotion and Construction Works
APROSI	Industrial sites promotion agency
ASEPEX	Senegalese export promotion agency
BCEAO	Central Bank of West African States
BNDE	National Bank for Economic Development
CCV	Cotonnière du Cap-Vert
CET	Common external tariff
CFCE	Lump-sum contribution to be paid by the employer
CGI	General Tax Code
CIF	Cost insurance freight
CNCAS	National Fund for Agricultural Loans
CPI	Presidential Investment Council
DAGRIS	Development of Agro-Industries of the South
DD	Customs duty
DOMITEXKA	Domaine Industriel Textile de Kahone
DPI	Prerequisite Import Declaration
ECOWAS	Economic Community of West African States
ENSEMA	Senegalese warehouses in Mali
FIKA	International Fair of Kaolack
FNPC	National Federation of Cotton Producers

FONSIS	Fonds souverain d'investissements stratégiques
GDP	Gross domestic product
GEOCOTON	Groupe agro-industriel spécialisé dans le développement de la culture cotonnière en filière intégrée
IHPI	Harmonized Industrial Production Index
NSTS	New Senegalese textile company
PCI	Community Solidarity Levy
PSE	Senegal Emergent Plan
RS	Statistical fee
SME-SMI	Small and medium-sized enterprises - Small and Medium Industries
SODEFITEX	Société de Développement et des Fibres textiles
SODIDA	Industrial Domain Company of Dakar
SOSEFIL	Société Sénégalaise de Filterie
SOTEXKA	Société Textile de Kaolack
SOTIBA	Société des Tissus de Bleaching et d'Apprêt
USD	United States dollar
VAT	Value added tax
WAEMU	West African Economic and Monetary Union
WTO	World Trade Organization

## Analytical Summary

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The textile industry in Senegal is little developed and is struggling to stabilize. The external balance of this sector is very deficient. In fact, imports of textile / clothing products generally exceed ten times the amount of exports. Senegal therefore relies heavily on its bilateral trading partners, usually Western and Asian.

Transformation companies in place are very little equipped with advanced technology. However, the sector benefits from a strong skilled workforce and at a lower cost. Openness to regional and international markets is also a major opportunity for the sector, as well as the country's industrialization policy through the Senegal Emergent Plan (PSE). The low productivity of the sector and the Chinese competition are the main bottlenecks of the sector. The challenge of the availability of inputs and energy resources remains to be met.

The entry into the sector and the establishment of new foreign units could materialize through three main axes:

- ✓ the installation of processing units at the cutting edge of technology;
- ✓ support for production in the form of improvement of the cotton sector and
- ✓ support for the training of young people and exploitation of the country's strategic position open to international and sub-regional markets.

Local financial institutions such as the National Bank for Economic Development (BNDE) and the National Fund for Agricultural Loans (CNCAS) are ready to support the development initiatives of the sector especially when they promote the development of local agriculture.

## 1. Overview of the textile industry in Senegal

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### 1.1. General look

The Senegalese textile sector, which was very dynamic, is now experiencing some difficulties. Factories such as SOTIBA, ICOTAF, COTONNERIE DU CAP VERT, NSTS, SOTEXKA, etc., which were the flagships of the Senegalese textile industry, have problems, if they have not simply put the key under the doormat. Besides, the few companies that operate must also face the competition from imports.

Unlike the industrial sector, cotton is still growing well in Senegal. The sector brings significant foreign exchange into the country and is one of the five clusters of the Accelerated Growth Strategy (AGS) on which Senegal counts as an emerging economy. Meanwhile, while the "Senegalese label" is trying to make its way, the law on Growth and Opportunities in Africa (AGOA) broaden the outlook.

*"Senegal has an established industrial culture in this field, ranging from cotton growing to garment making, ginning, weaving, spinning, knitting and finishing. There is a large amount of cotton available in the country and opportunities to create spinning mills,"* according to the Agency for the Promotion of Investments and major works (APIX SA).

According to the French Agency for International Business Development (UbiFrance) and the French economic mission in Senegal, cotton production is estimated for the 2008-2009 season at 21,000 tons<sup>1</sup> of lint, against peaks of 50,000 tons before.

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<sup>1</sup> Source: Journal l'observateur | March 13, 2009 / [http://www.seneweb.com/news/Economie/textile-s-n-galais-grandeur-et-d-cadence-d-un-secteur\\_n\\_21637.html](http://www.seneweb.com/news/Economie/textile-s-n-galais-grandeur-et-d-cadence-d-un-secteur_n_21637.html)



Clothing, textile spinning, weaving and textile finishing are the key sectors of the textile and leather industry with respective shares in the total weight of this branch of 53.4% and 36% respectively 6% (IHPI Renovation Survey, 2015)

## 1.2. Situation of cotton production in Senegal from 2000 to the present day

In 2012, cotton represented 1.4% of Senegal's GDP, while agriculture as a whole accounted for 7.4% of GDP. Cotton is one of Senegal's "top 10"<sup>2</sup> export products according the Director of SODEFITEX. In taking stock of the 2012/2013 cotton campaign, Bachir Diop, Head Manager of SODEFITEX (*Société de Développement et des Fibres textiles*), expressed his satisfaction. Indeed, **32,248 tons**<sup>3</sup> of seed cotton were collected in 2013, representing a 27% increase in production compared to the 2011/2012 season and 23% compared to the average of the five previous seasons (2006-2011). The average agronomic yield obtained is **957 kg/ha**, 12.06% higher than the average yield of the last five years. This production enabled **41,084 cotton** farmers belonging to 23,855 family farms to have an income of **5,212,110,603 FCFA** which corresponds to a net income per ha of 150,000 FCFA (after withdrawal of agricultural credit).

These 32,248 tons of seed cotton in 2013 enabled SODEFITEX, the main ginning company, to produce some 13,641 tons of fibre in 62,148 bales of cotton fabric in the ginning plants of Kahone, Kédougou, Tambacounda, Velingara and Kolda, with a ginning yield of 42.29%. They have also ginned 17,530 tons of cotton seeds, most of which are excellent livestock feed, rich in protein and energy, which contributes greatly to the added value of the Senegalese livestock sector.

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<sup>2</sup> <http://www.senepius.com/article/le-grand-retour-du-coton>

<sup>3</sup> Source : VIPEOPLE.NET : General Senegalese news site <https://www.vipeoples.net>  
Published on Sunday 5 May 2013, Interview with the Director General of SODEFITEX

According to Bachir Diop, (*in an interview with the information website Vipeoples.net*), a value of **4,177,000,000 FCFA** of agricultural inputs was used with a subsidy of 1 billion FCFA from the State (23.94%). The State subsidy for inputs made it possible to reduce the cost of the technical package per hectare, which went from 101,900 FCFA in 2011/2012 to 96,395 FCFA in 2012/2013 (it would have been 119,470 FCFA without subsidy). In addition, the State granted support of 752 million FCFA to maintain the producer price at 255 FCFA/kg, despite the drop in the world price which was expected to result in a drop in the producer price of 25 FCFA per kg, which would have broken the momentum of recovery.

### 1.2.1. Level of employment in the cotton sector

The 41,000 cotton farmers (see above) appreciated this State support, which contributed greatly to these performances. But beyond the figures, the cotton sector directly supports nearly 250,000<sup>4</sup> people.

Five ginning plants are the economic lungs of the cities of Kahone, Kedougou, Tambacounda, Velingara and Kolda and employ 270 permanent and nearly 400 seasonal workers. It is a structuring sector which, thanks to the link between farmers and the world market and their access to agricultural credit, constitutes an essential factor in the modernisation of family farms. Through literacy and vocational training in national languages, it has enabled the creation of new rural occupations. It has a ripple effect on grain and livestock production on family farms.

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*Jobs generated by cotton cultivation: 250,000 people absorbed by the cotton sector in 2013*

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<sup>4</sup> Source: senepus economy : Interview with the Director General of SODEFITEX  
<http://www.senepus.com>; Publication 01/05/2013

The major problem that must be solved in order for the industry to complete its recovery and reach the saturation of the industrial potential installed. Sodefitex (65,000 tons or more), is the resolution of the equation of over-indebted cotton growers. The cotton farmers are still historically have ensured a repayment rate of 96 to 98%. It is now a question of reversing this trend, regaining the producers left on the quay and restoring the productivity that placed Senegal among the best yields in West and Central Africa and the highest incomes per hectare for cotton farmers.

### 1.2.2. Production of cotton over the recent period

It should be noted that in recent years, particularly in 2016, cotton production has fallen substantially. The main cotton ginning company, SODEFITEX, was only able to harvest some 16,000 tons of cotton in 2016, out of a target of 40,000 tons. In 2015, it produced 20,000 tons of cotton according to an interview given by the General Manager of SODEFITEX to the economic magazine Jeune Afrique on 28 February 2017.

Also, compared to the 2016-2017 season, cotton production has reached its lowest level of 15,000 tons.

This fall is due to two main reasons:

- The first is economic: groundnut prices, which are more profitable, have led to a drop in sown areas for cotton. Indeed, the price of groundnuts has been much more favourable in recent years because of the intervention of Chinese traders in Senegal.
- The second reason for the decline in cotton production is linked to the climate, with a late start to the rains which, moreover, fell in small quantities. It should

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<sup>5</sup> Jeune Afrique Economic Magazine: Published on 28 February 2017.  
<http://www.jeuneafrique.com/407994/economie/coton-production-de-sodefitex-a-baisse-2016/>

be noted that cotton has a cycle of 130 days, so rainfall from June to October is required for it to yield more than one tonne per hectare. In 2016, June was completely dry and the rains stopped at the end of September. Including Tambacounda (in the east), the country's main cotton production area.

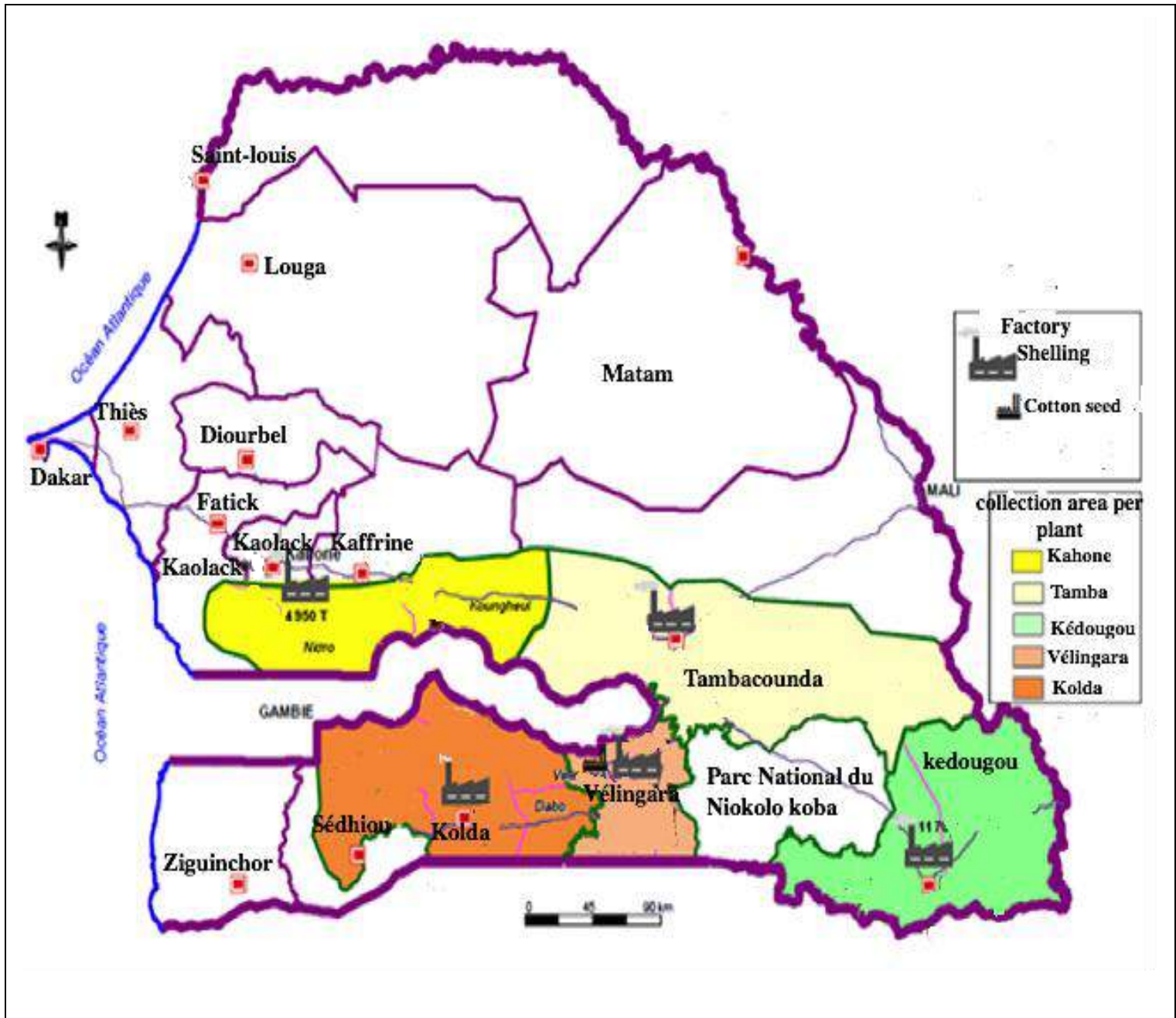
### 1.2.3. Cotton production areas

According to the official website of SODEFITEX:

Commonly called "*Cotonnière Zone*" or "Southern Third", the SODEFITEX intervention zone covers the natural regions of Eastern Senegal, Continental Casamance and Southern Sine Saloum (administrative regions of Tambacounda, Kolda, Kedougou, Sédhiou, Kaffrine and southern Fatick and Kaolack regions). In order to adjust its strategies, develop and implement suitable technical itineraries, SODEFITEX defines an operational breakdown distinguishing two major poles for securing supplies of agricultural products (the Sine-Saloum pole and the Fouladou pole) and an agroclimatic zoning that distinguishes a southern zone, a Median zone and a Northern zone with homogeneous climatic, edaphic, socio-economic and demographic characteristics. Most cotton production comes from southern areas. SODEFITEX has also invested in irrigated cotton's culture in the Anambe basin and in Podor.

One can thus apprehend the zones of cotton culture through the cartography below:

Mapping cotton production <sup>6</sup>



Source: SODEFITEX

<sup>6</sup> SODEFITEX <http://www.sodefitec.sn/index.php/fr/lentreprise/presentation/zones-de-culture>



#### 1.2.4. Policy to revive the cotton sector in Senegal in 2018

A real cotton reconquest mission is being conducted in Senegal. It is accompanied by a radical change in the State's support policy for the cotton sector.



Indeed, the price of cotton to the producer was fixed in agreement with the National Federation of Cotton Producers (FNPC) at **300 FCFA<sup>7</sup> per kilo (€0.46)** for the **2017/2018** season. By far the highest producer price in the sub-region and

45 FCFA more per kilo compared to 2016/2017.

There has been a change in policy because the Senegalese State decided in consultation with the actors of the sector - the FNPC (*National Federation of Cotton Producers*) and SODEFITEX - to put an end to subsidies to inputs, i.e. **1.4 billion FCFA (€ 2.13 million)**, and to defer this amount on the purchase price of cotton to producers, up almost 18% in 2017/2018.

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<sup>7</sup> Source: Journal le soleil published on November 18, 2017 : SODEFITEX launches agricultural product purchasing campaign [www.lesoleil.sn/.../72339-campagne-de-commercialisation-2017-2018-la-sodefitex-de](http://www.lesoleil.sn/.../72339-campagne-de-commercialisation-2017-2018-la-sodefitex-de)

Poor rainfall over the last three seasons and the ever-increasing appeal of groundnuts, whose price is more profitable following strong Chinese demand, pushed cotton production to a low level 15,000 tons in 2016/2017.

In the end, input subsidies were very often diverted, as inputs were bought back from producers to be sold in countries bordering the cotton zone. Illegal trafficking to the detriment of cotton cultivation, observes Bachir Diop, Director General of Sodefitex.

A more attractive producer price, but also the introduction of crop insurance against rainfall deficiency, all or part of which is subsidised, should enable SODEFITEX to recover. In 2017/2018, the objective is to sow 30,000 hectares and produce 25,000 tons of cotton, says Mr. Bachir Diop, Director of SODEFITEX. An intense communication campaign, including radio spots in different languages, is also being conducted to convince farmers to grow cotton again, according to the Senagriculture publication: 1st information portal on agriculture and livestock in Senegal. (Posted on July 11, 2017).

### **1.3. Different sub-sectors**

#### **1.3.1. The fibres.**

Essentially, cotton-fiber is marketed by SODEFITEX. It produces 17,000 tons<sup>8</sup> of fiber per year on average. The crisis of the Senegalese spinning industry forces this company to export (to Africa, Europe, Asia and America) all its production. In the past, Senegalese mills absorbed up to 3% of production. With a drop in production (16,000 tons in 2015/2016 and 15,000 tons in 2016/2017), Senegal is a small producer compared with other countries in the sub-region: the latter all produce more than 100,000 tons of seed cotton per year (500,000 tons Mali, Benin 250,000 tons).

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<sup>8</sup> Source : SODEFITEX <http://www.sodefitex.sn/index.php/fr/produits/fibre-de-coton>

Cotton fibre is especially appreciated on the world market, by the length of the fibre (length of silk) which determines its value. However, cotton under rain cultivated in Senegal (as in the rest of the sub-region) is short cotton, unlike long cotton from Egypt or Peru. On the other hand, cotton production by irrigation generally produces long-silk cotton, which makes it possible to obtain, in a more profitable way, finer articles at the end of the fibre processing processes (spinning, weaving and knitting).

### 1.3.2. The processing industries.

They include spinning, weaving, knitting and finishing (dyeing, printing, bleaching and finishing). This part of the sector has been the most worrying since the mid-1980s. Indeed, most industries had a fleeting existence (SOTIBA, SOTEXKA, ICOTAF, etc.) because of poor management and lack of local supply.

In the cotton processing industry, Senegal has four companies: CCV/SOSEFIL, DOMITEXKA, COSETEX, NSTS. In this lot, most of them experience frequent production stoppages and seem to have a debt level that is not sustainable. Others are experiencing serious production problems, but continue to function as well as they can.

#### ❖ DOMITEXKA :

The companies SOTIBA (*Société des Tissus de Bleaching et d'Apprêt*) and SOTEXKA (*Société Textile de Kaolack*) went bankrupt and were taken over by the businessman Serigne Mboup, president of the Kaolack Chamber of Commerce. In October 2010, he was chosen by the government at the time to take over the assets and liabilities of



SOTIBA and SOTEXKA, from whose ashes he founded a new entity: *Domaine industriel textile de Kahone-Saloum* (DOMITEXKA-Saloum)<sup>9</sup>.

DOMITEXKA, which has taken over SOTIBA and SOTEXKA, is in turn facing enormous difficulties and threat of closure. This fragility is partly due to the State's failure to respect its promises to inject funds for an acceleration and recovery of the plant's activities.

Of the 7 industrial branches that make up the plant, only one operates and currently has 80 employees. However, workers want the government to support them in order to boost productivity. Because, according to the supply and logistics manager, with the relaunch of the 7 industrial departments that make up the estate, the plant can employ more than 1000 young people.<sup>10</sup>

Last news, during the 3rd edition of the International Fair of Kaolack (FIKA) held in this year 2018, the organizing committee of the fair planned a set of programs, including a visit to the factory DOMITEXKA. To this end, the Secretary General of the Ministry of Industry and Small and Medium Industry, representing the Minister of Industry and Small and Medium Industry, visited the company to assess its situation. At the end of his visit, he could see that only one of the 7 industrial departments is functioning and has a high potential market.

Faced with this situation, the Secretary General of the Ministry of Industry said that the State is in a perspective of relaunching the activities of the DOMITEXKA plant.

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<sup>9</sup> <http://senbataxaal.blogspot.sn/2014/01/reprise-de-la-sotexka-et-de-la-sotiba.html> publié samedi 18 Janvier 2014

<sup>10</sup> [http://www.seneweb.com/news/Economie/fika-l-etat-veut-donner-un-nouveau-souff\\_n\\_237968.html](http://www.seneweb.com/news/Economie/fika-l-etat-veut-donner-un-nouveau-souff_n_237968.html)

Better still, he adds that the government has decided to give a new breath to this industrial unit.

The manager of the company, Mr. Serigne Mboup took the company by signing a lease management agreement with the State. This assumes that the State is a shareholder in DOMITEXKA.

❖ NSTS

The New Senegalese Textile Company (NSTS) is modernising its production tool and plans to triple its labour force. A few years ago the company specialized in spinning was shaken by a serious financial crisis marked by the closure of factories for several years leaving 400 workers in disarray.<sup>11</sup>

Currently the company is in the process of resuming growth following the signature of a memorandum of understanding which has made it possible to remove the obstacles to the continuation of its industrial activities in the Thiès region. By supporting the government, the company to adopt a recovery plan aimed at improving the financial situation of the group and its industrial redeployment on the basis of its own capabilities. Productivity and competitiveness of NSTS products are expected to improve. The final objective of the plan is to enable the group to return to profitability as soon as possible and to guarantee its sustainability by exploiting Senegal's many assets. Moreover, the economic and social impact of the NSTS group's programmes is quite significant and its implementation will lead to the creation of 435 permanent jobs in the town of Thies, the processing in the long term and on the spot

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<sup>11</sup> Source : jeune Afrique publié le 03 décembre 2015 à 17h58

Lien : <http://www.jeuneafrique.com/mag/280380/economie/nouvelle-societe-textile-senegalaise-se-refait-jeunesse/>

of nearly 4,000 tons of cotton produced in Senegal and the increase in export earnings in foreign currencies.

According to the latest available information from *Jeune Afrique* report published in 2015, NSTS is expected to reach full capacity in the second half of 2016, with a turnover of CFAF 20 billion and an employment level of about 450 people (compared to 120 at that date). 80% of NSTS's cotton yarn production is exported (Morocco, Europe), with the remaining 20% going to local industry and crafts.

❖ *Cotonnière du Cap-Vert (CCV)*<sup>12</sup>

Among the traditional cotton processing factories (ICOTAF, SOTIBA, NSTS, SOTEXKA), only *Cotonnière du Cap-Vert (CCV)* and *Société Sénégalaise de Filterie (SOSEFIL)*, which belonged to French groups and were sold to Lebanese, have operated continuously. Located at Km 17 on the road to Rufisque, the company continues its activities with a staff of 150 to 200 employees and a share capital of 992 180 000 CFA F according to information recorded in the register of the Chamber of Commerce and Industry of Dakar (*edition 2017*).

### 1.3.3. Garment manufacturing

Apart from the DOMITEXKA garment factory located in Louga, this sub-sector mainly comprises about fifteen small and medium-sized enterprises - Small and Medium Industries (SME-SMI) moderately structured grouped at the level of the Industrial Domain Company of Dakar, (SODIDA). The sub-sector also includes small workshops operating in the fashion sector and thousands of individual tailors in all villages and towns of Senegal.

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<sup>12</sup> Source : journal Sud Quotidien

[http://www.rewmi.com/pole-industriel-politexka-a-kahone-un-mariage-de-raisons\\_a16712.html](http://www.rewmi.com/pole-industriel-politexka-a-kahone-un-mariage-de-raisons_a16712.html)

#### 1.3.4. Craft

Textile craftsmanship is an ancient tradition in Senegal. It is mainly done by women in the field of dyeing, often organized in associations. The problems encountered are similar to those of clothing, especially for the difficulty of finding fabric at the local level. This sub-sector impacts on tourism through the manufacture of ethnic products. Although it is classified as informal sector, it occupies a beautiful world: dealers of dyes and auxiliary products in the markets, helpers-dyers, "tappers" (after dyeing and drying, the fabric is typed by men, to the using sticks, to give it a shiny appearance).

## 2. End-to-end supply chain analysis<sup>13</sup>

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### 2.1. Input Providers

#### 2.1.1. Small producers of cotton

Agricultural inputs are essential in the Senegalese textile sector. Collective mobilization efforts by producers are recent. The cotton produced by these producers is of good quality but production is limited and the market is dominated by a buyer / reseller. (see section 1.2)

#### 2.1.2. Cotton Industries / Agricultural Inputs

SODEFITEX is the only cotton ginning company in Senegal. As an active partner, it collaborates with international agencies, supports crop diversification and offers services to suppliers. But the fall in the price of cotton caused large losses, as the company was forced to sell at the international market price.

Historically, SODEFITEX was a mixed economy company, first public then privatized, created in 1974 with the mission of developing the cotton agro-industry in Senegal, particularly in the agro-ecological regions of Eastern Senegal and Upper Casamance that are favourable to cotton growing.

The company's production plants are located in the Kolda, Tambacounda, Kedougou, Kaffrine, Kaolack and Fatick regions.

On November 13, 2003, SODEFITEX changed its corporate name to *Société de Développement et des Fibres Textiles*. At the same time, it came under the control of the DAGRIS Group (*Développement des Agro-Industries du Sud*), the new name of the CFDT

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<sup>13</sup> ARTISANAL TEXTILES VALUE CHAIN ANALYSIS, SENEGAL – STRATEGIC FRAMEWORK FOR SUBSECTOR GROWTH INITIATIVES, USAID, 2006.

(*Compagnie Française pour le Développement des Fibres Textiles*), now GEOCOTON after two years of negotiations. This new identity marks the company's anchoring in sustainable development. The company's capital increased from CFA 750 million to CFA 3 billion, distributed as follows:

- ✓ DAGRIS Group today GEOCOTON 51%.<sup>14</sup>
- ✓ Republic of Senegal 46.5%
- ✓ CBAO Attijari Bank 1.25 %
- ✓ CNCAS 1.25%.

It is planned that the Republic of Senegal will sell 20% of its shares to seed cotton producers and 10% to the company's employees.

SODEFITEX's essential mission is the development of the cotton agro-industry. To carry out this mission, it provides agricultural advice, training of cotton farmers, production and installation of certified cotton seeds, collection of seed cotton production, ginning and marketing of fiber and seed. SODEFITEX has an installed ginning capacity of 65,000 tons spread over five plants. It also has a modern chemical delinted seed production unit.

SODEFITEX offers two main products to its customers: cotton fibre and cotton seed.

Cotton fibre from Senegal has all the characteristics of a quality fibre. It has an excellent homogeneity of silk length, it is distinguished by its whiteness, is pure, silky and very resistant. All the bales produced are carefully packed in cotton canvas stamped with the SODEFITEX logo.

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<sup>14</sup> Source SODEFITEX / [www.sodefitex.sn](http://www.sodefitex.sn)  
Lien:<http://sodefitex.sn/index.php/fr/lentreprise/emploi/2-uncategorised/30-presentation>

SODEFITEX has 5 types of sales which are the reference for the marketing of Senegalese fibre. More than 80% of the production is divided into Sigal S and Sigal head types.

- **SIGAL S:** It is a white to creamy fibre, clean, shiny, with little or no preparation. SIGAL S is an excellent quality cotton with high strength, shine and well parallelised fibres. It corresponds to Standard 0 - sub-class 1 of the Africa standards.
- **SIGAL:** White to creamy cotton, shiny, slightly more pronounced than for SIGAL S, slightly loaded. SIGAL is a cotton with a white fibre with a high resistance, slightly loaded, with a more marked preparation than SIGAL S. It corresponds to Standard 1, subclass 1 of the African standards.

**Types of sales in Senegal**

STANDARD 0	STANDARD 1	STANDARD 2	STANDARD 3	STANDARD 4
SIGAL/S	SIGAL	TAMA SAVAL MAKO	SEVE	



The quality obtained thanks to the professionalism of the Senegalese cotton farmers and the SODEFITEX technicians, to a manual harvest carried out essentially with cotton bags, to a meticulous

sorting at harvest, and to the constant concern of a ginning which preserves and expresses the natural characteristics of the fibre while preserving it from any contamination confer it since several years, a world recognition.

The quality approach implemented as part of SODEFITEX's quality management system, certified ISO 9001 version 2008 (certification since March 2005), enables this quality to be maintained and consolidated. Today nearly 60% of Senegalese production is automatically graded bale by bale thanks to an integrated measuring chain based at the Tambacounda metrology and grading laboratory.

### 2.1.3. Small ginneries / cotton spinning processors

Small traditional processors are very few (falling demand). They offer interesting flexibility for processing small volumes of organic cotton, but labor intensity tends to result in non-competitive prices for finished products.

### 2.1.4. Spinning on industrial scale

COTONNIÈRE DU CAP VERT is the only industrial cotton mill still in operation. She buys cotton from SODEFITEX and transforms it into different varieties of yarn. Good market sense and responsiveness to customer needs on his part. But this activity is very expensive because it is in direct competition with Asian imports.

### 2.1.5. Importers/resellers

Importers/resellers provide an essential part of the inputs to artisans: dyes, fabrics, yarn, tools and equipment, haberdashery, etc. They have gained experience and an established reputation. Nevertheless, they are threatened by falling prices and competition from Asian imports.

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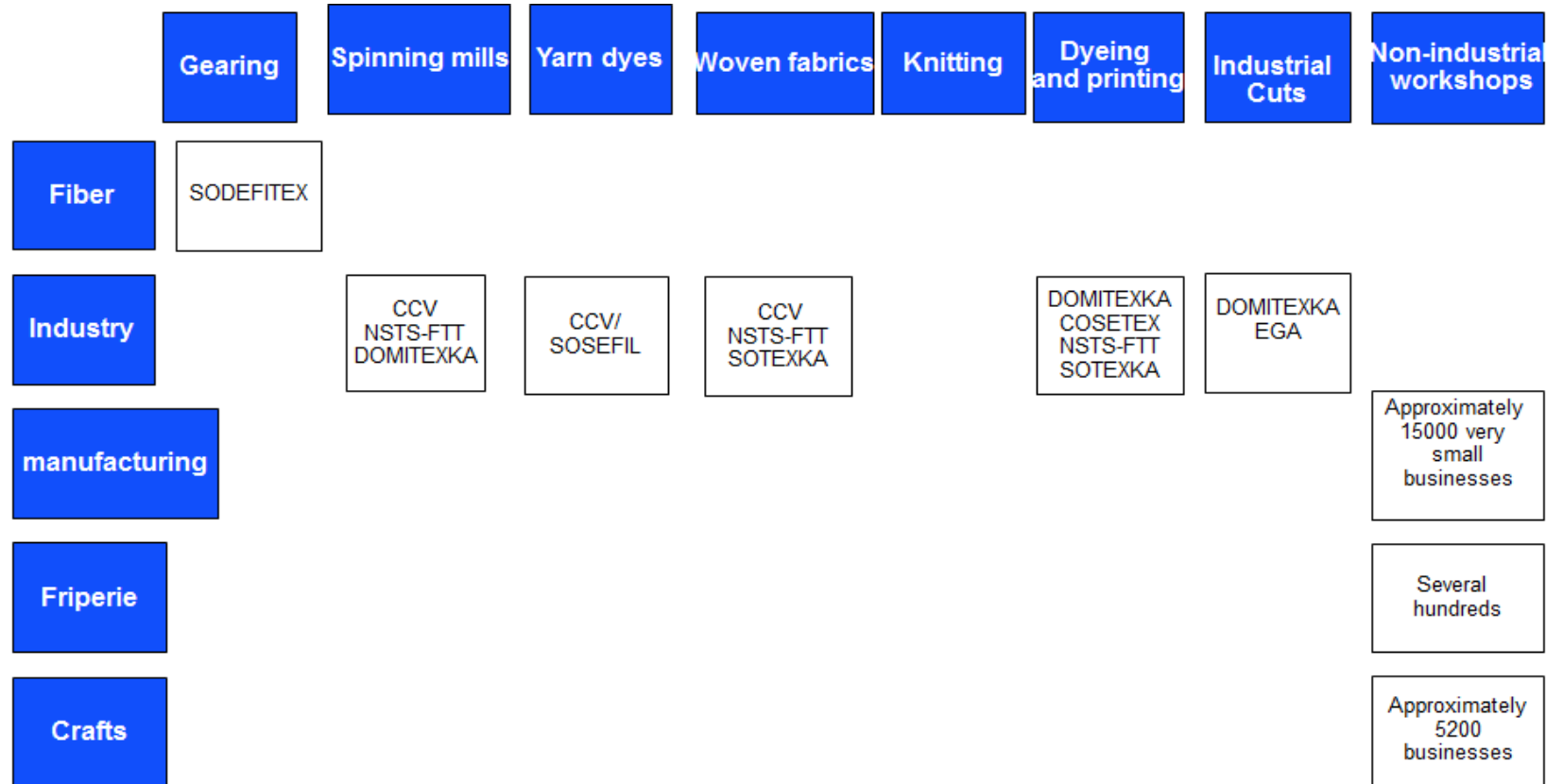
## *Textile sector simplified configuration in Senegal*

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The figure below gives an overview of the configuration of the textile-confection sector with the different actors involved.



The textile sector in Senegal and Business: Opportunities for Indian industries



Source : Gherzi Textile Organization

## 2.2. Producer and Processors

Composed of a wide range of actors and activities, this part of the value chain includes processes for adding value or transforming textiles (finished and unfinished products). Some actors integrate multiple functions (fashion designers combining weaving, printing and creating for example ready-to-wear, models).

### 2.2.1. Weavers

The weavers have a strong production capacity although their number is decreasing. Many are in the informal sector. They benefit from the national cultural value of weaving. However, the choice of threads remains limited in Senegal (material, colors, texture, etc.) and most of the products designed for the local market do not comply with quality standards and international trends. Therefore there is a lack of coordination and quality control.

### 2.2.2. Textile treatment

Micro and small companies practicing dyeing, printing, embroidery of fabrics, mainly imported, for resale to tailors in particular. Many are informal. These companies strongly rely on imported inputs, thus vulnerable to market fluctuations and importer relationships.

### 2.2.3. Sewing / clothing

Fashion designers, tailors and seamstresses produce both ready-to-wear and custom-made clothes sold in small shops in Dakar and its surroundings. Senegalese tailors and designers are famous in West Africa. But locally produced garments are becoming less competitive with imported goods.

### 2.2.4. Creators-entrepreneurs

Designers working in haute couture, interior design and fashion accessories, for the most part, run their own boutiques and workshops integrating weaving and other processing processes. Very involved in the promotion of Senegalese creation, these creators are mostly women. Credit institutions are quite reluctant to lend in this sector and despite local success, creators are struggling to stay in export markets.

## 2.3. Actors of the distribution

Textile products are distributed through wholesalers, specialized and super-market stores and retailers in major city markets.

### 2.3.1. Wholesalers/Retailers

Wholesale traders are mainly found in the Dakar markets (Sandaga market, HLM market). Many of them work in the informal sector. They are mainly found upstream of the distribution of fabrics and clothing. With the closure of some department stores, wholesalers distribute mostly imported fabrics. Among their customers are almost all retailers in the clothing markets and SMEs. Some even have the exclusivity of school fabrics to the detriment of specialty stores. Their prices are very flexible, because they prefer modest margins to avoid having to bear storage charges and to face police and customs "hassles".

### 2.3.2. Specialized stores

The number of stores specialising in the sale of textile products is considerably small.

### 2.3.3. Supermarkets and retailers

Supermarkets and retailers in the markets provide the relay in the distribution of textile products, especially low and mid-range products. Some local SMEs use the supermarkets channel to sell their products. Direct imports from supermarkets and retail traders are low, many of them prefer to source locally from wholesalers or specialised shops.

Retailers are the main distributors of products from the informal sector and smuggling industries. Very flexible in their prices, they managed to retain the less well-off layers. Some of them market quality products, obtaining supplies during the trips they make abroad. Products that enter "clandestinely" because very often hidden to deceive the vigilance of customs officers, which puts specialized stores at risk.

In addition, Senegal has several sophisticated hand-woven shops, craft markets, tourist and informal markets and several local seasonal fairs. However, textile retailers are quite

dispersed and it is not easy for visitors to know where to find what they are looking for. Few retailers have a marketing strategy to attract customers.

#### 2.3.4. Exporters

Many producers export value-added products directly to international customers. Some independent exporters have developed their own international customers and others act on behalf of foreign importers, offering integrated services to the industry. Legal export procedures are rather favorable in Senegal. But the options for packaging and labeling are limited and often of poor quality.

#### 2.3.5. Agents / Carriers

Freight forwarders play a vital role in exporting (administrative procedures, customs, etc.). Many exporting producers, however, complain about the opacity and complexity of the logistics of these actors.

#### 2.3.6. Industrial spinning

Importers of artisanal textile products from Senegal have sought to smooth the distribution chain by putting articles directly on the retail market. Importers often provide integrated services to creators and producers (product development, market information, etc.).

## 2.4. Clothing trends in Senegal

The clothing market is extremely dynamic in Senegal with a structure characterized by a predominance of imported products that monopolize a large share of the ready-to-wear market.

On the supply side, there has been a steady increase in clothing imports from emerging countries (China, India, etc.) and an increase in local points of sale. The market is highly competitive with a standardization of the offer and few Senegalese brands that really do not have the means for mass production (designers' brands).

In addition, the clothing market can be subdivided into three main segments according to styles of clothing and occasions: the two styles of clothing that predominate are the

traditional (Boubou in basins fabric and clothing in loinclothes) which remains highly prized by the local population for events (weddings, baptisms, religious celebration...)



and casual which remains the everyday dress.



Imports from emerging countries give pride of place to the latter style, which remains highly prized by the young segment of the population. Clothing commonly referred to as "in fashion" completes the picture. These are costumes, dresses, suits and others that are generally aimed at an active population and major events (gala evenings...)



Today, local production is focused on the traditional segment for several reasons: already the availability of raw materials in sufficient quality and quantity; indeed most of the fabrics used are from local production or come from Mali, to this can be added the know-

how of designers who have renowned expertise in terms of launching trends and quality of work.

Moreover, the manufacture of traditional garments remains a difficult sector to penetrate by foreign competition and demand is fully covered by supply.

Also, the fragile brands try to present an interesting and especially coherent offer in terms of quality but the main difficulty remains the lack of resources and strategic planning. To this, is added the equation of the distribution network since two options are proposed to the brands:

1. Getting distributed by ready-to-wear stores;
2. To set up its own distribution network

The first solution offers the advantage of benefiting from a network already established and especially immediately operational, however opting for this form of distribution by intermediary complicates the control of the final selling price to the customer and especially the merchandising of products (presentation, referencing...). In addition, the deployment of a sales force is essential to convince shops to reference products.

The second solution is the most interesting because it allows you to have complete control over selling prices; merchandising and product presentation in stores, but also allows you to control all the moments when the consumer will be in contact with the brand, thus establishing a one-to-one Marketing that will build customer loyalty and also better understand their expectations, which is the prerequisite for launching new products and trends. No Senegalese casual brand currently has its own distribution network because it requires substantial fixed assets.

However, the market remains very dynamic and offers a fairly attractive return on investment provided, of course, that the offer is consistent with consumer expectations and, above all, the market structure. Moreover, the increase in demographics combined with the emergence of a young class with considerable expenditure on clothing augurs well for the market, both in terms of growth in demand and in terms of an increase in the share of income devoted to clothing for young people.

### 3. Major players and competitors

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#### *Textile industry, China a giant that positions itself in Diamniadio<sup>15</sup>*

In addition to local units, China is trying to explore the Senegalese textile landscape.

Indeed, the Chinese C&H Garment Company Group plans to build an industrial garment manufacturing unit in Senegal for an investment of about 25 million dollars<sup>16</sup>. This project, which is part of the Senegal Emergent Plan (PSE), will be located in the Diamniadio industrial park.

Within this framework, an agreement in the form of a Memorandum of Understanding (MoU) has been signed between APIX and the company's management.

In addition to contributing to the development of the Diamniadio platform, this unit should densify the industrial fabric, create a subcontracting framework with the local private sector and diversify exports. In addition, the project would be likely to generate a significant transfer of technology beneficial to the development of the textile sector in the country.

The terms of the agreement concluded with APIX indicate that 1000 jobs will be created from June 2016, with a commitment to export the first containers to international markets. On the Senegalese side, the authorities highlighted the opportunities of the integrated WAEMU market, the availability of manpower and Senegal's strategic proximity with importing countries, particularly the United States and European Union countries.

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<sup>15</sup> DAKAR ACTU PUB

[https://www.dakaractu.com/Le-PSE-en-marche-le-groupe-chinois-C-H-va-construire-une-unite-de-confection-a-Diamniadio\\_a92843.html](https://www.dakaractu.com/Le-PSE-en-marche-le-groupe-chinois-C-H-va-construire-une-unite-de-confection-a-Diamniadio_a92843.html)

<sup>16</sup><https://www.agenceecofin.com/investissement/0807-30454-senegal-le-chinois-c-h-garment-va-construire-une-usine-textile-a-diamniadio>

For the Chinese firm, this investment is the first in a series of projects in Senegal in the industrial sector and in several sectors. This option will result in a gradual increase in jobs created, which could reach 50,000 workers.



## 4. Trades Analysis

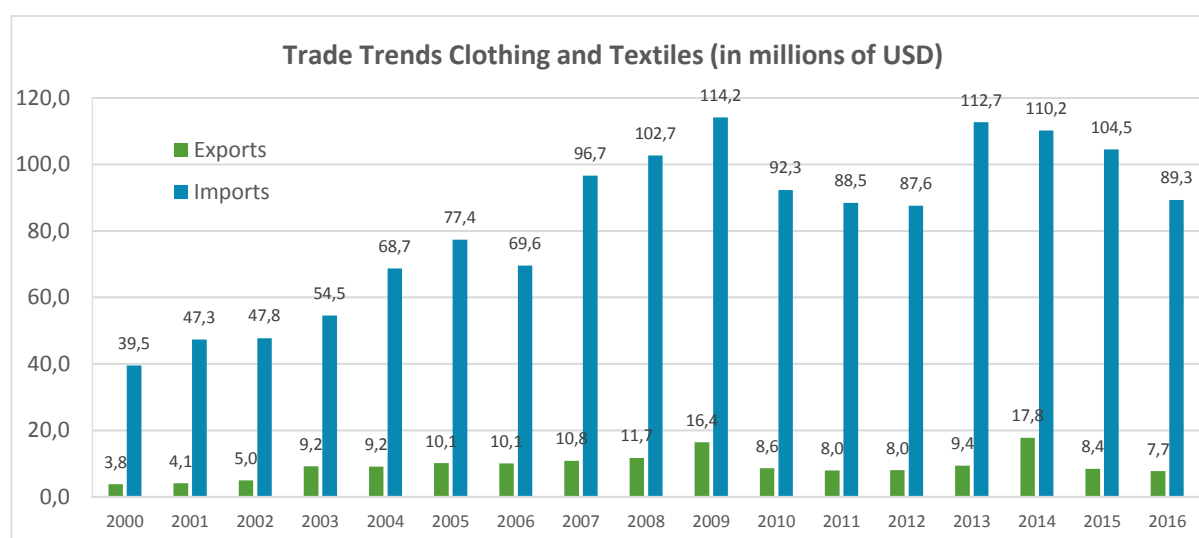
Senegal has a strong tradition of textile processing industries that were among the first in West Africa and exported a large part of the production.

Thus, we distinguish two major axes in the Senegalese export offer :

- The sub regional axis: In this zone, Senegalese production of non- buttonhole clothing and accessories is mainly intended for Gambia, Burundi, Mali and Burkina Faso.
- The international axis: the production of clothing and accessories other than buttonholes is exported respectively to the United States of America and France.

Senegal's trade balance in the textile/clothing sector is however, very deficient. In 2016, imports were worth more than 10 times the exports.

It should also be noted that the volume of trade experienced a trend increase between the years 2000 and 2009. There is a period of decline/stagnation between 2010 and 2012, then a small recovery in 2013. This recovery, however, struggles to stabilize so whereas in 2016 the value of imports amounts to 89.3 million USD against 7.7 million USD for exports.

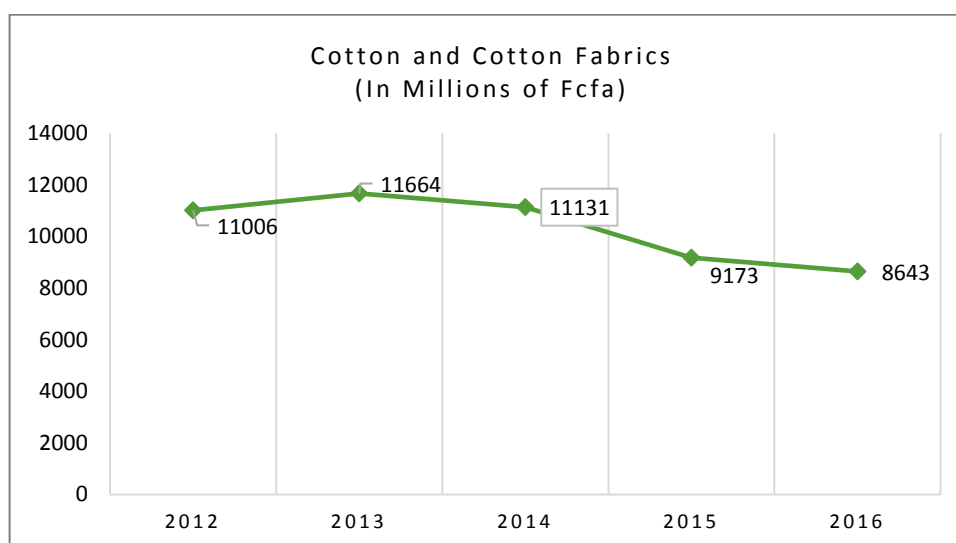


Source: WTO database

### 4.1 Structure of textile exports

The trend in Senegal's exports of cotton products declined over the period under review in line with the crisis in the sector and rainfall. From 11 664 CFA million in 2013, exports

of cotton and cotton fabrics dropped substantially to 8 643 million in 2016, down from 9 174 million in 2015. Between 2013 and 2016, the value of exports fell by more than 25%, reflecting the difficulty faced by the cotton sector.



Source: ANSD

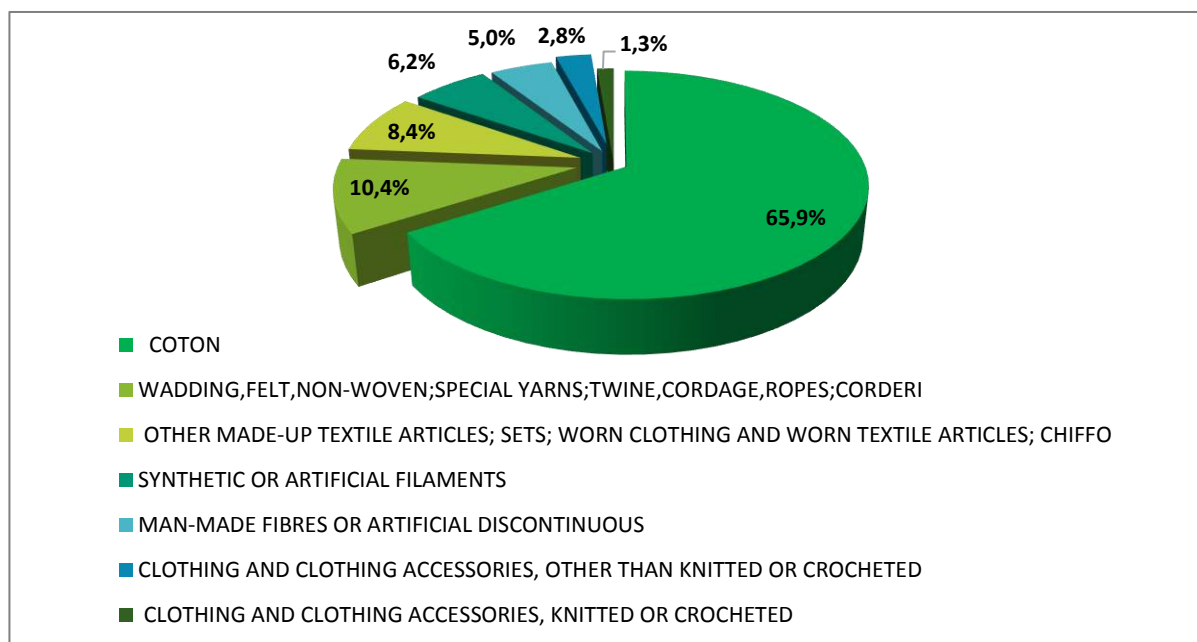
#### 4.1.1. Share of Cotton and other textile products in exports

At this level, it should be noted that exports of textile products are largely dominated by cotton with an amount of 9 billion CFA francs, or 65% of exports and a quantity of 12,709,949 Kg in net weight. The cotton exported consists mainly of ginned and unginned cotton (see Appendix). Apart from cotton, Senegal exports other textile products in particular:

- Wadding, felt, non-woven, special yarns, twine, cordage, rope and cables, representing 10.4% of textile exports (about 1 billion CFA)
- Other made-up textile articles; sets; worn clothing and chiffo (1 billion CFA).
- Synthetic filaments or articles.
- man-made staple fibres
- Articles of apparel and clothing accessories, other than knitted or crocheted  
Clothing and clothing, knitted or crocheted.

It is obvious that in value, exports would be more important because some producers, especially designers, export through informal channels.

Share of various textile products exported in 2015



Source: ANSD

The information collected from the National Agency for Statistics and Demography (ANSD) identifies 10 main destination countries including BENGLADESH at the head with a value of **5,831,232,723 FCFA**. Below are the top ten exporting countries.

Senegal's main customers of textile products (Exports in 2015)

N°	COUNTRIES	Exports in FCFA	Exports in USD
1	BENGLADESH	5 831 232 723	9 865 053
2	MALI	1 985 873 291	3 359 623
3	MALAYSIA	894 813 841	1 513 811
4	FRANCE	727 869 510	1 231 381
5	<b>INDIA</b>	<b>634 721 064</b>	<b>1 073 796</b>
6	MAURITANIA	515 856 666	872 706
7	REPUBLIC OF GUINEA	465 400 221	787 346
8	MAROCCO	403 297 810	682 284
9	GAMBIA	369 834 302	625 671
10	PORTUGAL	303 699 370	513 787

\*Dollars exchange rate: 1USD=591.1CFA

Source : ANSD (2015)

#### 4.1.2. Reasons for the sector's low export competitiveness

The export potential of the Senegalese textile industry is still struggling to stabilise with a roller-coaster ride over the last decade. In the opinion of the sector's economic operators, the sector's poor export performance is due in order:

- ✓ Lack of market information;
- ✓ Lack of business contacts;
- ✓ Lack of financial support;
- ✓ Low demand from the sub-region (in relation to the low competitiveness of Senegalese products).

The fourth point should be put into perspective because many operators in the sector feel that they have no export experience; they also feel that they are not sufficiently prepared to conquer foreign markets because they already find it very difficult to establish themselves on the local market. This opinion confirms what we might call the failure of the Senegalese textile and garment industry to seize the opportunities offered by AGOA.

Indeed, Senegal, like other sub-Saharan African countries, has been eligible since May 2000 for the American initiative which allows textile products to enter the American market duty free. This initiative also aims to expand exports from African countries and develop industrial potential in the textile and clothing industry. But to date, many eligible countries have succeeded in increasing their exports to the United States. This is not yet the case for Senegal.

#### **Note on the US initiative<sup>17</sup>**

The signing of the African Growth and Opportunity Act (AGOA) in 2000 demonstrated the U.S. government's commitment to forging closer economic ties with Africa. Today,

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<sup>17</sup> <http://www1.rfi.fr/fichiers/MFI/EconomieDeveloppement/301.asp>

more and more countries are trying to participate in the initiative, which is expected to offer import benefits to products from 34 countries in sub-Saharan Africa.

Export to the United States without being subject to customs duties or import quotas. That is what AGOA promises the lucky elected officials. However, the countries concerned must meet several conditions, in particular accept a reform of their economies to protect the right to private property and minimize state control over prices and production structures. In short, it is a question of establishing a market economy that is not only strongly modelled on the US model but also creates a "favourable environment for US investment". A lowering of tariff barriers for the United States is therefore called for, but also the assurance of political pluralism, a fight against corruption and the existence of social programmes.

Various reasons have been put forward to explain this failure. Among these are the expected lack of government support for the sector and the inability of the textile and clothing industry to meet orders from the American market. According to some operators in the sector, large orders from the American market in t-shirts and handmade items have not been satisfied to date. The sector thus pays a very heavy price for the absence of a real development and export promotion policy.

#### 4.1.3. Export recovery strategy

In view of this situation, the public authorities should set up a commercial strategy aimed primarily at conquering markets in the subregion. It is also the wish expressed by many operators in the sector, to conquer a market that is within their reach. A first action (more general for all other sectors) would consist in setting up an information system on markets in the sub-region. An initiative that could lead chambers of commerce to meet the expectations of their citizens.

Specific actions in the sector include:

- ✓ Selection of a core group of leaders who should serve as a pillar of the business strategy;
- ✓ The supervision and training of this elite;

- ✓ Support for the modernisation of equipment to improve quality;
- ✓ The creation of a purchasing centre both for the supply of raw materials and for better access to foreign markets;
- ✓ The creation of a support fund for companies in the sector.

All these actions can be part of a project to set up a collaboration or network platform of companies in the textile sector. A model of collaboration and networking aims to:

- Optimization of the production-distribution chain;
- The loyalty of the supply, distribution and logistics networks;
- And then a reduction in time and costs.

It enables operators in the sector to make the most of each other's complementarities, to face competition from imported products and to conquer foreign markets.

The first phase is to identify a few leading companies (well-structured industries, talented garment manufacturers, etc.) that can benefit from specific actions to improve their production and management capacity and, as a result, draw the smallest companies in the sector through subcontracting. The second stage would consist in forming groups (geographical or not) of companies in the sector around the leading companies. Such groupings would include other companies in the industry or complementary industries, including suppliers or manufacturers of raw materials and accessories, distributors, merchant-exporters, etc.

#### 4.1.4. Recommendations to boost textile exports

The recommendations are aimed at improving manufacturing processes and product quality, reducing production costs and widening market access. In a liberalized economy where the state confines itself to a regulatory role, the solution to the problems that hinder the development of the sector will depend first and foremost on the dynamism of economic operators. They will then be able to benefit in this fight from the support of public authorities, international organisations and donors.

Today, intermediary organizations are increasingly positioning themselves as interlocutors with donors for actions aimed at private sector development. In Senegal, the

textile sector is slow to really organise itself. A not very dynamic association gathers the stylists. There is no dialogue between fabric producers, garment industries and designers.

A first action could consist in organizing the professional associations of the sector for a better supervision. Management actions could focus in particular on:

- Technical assistance on production, management and export strategy aspects;
- Training and development of professionals;
- Strengthening synergies with markets and suppliers;
- The development of partnerships with foreign operators;
- The exchange of experience between operators in the sector with their counterparts in West Africa or advanced countries;
- The establishment of a purchasing centre to facilitate both the supply of intermediate consumption and better access to markets for export products.

The management and organisation of economic operators is partly the responsibility of intermediate bodies. To this end, the support of specialized structures such as the International Trade Centre, the Business Development Centre, are desired.

Other actions call on the public authorities. These are actions aimed at improving manufacturing processes and market regulation. These are:

- Combating anti-competitive practices, smuggling and the control of clothing imports;
- Create an incentive framework to attract the necessary investments for the establishment of new industries oriented towards greater cotton processing;
- Upgrade spinning and weaving facilities and other strategic businesses;
- Expand and diversify spinning and weaving facilities with a view to adapting them to demand in the garment and clothing industry;
- Develop a free zone (less restrictive) for exporting companies in the sector;
- Define a more flexible customs policy with regard to raw materials.

## 4.2. Textile import structure

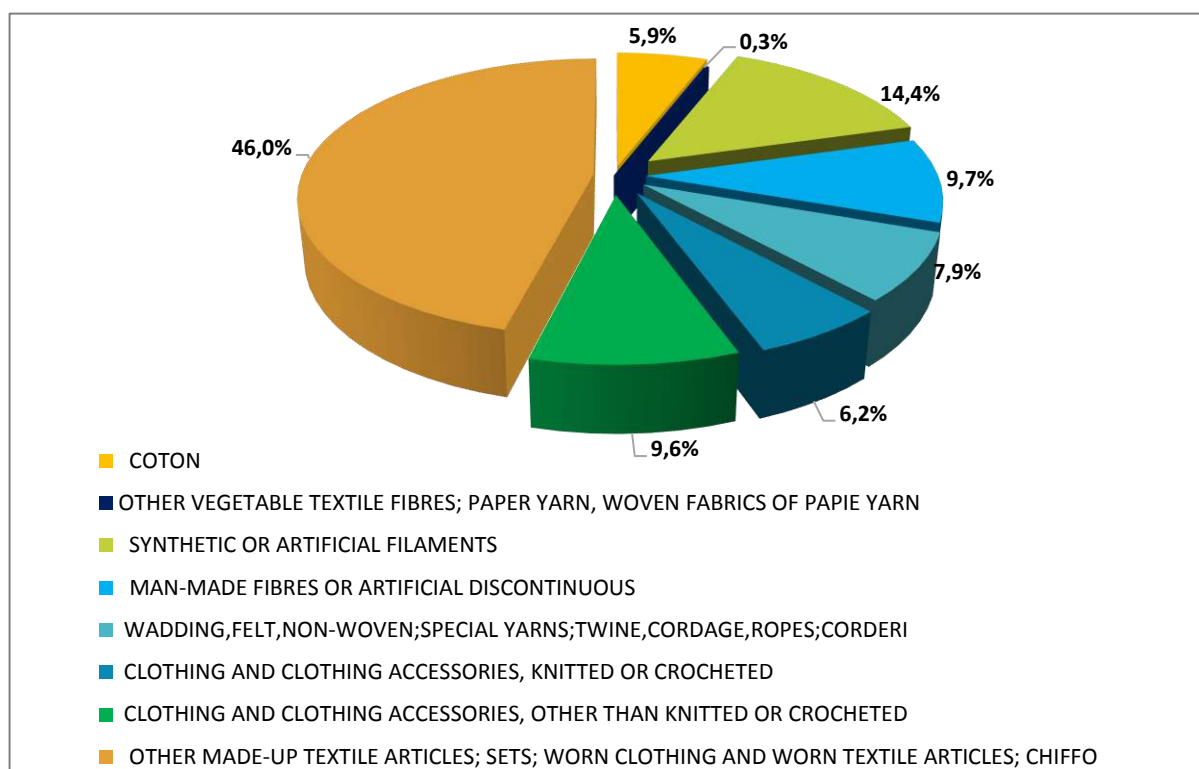
The structure of the countries of origin in terms of textile imports is today dominated by countries from Asia and Europe.

Over the past three years, imports of clothing and textile products have been steadily declining. They decline from USD 110.2 million in 2014 to a value of USD 89.3 million in 2016 (see above, WTO database).

### 4.2.1. Share of cotton and other textile products in imports

The structure of textile imports is absorbed by that of clothing imports with a 46.0% share. Next come man-made filaments (14.4%), man-made fibres (9.7%) and garments and clothing accessories other than knitted or crocheted (9.6%). The least imported textiles are wadding, felt, twine, etc. (7.9%), knitted clothing (6.2%), cotton (5.9%) and other vegetable textile fibres such as silk (0.3%).

Share of the various textile products imported in 2015



Source: ANSD



#### 4.2.2. Main countries of origin for cotton and other textile products

Senegal's main suppliers are China, India and France. The People's Republic of China is the leader, with about 21 billion CFA francs. Only these imports are more than 70% made up of clothing. Next comes INDIA with about 6 billion CFA francs, most of whose imports are cotton fabrics. FRANCE with 5 billion CFA francs and United States of America. The countries of the sub-region come far behind with Côte d'Ivoire at 1 billion CFA francs, then Mali with 437 million CFA francs. If we look at the top five textile supplier countries in Senegal, we find three Asian countries, which proves that the market for textile imports is dominated by Asian countries.

Senegal's main supplier countries of textile products (Imports in 2015)

N°	Countries	Imports in FCFA	Imports in USD
1	PEOPLE'S REPUBLIC OF CHINA	21 437 628 157	36 267 346
2	INDIA	6 410 347 525	10 844 777
3	FRANCE	5 999 870 674	10 150 348
4	UNITED STATES OF AMERICA	5 326 979 575	9 011 977
5	PAKISTAN	3 240 784 375	5 482 633
6	NETHERLANDS	2 555 400 484	4 323 127
7	TURKEY	2 509 662 969	4 245 750
8	SPAIN	2 216 921 875	3 750 502
9	SWISS	2 002 865 936	3 388 371
10	ITALY	2 002 790 443	3 388 243

\*Dollars exchange rate: 1USD=591.1CFA

Source: ANSD (2015)

### 4.3. Trade of textile products between Senegal and India

In 2015, Senegal exported only two textile products to India: peeled cotton and flexible containers made of synthetic or artificial textiles. These products represent 4.56% of the total amount of textile exports, or 1 073 796 USD.

Exports of textiles products to India in 2015

Products	Value in CFA	Value in USD	Poids Net (Kg)
Peeled cotton	621 467 221	1 051 374	791 814
Flexible containers of synthetic/artificial textile materials	13 253 843	22 422	7 126
Total	634 721 064	1 073 796	798 940

\*Dollars exchange rate: 1USD=591.1CFA

Source: ANSD (2015)

In 2015, imports of textile products from India were worth 10 844 777 USD, or 9.02% of the total amount of textile products imported into Senegal. The main products imported from India are textile bags/packaging bags (which account for 39% of textile imports from India), printed cotton fabrics and second-hand clothing.

**Imports of textiles products from India in 2015**

Products	Value in CFA	Value in USD	Net weight (in Kg)
Textile bags/packaging bags	2 525 947 802	4 273 300	1619496
Other printed fabrics with at least 85% cotton	629 887 453	1 065 619	1981347
Second-hand clothing	526 323 264	890 413	1091376
Flexible containers made of synthetic/artificial textile materials	451 569 687	763 948	215647
Gas-spotted fabrics, cotton, synthetic fibres and others	420 748 735	711 806	15282
Other fabrics of yarns of various colors	244 287 845	413 277	556480
Other	232 144 250	392 733	216269
Polypropylene used as carpet backing	159 766 186	270 286	157868
Other containers obtained from polyblades or similar forms	149 641 215	253 157	99410
Other embroidery of synthetic fibres/cotton	142 864 860	241 693	286364
Other twine, cordage, rope or cables of polyethylene or polypropylene	131 890 370	223 127	97208
Other polyester staple fibre fabrics	129 444 909	218 990	330186
Twine cordage rope of other synthetic textile fibres	117 678 400	199 084	76735
Other unbleached/bleached fabrics with at least 85% by weight filaments/blades	116 122 997	196 452	39650
T-shirts and singlets, of other textile fabrics, knitted or crocheted	92 119 707	155 845	205713
Other woven fabrics with at least 85% polyester filaments	41 372 566	69 992	116092
Other carpets & textile floor coverings	25 313 674	42 825	29143
Sets for men & boys	24 468 246	41 394	16952
Coco abaca ramies other vegetable textile fibres	20 885 449	35 333	46080
Other non-wovens, whether or not impregnated/coated/coated/laminated	20 610 352	34 868	9642
Knitted cotton women's/girl's set	19 300 553	32 652	30737
Other woven fabrics of mixed polyester staple fibres	18 938 763	32 040	65058
Other sacks/bags, packing of man-made textile fibres	17 046 760	28 839	9799

**The textile sector in Senegal and Business: Opportunities for Indian industries**

Other silk fabrics or silk waste	16 156 383	27 333	57501
Nonwovens, whether or not impregnated or coated/laminated with synthetic filaments	9 869 297	16 696	35627
Other men's or boys' synthetic garments	9 697 818	16 406	16784
Other coverages	9 479 971	16 038	5197
Articles made of strip yarn/similar shapes of twine or cord	8 660 237	14 651	3741
Men's shirts of other textile materials, knitted or crocheted	8 181 148	13 841	7988
Other bed linen/table linen/toilet/kitchen linen	8 100 363	13 704	6838
Scarves	7 734 874	13 086	9613
Baby clothing & clothing accessories of other textile materials	7 094 138	12 002	7108
Other synthetic fabrics of colored yarn	6 618 000	11 196	4502
Damask stockings & similar with at least 85% cotton	6 306 162	10 669	38021
Mechanical lace in strip pieces or in patterns of other fibres	5 659 000	9 574	12206
Other fabrics dyed with at least 85% by weight of polyester filaments	4 926 230	8 334	8289
Women's/girls' dresses of cotton and other textile materials	4 745 529	8 028	2278776
Toweling or kitchen linen of the cotton terry type	4 504 004	7 620	2978
Other impregnated fabrics coated with plastics	3 420 957	5 787	18416
Embroidery of other textile materials in strips or patterns	3 323 984	5 623	14574
Chemical/air embroidery & bottom embroidery cut into strips	3 267 872	5 528	7398
Women's/girls' suits, other than cotton knitwear	2 791 000	4 722	2000
Men's/boys' breeches & shorts overalls trousers with braces	2 753 992	4 659	3898
Rags, twine, cordage, rope and cables of textile materials in the form of waste	2 300 002	3 891	22016
Other made-up articles including clothing patterns	1 887 180	3 193	769
Knitted overalls trousers with panties & cotton shorts	1 764 400	2 985	2368
Other curtain glazing for interior blinds; cotton and bed valances	1 631 073	2 759	1609
Gloves mittens & mitts	1 586 544	2 684	473
Other narrow woven fabrics of other textile materials	1 289 500	2 182	1711
Skirts & divided skirts of other textile materials	1 094 770	1 852	2314
Handmade lace in strips or patterns	1 014 796	1 717	2500
Panties & swimwear for women/girls	912 700	1 544	1995
Anoraks men's/boys' jackets & similar articles	902 641	1 527	469
Put up for retail sale	880 992	1 490	3811
Plush pile fabrics of other textile materials, knitted or crocheted	812 180	1 374	5032
Suits	418 470	708	20
Other women's single yarn stockings and knee-highs	413 500	700	676

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**The textile sector in Senegal and Business: Opportunities for Indian industries**

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Overalls trousers with panties & shorts of other textile materials	411 500	696	662
Glazing, curtains...knitted with synthetic fibres	375 800	636	8174
Carpets & other floor coverings of wool or tufted fine animal hair	320 761	543	43
Blouses / shirts for women/ girls	276 532	468	465
Yarn of artificial filaments put up for retail sale.	172 694	292	155
Sweaters pullovers cardigan cardigans vests underpulls	81 794	138	761
Combinations or bottoms of dresses & petticoats of synthetic/artificial fibres	76 910	130	183
Other patch labels & similar labels of textile materials in the piece	57 784	98	60
<b>Total</b>	<b>6 410 347 525</b>	<b>10 844 777</b>	<b>9 910 255</b>

*\*Dollars exchange rate: 1USD=591.1CFA*

Source: ANSD (2015)

## 5. Legal framework of the sector in Senegal

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In general, by comparing tariffs on textile/clothing, between the countries of the West African Economic and Monetary Union (WAEMU) and other developing countries, it is noticed that these tariffs are much lower in the countries of this union. Tariff is 20% in WAEMU for textiles (printed fabrics) and for clothing, whereas it is 35.9% in Morocco for textiles (printed fabrics), and 49.8% for clothing. In China, it is 20.1% and 23.5% respectively for printed fabrics and clothing, and in Bangladesh, 28.4% and 36.9%, respectively.<sup>18</sup>

Thus, the following lines describe in detail the regulation of customs tariffs in Senegal.

### 5.1.Import Tariffs

In January 2000, Senegal put in place a new import tariff structure to conform with the Common External Tariff (CET) scheme agreed upon by the member states of the West African Economic and Monetary Union (WAEMU or UEMOA). Under the new structure, Senegal lowered its highest tariff rate and established four product categories with tariff rates of 0, 5, 10 and 20 percent. It also eliminated a separate customs stamp tax of five percent, replacing it with a one percent “statistical fee.” The new tariff regime covers the following product categories for the four tariff rates:

- Category 0 (zero rate): social, cultural and scientific goods, agriculture inputs, capital goods and computer and data processing equipment not available through local production.
- Category 1 (five percent): raw materials, crude oil, and cereals for industries.
- Category 2 (ten percent): semi-finished products, intermediate goods, other cereals, diesel and fuel oil.

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<sup>18</sup> The impact’s evaluation of the common external tariff (CET) of WAEMU in Senegal, <http://www.cepod.gouv.sn/sites/default/files/Evaluation%20de%20l%27impact%20du%20tarif%20ext%C3%A9rieur%20commun%20de%20l%27UEMOA.pdf>

- Category 3 (twenty percent): goods for final consumption, capital goods and computer and data-processing equipment already available through local production, new and used vehicles.<sup>19</sup>

The table of import duties and taxes applicable to imported products includes the Customs Duty (DD), the Statistical Fee (RS) and the Community Solidarity Levy (PCI), which is a resource allocated to the Union, with the following rates:

**Table of import duties and Taxes**

Category	Customs Duty (DD)	Statistical Fee (RS)	Community Solidarity Levy (PCI)
0	0%	1%	1%
1	5%	1%	1%
2	10%	1%	1%
3	20%	1%	1%

Source: Custom Services<sup>20</sup>

The basis of assessment for duties and taxes shown in the table above is the CIF value. To these duties and taxes is added VAT at the single rate of 18% for Senegal, except for products that are exempt.

The statistical fee is levied on products imported from third countries and released for consumption, including those exempt from customs duty, with the exception of goods imported under diplomatic exemptions and those acquired under financing granted by foreign partners subject to an express exemption clause.

The ECOWAS deduction of 0.5% on the CIF value is also due when products imported from non-member countries are released for consumption.

The following tables show tariffs for some textiles products in Senegal.

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<sup>19</sup> <https://photos.state.gov/libraries/senegal/323264/pdf/2014-senegal-commercial-guide.pdf>

<sup>20</sup> <http://www.douanes.sn/fr/node/722>

**Silk tariffs<sup>21</sup>**

Rank	N.T.S.	Commodity description	U.S.	D.D.	R.S.	P.C.I.
50.01	5001.00.00.00	<b>Silkworm cocoons suitable for reeling.</b>	kg	5	1	1,5
50.02	5002.00.00.00	<b>Raw silk (not milled).</b>	kg	5	1	1,5
50.03	5003.00.00.00	<b>Silk waste (including cocoons unsuitable for reeling, yarn waste and garnetted stock).</b>	kg	5	1	1,5
50.04	5004.00.00.00	<b>Silk yarn (other than yarn spun from silk waste) not put up for retail sale.</b>	kg	10	1	1,5
50.05	5005.00.00.00	<b>Silk waste yarn, not put up for retail sale.</b>	kg	10	1	1,5
50.06	5006.00.00.00	<b>Silk yarn and yarn spun from silk waste put up for retail sale; silk bristle.</b>	kg	20	1	1,5
50.07		<b>Fabrics of silk or silk waste.</b>				
	5007.10.00.00	Fabrics of bourrette	kg	20	1	1,5
	5007.20.00.00	Other woven fabrics, containing 85% or more by weight of silk or of silk waste other than wadding	kg	20	1	1,5
	5007.90.00.00	Other fabrics	kg	20	1	1,5

N.T.S: Tariff and Statistical Classification

U.S: Unit of measure

D.D: Customs Duty

R.S: Statistical Fee

P.C.I: Community Solidarity Levy

**Cotton Tariffs<sup>22</sup>**

Rank	N.T.S.	Désignation des marchandises	U.S	D.D	R.S	P.C.I
52.01		<b>Cotton, not carded or combed</b>				
	5201.00.10.00	• Unpeeled	kg	5	1	1,5
	5201.00.90.00	• Other	kg	5	1	1,5
52.02		<b>Cotton waste (including yarn waste and garnetted stock).</b>				
	5202.10.00.00	• Yarn waste	kg	5	1	1,5
	5202.91.00.00	• Teared	kg	5	1	1,5

<sup>21</sup> <http://www.douanes.sn/fr/node/723>

<sup>22</sup> <http://www.douanes.sn/fr/node/723>

	5202.99.00.00	• Other	kg	5	1	1,5
<b>52.03</b>		<b>Cotton, carded or combed.</b>				
	5203.00.10.00	• Carded	kg	5	1	1,5
	5203.00.20.00	• Combed	kg	5	1	1,5
<b>52.04</b>		<b>Cotton sewing thread, whether or not put up for retail sale.</b>	kg	10	1	1,5
<b>52.05</b>		<b>Cotton yarn (other than sewing thread), containing 85 % or more by weight of cotton, not put up for retail sale.</b>	kg	10	1	1,5
<b>52.06</b>		<b>Cotton yarn (other than sewing thread), containing less than 85 % by weight of cotton, not put up for retail sale.</b>	kg	10	1	1,5
<b>52.07</b>		<b>Cotton yarn (other than sewing thread) put up for retail sale.</b>				
	5207.10.00.00	• Containing at least 85% by weight of cotton	kg	10	1	1,5
	5207.90.10.00	• Fishing wire	kg	5	1	1,5
	5207.90.90.00	• Other	kg	10	1	1,5

N.T.S: Tariff and Statistical Classification

U.S: Unit of measure

D.D: Customs Duty

R.S: Statistical Fee

P.C.I: Community Solidarity Levy

## 5.2.Trade Barriers

Special tariffs are also applied under the CET regime to protect selected industries, although rates have been lowered in some cases and a five-year phase out period is scheduled. These special tariffs include the “*taxe degressive de protection*” and the “*taxe conjoncturelle a l’importation.*” The *taxe degressive de protection* is applied to imports of finished products such as tobacco, matches, tomato paste, candies, batteries, powdered milk, candles, etc. that compete with local production. With the exception of tobacco, the rate under the new regime dropped from 20 to 15 percent. The cyclical or seasonal tax, called the “*taxe conjoncturelle a l’importation,*” protects local production of vegetables, rice,



onions, potatoes, etc. with a 10 percent levy applied when world prices drop and threaten local producers.<sup>23</sup>

### 5.3.Import Requirements and Documentation

All imports of goods must be a Prerequisite Import Declaration (DPI) at the control company authorized to do so.<sup>24</sup>

Thus, any customs declaration recorded in Senegal must mention the reference of the DPI, as well as of the corresponding Report of Findings (AV) issued by the inspection company, or failing that, refer to the exclusions or limitations to the verification envisaged by the decree before boarding.

*Bank domiciliations: A legal basis is the Regulation N° R09/98/CM/UEMOA/20 December 1998 on the external financial relations of WAEMU member states.*

Any import with the Financial Regulation of FOB value exceeding 5,000,000 FCFA (approximately 10, 000 USD), must, whatever its origin, be domiciled with an approved intermediary bank. Together with the debit transaction, a Prerequisite Import Declaration (DPI), on the form provided for that purpose by the regulations, is filed and recorded automatically by the approved intermediary bank.

Imports without financial regulations are subject to an exemption from debit, but subject to the prior approval of the Directorate in charge of External Finance, housed at the National BCEAO.

The debit is required to import any amount over 5,000,000 FCFA or against-value; it is governed by the Regulations N° R09/98/CM/UEMOA of 20 December 1998 on the external financial relations of WAEMU member states.

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<sup>23</sup> <https://photos.state.gov/libraries/senegal/323264/pdf/2014-senegal-commercial-guide.pdf>

<sup>24</sup> <http://www.finances.gouv.sn/en/index.php/comment-importer-exporter-au-senegal>

### 5.3.1. Opening of the dossier

The importer provides:

- the proforma invoice or any other form of business contract,
- exchange authorization already stamped,
- the import certificate
- and justify the detention of an import-export card.

The bank records everything, open a file to which it assigns a number like all the other documents produced and restores his client importer, the import certificate that the latter must make certified by the Customs Service, at the arrival of the goods.

### 5.3.2. Discharge of the dossier

The file is considered cleared when there are:

- the import certificate stamped by Customs
- notices of bank settlement at most for the domiciled amount
- a copy of the bill of lading or other transport document.

## 6. Strengths, Weaknesses, Opportunities and Threats of the Sector

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>Abundant and cheap labor, very close to export markets, and has a dynamic diaspora that can serve as a relay in most developed countries</li> <li>Local production of quality cotton</li> <li>Highly profitable cotton prices to farmers, which could lead to a considerable increase in cotton in 2018.(setting a price at 300 FCFA per kilo (€0.46) for the 2017/18 season).</li> <li>Implementation of crop insurance against rainfall deficit. This is a great support given by the State to cotton farmers.</li> <li>Cotton is one of Senegal's "top 10" export products: an opportunity for players in the textile industry.</li> <li>The sector has a good production capacity. For example, SODEFITEX has 5 ginning plants capable of producing 65,000 tons of carefully packaged fibre.</li> </ul>	<ul style="list-style-type: none"> <li>Downward trend in labor productivity: In Senegal, while labor productivity almost halved between 1974 and 2003, it was almost divided by 3 for textiles and clothing</li> <li>Old age / lack of production equipment in the sector</li> <li>Few training structures that can support the needs of the sector</li> <li>High cost of production factors</li> <li>Low / No access to electricity in some areas as well as high frequency of power cuts</li> <li>Groundnut prices are often more profitable, leading to a drop in cotton sown areas (groundnut is well remunerated because of the intervention of Chinese traders in Senegal).</li> <li>Regular diversion of input subsidies: inputs are bought back from producers to be sold in countries bordering the cotton zone. This is illegal trafficking at the expense of cotton cultivation.</li> <li>It is necessary, under rain, between 800 and 1 200 mm, so that the cotton plant satisfies correctly its needs in water, which limits the area of predilection of this plant in Senegal.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>Regional markets offer interesting opportunities because of trade agreements, transport networks and</li> </ul>	<ul style="list-style-type: none"> <li>Asian and especially Chinese competition</li> </ul>

<p>the relative ease of identifying cultural tastes.</p> <ul style="list-style-type: none"><li>• Erratic variations in bilateral exchange rates compared to competing countries</li><li>• Geographic proximity, commercial opportunities offered under the AGOA and regional markets of UEMOA and ECOWAS, in addition to a long tradition in textile/ clothing</li><li>• Support from the authorities through the Senegal Emergent Plan (PSE) which aims at developing the industrial sector</li><li>• Great possibility of cotton supply in the countries of the sub-region.</li></ul>	<ul style="list-style-type: none"><li>• Competitiveness with other pay in the sub-regions, especially Burkina Faso</li><li>• The ecological and socio-economic impact</li></ul>
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## 7. Business environment in Senegal

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### 7.1. Measures to promote the private sector<sup>25</sup>

In an effort to improve the business environment, the Government of Senegal has adopted national and sectoral strategy documents, including the SME Sector Policy Letter (LPS/SME) articulated with the Senegal Emerging Plan.

The State has confirmed its choice to make the private sector the pillar of its development strategy to achieve the growth rates required for economic emergence. The implementation of this strategy has resulted in the strengthening of the institutional approach to investment promotion, with the creation of structures such as the Presidential Investment Council (CPI), Investment Promotion and Major Works (APIX) and the Senegalese Export Promotion Agency (ASEPEX). The system also includes specialized structures such as ADEPME, the Bureau de mise à niveau des Entreprises and the Agence de Promotion de sites Industriels (APROSI). An innovative financing scheme consisting of a bank specialising in the SME/SMI target (BNDE), a guarantee fund FONGIP (*Fonds de Garantie des Investissements Prioritaires*) (Priority Investment Guarantee Fund) and an instrument dedicated to structuring investments FONSI (Fonds Souverain d'Investissements Stratégiques) accompany this mechanism.

It should be noted that a department dedicated to investment promotion has been created with the aim of channelling efforts and related public policies and strengthening the private sector. Indeed, it was a question of developing a strategic place of prime importance in Senegal's institutional architecture, to make it a catalyst for development policies. The new Ministry also reflects the desire to bring investment promotion up to the level of economic challenges by setting up a strategic and political steering mechanism at

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<sup>25</sup> Direction de la Promotion des Investissements (Investment Promotion Directorate)

ministerial level and guaranteeing the improvement of gross fixed capital formation. Moreover, the Government, through the Ministry in charge of the promotion of the

The Government has already shared the new law governing partnership contracts, the Special Economic Zone, industrial parks and projects under the Senegal Emerging Plan (PSE).

## 7.2. Incentives for investment

Strong investment incentives in Senegal are contained in the General Tax Code and the Investment Code. Based on Act 92-40 of 9 July 1992, this code was reformed by Acts 2004-12 of 6 February 2004 and 2012-31 of 31 December 2012 with a view to improving tax citizenship, simplifying procedures, creating jobs and encouraging private investment. This is how the Single Global Contribution was introduced and the Corporate Income Tax (CIT) is 30%. Under the Investment Code, tax relief measures, guarantees and advantages are granted to investors through the Investment Code. The scope of the investment code is extended to several strategic sectors. The transparency, clarity and scope of the advantages make this code a particularly attractive tool for investors. It provides customs and tax benefits for new businesses and expansion projects. These advantages include the exemption from customs duties, the suspension of VAT and the reduction of the tax rate on profits.

### 7.2.1. Privileged access to regional and international markets

Senegal's strategic geographical location marks its opening to the world and gives it a position that facilitates access to the sub-regional market and the main export markets. Senegal is 6 hours from Europe and 7 hours from the United States by plane. Dakar is at the crossroads of several maritime routes and offers a real comparative advantage for maritime freight. The link takes less than 6 days to Europe and 7 days to the United States. The country, which is 400 kilometres from Cape Verde, borders the Gambia, Mauritania, Mali, Guinea and Guinea Bissau. Access to the hinterland (Mali, Burkina Faso) is particularly popular for merchandise exports, thanks in particular to the presence of the Entrepôts du Sénégal au Mali (ENSEMA) located in Bamako.

## 7.2.2. Analysis of corporate income tax in Senegal

### **Box I. Analysis of corporate income tax in Senegal**

*In Senegal, by a law 2004-12 of 6 February 2004, corporation tax rose from 35% to 33%. In 2006, the revision of the said law resulted in a reduction of the IS from 33% to 25%.*

*A new Act No. 2012-31 of 31 December 2012 once again increased the SI from 25% to 30%, the rate in force since that date.*

*The Government considers that with 30% corporate tax, Senegal remains in the low average internationally. The government's tax policy is based on logic, which is to "tax capital income rather than capital itself". For the State, in return for the numerous targeted incentives introduced in the new tax code to encourage business investment and productivity, it was logical to strengthen the taxation of profits downstream. The reduction of the income tax which will cost 28 billion CFA francs to public finances will help to increase the purchasing power of employees in both the public and private sectors.*

*The substantial reduction in registration fees on real estate transactions and on acts creating or increasing companies' capital is also a fundamental achievement. Finally, full exemption from VAT is now granted on purchases of equipment by approved agricultural businesses.*

*In any event, the experts agree that the 2006 decline did not meet the targeted objectives. In the absence of explicitly stated counterparts on employment, the reinvestment of the surplus generated by the tax cut just translated into :*

*The increase in companies' revenues;*

*The increase in transfers exacerbated by the free movement of capital*

*The deterioration in the current account balance*

*A shortfall of more than 28 billion in public finances.*

*Overall, the decline was more beneficial for large companies that did not reinvest the surplus generated by the measure. The reduction has benefited large companies more, as evidenced by the higher level of their self-financing capacity. However, in Senegal, SMEs represent more than 90% of companies. This observation advocates a differentiated policy of lowering the corporate tax rate, in order to better promote economic activities.*

*Finally, in return for the many targeted incentives introduced in the new tax code to encourage business investment and productivity, it was logical to strengthen downstream taxation of profits.*

### 7.2.3. The Integrated Special Economic Zone

#### **Box II. The Integrated Special Economic Zone**

*The Integrated Special Economic Zone is an area of three sectors 718 hectares 14,200 hectares and 50 hectares located 45 km from Dakar (Capital). Benefiting from easier access via the new toll motorway and adjacent to the new Blaise Diagne International Airport, its purpose is to create the conditions for the emergence and development of a competitiveness and economic growth cluster capable of exerting a powerful driving effect on the national economy.*

*The project aims to position Senegal as a business hub in West Africa. Blaise Diagne International Airport, the economic zone houses the facilities of the cargo village for logistics operators operating in the Airport.*

*The purpose of this Zone is to offer a set of infrastructures and services that ensure the best conditions for companies to carry out their activities.*

*Companies established within the Zone as well as procedures facilitating their operation. The project goes beyond the Industrial Free Zone concept; it will include an industrial park, service areas, offices and a logistics platform, a commercial zone, tourist complexes and residential areas.*

*Tax and customs advantages of ZESI approval:*

- *Period of validity of the benefits: 50 years*
- *Exemption from customs duties on equipment and raw materials*
- *Admission free of all customs duties*
- *Exemption from the payment of any income tax*
- *Possibility of concluding fixed-term contracts for five (05) years*
- *Right to employ foreign and Senegalese personnel for companies*
- *Foreigners*

Source : Direction de la Promotion des Investissements (Investment Promotion Direction)

### **7.3. The Investment Code**

As part of the process of constantly improving the business environment in order to stimulate private investment, the State of Senegal has promulgated a new investment code. The new code meets the following objectives:



- Improving Senegal's competitiveness in terms of incentives offered to investors;
- Ensuring consistency with the tax reform;
- Job creation;
- Decentralization of production activities;
- Densification of the existing industrial fabric.

### 7.3.1. Major Innovations

The new code is characterized by a set of major innovations aimed at boosting private investment in strategic sectors, including:

- The institution of a tax credit system for investments of an amount equal to 40% of investments in fixed assets, over a period of five (5) years and capped, for each fiscal year, at 50% of taxable profit for new businesses and 25% for extensions;
- The extension of the scope of the code to strategic sectors (tele-services, industrial parks, cyber-villages, commercial complexes, etc.) to limit the amount of planned investments in services..;
- Encouraging labour-intensive activities and encouraging job creation in regions other than Dakar;
- The delimitation between the investment phase and the operating phase, which allows the investor to fully enjoy the operating benefits during the planned (05) year period and the Administration to collect all information relating to the implementation of the approved programme and the start of activities;
- Compliance with the provisions of the Environmental Code;
- The abolition of the minimum capital requirement.

### 7.3.2. The Export Processing Enterprise Scheme

The scope of the free export enterprise statute covers agriculture in the broad sense, industry and teleservices. To be approved, the company must have an export potential of at least 80% of its turnover.

Approval as a free export company guarantees:

- The free transfer of funds necessary for investment and commercial and financial operations to countries outside the franc zone;
- The free transfer of salaries for foreign employees;
- The free transfer of dividends for foreign shareholders ;
- Recruitment of foreign personnel without restriction;
- Arbitration by the International Centre for Settlement of Investment Disputes (ICSID).

Separate benefits are granted to companies in addition to these guarantees. These privileges have a term of 25 years renewable from the date.

### 7.3.3. Guarantees, Rights, Freedoms and Obligations of the company

- Protection against nationalisation, expropriation or requisition;
- Availability in foreign currencies;
- Capital transfer and remuneration guarantee;
- Access to raw materials;
- Equal treatment;
- Business rights and freedoms (economic and competitive freedom);

Obligations of the company (respect for public order, protection of the environment and consumers, compliance with rules and standards on products, provision of information to monitor its obligations).

#### 7.3.4. Customs and tax advantages for new companies and expansion projects<sup>26</sup>

Any newly created economic entity in the implementation phase of an eligible investment programme with a view to starting up its activities.

##### *CGI (General Tax Code) Benefits*

##### In the realisation phase:

- Customs exemptions (03 years);
- VAT suspension (during the implementation phase of the project).

##### In operation phase:

CFCE exemption = five (05) years and eight (08) years if at least 200 jobs are created or if 90% of the jobs created are outside the Dakar region;

- Possibility to conclude fixed-term contracts for a limited period of five (5) years;
- Possibility to benefit from commercial vehicles after obtaining approval for the operation phase;
- Reduction of 40% of taxable profit for 5 years and up to 50% of approved investments (70% of approved investments if the company is outside Dakar).
- Extension project

This is any approved investment program, initiated by an existing company and which generates:

- an increase of at least 25% in the production capacity or acquisition value of fixed assets;
- or an investment in production equipment of at least FCFA 100 million.

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<sup>26</sup> Source : APIX, Loi n° 2004-06 du 06 février 2004, modifiée; Loi n°2012-31 du 31 décembre 2012 portant Code général des impôts

## 8. Market Operating Strategy/Access to Financing

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### 8.1. Strategic directions of entry

An efficient exploitation of the Senegalese textile market should focus on three main axes: the establishment of production/processing units; support for local production and openness to sub-regional markets.

#### 8.1.1. The establishment of production units

As mentioned earlier, Senegal does not have production units at the cutting edge of international technology. Despite the existence of the Chinese threat, the country remains very favourable to the establishment of foreign factories. This will aim to stimulate the national economy, create jobs and improve household living conditions. These elements being the spearhead of the Senegal Emergent Plan, Indian companies could benefit from the support of the Senegalese authorities. One of India's strengths is that it is historically the leading supplier of textile products in Senegal.

It should however be noted that this could constitute a threat to Senegalese companies already in place. It is therefore important that the new companies to be established are able to support existing state enterprises.

Moreover, due to Senegal's political stability and favourable trade agreements in the subregion, the establishment of textile production units would be a real boon for India, which could supply most countries in the subregion with processed textile products.

Indeed, the Emerging Senegal Plan (PSE) has provided for the implementation of 27 projects including the flagship of 2 to 3 industrial platforms of significant size designed as an ecosystem of efficient services and incentives, with a view to boosting the country's industrial development. The construction of the Diamniadio Industrial Park follows this logic.

The Diamniadio Industrial Park was a godsend for the Indian textile industries. It is located 5 minutes from the AIBD airport, 20 minutes from the port of Dakar, at the foot of the toll motorway, 5 minutes from the high-speed train (TER).

Diamniadio is also strategically located in the textile sector. It is indicated as a coordination centre for factories located in the interior of the country and as a location for factories processing textile raw materials and the production of clothing of all kinds.

Diamniadio Industrial Park covers an area of 53 ha and is home to all non-polluting industrial enterprises with a strong economic impact oriented towards export and import substitution (min 50%) and having an investment programme of at least 300 million FCFA (600,000 USD) with at least 5 jobs per 100 m<sup>2</sup>. An Indian company which settles there, obtains exemptions from all duties, taxes, royalties, levies, for all goods, production goods, equipment, raw materials, inputs, semi-finished and finished products<sup>27</sup>. Thus, there are many advantages for Indian textile industries in Senegal, particularly in Diamniado.

#### 8.1.2. Support for local production

Outside the processing units, India can stimulate local production by investing in the revitalisation of cotton cultivation, the main spearhead of textiles. This has a double advantage: it will see the full cooperation of the State which encourages local production, but would also constitute an important source of raw material for the processing units.

It would be appropriate for India to support cotton farmers with loans at a preferential rate to avoid over-indebtedness of producers. (Cotton farmers have historically ensured a repayment rate of 96% to 98%)

To take full advantage of cotton farming, cotton manufacturers would have to buy cotton from farmers at a more competitive price than groundnuts. Because the two cash crops compete and farmers focus their efforts on the most profitable crops.

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<sup>27</sup> <http://www.aprosi.sn/conditions-p2i.php>

For example, in general, the ratio of cotton to peanut prices must be 1.3 for competition to be balanced between the two products. If groundnuts are traded between 240 and 245 CFA francs per kilo, and cotton is at 255 CFA francs per kilo, it is obvious that, under these conditions, cotton cannot hold.

Setting a more competitive price therefore remains an essential factor in boosting cotton production.

Another component of this support would be support for training young people in textile trades. In addition to providing a quality local workforce, this will contribute to reducing youth unemployment, another important aspect of the PSE<sup>28</sup>. Moreover, the new cotton farmer could adopt a diversification strategy similar to SODEFITEX by integrating other crops (cereals, flour, feed, seeds...) which would allow him to avoid the vagaries of world cotton prices.

### 8.1.3. An opening to Sub-regional Markets

Senegal's opening to the sub-region and Western countries is an advantage for a new entrant. As several WAEMU countries are cotton producers, an Indian processing and/or production unit based in Senegal could import raw materials (raw cotton) from these countries if local production is not sufficient to fill the demand. This would greatly contribute to stimulating the sector in the subregion and facilitate the creation of other production units in these countries. As a consequence, India has two opportunities: the first is to help local cotton production, the second is to make clothing and other textile articles.

Senegal's position should also be profitable for exports. The country is open to tourism, Western countries and carries out very important port activities.

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<sup>28</sup> Senegal Emerging Plan

## 8.2. Credit / Financing Opportunities

As part of the drive for economic activities, some financial institutions such as BNDE<sup>29</sup> are ready to support the process of industrialization of the textile sector in Senegal.

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<sup>29</sup> National Bank for Enterprise Development

## 9. APPENDIX

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### APPENDIX 1 : Focus on SODEFITEX and the cotton sector in Senegal

Fifteen years ago (2003), SODEFITEX and, more generally, the Senegalese cotton sector, emerged from the most serious crisis in their history. In 1998/99, the extremely virulent and irresistible invasion of the " white fly ", a parasite previously absent from the Senegalese parasite faunas, literally kneaded the cotton sector which recorded the worst technical results since the birth of SODEFITEX: 11,628 tons of seed cotton, 240 kg of seed cotton / ha; 14 616 tons of seed cotton and 682 kg of cotton seed / ha the following year. The main ginning company SODEFITEX was literally out of payment. "If it were not a public company, it would have been forced to file for bankruptcy", reveals the Director General of Sodefitex.

The company had lost the confidence of cotton growers, employees, customers and suppliers. It is then that, thanks to the political alternation of the year 2000, the new authorities decide to change the leadership of the company. For the first time SODEFITEX, formerly run by senior officials from outside the company, would promote leadership from its management staff. An emergency plan has been developed to restore the fundamentals : compression of unproductive charges, concentration of resources towards the revival of production, deepening of the partnership with cotton producers, establishment of a social dialogue with employees and trade unions and adoption of a social pact for the recovery, presence supported by management on the ground alongside farmers. This emergency plan for the year 2000/01 resulted in production of 20,400 tons, an increase of 39.6%. Above all, it helped restore the confidence of producers, employees, customers, suppliers and banks. From then on, the bases were posed for the development of the sector.

A consensual strategic plan has been drawn up between SODEFITEX and the National Federation of Cotton Professionals (FNPC), around which all the actors in the sector have mobilized. This strategic plan, entitled " Program of recovery and revival of the cotton sector in Senegal " has been translated into a State / SODEFITEX / FNPC framework agreement, signed in July 2001 and aiming at the stabilization of production around 35,000 tons, then progress to 65 000 tons, saturation of installed industrial potential.

The implementation of this strategic plan gave unexpected results: from 2003/2004, only two years after the signing of the framework agreement, the Senegalese cotton production record is set with



51,640 tons in 2003/ 200 04 yields are above 1.1 tons per hectare. A new record is broken in 2006/07 : 52,422 tons with 1.2 tons per hectare. It is then that the cumulative effects of the global crisis of the cotton sector resulting in the collapse of prices and its direct consequence, the fall in the price to the producer which passes from 195 FCFA to 180 FCFA the kg of 1st choice, a calamitous rainfall and soaring input prices have led the industry into serious difficulties.

The 2007/2008 season was characterized by a deficit rainfall which settled very late and which subsequently came to an abrupt halt on September 20, 2007. This delay has resulted in a high rate of sowing of the best-performing cotton growers. are found, like the majority, without income in a context of acute grain deficit.

The next season was a generalized food crisis that favored the development of survival strategies based on bad practices: massive diversions and trafficking of subsidized agricultural inputs. These practices have accelerated the deterioration of the situation and the depression of the cotton farms in the spiral of over-indebtedness. The same process hit all African countries, with African cotton production undermined by the crisis, halved. This resulted in the massive abandonment of cotton growing. Production falls: 36 700 tons in 2007/2008, 26 200 tons in 2008/2009, 18 500 tons in 2009/2010. At the same time, the number of cotton producers increased from 60,429 to 33,604.

In 2010, the actors of the sector develop a recovery plan and production resumes an upward curve supported by the rise in world cotton prices, which allowed to increase the price to the producer: 205 FCFA in 2010/11 (the threshold psychological, true " inaccessible star " of 200 FCFA / kg, is crossed for the first time) and 255 FCFA in 2011/2012.

## APPENDIX 2: EXPORT OF COTTON AND OTHER TEXTILE PRODUCTS IN 2015

ITEMS CHAPTER/ ITEMS PRODUCT	Value (in FCFA)	Value (in USD)	Net weight (in Kg)
Silk	5 700 000	9 643	34 000
Cotton	9 173 312 944	15 519 054	12 709 949
Other Vegetable Textile Fibers; Paper Yarns, Paper Yarn Fabrics	700 584	1 185	391
Synthetic Or Artificial Filaments	863 610 965	1 461 023	239 630
Synthetic Or Artificial Fibers Discontinuous	694 521 170	1 174 964	245 149

Wadding, Felt, Non Woven; Special Yarns; Twine, Strings, Ropes; Corderi	1 449 839 058	2 452 781	362 444
Carpets And Other Textile Floor Coverings	5 152 129	8 716	16 013
Special Fabrics; Lace; Tapestries; Trimmings; Embroidery	1 442 553	2 440	645
Impregnated, Covered, Laminated Fabrics; Technical Textile Articles	2 628 701	4 447	2 347
Hosiery Fabrics	32 048	54	8
Clothes And Clothing Accessories, Hosiery	181 588 482	307 204	65 139
Clothing And Clothing Accessories, Other Than Hosiery	396 767 634	671 236	199 624
Other Textile Articles Garments; Assortments; Friperie And Chiffo	1 164 239 636	1 969 615	673 839
<b>Total</b>	<b>13 939 535 904</b>	<b>23 582 365</b>	<b>14 549 178</b>

\*Dollars exchange rate: 1USD=591.1CFA

Source: ANSD

### **APPENDIX 3: SENEGALESE TEXTILE EXPORTS BY COUNTRY IN 2015**

<b>N°</b>	<b>Country</b>	<b>Value in FCFA</b>	<b>Value in USD</b>
1	BENGLADESH	5 831 232 723	9 865 053
2	MALI	1 985 873 291	3 359 623
3	MALAISIA	894 813 841	1 513 811
4	FRANCE	727 869 510	1 231 381
5	INDIA	634 721 064	1 073 796
6	MAURITANIA	515 856 666	872 706
7	REPUBLIC OF GUINEA	465 400 221	787 346
8	MOROCCO	403 297 810	682 284
9	GAMBIA	369 834 302	625 671
10	PORTUGAL	303 699 370	513 787
11	NIGER	201 648 458	341 141
12	COTE D'IVOIRE	185 936 204	314 560
13	UNITED STATES OF AMERICA	156 610 585	264 948
14	CONGO	138 336 745	234 033
15	TAIWAN	124 459 602	210 556

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16	SPAIN	118 035 278	199 687
17	CAMEROON	112 468 730	190 270
18	THAILAND	106 469 564	180 121
19	SWISS	89 071 892	150 688
20	ILES DU CAP VERT	81 279 713	137 506
21	BELGIUM-LUXEMBOURG	79 941 023	135 241
22	SIERRA LEONE	78 367 668	132 579
23	VIETNAM	73 688 143	124 663
24	INDONESIA	34 067 245	57 634
25	GUINEE EQUATORIALE	29 631 694	50 130
26	BENIN	26 527 548	44 878
27	SOUTH OF AFRICA	23 125 373	39 123
28	EMIRATS ARABES UNIS	22 964 357	38 850
29	BURKINA FASO	13 918 824	23 547
30	BURUNDIA	12 302 758	20 813
31	GHANA	11 175 682	18 907
32	PEOPLE'S REPUBLIC OF CHINA	9 750 778	16 496
33	GUINEE BISSAU	9 205 243	15 573
34	UNITED KINGDOM	8 165 397	13 814
35	LIBERIA	7 472 468	12 642
36	NIGERIA	5 321 972	9 004
37	ITALIA	4 972 500	8 412
38	BRESILIA	4 777 577	8 083
39	GABON	4 698 045	7 948
40	AUSTRALIA	4 606 881	7 794
Total		13 911 596 745	23 535 099

*\*Dollars exchange rate: 1USD=591.1CFA*

Source: ANSD

**APPENDIX 4: Imports of textile products in 2015**

ITEMS CHAPTER/ ITEMS PRODUCT	Value (in FCFA)	Value (in USD)	Net weight (in Kg)
Silk	169 142 941	286 149	429 875
Laine, Poils Fins Ou Grossiers; Fils Et Tissus De Crin	65 714 575	111 173	119 796

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Cotton	3 979 386 851	6 732 172	8 333 610
Other Vegetable Textile Fibers; Paper Yarns, Paper Yarn Fabrics	193 381 264	327 155	598 488
Synthetic Or Artificial Filaments	9 814 441 049	16 603 690	11 891 916
Synthetic Or Artificial Fibers Discontinuous	6 628 086 498	11 213 139	6 778 203
Wadding, Felt, Non Woven; Special Yarns; Twine, Strings, Ropes; Corderi	5 345 999 849	9 044 155	2 997 921
Clothes And Clothing Accessories, Hosiery	4 233 582 127	7 162 210	3 342 025
Clothing And Clothing Accessories, Other Than Hosiery	6 501 926 193	10 999 706	4 878 692
Other Textile Articles Garments; Assortments; Friperie And Chiffo	31 318 114 732	52 982 769	32 454 597
<b>Total</b>	<b>68 249 776 079</b>	<b>115 462 318</b>	<b>71 825 123</b>

*\*Dollars exchange rate: 1USD=591.1CFA*

Source: ANSD

**APPENDIX 5: IMPORTS OF TEXTILE PRODUCTS BY COUNTRY IN 2015**

<b>N°</b>	<b>Country</b>	<b>Value in FCFA</b>	<b>Value in USD</b>
1	PEOPLE'S REPUBLIC OF CHINA	21 437 628 157	36 267 346
2	INDIA	6 410 347 525	10 844 777
3	FRANCE	5 999 870 674	10 150 348
4	UNITED STATES OF AMERICA	5 326 979 575	9 011 977
5	PAKISTAN	3 240 784 375	5 482 633
6	PAYS BAS	2 555 400 484	4 323 127
7	TURQUIE	2 509 662 969	4 245 750
8	ESPAGNE	2 216 921 875	3 750 502
9	SUISSE	2 002 865 936	3 388 371
10	ITALIE	2 002 790 443	3 388 243
11	COREE DU SUD	1 942 602 760	3 286 420
12	JAPON	1 801 123 984	3 047 072
13	MAROC	1 744 862 061	2 951 890
14	ROYAUME UNI	1 620 148 577	2 740 904
15	THAILANDE	1 211 330 001	2 049 281
16	TAIWAN	1 181 136 880	1 998 201

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17	COTE D'IVOIRE	1 127 798 444	1 907 966
18	VIETNAM	1 102 922 767	1 865 882
19	GERMANY	880 862 900	1 490 210
20	BELGIUM-LUXEMBOURG	873 268 491	1 477 362
21	UNITED ARAB EMIRATES	637 196 500	1 077 984
22	MALI	436 966 754	739 243
23	PORTUGAL	405 436 504	685 902
24	GUINEA REPUBLIC	341 998 368	578 580
25	CANADA	331 990 978	561 649
26	INDONESIA	261 750 887	442 820
27	NIGERIA	217 917 949	368 665
28	HONG-KONG	194 147 593	328 451
29	LIBAN	191 896 166	324 642
30	BRESIL	131 820 754	223 009
31	EGYPT	128 989 451	218 219
32	POLAND	106 381 640	179 972
33	TUNISIA	101 132 359	171 092
34	SOUTH AFRICA	99 697 332	168 664
35	AUSTRALIA	65 117 877	110 164
36	MAURITANIA	60 856 063	102 954
37	AUSTRIA	50 655 565	85 697
38	KENYA	34 364 900	58 137
39	USA VIRGIN ISLANDS	27 305 618	46 195
40	HUNGARY	26 110 785	44 173
	Total	71 041 042 921	120 184 475

*\*Dollars exchange rate: 1USD=591.1CFA*

Source: ANSD

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*LIST OF TEXTILE PROFESSIONALS IN SENEGAL*

---

**MANUFACTURE OF OTHER TEXTILE ARTICLES**

**ETABLISSEMENTS NDOYE ET FRERES**

Mboro BP 37 - Thiès, SENEGAL  
Tel +221- 33 955 42 77  
Mob+221-70 722 14 87  
Email : maramendoye1986@gmail.com / etsmarame@orange.sn  
Mrs Marame NDOYE, Entrepreneur

**SADIYA DESIGN**

Flanc des Mamelles, Route de Ngor, Dakar, SENEGAL  
Tel. +221- 33 820 49 14  
Email: csadiya@orange.sn  
Mrs Alimatou SADIYA GUEYE, General Manager

**ASTOU TEXTILE**

Mbour Thiocé Ouest, Dakar SENEGAL  
Mob +221-77 651 35 90 / 70 594 73 98  
Email: dialloastou06@gmail.com  
Mrs Aïssatou DIALLO, General Manager

**DIADA STYLE**

Villa N° 4521 E Amitié 3 Dakar SENEGAL  
Tel. +221-33 824 85 69  
Mob. +221- 77 145 11 92  
Email. oumoulseyeseck@gmail.com  
Mrs Oumoul Khairy SECK, Manager

**NATACOUTURE**

Mamelles Ouakam, Dakar Senegal  
Tel +221-77 633 55 56  
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Mrs Aime DIALLO

**DOMITEXKA**

BP 62 001 Dakar, SENEGAL  
Tel+221-33 822 75 05  
Fax +221-33 822 75 06  
Email: babacar.mbaye@cgbm.sn  
Mr Babacar MBAYE, General Manager  
Email: abybaseck@yahoo.fr, Mrs Aby BA SECK, Director of Production

**FE.N.A.P.H**

Batiment 46-47 SODIDA Dakar Senegal

Lot 46-47 ZONE SONEPI / SODIDA - BP: 7051 Dakar, SENEGAL  
Tel. +221-33 825 95 92 / 33 824 24 45  
Fax +221-33 824 24 43  
Email: athjg@yahoo.fr  
Mr Gora ATHIE, President

**RAMA DIAW FASHION**

Rue Blaise Diagne, Ile Nord, Saint-Louis, SENEGAL  
Tél: (+221) 77 149 54 77 (+221) 33 961 92 52  
Email. ramadiawsl@gmail.com  
Website: www.ramadiawfashion.com  
Mrs Rama DIAW, General Manager

**COMPAGNIE TEXTILE DE L'OUEST AFRICAIN (COTOA)**

**Trade Register 2611 B** **N. Taxpayer** **00138892 G 3**

Km 2,5, Boulevard du Centenaire B.P. 201 DAKAR

*Legal form :* Limited Company.  
*Phone:* 33.839.40.40  
*Fax :* 33.832.40.30  
*Website:*  
*Email :* cotoa@orange.sn  
*Capital:* 691.824.000 CFA  
*Revenue General:* 2.500.000.000 CFA  
*Number of employees :* NUMBER OF EMPLOYEE DE 25 à 50 SALARIES  
M. Michel THERON Directeur Général :

Industrie de transformation de fibres textiles

**COMPAGNIE SENEGALAISE DE TEXTILE (COSETEX)**

**Trade Register 99 B 970** **N. Taxpayer** **03457952 E 3**

Km 24, Route de Rufisque B.P. 7782 DAKAR

*Legal form :* Limited Company.  
*Phone:* 338369284 / 338366037  
*Fax :* 33.836.60.39  
*Website:*  
*Email :* cosetex@arc.sn  
*Capital:* 300.000.000 CFA  
*Revenue General:*  
*Number of employees :* NUMBER OF EMPLOYEE DE 100 à 150 SALARIES  
M. Brahim HAIDOUZ Directeur Général :

**COLLE SOW ARDO**

**Trade Register 83 A 2350** **N. Taxpayer** **19798322 A 1**

186, Avenue Lamine Guèye B.P. 3923 DAKAR

*Legal form :* Limited Company.  
*Phone:* 33.842.93.83  
*Fax :* 33.821.25.29  
*Website:* www.collesowardo.com  
*Email :* collesowardo@orange.sn

*Capital:* 100.000.000 CFA  
*Revenue General:*  
*Number of employees :* NUMBER OF  
EMPLOYEE DE 20 à 25 SALARIES  
Mme Aminata SOW Directeur Général :

**CONFECTION TAIR  
HANN**

**Trade Register SN DKR 91 A2456 N. Taxpayer 016127422 D 1**

Km 11,5 Route de Rufisque Allignement SIPS B.P. 31087 THIAROYE DAKAR

*Legal form :* Entreprise individuelle.

*Phone:* 33.834.59.14

*Fax :* 33.826.77.72

*Website:*

*Email :* hanneconf@hotmail.fr

*Capital:*

*Revenue General:*

*Number of employees :* NUMBER OF  
EMPLOYEE DE 1 à 5 SALARIES

M. Taïr HANN Directeur Général :

Spécialiste en Habillement Sportif

**CONFECTION BARA DIOP (CONFEBAD)**

**Trade Register 89 A 1014 N. Taxpayer 00959442 B 1**

22, Rue Moussé Diop B.P. 20167 DAKAR DAKAR

*Legal form :* Entreprise individuelle.

*Phone:* 338423586 / 775617947

*Fax :* 33.842.93.66

*Website:*

*Email :* confebad@hotmail.com

*Capital:* 2.500.000 CFA

*Revenue General:*

*Number of employees :* NUMBER OF  
EMPLOYEE DE 5 à 10 SALARIES

M. Seydina Libasse DIOP Directeur Général :

TENUE DE SPORT

**GESTION INDUSTRIELLE ET COMMERCIALE DU SENEGAL (GICS)**

**Trade Register SNDKR 2005 M 14415 N. Taxpayer 00653192 D 1**

12,5 Route de Rufisque B.P. 4269 CP 18522 DAKAR

*Legal form :* Entreprise unipersonnelle à responsabilité limitée (E.U.R.L.).

*Phone:* 338235388 / 776342819

*Fax :* 33.823.53.88

*Website:*

*Email :* gics47@yahoo.fr

*Capital:* 14.000.000 CFA

*Revenue General:* 65.000.000 CFA

*Number of employees :* NUMBER OF  
EMPLOYEE DE 5 à 10 SALARIES

M. Mbaye GUEYE Directeur Général :



**ERA BAKER TILLY**

Trade Register SN DKR 96 B 478

N. Taxpayer

00756152 S 2

Sacré Coeur 3 n° 9024 bis B.P. 5837 DAKAR

Legal form : S.A.R.L.

Phone: 338674374/ 338670799

Fax : 33.825.30.32

Website: www.erabti.com

Email : contact@erasng.com

Capital: 2.000.000 CFA

Revenue General: 240.000.000 CFA

NUMBER OF EMPLOYEE DE 15 à 20

Number of employees : SALARIES

M. Iba Joseph BASSE Directeur Général :

**BROD'ART**

21, Rue Mohamed V B.P. 4202 DAKAR DAKAR

Legal form :

Phone: 221.842.42.04

Fax : 221.842.42.04

Website:

Email : brod-art@hotmail.com

Capital:

Revenue General:

Number of employees :

**LE CHIFFONNIER INDUSTRIEL SARDI**

Zone industrielle Sud Rocade Fann Bel Air B.P. 21551

DAKAR Legal form :

Phone: 221.832.69.05

Fax : 221.832.10.18

Website:

Email : sardi@sentoo.sn

Capital:

Revenue General:

Number of employees :

M. Khassor NDIAYE Directeur Général :

**MAME DIARRA COUTURE**

99, Rue Amadou Assane Ndoye DAKAR

Legal form :

Phone: 822.22.09/ 634.12.23

Fax :

Website:

Email :  
Capital:  
Revenue General:  
Number of employees :

#### **GUELEWAR COUTURE**

Bourguiba X Front de Terre B.P. 30032 DAKAR  
Legal form :  
Phone: 775698455/ 338253491  
Fax :  
Website:  
Email : jeuneamadou@yahoo.fr  
Capital:  
Revenue General:  
Number of employees :  
M. Amadou SY Directeur Général :

#### **VERSUS STUDIO**

15, Rue Huart B.P. 891 DAKAR DAKAR  
Legal form :  
Phone: 221.889.73.73  
Fax : 221.889.73.83  
Website:  
Email : versus@sentoo.sn  
Capital:  
Revenue General:  
Number of employees :

#### **LE SALOUM BABY ENFANT**

##### **Trade Register 94 B 1248**

HLM Grand Yoff C n° 161 DAKAR  
Legal form : G.I.E.  
Phone: 338278492/775688747  
Fax :  
Website:  
Email : gielesaloum@yahoo.fr  
Capital: 100.000 CFA  
Revenue General:  
Number of employees : NUMBER OF  
EMPLOYEE DE 1 à 5 SALARIES  
M. Abibou CISSE Directeur Général :

#### **SOCIETE DE COMMERCE ET DE TRAVAUX DEVELOPPEMENT (SCOT DEVELOPPEMENT)**

Grand Yoff Taïba 4 DAKAR

Legal form :

Phone: 33.827.06.67

Fax :

Website:

Email : scotdeve@hotmail.com

Capital:

Revenue General:

Number of employees :

M. Mactar DIOP Directeur Général :

#### CENTRE D'APPUI A L'INITIATIVE FEMININE (CAIF)

N. Taxpayer

23482760 S 1

Sacré Coeur 2 n° 8613 A DAKAR

Legal form : G.I.E.

Phone: 33.825.13.50

Fax : 33.825.13.50

Website: www.sencaif.com

Email : secaif@gmail.com / abacaif@yahoo.fr

Capital: 60.000.000 CFA

Revenue General: 15.000.000 CFA

NUMBER OF  
EMPLOYEE DE 75 à 100 SALARIES

Number of employees :

Mme Arame Ba DRAME Directeur Général :

#### DIOR DIARAMA

Trade Register SNDKR 2006 A 16266

N. Taxpayer

26594092 R 1

Hamo 4 n° K 10 DAKAR

Legal form : Etablissement individuel.

Phone: 77.653.10.36

Fax :

Website:

Email : fatoumbathio@yahoo.fr

Capital: 1.500.000 CFA

Revenue General: 4.500.000 CFA

NUMBER OF  
EMPLOYEE DE 1 à 5 SALARIES

Number of employees :

Mme Fatou FALL Directeur Général :

#### LAAY DIAARA

##### COUTURE

Trade Register SN DKR 81 A 662

N. Taxpayer00896662 C 1

Lot n°64 Domaine Industrielle B.P. 7252 DAKAR

Legal form : Entreprise individuelle.

Phone: 33.824.46.25

Fax : 33.825.83.41

Website: www.laaydiaara.com

Email : info@laaydiaara.com

Capital: 7.000.000 CFA

*Revenue General:* 49.416.706 CFA  
NUMBER OF  
*Number of employees :* EMPLOYEE DE 15 à 20 SALARIES  
M. Abdoulaay Diaara DIOP Directeur Général :

#### NASSE COUTURE

face Caisse de Sécurité Sociale RUFISQUE  
*Legal form :* Entreprise individuelle.  
*Phone:* 338362600/ 776430839  
*Fax :*  
*Website:*  
*Email :* couturenasse@yahoo.fr  
*Capital:*  
*Revenue General:*  
*Number of employees :*  
Mme Maimouna LO Directeur Général :

#### BINETA SALSAO

Avenue Birago Diop Point E DAKAR  
*Legal form :* Entreprise individuelle.  
*Phone:* 338245733/ 776396289  
*Fax :*  
*Website:*  
*Email :* binetasalsao@orange.sn  
*Capital:*  
*Revenue General:*  
*Number of employees :*  
Mme Bineta SALSAO Directeur Général :

#### SHALIMAR COUTURE

##### Trade Register 85 B 98

119, Boulevard De Gaulle B.P. 12179 DAKAR  
*Legal form :* Entreprise individuelle.  
*Phone:* 33.821.02.52  
*Fax :* 33.822.85.83  
*Website:*  
*Email :* dioumadieng@yahoo.fr / shalimarcouture@yahoo.fr  
*Capital:* 1.000.000 CFA  
*Revenue General:*  
NUMBER OF  
*Number of employees :* EMPLOYEE DE 5 à 10 SALARIES  
Mme Diouma Dieng DIAKHATE Directeur Général :

#### BELLE DAME COUTURE

##### Trade Register 98 A 4193

N. Taxpayer 00511442 C 1

Place Obélisque / Colobane B.P. 12554 DAKAR  
*Legal form :* Entreprise individuelle.  
*Phone:* 338218147/ 775483909

*Fax :* 33.821.06.05  
*Website:*  
*Email :* gkkc@hotmail.com  
*Capital:* 150.000.000 CFA  
*Revenue General:*  
*Number of employees :* NUMBER OF EMPLOYEE DE1 à 5 SALARIES  
Mme Fatou Mor GUEYE Directeur Général :

#### ALIPHAJOE

Rue 64 X 55 Gueule Tapée DAKAR  
*Legal form :* Entreprise individuelle.  
*Phone:* 338219607/ 776457281  
*Fax :*  
*Website:*  
*Email :* papathe52@yahoo.fr  
*Capital:*  
*Revenue General:*  
*Number of employees :*  
M. Pathé GUEYE Directeur Général :

#### SAGATA CREATION

Route du Front de Terre Enceinte CPD Liberté 6 DAKAR  
*Legal form :*  
*Phone:* 338375472/ 776366194  
*Fax :*  
*Website:*  
*Email :* asow.kaneexp@gmail.com  
*Capital:*  
*Revenue General:*  
*Number of employees :*  
Mme Adama SOW Directeur Général :

#### SENEGAL BRODERIE MODERNE (SBM)

**Trade Register SNDKR 2006 A 10114** **N. Taxpayer** **04081212 R 1**  
Lot 29 , Bat 24 Sodida DAKAR  
*Legal form :*  
*Phone:* 338249471/ 338690068  
*Fax :*  
*Website:* www.senegalbroderie.com  
*Email :* danefall@senegalbroderie.com  
*Capital:*  
*Revenue General:*  
*Number of employees :*  
M. Mamadou FALL Directeur Général :

2, Place de l'indépendance

### THIER CREATION

Lot n° 107 Zone Sonepi DAKAR

*Legal form :* Entreprise individuelle.

*Phone:* 338257391/ 776384822

*Fax :*

*Website:*

*Email :* thiersci@yahoo.fr

*Capital:*

*Revenue General:*

*Number of employees :*

M. Thierno SOKHNA Directeur Général :

### TOUBA BELEL COUTURE

Parcelles Assainies U-14 n° 0023 DAKAR

*Legal form :* Entreprise individuelle.

*Phone:* 338253962/ 776455175

*Fax :*

*Website:*

*Email :* hecfenaphsodida@yahoo.fr

*Capital:*

*Revenue General:*

*Number of employees :*

M. Amadou FALL Directeur Général :

### NAVETTE D'OR

Rue 27 X 6 Médina DAKAR

*Legal form :* Entreprise individuelle.

*Phone:* 33.821.93.41

*Fax :*

*Website:*

*Email :* kenemearelao@hotmail.com

*Capital:*

*Revenue General:*

*Number of employees :*

M. Mamadou L. KENEME Directeur Général :

### COMPLEXE SADYA

Mamelles, Rte de l'Aéroport DAKAR

*Legal form :* Entreprise individuelle.

*Phone:* 338204914/ 776446312

*Fax :*

*Website:*

*Email :* sadya@orange.sn

*Capital:*

*Revenue General:*

*Number of employees :*

Mme Alimatou Sadya GUEYE Directeur Général :

### **COMPLEXE SAPHIR**

76 Bis, Avenue De Gaulle DAKAR

*Legal form :*

*Phone:* 33.821.13.02

*Fax :* 33.823.61.14

*Website:*

*Email :* saphir@orange.sn

*Capital:*

*Revenue General:*

*Number of employees :*

Mme Bintou Khouma DIOP Directeur Général :

### **SIGIL**

Sicap Rue 10, Rue Niente n°988 DAKAR

*Legal form :*

*Phone:* 338647705/ 775019754

*Fax :*

*Website:*

*Email :* sigil.com2@free.fr

*Capital:*

*Revenue General:*

*Number of employees :*

M. Cheikhna Cheikh Bamba LOUM Directeur Général :

### **ABOUBACAR SARR PRODUCTION (ABS PRODUCTION)**

Ouagou Niayes 2 n° 395 DAKAR

*Legal form :*

*Phone:* 338254572/ 775337673

*Fax :*

*Website:*

*Email :*

*Capital:*

*Revenue General:*

*Number of employees :*

M. Aboubacry SARR Directeur Général :

### **ASSOCIATION DES FORMATEURS ARTISANS DU SENEGAL (AFAS)**

**Trade Register 95 B 645**

**N. Taxpayer0320317**

26, Rue Armand Angrand DAKAR

Legal form : G.I.E.  
Phone: 776171807/ 766888153  
Fax :  
Website:  
Email : sagnae@yahoo.fr  
Capital:  
Revenue General:  
NUMBER OF  
EMPLOYEE  
Number of employees : DE 25 à 50 SALARIES  
M. Ousseynou MBAYE Directeur Général :

#### **ZEINA CREATION**

##### **Trade Register SNDKR 2009 A 10289**

Cité Soprim n° 58 A DAKAR

Legal form : Entreprise individuelle.  
Phone: 338350769/ 775105233  
Fax :  
Website:  
Email : zcreational@yahoo.fr  
Capital:  
Revenue General:  
NUMBER OF  
EMPLOYEE DE 5 à 10 SALARIES  
Mme NDIAYE Alima DIAKITE Directeur Général :

#### **DOULAYE COUTURE**

##### **Trade Register SNDKR 2008 A 18318 N. Taxpayer 26294022 R 1**

Parcelles Assainies U. 19 n° 81 DAKAR

Legal form : Entreprise individuelle.  
Phone: 77.637.01.41  
Fax : 33.851.71.05  
Website:  
Email : doulayehautecouture@hotmail.com  
Capital: 1.000.000 CFA  
Revenue General:  
NUMBER OF  
EMPLOYEE DE 25 à 50 SALARIES  
M. Abdoulaye NDAW Directeur Général :

#### **COMPLEXE THIORO MAROSSO**

##### **Trade Register SN DKR 2010 M 4607 N. Taxpayer 002422301**

35, Cité des Enseignants Golf Nord DAKAR

Legal form : Entreprise individuelle.  
Phone: 338372187/ 775495650  
Fax : 33.837.21.87  
Website:  
Email : complexethioromarosso@yahoo.fr  
Capital:



Revenue General:

NUMBER OF  
Number of employees : EMPLOYEE DE 1 à 5 SALARIES  
Mme Dior FALL Directeur Général :

#### BE FASHION (BF)

Trade Register SNDKR 2009 B 15642 N. Taxpayer 041039592 C 2

Sicap Amitié 3 , n° 4521/E B.P. 16582 FANN DAKAR

Legal form : S.A.R.L.

Phone: 33.825.21.29

Fax : 33.864.73.48

Website:

Email : befashion@live.fr

Capital: 1.000.000 CFA

Revenue General:

NUMBER OF  
Number of employees : EMPLOYEE DE 1 à 5 SALARIES  
Mme Abibatou Khady DIACK Directeur Général :

#### SEN SETAL

Trade Register SN DKR 2010 B 2752 N. Taxpayer 0041732172 E 2

Sicap Liberté 2 B.P. 28363 MEDINA DAKAR

Legal form : S.A.R.L.

Phone: 776199984/ 775642569

Fax :

Website:

Email : sensetal2010@live.fr

Capital:

Revenue General:

Number of employees :

#### AFRIQUE SERVICES KANE ET DIAW (ASKADI)

Trade Register SN DKR 2009 B 4577 N. Taxpayer 004021995

Gueule Tapée Imm. dièze B Ap. 14 DAKAR

Legal form : S.A.R.L.

Phone: 301042570/ 774406291

Fax :

Website:

Email :

Capital: 1.000.000 CFA

Revenue General:

NUMBER OF  
Number of employees : EMPLOYEE DE 1 à 5 SALARIES  
Mme Oumy LY Directeur Général :

#### FEEM DESIGN

**Trade Register SNDKR 2006 B 10003** **N. Taxpayer** **29500472 Y 1**  
 Ouakam Tally Américain Y DAKAR  
*Legal form :* Entreprise unipersonnelle à responsabilité limitée (E.U.R.L.).  
*Phone:* 33.860.34.03  
*Fax :*  
*Website:* www.feemdesign.com  
*Email :* pdieng7@gmail.com  
*Capital:* 1.000.000 CFA  
*Revenue General:*  
 NUMBER OF  
*Number of employees :* EMPLOYEE DE 5 à 10 SALARIES  
 Mme Yaye Fatou GUEYE Directeur Général :

**UNIVERS DE LA MODE**  
**Trade Register 82A2112** **N. Taxpayer** **25895312C6**  
 Avenue Bourguiba X Castors Face Senelec DAKAR  
*Legal form :* G.I.E.  
*Phone:* 33.864.55.68  
*Fax :*  
*Website:*  
*Email :* unversdelamode\_sn@yahoo.fr  
*Capital:* 10.000.000 CFA  
*Revenue General:* 18.200.000 CFA  
 NUMBER OF  
*Number of employees :* EMPLOYEE DE 5 à 10 SALARIES  
 M.Amath NDIAYE Directeur Général :

**SELLE DIENG**  
**Trade Register SN DBL 2014 A 1277** **N. Taxpayer** **005073911**  
 Touba Guede Bousso DIOURBEL  
*Legal form :* Entreprise individuelle.  
*Phone:* 77.417.01.46  
*Fax :*  
*Website:*  
*Email :* sellediengdiop@yahoo.fr  
*Capital:* 15.000.000 CFA  
*Revenue General:*  
*Number of employees :* NUMBER OF EMPLOYEE DE 5 à 10 SALARIES  
 M. Selle DIENG Directeur Général :

## SPINNING, WEAVING AND TEXTILE ANNOBLISHING

**NOUVELLE SOCIETE TEXTILE SENEGALAISE (NSTS)**  
**Trade Register 91 B 374** **N. Taxpayer** **0049256**  
 2, Place de l'Indépendance B.P. 5605 DAKAR

Legal form : Limited Company.  
Phone: 338229065 / 338224310  
Fax : 33.822.52.41  
Website:  
Email : stt@sentoo.sn  
Capital: 100.000.000 CFA  
Revenue General:  
Number of employees :  
M. Ibrahima Macodou FALL Directeur Général  
:  
Etablissements industriels = Thiès : 951.24.61

#### COLLE SOW ARDO

**Trade Register 83 A 2350** **N. Taxpayer** **19798322 A 1**  
186, Avenue Lamine Guèye B.P. 3923 DAKAR  
Legal form : Limited Company.  
Phone: 33.842.93.83  
Fax : 33.821.25.29  
Website: www.collesowardo.com  
Email : collesowardo@orange.sn  
Capital: 100.000.000 CFA  
Revenue General:  
Number of employees :  
NUMBER OF  
EMPLOYEE DE 20 à 25 SALARIES  
Mme Aminata SOW Directeur Général :

#### AISSA DIONE TISSUS (ADT)

**Trade Register 91 B 642** **N. Taxpayer** **0050104 2 C 2**  
SODIDA Zone Artisanale N°104 Bis B.P. 5804 FANN DAKAR  
Legal form : Limited Company.  
Phone: 33.825.75.15  
Fax : 33.825.81.72  
Website: www.aissadione.com  
Email : adt@orange.sn  
Capital: 30.000.000 CFA  
Revenue General:  
Number of employees :  
NUMBER OF  
EMPLOYEE DE 50 à 75 SALARIES  
Mme Aïssa DIONE Directeur Général :

#### COLORANTS ET PRODUITS CHIMIQUES (CPC)

**Trade Register 99 B 786** **N. Taxpayer** **0337271 2 R 2**  
HLM Grand Yoff - Scat Urban Immeuble Boubou SOW N°3 B.P. 13107 DAKAR  
Legal form : S.A.R.L.  
Phone: 33.827.34.84  
Fax : 33.827.34.85  
Website:  
Email : tembacpc@orange.sn  
Capital: 1.000.000 CFA  
Revenue General:

NUMBER OF  
*Number of employees :* EMPLOYEE DE 5 à 10 SALARIES  
M. Tamba KONTE Directeur Général :  
Import Export de Colorants

**ETABLISSEMENT GORA ATHJ CONFECTION (EGA CONFECTION)**

**Trade Register 77 A 359** **N. Taxpayer** **00867352 C 1**

Rue 13 Prolongée X Bouguiba Castor B 4647 B.P. 7051 MEDINA DAKAR

*Legal form :* Entreprise  
individuelle.

*Phone:* 33.824.24.45

*Fax :* 33.824.24.43

*Website:*

*Email :* athjgora@yahoo.fr

*Capital:* 80.000.000 CFA

*Revenue General:*

NUMBER OF  
*Number of employees :* EMPLOYEE DE 25 à 50 SALARIES

M. Gora ATHJ Directeur Général :

**NDAAGOU  
SENPREMAGE**

**Trade Register 93 B 425** **N. Taxpayer** **00879412 C 2**

SODIDA Lot n° 6 B.P. 7096 DAKAR DAKAR

*Legal form :* S.A.R.L.

*Phone:* 33.824.24.81

*Fax :* 33.825.52.20

*Website:*

*Email :* ndaagousentremage@yahoo.com

*Capital:* 1.000.000 CFA

*Revenue General:* 100.000.000 CFA

NUMBER OF  
*Number of employees :* EMPLOYEE DE 25 à 50 SALARIES

Mme MBAYE Ndeye Ndack Directeur Général :

**AMINA COUTURE KEUR SERIGNE FALLOU**

HLM Paris Guédiawaye DAKAR

*Legal form :*

*Phone:* 221.837.55.13

*Fax :*

*Website:*

*Email :*

*Capital:*

*Revenue General:*

*Number of employees :*

Mme Aminata MBATHIE Directeur Général :

**COOPERATIVE CAXXU NDIAMBOUR**

Rue Mariama Niass MERMOZ B.P. 17514 DAKAR

*Legal form :*

*Phone:* 338603480/ 776580074

*Fax :*

*Website:*

*Email :* fadiga88@yahoo.fr

*Capital:*

*Revenue General:*

*Number of employees :* NUMBER OF EMPLOYEE DE 5 à 10 SALARIES

### LE SALOUM BABY ENFANT

**Trade Register 94 B 1248**

HLM Grand Yoff C n° 161 DAKAR

*Legal form :* G.I.E.

*Phone:* 338278492/775688747

*Fax :*

*Website:*

*Email :* gielesaloum@yahoo.fr

*Capital:* 100.000 CFA

*Revenue General:*

*Number of employees :* NUMBER OF  
EMPLOYEE DE 1 à 5 SALARIES

M. Abibou CISSE Directeur Général :

### LAAY DIAARA

**COUTURE**

**Trade Register SN DKR 81 A 662**

**N. Taxpayer00896662 C 1**

Lot n°64 Domaine Industrielle B.P. 7252 DAKAR

*Legal form :* Entreprise individuelle.

*Phone:* 33.824.46.25

*Fax :* 33.825.83.41

*Website:* www.laaydiaara.com

*Email :* info@laaydiaara.com

*Capital:* 7.000.000 CFA

*Revenue General:* 49.416.706 CFA

*Number of employees :* NUMBER OF EMPLOYEE DE 15 à 20 SALARIES

M. Abdoulaay Diaara DIOP Directeur Général :

### NASSE COUTURE

face Caisse de Sécurité Sociale RUFISQUE

*Legal form :* Entreprise individuelle.

*Phone:* 338362600/ 776430839

*Fax :*

*Website:*

*Email :* couturenasse@yahoo.fr

*Capital:*

*Revenue General:*

*Number of employees :*

Mme Maimouna LO Directeur Général :

**BINETA SALSAO**

Avenue Birago Diop Point E DAKAR

*Legal form :* Entreprise individuelle.

*Phone:* 338245733/ 776396289

*Fax :*

*Website:*

*Email :* binetasalsao@orange.sn

*Capital:*

*Revenue General:*

*Number of employees :*

Mme Bineta SALSAO Directeur Général :

**SHALIMAR COUTURE**

**Trade Register 85 B 98**

119, Boulevard De Gaulle B.P. 12179 DAKAR

*Legal form :* Entreprise individuelle.

*Phone:* 33.821.02.52

*Fax :* 33.822.85.83

*Website:*

*Email :* dioumadieng@yahoo.fr / shalimarcouture@yahoo.fr

*Capital:* 1.000.000 CFA

*Revenue General:*

NUMBER OF

*Number of employees :* EMPLOYEE DE 5 à 10 SALARIES

Mme Diouma Dieng DIAKHATE Directeur Général :

**BELLE DAME COUTURE**

**Trade Register 98 A 4193**

**N. Taxpayer**

**00511442 C 1**

Place Obélisque / Colobane B.P. 12554 DAKAR

*Legal form :* Entreprise individuelle.

*Phone:* 338218147/ 775483909

*Fax :* 33.821.06.05

*Website:*

*Email :* gkkc@hotmail.com

*Capital:* 150.000.000 CFA

*Revenue General:*

NUMBER OF

*Number of employees :* EMPLOYEE DE 1 à 5 SALARIES

Mme Fatou Mor GUEYE Directeur Général :

**ACOMA**

Km 2 Avenue Cheikh Anta Diop DAKAR

*Legal form :*

*Phone:* 338238303/ 776090900

*Fax :*

*Website:*

*Email :* caritasdak@arc.sn

*Capital:*

*Revenue General:*

*Number of employees :*

M. Victor SAGNA Directeur Général :

**COTONNIERE DU CAP VERT (CCV)**

**Trade Register SN DKR 4855 B**

**N. Taxpayer**

**00294802 G 3**

Km 11 Route de Rufisque B.P. 20003 THIAROYE DAKAR

*Legal form :* Limited Company.

*Phone:* 33.834.05.84 / 89

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**The textile sector in Senegal and Business: Opportunities for Indian industries**

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*Fax :* 33.834.08.79  
*Website:*  
*Email :* ccv@ccv.sn  
*Capital:* 992.180.000 CFA  
*Revenue General:* NUMBER OF EMPLOYEE DE 150 à 200  
*Number of employees :* SALARIES  
M. Fabrice ROSTAGNI Directeur Général :

**TISSAFRIC**

Patte d'Oie Builders n° C-57 DAKAR  
*Legal form :*  
*Phone:* 77 658 33 64  
*Fax :*  
*Website:*  
*Email :* tissaftric@orange.sn  
*Capital:*  
*Revenue General:*  
*Number of employees :*  
Mme Marianne TRAORE Directeur Général :

**PROMOFIL**

**Trade Register SN DKR 2006 A 2648** **N. Taxpayer** **26940252 R 1**  
Liberté 6 n° 8133 DAKAR  
*Legal form :* Entreprise individuelle.  
*Phone:* 33 827 09 07  
*Fax :*  
*Website:*  
*Email :* promofil1985@@yahoo.fr  
*Capital:*  
*Revenue General:*  
*Number of employees :*  
Mme Maiga Habi SANATA Directeur Général  
:

**NOUVELLE CONFECTION DAKAROISE (NOCODA)**

**Trade Register 22008 A** **N. Taxpayer** **00384152 C 1**  
Zone industrielle SONEPI 40-41 B.P. 7228 DAKAR  
*Legal form :* Entreprise individuelle.  
*Phone:* 33.824.93.25  
*Fax :* 33.825.11.51  
*Website:*  
*Email :* nocoda@yahoo.fr  
*Capital:*



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*Revenue General:* 500.000.000 CFA  
NUMBER OF EMPLOYEE DE 25 à 50  
*Number of employees :* SALARIES

**SYNERGIE BUSINESS**

**Trade Register SN DKR 2005 A 1667** **N. Taxpayer** **26766192 R 6**

Cité Panoramique n° 49 Liberté 6 Extension DAKAR

*Legal form :*

*Phone:* 77.632.15.68

*Fax :*

*Website:*

*Email :* sy.aissatou@ymail.com

*Capital:*

*Revenue General:*

*Number of employees :*

M. Aissatou SY Directeur Général :