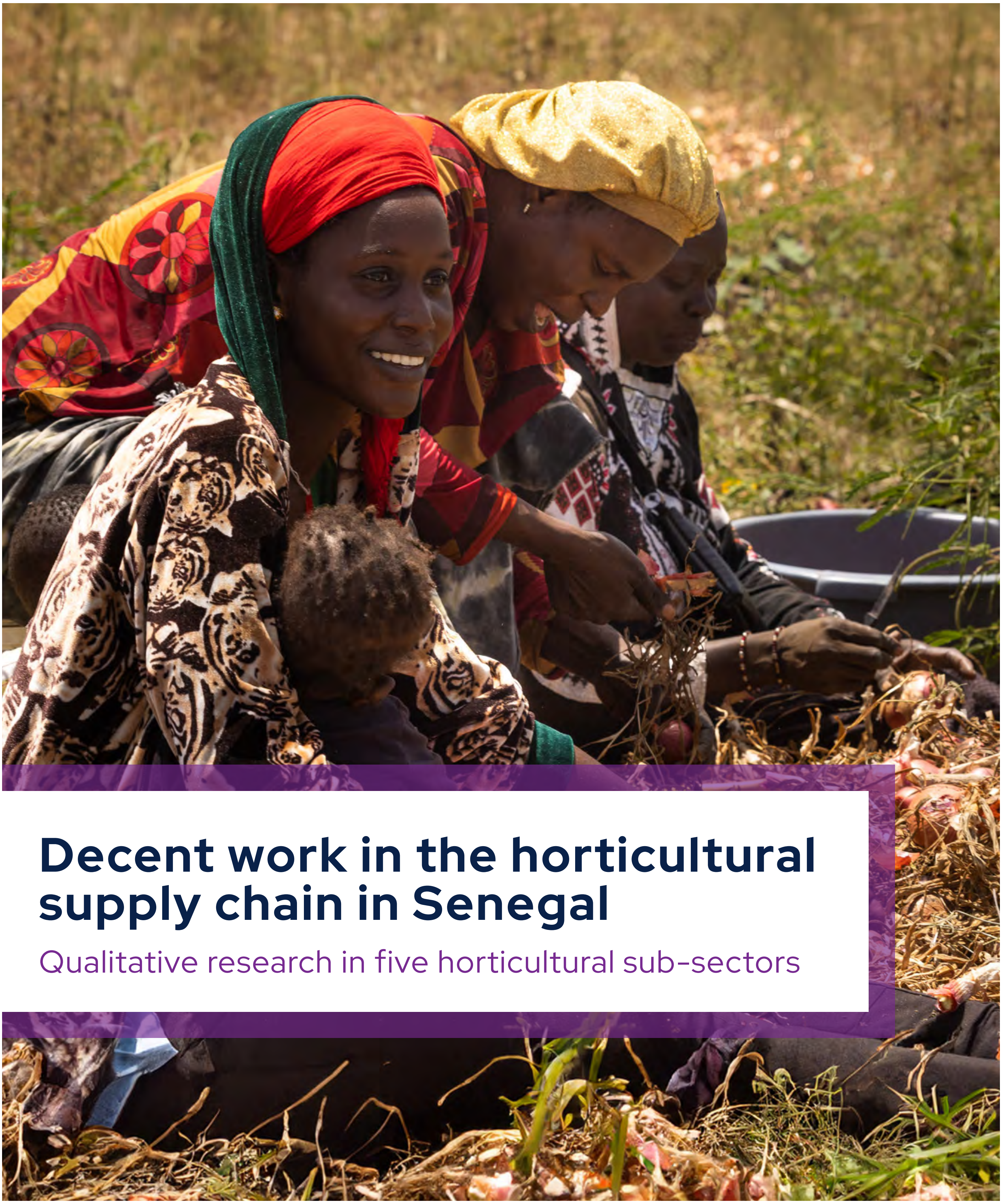

Decent work in the horticultural supply chain in Senegal

Qualitative research in five horticultural sub-sectors

MEYS Emerging Markets Research
Nafifu SARL

CNV Internationaal

Colophon

Decent work in the horticultural supply chain in Senegal: Qualitative research in five horticultural sub-sectors

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With thanks to : Francisca Dusseldorp, Latifou Yessoufou, Moussa Diop

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Acronyms

ANSD: Agence Nationale de la Statistique et de la Démographie (National Agency for Statistics and Demography)

CSS: Caisse de Sécurité Sociale (Social Security Fund)

DAPSA: Direction de l'Analyse, de la Prévision et des Statistiques Agricoles (Department of Agricultural Analysis, Forecasting and Statistics)

ENES: Enquête nationale sur l'emploi au Sénégal (National employment survey in Senegal)

FCFA: Franc des Communautés de l'Afrique de l'Ouest (West African Community Franc)

FGTS/B: General Federation of Senegalese Workers

GIE: Economic Interest Grouping

IPRES: Senegalese pension fund

NACE: Foreign Trade Analysis Note

NINEA: National Identification Number for Companies and Associations

ILO: International Labour Organisation

NGO: Non-Governmental Organisation

PAPA: Agricultural Policy Support Project

PAPSEN: Programme d'Appui au Programme National d'Investissement dans l'Agriculture au Sénégal (Support programme for the national agricultural investment programme in Senegal)

SME: Small and Medium-sized Enterprises

PPTD: Programme Pays de Promotion du Travail Décent (Decent Work Country Programme)

PSE: Plan Sénégal Emergent (Senegal's Emerging Plan)

RGE: General Business Census

RGPHAE: Recensement général de la Population, de l'Habitat, de l'Agriculture et de l'Elevage (General Population, Housing, Agriculture and Livestock Census)

RGPH: Recensement général de la Population et de l'Habitat (General Population and Housing Census)

SMAG: Guaranteed Minimum Agricultural Wage

SMIG: Guaranteed Interprofessional Minimum Wage

UEMOA: Union Economique et Monétaire Ouest Africaine (West African Economic and Monetary Union)

UDTS: Democratic Union of Senegalese Workers

SNTS: National Confederation of Senegalese Workers

Foreword

Decent work is essential to the social and economic development of the hundreds of thousands of individual workers active in Senegal's horticultural sector. It is therefore also high on the national policy agenda. At the same time, it is also a relatively new subject, on which little qualitative research has been carried out among the main players in the horticultural value chain.

We are grateful to CNV Internationaal for granting us this research mission on decent work in five horticultural sub-sectors in the three main horticultural zones of Senegal. In particular Francisca van Dusseldorp and Latifou Yessoufou of CNV Internationaal. They provided us with concrete feedback on which we were able to tailor our questionnaires to obtain the best results from respondents.

Our research teams in Senegal were able to collect over eight hundred individual responses from farmers, traders and individual workers on small and large farms and businesses in the regions of Saint-Louis, Thiès and Ziguinchor. This study was carried out largely during the rainy season, a difficult time in Senegal for collecting relatively large quantities of field data. We are therefore very grateful that they were able to do so.

Finally, we would like to thank Moussa Diop of labour union UDTS for his valuable comments on earlier versions of our research results.

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Executive summary

Decent work is defined by the International Labour Organisation (ILO) and endorsed by the international community as "productive work for women and men in conditions of freedom, equity, security and human dignity. Decent work implies employment opportunities that: are productive and provide a fair income; ensure security at work and social protection for workers and their families; provide opportunities for personal development and promote social inclusion; give people the freedom to express their concerns, to organise and to participate in decisions that affect their lives; and ensure equality of opportunity and treatment for all." Senegal has adopted the ILO's definition of decent work and translated it into a National Decent Work Agenda (*Programme Pays de Promotion du Travail Décent*-PPTD) since 2012. These agendas run for four years. The last one ran from 2018 to 2022. The results of the promotion and implementation of decent work over the last twelve years have shown mixed results, but overall it can be said that decent work in the agricultural and non-agricultural sectors is still limited.

Horticulture is one of the main agricultural sectors in Senegal. The main crops produced are onions, tomatoes, green beans, mangoes and cashew nuts. They are grown mainly in three horticultural areas of Senegal: the Senegal River valley, Casamance and Niayes. These five horticultural sub-sectors account for 40% of national horticultural production, are major export crops and provide employment for hundreds of thousands of people. Promoting and implementing decent work in these five sub-sectors would therefore have a huge economic and social impact on many workers and their families.

Qualitative and quantitative research on decent work in the horticultural sector in Senegal is currently poorly conducted. More specifically, research on the on the main stakeholders in the five sub-sectors of the horticultural supply chain has never been carried out in Senegal. The research methodology chosen by the research team of MEYS and Nafifu included primary and secondary research. The technique chosen for primary data collection was non-random self-selection sampling. Respondents selected using this technique were drawn from the following five groups: individual workers on small and large farms, employers on small farms, trading companies and input suppliers. All respondents operated in one of the three horticultural zones. To collect field data from employers and workers in the horticultural sub-sectors, five different questionnaires were developed by the research team of MEYS and Nafifu, with a different set of questions for each group of respondents. To collect the field data, the online survey tool SurveyMonkey was used by the research team. In addition to the field data collected through questionnaires in Senegal, a semi-structured face-to-face interview was conducted with a major Dutch importer of green beans from Senegal. In total, data from 883 respondents was collected over the period June - September 2024. For the secondary research, the research team of MEYS and Nafifu collected data from existing sources such as the ANSD, the ILO, the Ministry of Labour and the Ministry of Agriculture (DAPSA).

Collecting primary data on decent work in Senegal has proved to be a challenge for the research team of MEYS and Nafifu. Many employers and workers do not want to talk about the subject, even anonymously. The current labour market situation in rural areas, with high unemployment rates and a lack of paid employment alternatives outside horticulture, means that workers are often reluctant to talk about decent work for fear of losing their jobs. The vast majority of employers operate in the informal economy, deliberately or otherwise ignoring their legal obligations to their workers to provide decent work. In addition, most of the fieldwork has been carried out during the rainy season in

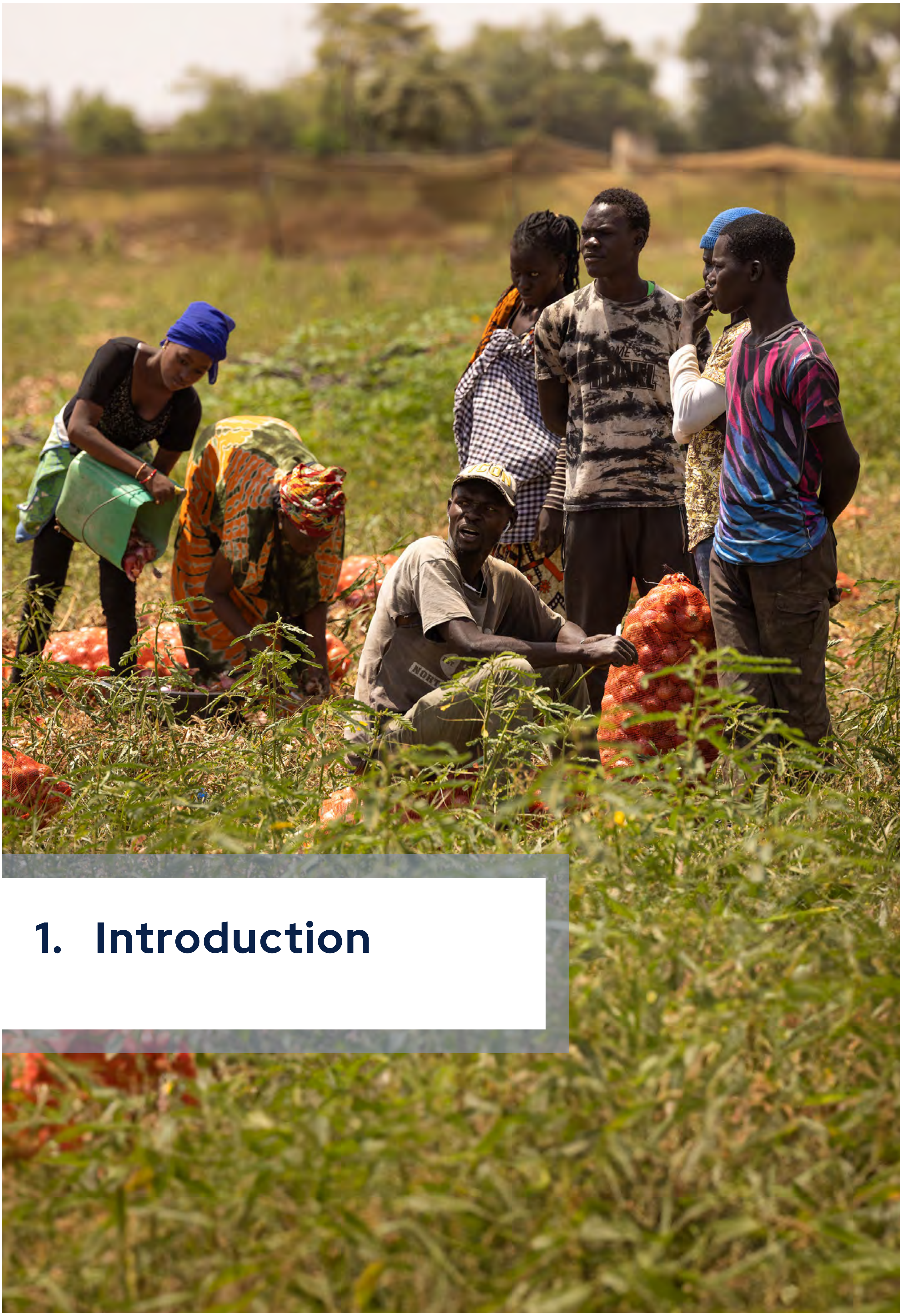
Senegal, making traveling more difficult and many horticultural farms are closed. Despite these difficulties, over 800 people were interviewed.

Although Senegal has a decent work programme, a national labour code and a national social security system for employers and workers, the main findings of this research are that decent work is almost non-existent in the five horticultural sub-sectors, with the exception of a few large farms. Most employers in the five horticultural sub-sectors do not provide their workers with written employment contracts, pay less than the legal minimum wage and offer almost no social security benefits. The majority of horticultural businesses are not registered with CSS and/or IPRES, and many do not even have a NINEA. Workers generally feel treated with contempt by their employers, work hard but don't feel they are rewarded for it. As they have no written labour contract, it is very difficult for them to discuss this situation with their employer. The result is that they are stuck in low-paid, underpaid jobs with no opportunity to develop as professionals and receive a decent wage. Worker representation is very weak in companies, with trade unions playing little or no role in these sub-sectors. Discussions with the employer on decent working conditions therefore fall to the individual worker, who is in a weak position vis-à-vis the employer.

The promotion and implementation of decent work in organisations active in the five horticultural sub-sectors cannot be achieved overnight. For the Senegalese government, it is essential that the informal sector be formalised. Otherwise, it will be very complicated to implement decent work, monitor its progress and, if necessary, take action through formal legal measures in accordance with the national labour code. One of the main conclusions of this research is that the majority of small farms and SMEs do not pay the legal minimum wage SMIG or SMAG[1] , which means that a large majority of their workers are dissatisfied with their pay. As they receive virtually no social security benefits and have no written labour contract, these workers are in constant fear of not having enough to support their families, especially when they fall ill, are injured or retire. The payment of at least the legal minimum wage, the provision of written labour contracts and social security benefits, in accordance with the national labour code, should therefore be an absolute priority for the Government and labour unions.

Of the fourteen national labour unions, after the general labour union elections on 12 December 2023, five were selected to represent workers in negotiations with international and national bodies such as the Ministry of Labour. Among these five unions, two were also mentioned by respondents to this research, namely the CNTS and the FGTS/B. To promote and implement decent work, CNV Internationaal should cooperate with one of these two unions. In doing so, it is vitally important to have a physical presence with an office in each of the three horticultural zones, so that workers and employers can visit and discuss their grievances, gather information, etc. on decent work. In addition, CNV Internationaal and its labour union partner should proactively approach employers in the five horticultural sub-sectors. But the approach to small farmers and large farms needs to be different. Small farmers are approached by working with local agricultural cooperatives. They know much more about individual farm owners and understand the local situation very well. For larger farms, CNV Internationaal and its local labour union partner can contact the owner directly to discuss decent work on their farm. Public denunciation of individual farms and businesses by CNV Internationaal and its local union partner should be avoided, as this would lead to closed doors on the part of employers. It is better to show best practice as an example to others.

[1] The hourly guaranteed minimum wage (SMIG) for non-agricultural workers subject to the statutory forty-hour working week is set at 370,526 FCFA, or 64,223 FCFA per month, by the Senegalese government in 2023. The official minimum hourly wage in the agricultural sector (SMAG) is 236,865 FCFA.



1. Introduction

1. Introduction

CNV Internationaal aims to improve the rights of workers (both formal and informal) in private sector supply chains: freedom of association, collective bargaining, decent wages, safe and respectful working conditions, gender equality and freedom from discrimination and gender-based violence in the workplace, and so on.

CNV Internationaal is convinced that decent work for all can only be achieved by involving all actors in the supply chain, holding all parties to account for their responsibilities. That's why CNV Internationaal is (not is) actively involved. With this in mind, CNV Internationaal offer training and advice on HRDD (Human Rights Due Diligence) and stakeholder engagement to European companies, local experts and trade unions.

1.1 Context of qualitative research

Senegal is developing its agricultural production with the aim of guaranteeing food security and stimulating economic growth and sustainable development in rural areas. Senegal's horticultural products are intended for local consumption and for export, particularly to West Africa and the countries of the European Union. Senegal's relative proximity to Europe and its position in the Sahel region make it an attractive partner for close cooperation.

The expansion of the fresh fruit sector brings with it inherent sustainability challenges. More land will need to be irrigated, more pesticides will be applied and, finally, more fruit will need to be stored in cold stores. Waste management will also become crucial. Efficient fruit production sectors include mechanisms to guarantee maximum value for each category of fruit. For example, as production of fresh fruit for export increases, productive commercial uses will need to be found for second and third category fruit. This includes a potential expansion of processing, which is still in its infancy in Senegal.

CNV Internationaal has been working in Senegal for over 15 years, focusing on four key result areas: 1) social dialogue, 2) working conditions in value chains, 3) youth employability and 4) gender equality. CNV Internationaal has established a partnership with the labour union UDTS (Union démocratique des travailleurs du Sénégal). Through our collaboration with UDTS, we aim to strengthen labour union capacity and improve working conditions in the country.

Senegal has been identified by the Ministry of Foreign Affairs as one of the "combi countries" where the Netherlands intends to invest more in terms of aid and trade. The horticulture sector has been chosen as the main focus of the Dutch combined programme in Senegal. CNV Internationaal and its partners are relatively new to this sector, hence the need for this study.

1.2 Qualitative research objectives

The overall objective of this qualitative research is to carry out an analysis of the horticultural sector in Senegal, the results of which will be used to identify interventions to promote decent work in horticultural value chains. The study focuses on five horticultural sub-sectors: onions, tomatoes, green beans, mangoes and cashew nuts. This selection was made in consultation with various stakeholders, taking into account the size of the sub-sector (volume, employment) and its importance for the export of horticultural products to the Netherlands. The results of the qualitative research are also being used to select local participants with whom CNV Internationaal will promote and implement decent work in the five sub-sectors.

2. Decent Work Agenda in Senegal

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Decent work is defined by the International Labour Organisation (ILO) and endorsed by the international community as "productive work for women and men in conditions of freedom, equity, security and human dignity. Decent work implies employment opportunities that: are productive and provide a fair income; ensure safety at work and social protection for workers and their families; provide opportunities for personal development and promote social integration; give people the freedom to express their concerns, to organise and to participate in decisions that affect their lives; and ensure equality of opportunity and treatment for all."

Decent work is also a political programme that guides the ILO's action. The Decent Work Agenda consists of four pillars institutionalised in the 2008 Declaration on Social Justice for a Fair Globalisation. The four pillars are

- **Job creation**: Building societies and economies that generate opportunities for investment, entrepreneurship, skills development, job creation and sustainable livelihoods;
- **Extending social protection**: Promoting inclusion and productivity by ensuring that women and men enjoy safe working conditions, allowing sufficient free time and rest, taking account of family and social values, providing adequate compensation for loss/decrease of income and providing access to adequate social security;
- **Promoting social dialogue and good governance**: Creating effective labour market institutions and efficient, independent employers' and workers' organisations, enabling a strong commitment on all sides to increase productivity, manage labour relations and build inclusive societies;
- **Guaranteeing rights at work**: Ensuring that economic development goes hand in hand with social development and respect for the rights of all workers, particularly those who are disadvantaged or poor.

These pillars are an integral part of the 2030 Agenda for Sustainable Development, more commonly known as the Sustainable Development Goals, with gender as a cross-cutting theme. Quality employment is seen as the implementation of the Decent Work Agenda and is often synonymous with working conditions.

The Senegalese government has adopted the ILO's Decent Work Agenda and translated it into a national programme called Senegal's Decent Work Country Programme (*Programme Pays de Promotion du Travail Décent* -PPTD). The first PPTD covered the period 2012-2016 and showed mixed results. The main criticisms related to the lack of a governing body for the programme and the inadequacy of the financial resources mobilised. This led to many unfulfilled objectives, often formulated too broadly, at the end of the programme. The experiences of PPTD1 were discussed at a PPTD Implementation Steering Committee in January 2017. Based on these discussions, the following SWOT analysis on decent work in Senegal was formulated:

SWOT analysis of decent work in Senegal

Strength	Weaknesses
- Existence of a legal and institutional framework promoting decent work - The government's political commitment via the Senegal Emerging Plan (PSE) - Introduction of CMU (Universal Health Coverage) - Aligning the PPTD with the PSE - Adoption of the National Social Protection Strategy, in the spirit of the principles of the NITs and the SDGs - Existence of a culture of social dialogue and collective bargaining - Experiences gained through the PPTD1	- Lack of integrated information system and global communication on decent work - Mismatch between labour market needs and training provision - High rate of social evasion - Weak coordination between structures responsible for promoting employment - Insufficient technical training centres at local level - Insufficient resources to promote decent work - Precariousness of certain jobs - Low take-up of certain international labour standards - Strong predominance of the informal sector
Opportunities	**Threats**
- Demographic dividend (young people can be a major source of human capital) - Standardisation of the investment framework within the UEMOA - Draft reform of the national interprofessional collective agreement (CCNI) - Existence of training funds - Existence of a fund to finance self-employment - Political will to restructure the informal sector - Strengthening public-private partnerships to promote decent work	- Scarcity of resources to sustain projects - Brain drain - Low economic output in local authorities - Non-pooling of resource funds intended to promote decent employment

Source: PPTD 2018 - 2022

As far as collective agreements are concerned, there is a federal agreement for the agricultural sector in 1958, which is obsolete. Social dialogue is also lacking in the sector. The *Loi d'orientation agro-sylvo-pastorale* (LOASP)[2] of May 2004 is controversial. Agro-sylvo-pastoral development policy has since been marked by the gradual withdrawal of the State, in line with the principles of refocusing its missions on refocussing its missions on sovereign functions, pursuing the policy of decentralisation, improving the living environment and conditions in rural areas, and creating an environment conducive to private investment in rural areas. The law has also been used to expropriate land for the benefit of large agricultural companies.[3]

[2] LOASP sets out the main principles and visions for the development of the agricultural and rural sector. In particular, it lays the foundations for land tenure, market regulation and the rights and status of farmers and farms. It thus constitutes a general framework for the development of the sector, into which sub-sectoral policies and development programmes must fit. The aim of LOASP is to base rural development on modernising family farming, while promoting agricultural entrepreneurship. The scope of this law covers all economic activities in rural areas, including processing, trade and services, and is in line with the principles of refocusing the State on its regalian functions (*Source: Processus de concertation pour l'élaboration d'une politique publique: la Loi d'orientation agro-sylvo-pastorale du Sénégal, ISRA- REFLEXIONS ET PERSPECTIVES- VOL. 6, N°02).*

[3] Remark Moussa Diop, UDTS

The second PPTD ran from 2018 to 2022 and essentially built on the lessons learned from the first programme. It was part of the country's long-term strategy, the Plan Sénégal Emergent (PSE), and focused on two priorities:
Priority 1: Promoting the creation of decent jobs for men and women
Priority 2: Strengthening and extending social protection

For each of these two priorities, a number of achievements were expected, with short- and medium-term indicators:

Priorities	Achievements	Indicators
Priority 1:	1. Decent employment policies and strategies for young men and women developed and implemented.	i. New employment policy validated and implemented ii. Number of gender-sensitive regional strategies developed to promote youth employment iii. Annual rate of increase in the share of the State budget allocated to youth employment
	2. Intensive public programmes to create decent jobs for young people in promising sectors.	i. Number of works contracts carried out in local authorities using the labour-based approach[1] ii. Number of young people (men and women) benefiting from labour-based jobs
	3. Schemes to promote employability, micro, small and medium-sized enterprises and the integration of young people in rural and urban areas, put in place	i. Rate of integration of young people (women, men) into companies in rural and urban areas ii. Rate of integration of young people (women, men) through self-employment in rural and urban areas
	4. Policies and programmes facilitating the transition from the informal to the formal economy developed and implemented.	i. Gender-disaggregated data available on informal employment ii. Action plan and roadmap adopted for the transition from informality to formality iii. Number of legal, regulatory and institutional initiatives taken
	5. The information system on the employment market, labour and vocational training is operational and gender-sensitive.	i. Number of staff trained in structures producing decent work statistics ii. Number of gender-sensitive decent work indicators produced and reported annually
Priority 2:	6. The legal and institutional framework of formal social protection systems strengthened	i. Number of legislative and regulatory texts adopted in the field of social protection ii. Percentage of public resources allocated to social protection for workers
	7. Social protection extended to all workers, including those in the informal economy	i. Number of laws and regulations adopted for the social protection of workers in the informal sector ii. Number of social security schemes for the informal economy implemented.
	8. Improved health and safety at work and general working conditions in the private, public, informal and agricultural sectors.	i. Rate of implementation of the national OHS programme[2] ii. Percentage of companies complying with basic OHS rules and general working conditions

Note: (1) labour-intensive; (2) Occupational Health and Safety
Source: PPTD 2018 - 2022

The overall cost of the Senegal 2018-2022 PPTD is USD 1,541,000, including USD 493,000 as a potential contribution from the ILO and USD 1,048,000 to be raised.

The results of PPTD2 are not yet clear. An evaluation of the programme has not yet been published at the time of writing this qualitative research. The Ministry of Labour carries out annual labour inspections of (newly) registered companies to check the presence of written labour contracts, worker representation and social protection. The results are published on the Ministry's website and are used by the Government to monitor progress on the Decent Work Agenda. At present, the government's social protection programmes for workers only cover the formal private and public sectors.

The *Agence nationale de la statistique* ANSD has translated decent work in Senegal into three of the most widely used indicators of employment opportunities: the activity rate[4] , the employment rate[5] and the unemployment rate[6] . Paid employment, which provides information on job quality, is also added to measure decent work and its evolution over time.[7] These figures are limited to the economy at national level and are not subdivided into different economic (sub)sectors such as horticulture. In the first quarter of 2024 (the latest figures), 58.6% of people of working age participated in the labour market. This level of activity was higher in rural areas, where it stood at 60.0%, compared with 57.7% in urban areas. By gender, it was higher for men than for women, at 68.5% and 49.1% respectively. The employment rate was 40.0%. It was higher in urban than in rural areas, at 44.3% and 33.6% respectively. In addition, the employment rate was higher for men (53.3% compared with 27.1% for women). Paid employment accounted for 40.7% of total employment in the quarter under review. It varies according to gender and place of residence. For men, it is estimated at 45.7%, compared with 31.1% for women. Access to paid employment is higher in urban areas (46.6%) than in rural areas (28.9%).[8]

The PPTD does not focus on a particular economic sector, but on the whole economy (formal and informal) in Senegal. Given that only 3% of non-agricultural businesses belong to the formal economy, while 100% of agricultural households operate in the informal economy, implementing decent work in all sectors of the economy and at all levels is a difficult task for the government.

This qualitative research looks at decent work in five sub-sectors of the horticultural supply chain in Senegal's three main horticultural areas: the Niayes, the Senegal River Valley and Casamance. These five sub-sectors (onion, green bean, tomato, mango, cashew nut) account for 42% of Senegal's total national production of fresh fruit and vegetables. The application of decent working conditions in these sub-sectors will cover tens of thousands of horticultural households, traders and input suppliers, and will benefit more than half a million individual workers.

[4] People of working age participating in the labour market. The minimum legal age for salaried employment and apprenticeships in Senegal is 15.
[5] Measures the proportion of people of working age who are in employment.
[6] The unemployed include all persons of working age who, during the reference period, were without work, available for work for a period of two weeks and looked for work during the four weeks preceding the collection date.
[7] Le Phare, Quarterly Bulletin - N 018 / May 2024, ANSD
[8] Enquête nationale sur l'Emploi au Sénégal (ENES) First quarter 2024, June 2024, ANSD

3. Horticultural sectors in Senegal

3. Horticultural sectors in Senegal

Depending on the agro-ecological zone concerned, each region of Senegal has developed value chains that take into account the local opportunities offered by rain-fed agricultural produce (cereals, groundnuts, cotton, sesame, fonio, etc.), and off-season produce (vegetables, fruit) and wild fruit[9] :

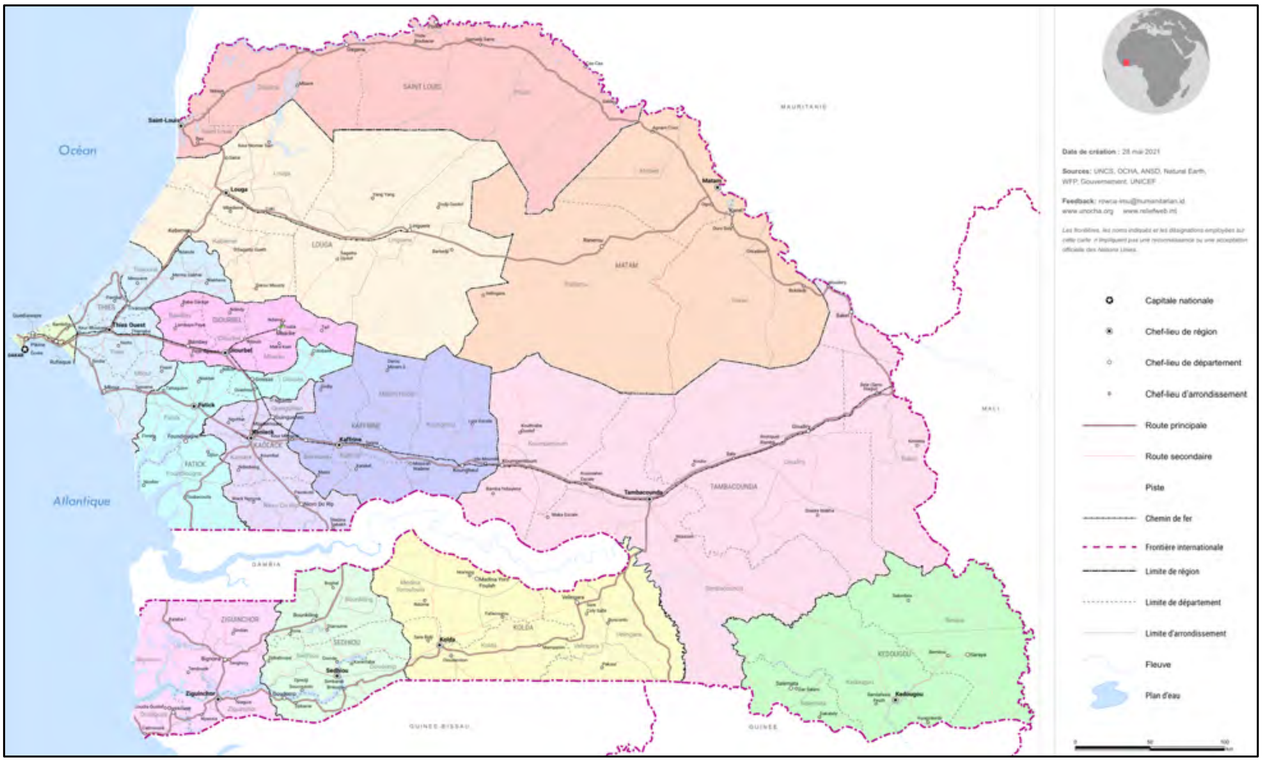
Region	Main agricultural value chains	Market opportunities	Market challenges
Dakar	- horticultural crops (vegetables, fruit) - products brought in from the interior of the country (oils, picked fruit, etc.)	- various specialised markets (Thiaroye, Castor); - a steadily growing population, with the rural exodus and the search for jobs	- storage capacity, conservation - various bottlenecks in transport, storage capacity, low levels of processing
Diourbel	- NTFP[a] (Kad pods, Balanites fruit, jujube) - local poultry	- wholesale to urban markets (e.g. Dakar) - roadside sales or local markets;	- transformations to add value, storage, etc.
Fatick	- fish, prawns, fresh or dried - iodised salts in bags or sachets - rain-fed agricultural products (groundnuts, millet, cowpeas, etc.)	- N1 road and various secondary roads - weekly markets (e.g. Passy, Foundiougne, etc.), - hotels, campsites, ... - close to Kaolack, Diourbel, ...	- storage capacity, conservation - adequate packaging almost non-existent - risk of rotting, loss of products
Kaffrine	- groundnuts and derived products (oil, seeds, oilcake, etc.) - Various livestock (oxen, sheep, goats, local poultry)	- roads (e.g. N1 Dakar - Tamba - towards Mali) - weekly markets in various localities (Birkilane, Kaffrine, etc.) - campsites, hotels, large neighbouring towns (Tamba, Kaolack, Touba, Mbacké, etc.)	- little or no storage and packaging - inadequate packaging - hygiene conditions to be improved and transformation processes to be better adapted and applied
Kaolack	- groundnuts and derived products (oil, seeds, oilcake, etc.) - sweet corn, fresh peanuts, early - iodised salts with the salt marshes of the Sine Saloum.	- on major roads (to Mali, Gambia, Guinea Bissau, Conakry) - transport to major urban centres by return delivery lorries - Mali and other neighbouring countries (Burkina Faso)	- low storage and preservation capacity - often hot climate leading to product losses - low trucking capacity due to high demand for salt in Mali, Burkina Faso
Kédougou	- early mangoes (from late May - June) - honey, wax, palm oil, shea butter	- good development of new markets with the arrival of mining companies - greater awareness of these products in urban areas (e.g. Dakar)	- distance from major urban centres, risk of product loss - the sometimes highly perishable nature of these products
Kolda	- picked fruit (Mad, Tol, palm kernels) - honey, wax, palm oil, milk derivative	- Diawbé market, neighbouring countries (Guinea Bissau, Conakry, Gambia)	- quality of roads, difficulty of access to certain localities

[9] Study on the agricultural potential of Senegal's agro-ecological zones, COSOP guidelines (2019-2024), November 2018 to March 2019, IFAD

	- livestock (cattle, dairy products, etc.) - local poultry (meat, eggs, etc.)	- numerous weekly markets in the region - Kolda on a busy road	- little or no processing for longer shelf life, more added value
Louga	- seafood near Potou (fresh, dried fish - locally picked fruit (Dankh, soump, gum, etc.) - various livestock (sheep, goats, local chicken)	- transit area towards Saint Louis, Mauritania, Matam, etc. not far from Touba - large, well-known livestock markets (Dara, Linguère, Barkédji, etc.) - various weekly markets that are attracting ever-larger crowds	- low storage and processing capacity for fish products - difficulty of access in certain localities, due to the quality of the tracks - market often more advantageous to traders than to producers
Matam	- dairy by-products (oil, milk) - various livestock (sheep, goats, oxen, etc.) - local rice, various vegetables, …	- cross-border markets with Mauritania, Mali - various weekly markets in the area, with access sometimes very difficult - transit zone to neighbouring countries (Mauritania, Mali)	- very long transport distance, continental heat not conducive to storage - distance from certain major urban centres (700 km from Dakar, for example)
Saint Louis	- rice valley - various vegetables (onion, sweet potato, melon, etc.) - fresh and processed fish, dried, smoked, …	- main roads (N2) and neighbouring Mauritania - cross-border markets (e.g. Rosso, Dagana, etc.) - is benefiting other major urban centres such as Louga, Thiès and Dakar.	- logistics not always appropriate - continuous cold chain - little or no processing of agricultural products
Sédhiou	- picked fruit (Mad, ditakh, etc.) - mangoes, cashews - medicinal plants	- transport by lorry to major coastal urban centres (Mbour, Dakar, etc.) - weekly and local markets	- processing techniques that add value, allowing longer storage periods and adding value to products
Tambacounda	- Tiger nuts and derivatives - products from the processing of jujubes, Soump, … - fonio, sesame, sorghum	- tourist camps, cross-border markets, neighbouring countries (Mali, Guinea, Mauritania) - transport by return delivery lorries ;	- road quality for transport to major urban centres (Mbour, Dakar, etc.)
Thiès	- mangoes (local, early varieties) - various vegetables with neighbouring Niayes - poultry farming (meat, layers, quail, other)	- large vegetable markets such as Notto Gouye Diama - close to major roads (N1 and N2) - proximity to major hotels in Saly, Mbour, Petite côte	- increasingly stringent quality requirements - storage and preservation facilities) - standardised logistics better suited to transport (cold chain, packaging, etc.)
Ziguinchor	- harvested fruit (madras, Tol, oil palm, etc.) - cashews with various by-products (nuts, oil, juice, etc.) - mangoes, pineapples, bananas, …	- transport boats leaving the port of Ziguinchor, Farafenié bridge - transport by various trucks with the new facilities for crossing the Gambia river - neighbouring countries such as Gambia, with cross-border markets	- reasonable transport times to ensure the arrival of quality, non-rotten products - taking advantage of cross-border markets such as Diawbé, other

Note: (a) Non-timber forest products (NTFPs) are products collected in the forest without the need to fell trees.

In general, agricultural commodity flows are directed towards urban areas, particularly coastal areas, whose strong demand exerts a powerful pull on the local market. Food flows in the country converge on Dakar and north-west Senegal, an urbanised, relatively high-income area whose considerable demand also exerts a strong influence on the markets of neighbouring countries.

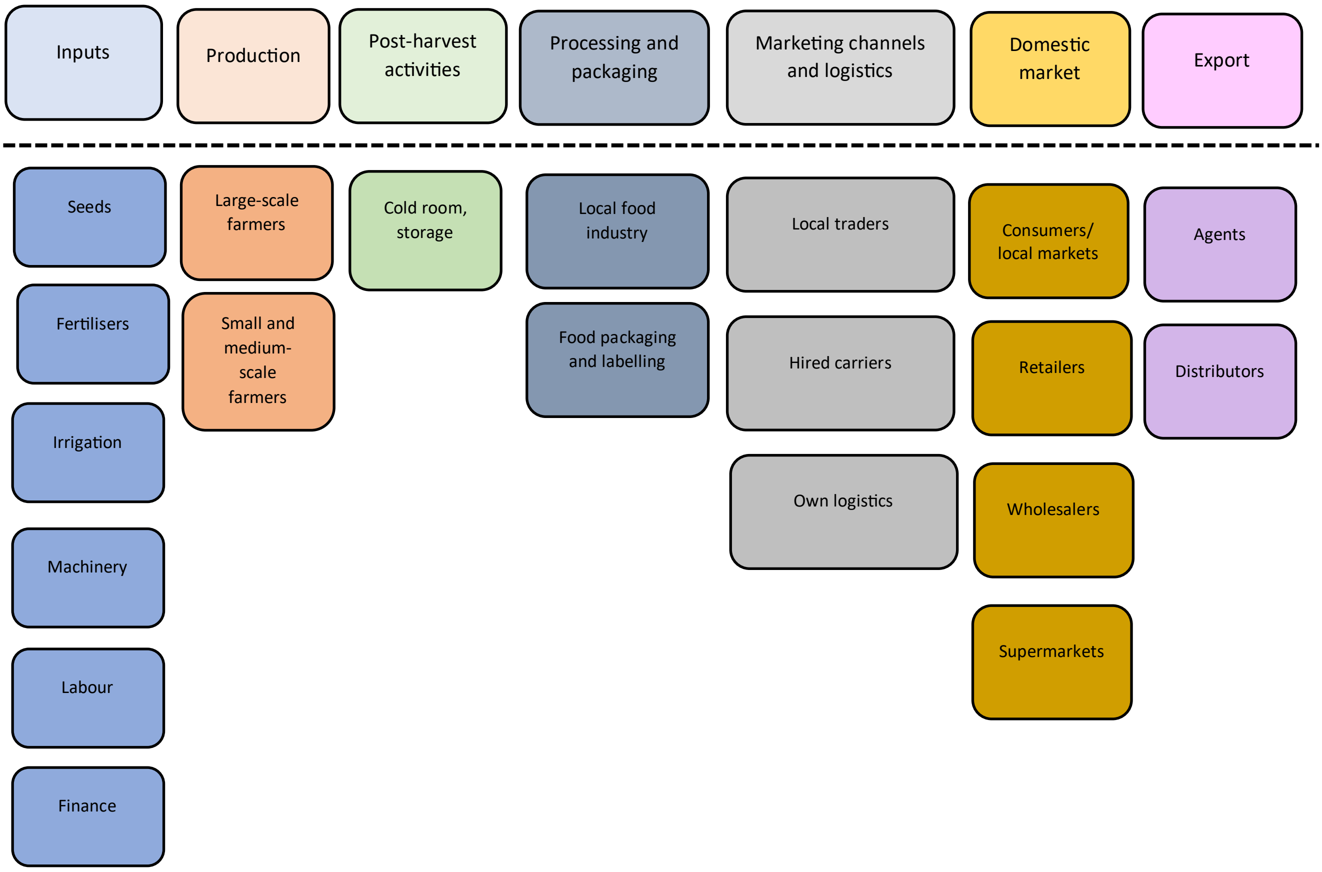


Administrative map of the Republic of Senegal

Two horticultural supply chains coexist in Senegal[10] : (1) a modern, vertically coordinated, capital- and labour-intensive supply chain, producing for both export and the domestic market, and (2) a traditional, labour- and capital-intensive domestic supply chain. The structure of the horticultural supply chain in Senegal, distinguishing between the export and domestic market, and the traditional and modern supply chain, is illustrated in the schematic representation below. Upstream, the traditional supply chain is dominated by small individual farmers. The most common means by which produce reaches the domestic market is through a network of small and medium-sized itinerant traders or "bana-banas" and small wholesalers who buy produce from farms or rural assembly markets and transport it to the larger urban markets (in Dakar, Touba, Saint-Louis, Thiès) or to more remote areas in the south of the country. In urban areas, small (street) retailers, grocery shops and the food services industry source their produce from these local markets. And for consumers further down the supply chain, local markets are the main outlet for horticultural products.

[10] Resilience of global and local value chains to the Covid-19 pandemic: Survey evidence from vegetable value chains in Senegal, Kaat Van Hoyweghen *et al*, Agric Econ. 2021 May; 52(3): 423-440

Schematic representation of the horticultural supply chain in Senegal



While the national horticultural supply remains largely traditional, a degree of modernisation is underway. Upstream of the national supply chain, a number of medium and large agro-industrial companies have entered the market over the last decade. Often with foreign capital and management. Examples include Société de Cultures Légumières (SCL), Qualité Fruits Sénégal (QFS) and Grands Domaines du Sénégal (GDS). They mainly supply the national market through medium-sized, well-organised traders and wholesalers. In addition, modern supermarket chains such as Auchan and Casino have been springing up in Senegal's towns and cities in recent years, particularly in Dakar. They offer a wide range of fresh produce at competitive prices and attract customers from a variety of social backgrounds, not just the more affluent. Nevertheless, the market share of these supermarkets is still well below that of traditional local markets. Imports of fresh fruit and vegetables are controlled by a small number of importing companies, almost all of which are located in Dakar. Imported fresh fruit and vegetables (mainly onions, potatoes, bananas and apples) reach local markets and consumers throughout the country via "bana-bana" traders. The modern export supply chain is organised around a few large, capital-intensive agro-industrial companies that produce, process and export their products. Contract farming with smallholders exists for mangoes, tomatoes (and a little for green beans), but the general trend over the last 15-20 years in the export supply chain has been towards greater consolidation, industrialisation and full vertical integration of production and export. Exporting companies mainly sell directly to foreign importers, but in recent years, when domestic market prices are favourable due to seasonal import bans, they also sell to domestic traders and local supermarkets.

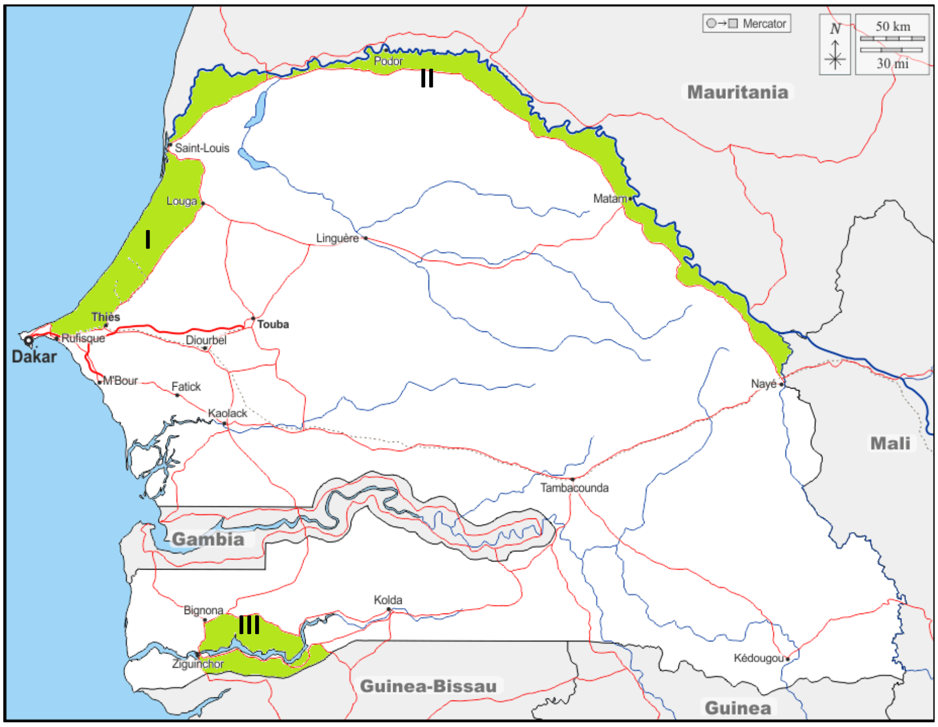
Senegal's main horticultural zones are:

I. Niayes
II. Senegal River Valley (VFS)
III. Casamance

Ad. I] The Niayes is an agro-ecological zone of vital importance to Senegal's economy. This region is characterised by physical conditions (mild, humid climate, shallow water table, soil typology, etc.) and a socio-economic context favourable to intensive agro-pastoral activities. It is the main area for Senegal and offers good conditions for arboriculture.

Ad. II] The Senegal River Valley (VFS) plays an important role in the country's agricultural economy. It covers more than 10,000 hectares and provides the bulk of the country's agricultural produce. Most of the country's onion production takes place in this area. It is also the best performing horticultural area, with a high level of human resources mobilised during agricultural campaigns.

Ad. III] Casamance is the most southerly and wettest part of Senegal, with monsoons lasting more than 8 months a year (rainfall > 800 mm), and is home to 20% of the country's arable land. The Casamance is particularly rich in natural resources and is home to the country's most important rain forest formations.



Main horticultural areas in Senegal: (I) Niayes; (II) Senegal River Valley; (III) Casamance

Horticultural production in these three regions accounts for over 80% of national production. The Niayes in particularly is regarded as Senegal's national granary. Most of the production of important horticultural crops such as onions, green beans and tomatoes is grown in this coastal region, which stretches from Dakar to Saint-Louis in the north of the country. The Casamance is the most important area for mango and cashew nut production, while in the northern region industrial tomatoes, green beans and onions are widely grown, particularly by large (foreign) farmers for export to Europe.

In addition to the large number of farm households located in the three horticultural zones, small traders (banabanas, coxeurs), retailers and wholesalers, who are closely linked to these households, are often located in the same zone. As well as supplying rural markets, traders in the Niayes also supply Dakar's urban markets.

The capital Dakar is Senegal's economic powerhouse. Nearly 40% of all registered businesses are located in the city, which accounts for 92% of total annual turnover in the formal sector. Almost all the head offices of national and international companies are located in this city. With the port of Dakar and the international airport nearby, all exporting and importing horticultural companies have an office in Dakar. The same applies to suppliers of agricultural inputs, who often have to import their products, although they also have distribution centres in other parts of the country, close to their main target group. As well as being Senegal's business centre, all the government organisations and labour unions are based in this city of 3.9 million inhabitants (22% of the total population).

4. Research methodology

4. Research methodology

In this qualitative research, the focus is on the following players in the horticultural supply chain:

- Agricultural input suppliers
- Farmers (small and large)
- Retailers
- Exporters
- Importers in the Netherlands

For this qualitative research, individual workers at small and large farms as well at retail shops were also interviewed.

4.1 Collecting data

Primary and secondary data were collected over the period June to September 2024. Primary data was collected using two types of research methodology:

a. Interview
b. Questionnaire (completed by the interviewer)

Ad. a) The interview was conducted with a Dutch importer of selected horticultural products from Senegal, mainly green beans and mangoes. The type of interview chosen was a non-standardised semi-structured interview, with a list of several key topics and questions to be addressed during the interview regarding decent working conditions at the Senegalese supplier of selected horticultural products. The interview was recorded by MEYS, analysed and, after approval by the interviewee, used for this qualitative study. The name of the Dutch company and the interviewees are all anonymous.

Ad. b) Based on the first phase of this qualitative research and following consultation with various stakeholders at an online meeting on 14 June 2024, five horticultural sub-sectors were selected for an in-depth study using a face-to-face questionnaire completed by a researcher. The selection criteria used were as follows:

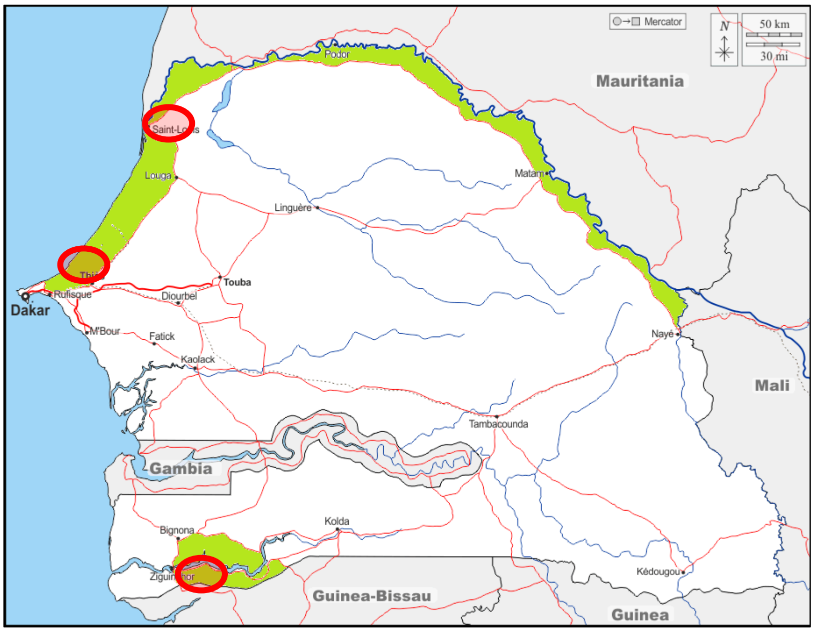
- Ability to generate decent jobs in the long term
- Sustainability of outlets/sales channels in relation to changes in global demand
- Presence of national and multinational companies (EU and Netherlands)
- Size of workforce

The result of the online consultation was the selection of the following five horticultural sub-sectors:

- Onion
- Tomato (industrial)
- Green beans
- Mango
- Cashew nuts

In each sub-sector, the key players in the supply chain were identified: agricultural input suppliers, horticultural households, horticultural traders and individual workers. The latter were divided into two groups: workers employed by SMEs and workers employed by large agribusinesses. For each stakeholder group, a different questionnaire was designed by MEYS containing open and closed questions, and shared with CNV Internationaal for final approval. The questionnaire included both open and closed questions. To collect the field data, MEYS and Nafifu used a tool called SurveyMonkey© . This tool was used (online/offline) by the three field teams using their smartphones.

As well as selecting horticultural products and supply chain players, this qualitative research also focused on the three main horticultural areas: the Niayes, the Senegal River valley and Casamance.



zone selected for qualitative research

To select respondents (producers, traders, input suppliers, workers), the research team used a non-random self-selection sampling technique. This technique enabled the research team to self-select respondents who were relevant to the research. Relevance is defined as respondents active in one of the five horticultural sub-sectors in one of the three horticultural zones. Non-random self-selection sampling is also used to select a Dutch importer of Senegalese horticultural products.

The number of survey respondents spread across the three zones and the various players in the horticultural supply chain was as follows:

Number of respondents

Horticultural zone	Region	In-depth interviews	Survey using questionnaires				
		Dutch companies	Input supplier	Producer	Retailer	Workers	
						SMES	Large farms
VFS	Saint-Louis		2	63	31	131	46
Niayes	Thiès, Dakar		8	89	36	123	0ª
Casamance	Ziguinchor, Sédhiou		8	100	42	120	81
Total		**1**	**18**	**252**	**111**	**374**	**127**

Note: (a) no response from several large farms in the Thiès region.

A total of 883 respondents were interviewed over the period June to September 2024. In the opinion of the research team, this number of respondents is sufficient to give qualitative statements on the situation of decent working conditions in the horticultural supply chain of the five selected sub-sectors in Senegal.

To collect secondary data, the research team used online publications from various sources, including the Ministry of Agriculture, the ANSD, the Ministry of Labour and academic articles.

4.2 Validity questionnaires

The measurement of the internal or measurement validity of the questionnaires is carried out using relevant data from previous studies on horticulture in Senegal. In this case, the annual surveys conducted by the Ministry of Agriculture (DAPSA) and the National Statistics Office ANSD. In addition, various donor-funded programmes on the sector (e.g. PAPSEN, PAPA) have also provided relevant data for comparison.

4.3 Concepts and definitions

The following concepts and definitions were used in this qualitative research:

Remunerated activities: these are productive activities for which, when the person does the work, he or she receives remuneration payable in the form of wages or salary. Remunerated activities are those aimed at producing goods or providing services for remuneration or profit and other activities directly related to employment. Looking for work and setting up a business are not included in this definition.

Crop year: A crop year is the period during which a normal growing cycle takes place. This cycle runs from the start of sowing to harvesting for annual crops.

Head of household The head of household is the member of the household who is responsible for organising meals and, more generally, for organising the life of the household. His or her authority is recognised and accepted by all members of the household. The head of household is necessarily a resident, i.e. a member who lives permanently in the household compound.

Trader: A trader is a natural or legal person who buys and sells products and services on his own behalf or on behalf of a customer with the aim of making a profit.

Farmer : The farmer is the natural or legal person responsible for the running of the farm and for major decisions concerning the use of resources. He also has technical and financial responsibility for the farm. He may run the farm directly or entrust responsibility for day-to-day management to a salaried manager.

Agricultural holding outside the household (EAHM): EAHM refers to one of the 4 categories of agricultural holdings defined below:

- **Agricultural business:** This is a farm managed by a legal entity. In other words, it is the modern agricultural holding; it can also be assimilated to a special agricultural holding. In general, it has a NINEA and keeps regular accounts;
- **Modern farm**: This refers to any agricultural holding enclosed by walls or barbed wire, housing plots of farmland, farm machinery, livestock, poultry under cover and the farmer's living quarters. The farm may have a diversified activity (mixed farming and livestock farming) or, on the contrary, be more or less specialised in a particular field: cereal crops, cash crops or field crops,

horticulture, stabling, fattening, poultry farming, milk or egg production, fruit growing, market gardening and/or horticulture, livestock farming and/or fattening, poultry farming, among others;

- **Large farm**: This is any farm that sows 10 hectare or more in a single crop year. The owners of large farms may be individuals, marabouts or boarding Koranic schools (Daaras), groups or associations, etc. ;
- **Horticultural production group/cooperative**: A horticultural production group/cooperative is any group of individuals specialising in market gardening, fruit or flower production and organised with the aim of producing together on the same estate, pooling the means of production and sharing the fruits of production. However, any grouping of horticultural producers that does not have joint production as its objective is not considered to be a horticultural production grouping/cooperative. The group may have other objectives, such as the joint purchase of inputs, the joint use of means of production or the joint marketing of products.

Inputs: In agriculture, inputs are all products that are not naturally present in the soil and that are added to improve crop yield. They include seeds, products designed to improve soil quality (chemical or organic fertilisers) and those (fungicides, herbicides, insecticides, etc.) designed to eliminate pests or invasive or undesirable plants (weeds).

Household: A household is a group of people, with or without family ties, who pool their resources to prepare and share meals together, under the authority of a single person called the head of household. The household thus refers to a consumption unit. Usually, members of the same household live under the same roof or in the same compound.

NINEA: Registration with NINEA (National Identification Number for Enterprises and Associations) and obtaining an unique fiscal number are compulsory for all companies operating in Senegal, duly registered or approved national or foreign associations, professional trade unions, central public administrations, public establishments, local authorities and political parties, occasional operators, landowners, non-governmental organisations (NGOs), etc. Together, these units make up the *Répertoire National des Entreprises et Associations* (RNEA). It represents the exhaustive database of registered economic units operating on national territory. It contains information on the identification, location, classification, etc. of each unit.

SME (small and medium-sized enterprise)[11] : any natural person or legal entity that is autonomous, trades or produces goods and/or market services, and whose annual turnover excluding tax does not exceed two billion (2,000,000,000) CFA francs. The SME includes the individual Entrepreneur, the Very Small Enterprise, the Small Enterprise and the Medium Enterprise defined below. The company must be legally registered and must keep regular accounts:

- **Entrepreneur**: any natural person carrying on, on an individual basis, a professional, civil, commercial, craft or agricultural activity or providing services, whose annual turnover excluding tax does not exceed: FCFA 30,000,000 for commercial activities; FCFA 20,000,000 for craft and similar activities; FCFA 10,000,000 for providing services.
- **Very Small Enterprise (VSE)**: any person, other than an entrepreneur, whether natural person or legal entity, carrying on a professional, civil, commercial, craft, agricultural, industrial or service-

[11] According to the 2016 General Enterprise Census (RGE-2016), 99.8% of businesses are SMEs, including 81.8% of entrepreneurs, 16.4% of very small enterprises (VSEs), 1.2% of small enterprises (SEs) and 0.4% of medium-sized enterprises (MEs).

provision activity, with a declared annual turnover excluding tax of less than or equal to FCFA 100,000,000 and with fewer than 10 employees. Very small businesses keep at least a simplified accounting system;

- **Small Business (SB)**: any natural or legal person carrying on a professional, civil, commercial, craft, agricultural, industrial or service-providing activity, with an annual turnover excluding tax of more than FCFA 100,000,000 and less than or equal to FCFA 500,000,000 and with between 10 and 20 employees. It keeps its own accounts, or accounts kept by a chartered accountant, a Centre de Gestion Agréé (CGA) or any other similar approved structure;
- **Medium-sized enterprise (ME)**: any natural or legal person carrying on a professional, civil, commercial, craft, agricultural, industrial or service-providing activity, with an annual turnover excluding tax of more than FCFA 500,000,000 and less than or equal to FCFA 2,000,000,000, and with between 20 and 250 employees.

Horticultural sector: In its broadest definition, the horticultural sub-sector covers market gardening, fruit growing (fruit trees) and floral production (flowers and ornamental plants). Flowers and ornamental plants are not included in this survey of horticulture in the Niayes, Saint-Louis and Ziguinchor areas. More specifically, the following are included in the census:

- Production of market gardening crops in the off-cold season
- Production of market gardening crops in the off-season,
- Market gardening crop production during the rainy season,
- Fruit production (excluding picking) in all seasons.

Horticultural worker: a horticultural worker is an individual hired by a horticultural household to do paid farm work during the horticultural season, either occasionally, temporarily or permanently.

4.4 Limitations

Time and budget constraints limited the number of respondents who could be interviewed. Nevertheless, with 883 respondents, working in three different areas of Senegal and in five different sub-sectors, qualitative statements can be made about the overall results. Splitting the results of the field research would not provide sufficient data to be representative of any particular sub-sector, area or stakeholder in the value chain. In addition, many farmers practice more than one crop, which makes it difficult to separate the data between the different sub-sectors. For example, farmers in the Thiès region grow onions and potatoes on the same plot of land. Similarly, commercial traders buy and sell more than one type of horticultural product and therefore operate in more than one horticultural sub-sector.

A large proportion of the interviews were conducted during the rainy season in Senegal. This meant that many farms operating in one or more of the horticultural sub-sectors were closed and workers were not active on the farms. Selecting representative farms and interviewing a sufficient number of farm owners and individual workers, therefore, took much longer time.

Farm households often do not keep good (formal) accounts of, for example, the exact quantities they produce and sell, their total costs, capital expenditure and (net) income on an annual basis. This can lead to answers to quantitative questions that may be difficult to verify objectively.

Interviewing employers in Senegal and the Netherlands about the decent working conditions of their workers proved to be a difficult task for the research team. Many employers (SMEs, large companies) were reluctant to cooperate, even though the interviews were anonymous. Interviewing individual workers was in many cases even more complicated, as they found it difficult to respond openly to the research questions about their current working conditions. For many workers in the horticultural value chain, having a formal written labour contract with legal entitlements to social benefits is not taken for granted.

5. Farm input suppliers

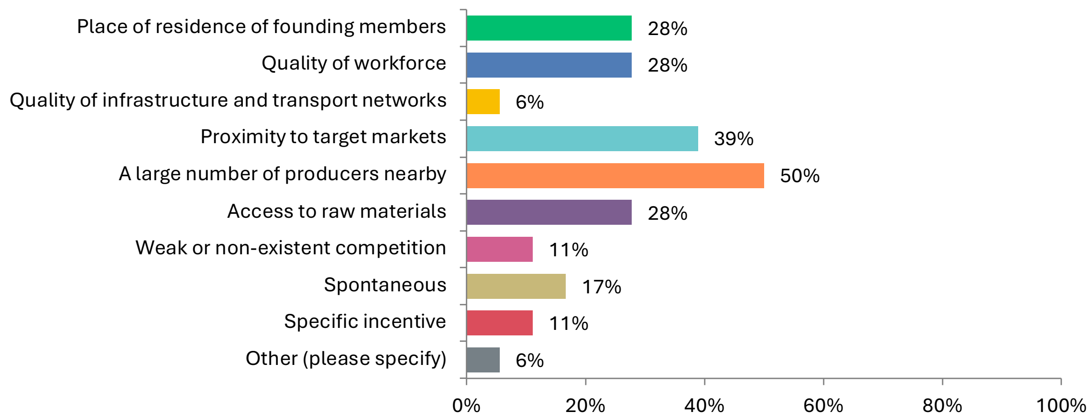
5. Farm input suppliers

5.1 Company profile

Local suppliers of farm inputs such as fertilisers, seeds and crop protection products play an important role in the horticultural supply chain. Their main customers are farm households. The type of input suppliers is quite diverse. There are companies that focus on a specific product and others that have a wide range. There are companies with 100% Senegalese capital and others that are a local subsidiary of a foreign company. Tropicasem, based in Dakar, is Senegal's largest seed supplier, with its own shops in the main horticultural areas, while SEDAB (*Sahélienne d'Entreprise de Distribution et d'Agro-business*), founded in 1985 and based in Dakar, offers not only seeds but also chemical fertilisers through its 24 outlets in different regions of Senegal. Éléphant vert Sénégal is a local subsidiary of the French company Éléphant vert, which offers bio-based fertilisers, and Les Niayes Sarraut, which has been in business since 1988, sells seeds, chemical fertilisers and crop protection products to farmers and consumers in Dakar and Saint-Louis.

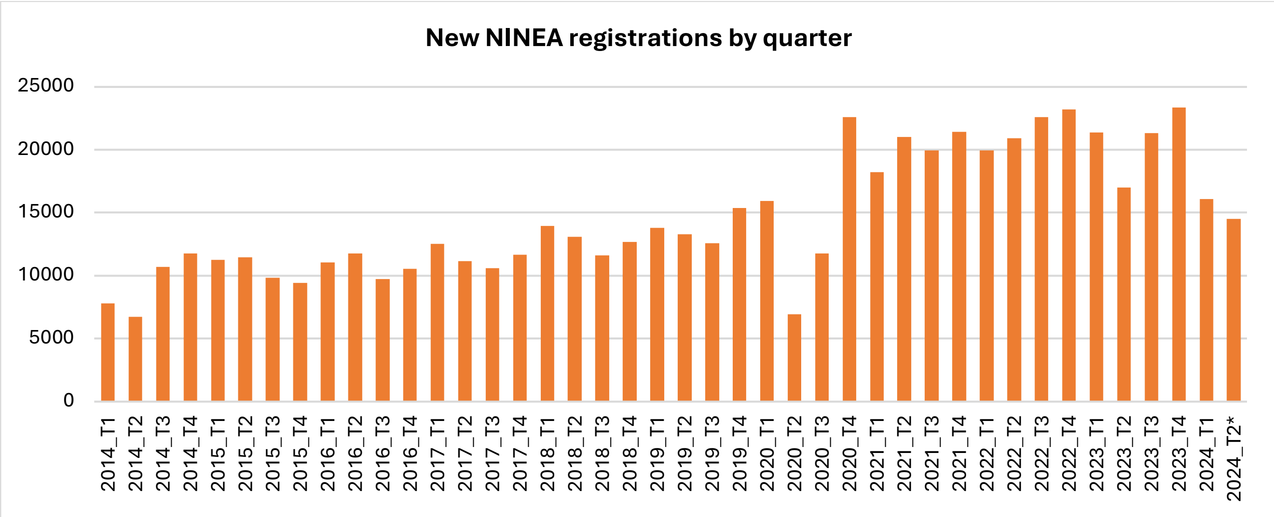
As with most input suppliers, the largest group of buyers are farmers. As a result, the main reason for locating their business at the current site was the large number of growers nearby (50%), followed by proximity to their target markets (30%). The quality of the workforce was an important reason for more than a quarter (28%) of input suppliers.

What is your main motivation for setting up a business in this locality (several answers possible)?



The most common legal form for input suppliers in the horticultural value chain is the sole proprietorship (44%). The vast majority of companies are registered in the Commercial Register and also have a NINEA. Obtaining a *National Identification Number for Companies and Associations* (NINEA) is compulsory for all companies operating commercially in Senegal and is used to pay taxes.

Since 2014, the number of new NINEA registrations has increased significantly. It has risen from around 10,000 - 15,000 per quarter to over 15,000 new listings per quarter over the last three years. The vast majority of new registrations in NINEA are in commerce. In the first quarter of 2024, legal entities that declared commerce as their main activity accounted for 28%. The most common sectors among new legal entities also include "Agriculture, livestock and fishing" (17.7%), followed by "Business services" (17.1%), "Construction and public works" (12%) and "Personal and miscellaneous services" (6.3%). However, the 'Textile industries' (1.1%) and 'Hotels, bars, restaurants' (1.5%) sectors recorded lower proportions in terms of new business start-ups. Among sole proprietorships, trade also remains the most declared sector of activity, with 68.3%. In addition to trade, sectors such as "Miscellaneous personal services" (9.6%), "Services provided to businesses" (6.4%), transport and communication (3.8%), construction and public works (3.6%), as well as agriculture, livestock farming and fishing (2.3%), and other industries (2.2%), are the most common activities carried out by sole traders. The food industry (0.8%) and hotels, bars and restaurants (1.4%) are less well represented.[12]



Note: (*) April - May
Source: ANSD

According to the latest enterprise survey carried out by ANSD[13] , there are more than 400,000 economic units (formal and informal) operating in Senegal, around 40% of which are based in Dakar, followed by the region of Thiès.

Farm input suppliers are much less likely to register with IPRES (*Senegalese pension fund*) and CSS (*social security fund*)[14] . More than half of them are not registered with these national social security schemes and therefore do not pay social security benefits for their employees in the event of retirement (IPRES) or work-related accidents/injuries/illnesses (CSS).

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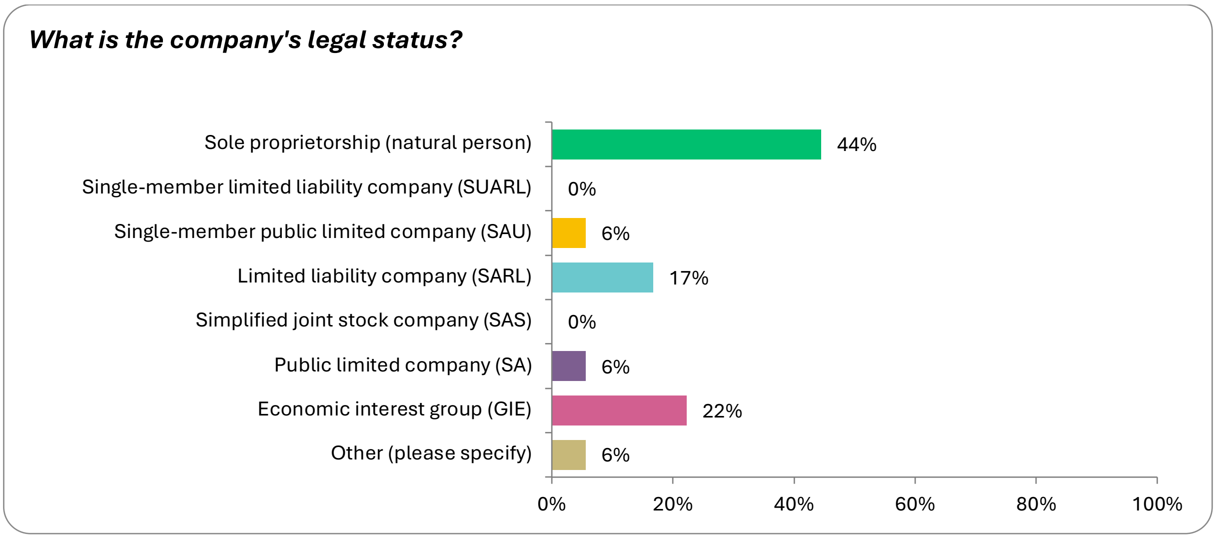
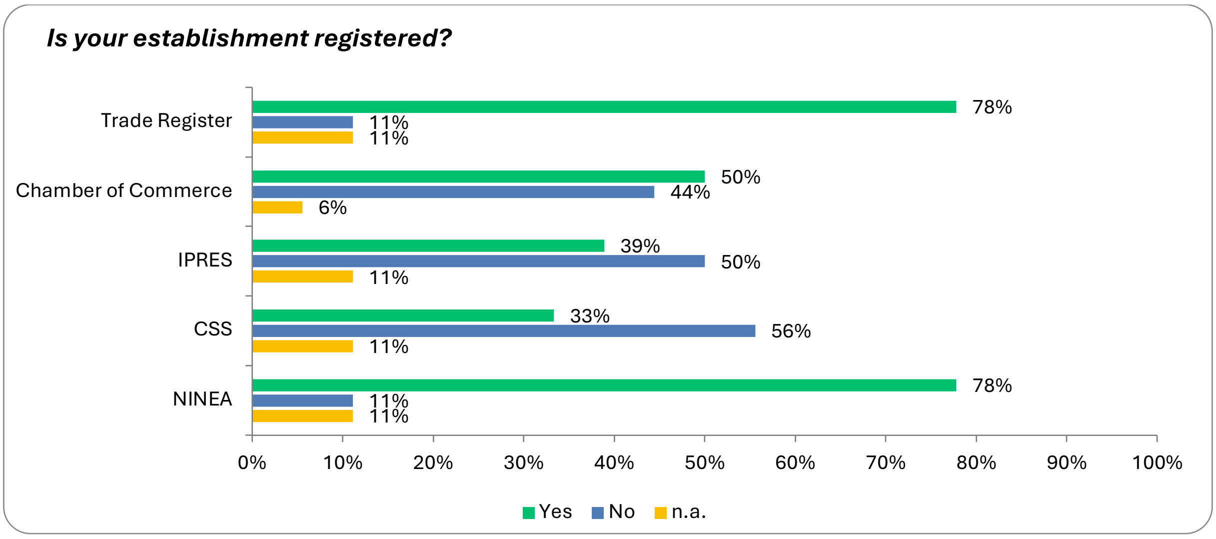
[12] Bulletin Trimestriel sur les Nouvelles Immatriculations au NINEA (BTNIN) (T1-2024), ANSD, April 2024
[13] Recensement General des Entreprises (RGE) 2016, Ministry of the Economy, Finance and Planning, January 2017
[14] In Senegal, companies must register with IPRES and CSS to guarantee favourable working conditions for employees and their families. Senegalese law requires all employers of salaried staff to register with CSS within two months of taking on their first employee. The CSS provides family benefits and occupational accident cover. IPRES is a private-law body under State supervision. It provides retirement pensions or allowances to former employees who have paid contributions for at least 1 year, and survivor's pensions or allowances to widows, widowers and orphans of a dependent father or mother in the event of the death of an employee.



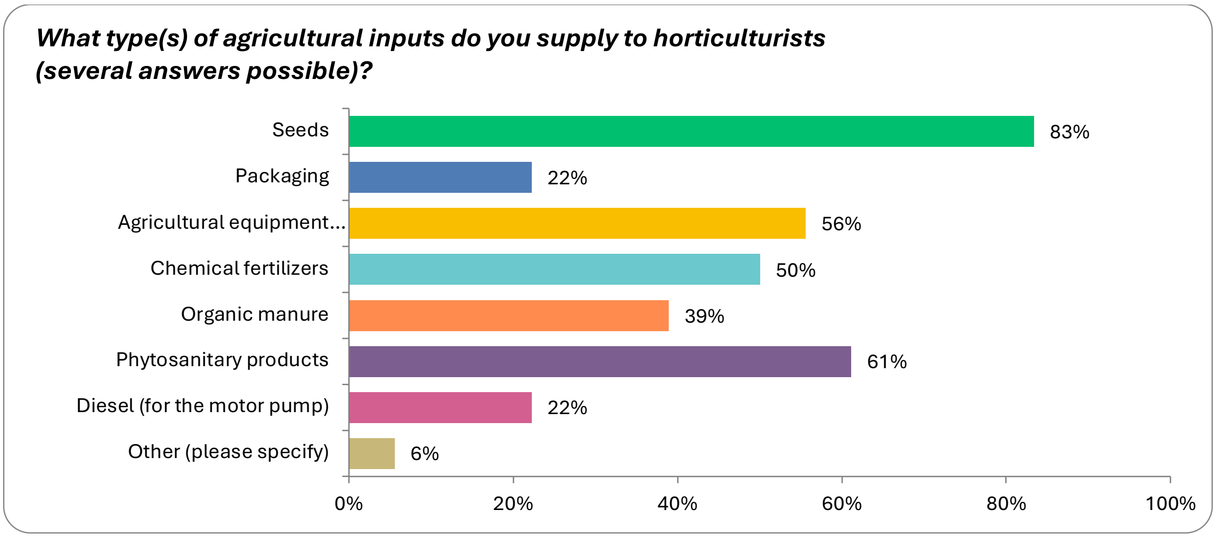


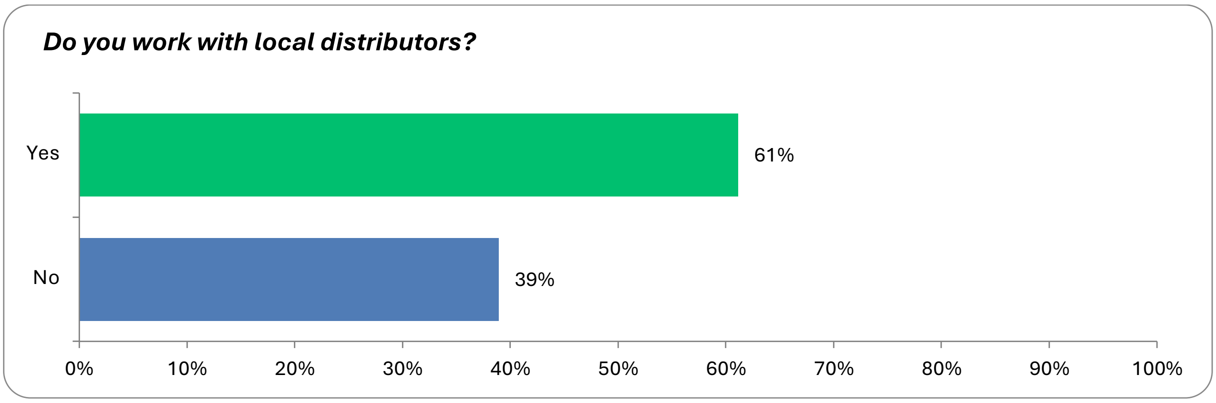
The most important products sold by the majority of input suppliers are seeds (83%), followed by phytosanitary products and agricultural machinery and equipment. In Senegal, there are two seed systems, one "formal" and the other "informal".[15] The formal system is regulated by the State and each player in the system has a clearly defined task. It ranges from varietal selection to seed marketing, and includes pre-basic production, seed multiplication, quality control, conditioning and certification. The so-called "informal" system refers to seed exchange networks between farmers. After the harvest, some of the seed is selected and exchanged between farmers in the same area.[16] The "informal" system supplies the majority of seeds used by local farmers. The formal seed production system is the one through which the State aims to produce quality seed to increase agricultural yields and producers' incomes. This system is based on a well-defined legislative framework and involves players with diverse profiles. A company like SPIA SA (*Société de Produits Industriels & Agricoles*), founded in 1980 and based in Dakar, sells phytosanitary products and a wide range of vegetable seeds through 71 shops across the country with its 150 employees. Terragrisen, a local subsidiary of the French international company ICS since 2009, sells not only seeds, but also machinery and equipment to farmers in Senegal. There are also suppliers who focus on new developments in the horticultural

[15] Structure et opération du système semencier au Sénégal : cas des céréales et légumineuses, Ndèye Fatou Faye *et al.* Ministry of Agriculture, USAID, March 2019

[16] The most important difference between the formal and informal seed systems in Senegal is that in the formal system, seed production is clearly distinguished from food production, whereas in the informal system, this distinction between seed production and food production does not exist.

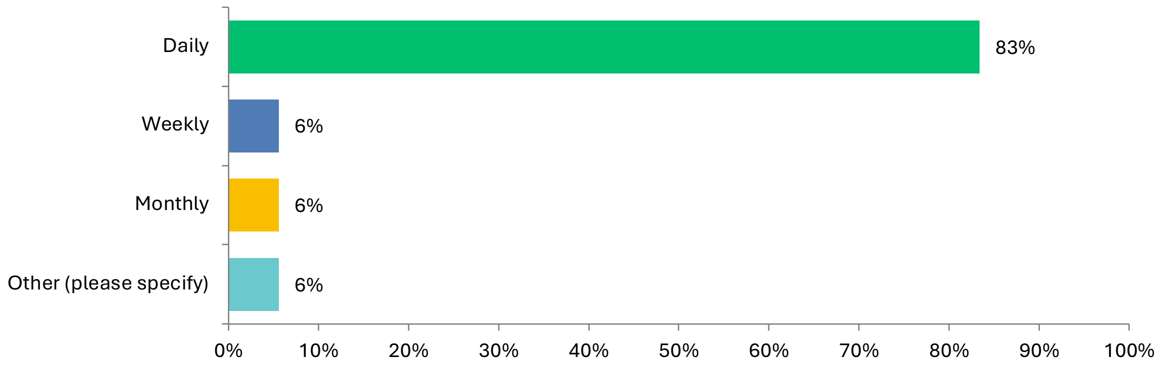
sector in Senegal, such as growing crops under plastic. A company like Fiaya-Agricole, based in Dakar, has seen this opportunity and sells materials for the construction of plastic greenhouses. Fiaya-Agricole uses its knowledge from its own horticultural plant cultivation to design and develop its greenhouse products and services. Like seed supplier Tropicasem, more than half the suppliers of agricultural inputs work - alongside their own shops - with local distributors. These distributors are located in towns and villages in the main horticultural areas close to farmers.



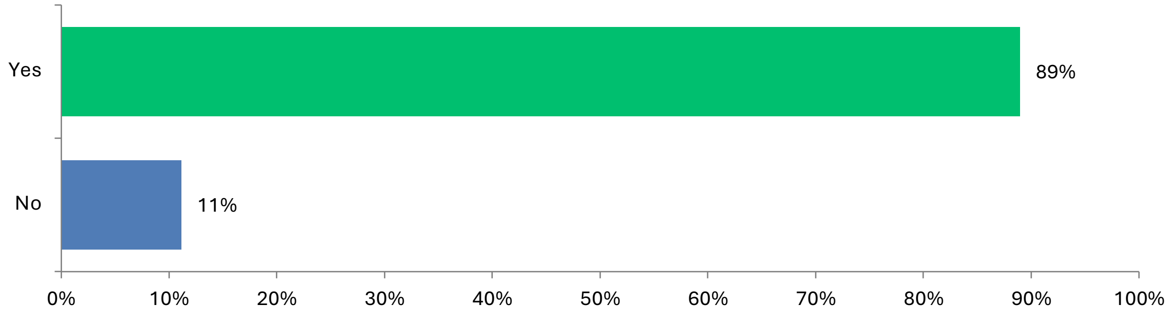


Eight out of ten input suppliers sell their products on a daily basis. This is particularly true for seeds and crop protection products that farmers need for each horticultural season. Almost 90% of input suppliers therefore sell directly to individual farmers. For example, Agroseed, a Senegalese supplier of vegetable seeds from international seed companies such as Dutch company Rijk Zwaan, sells directly to individual farmers in different parts of the country.

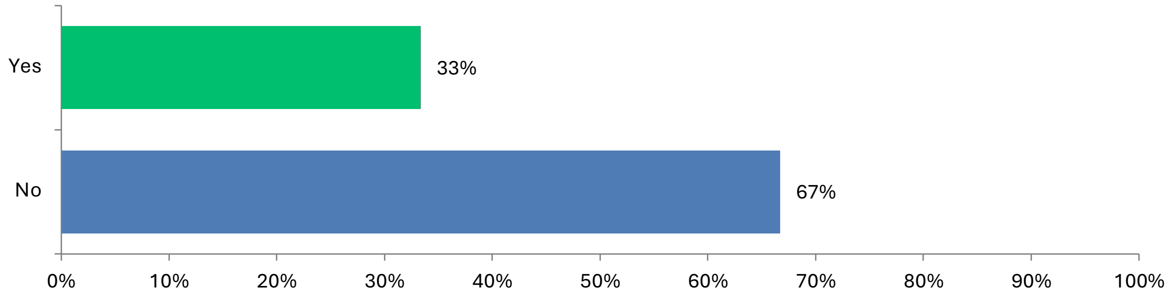
How often do you sell your products to horticultural households?



Do you sell directly to individual horticultural households?



Do you offer professional training to horticultural households on how to use the agricultural inputs you sell?

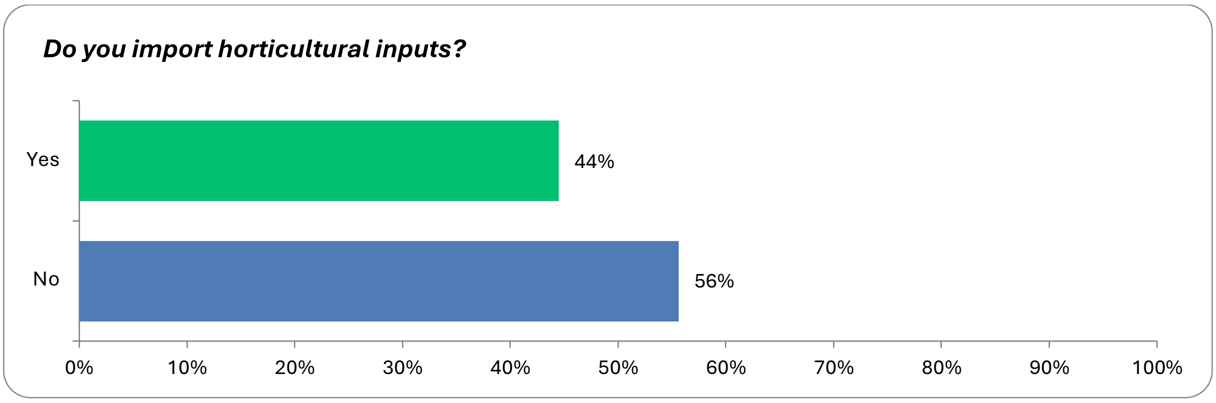


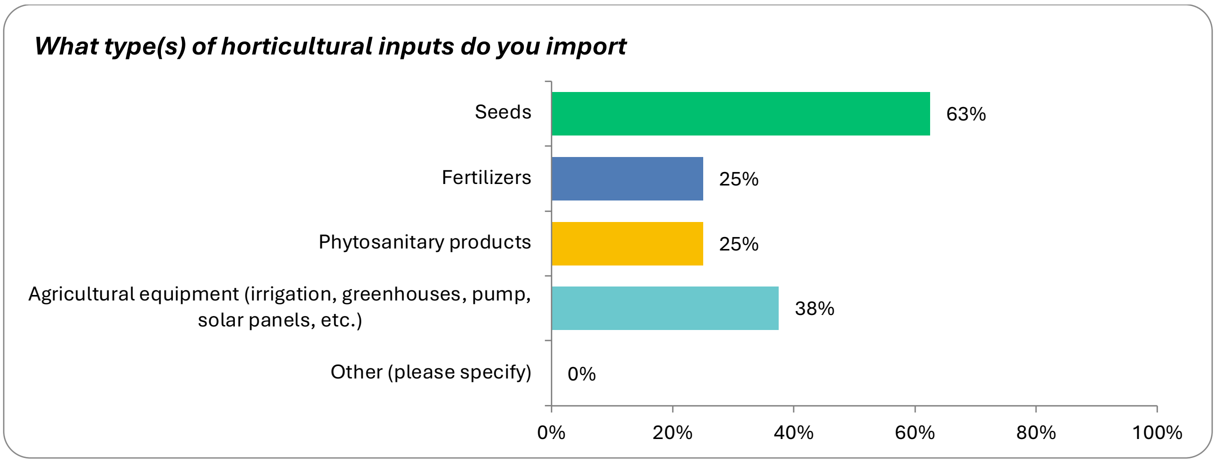
Although many horticultural farmers are unfamiliar with the types of certified seed available on the local market, or do not know how to use the different types of crop protection products, only a third of input suppliers offer training to farmers on how to use their products to best effect. Instead of training, input suppliers often offer farmers after-sales services on how best to apply their products, depending on the type of soil and crop. For example, BIOTECH, a Senegalese company based in Dakar, sells organic fertilisers and plant protection products to farmers. BIOTECH offers farmers not so much training as after-sales service on how to use these products. The input supplier Les Niayes Surraut has a showroom, where they can present their products to potential buyers, and a service centre.

Almost half of the input suppliers (44%) import their products. In particular, seeds and agricultural machinery and equipment. At national level, Senegal imports more than 40,000 tonnes of seed a year[17] , with local demand far outstripping national seed supply. Demand for certified seed is particularly strong. Suppliers such as Tropicasem, SPIA and Terragrisen import certified seed from

[17] NACE 2022, ANSD

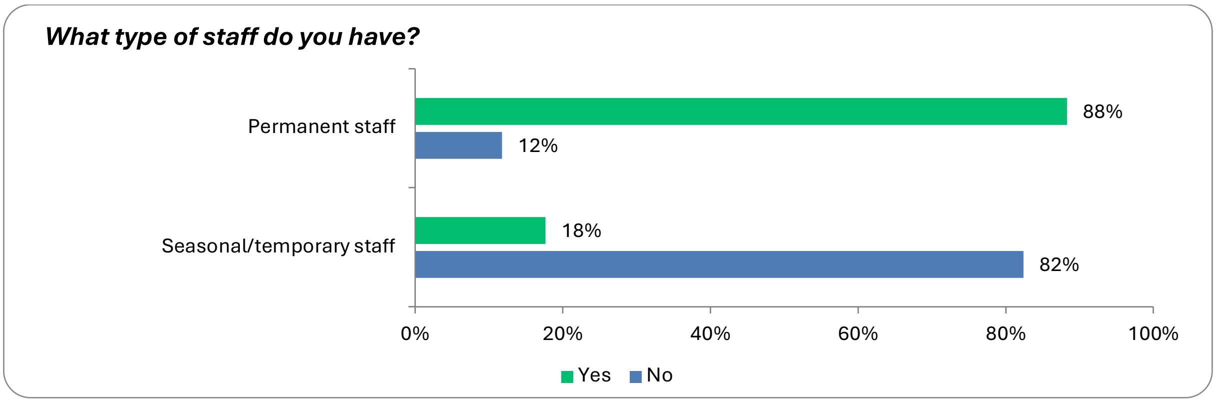
abroad, mainly from Europe, for sale on the local market. Dakar-based Agripro imports and sells agricultural machinery and equipment to Senegal's largest farmers and cooperatives. Input suppliers who do not import their products source them from specialist manufacturers or produce and market them themselves. For example, the Senegalese company CMGP.CAS is a diversified producer and supplier of seeds, crop protection products, fertilisers, nets and irrigation systems. With 40 employees at two sites, Dakar and Saint-Louis, CMGP is one of the largest companies selling these types of products to farmers in Senegal.

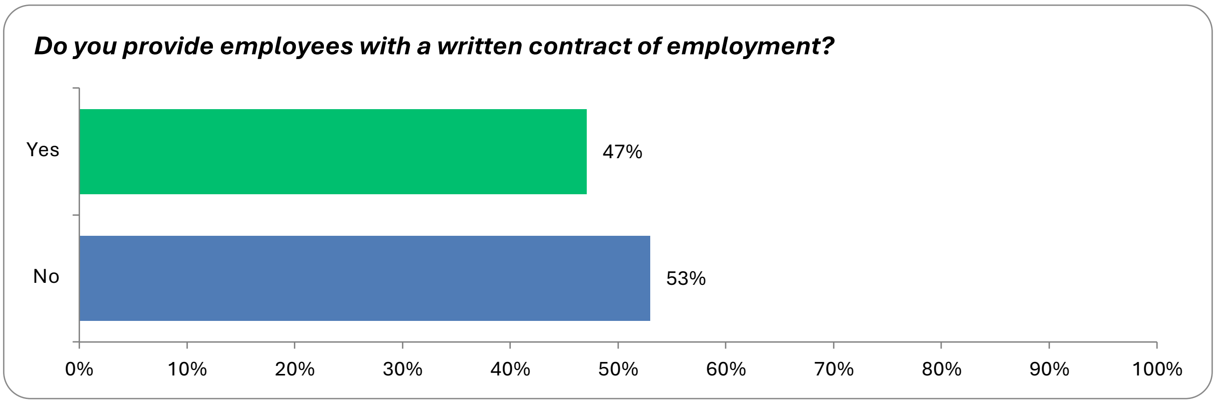




5.2 Jobs

Agricultural input suppliers also provide employment for permanent and temporary/seasonal workers. The latter is due to the fact that the horticultural sector is seasonal, which results in a seasonal demand for agricultural inputs. The majority of these workers are paid a salary, but more than half of businesses do not offer their employees a written labour contract. Around 40% of businesses pay their workers an average monthly salary of maximum 100,000 FCFA which is higher than the legal minimum wage of around 64,000 FCFA, 40% between 100,000 and 500,000 FCFA and 20% more than 500,000 FCFA per month.



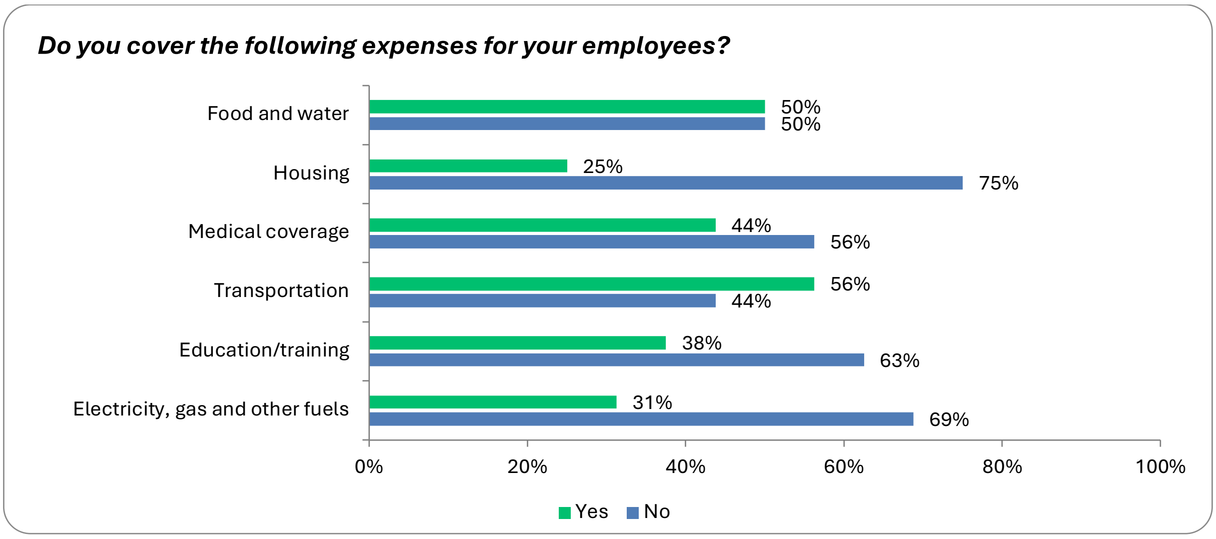


The benefits offered to individual workers of input suppliers present a mixed picture. Most companies offer a weekly rest day and paid time off on public holidays, but paying a bonus for work done on a rest day or public holiday is less popular. Giving employees at least 12 working days with paid holiday per year is only offered by a third of companies .[18]

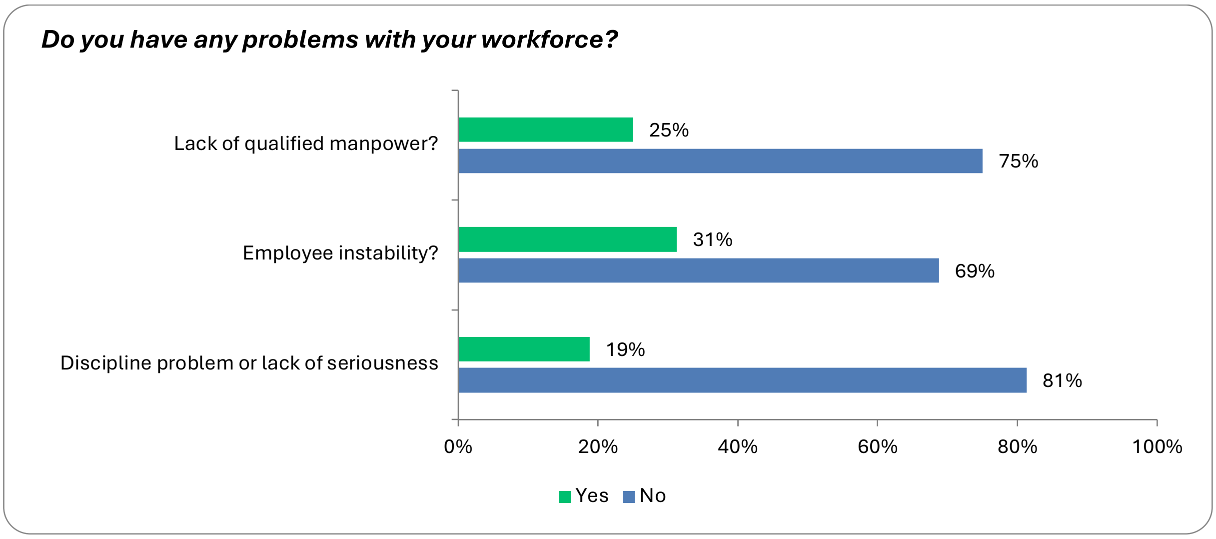
Do you :	Yes	No	Total
Give employees a weekly day off?	71%	29%	100%
Give employees paid leave on national public holidays?	71%	29%	100%
Pay a bonus to employees when they work on a day off or a public holiday?	53%	47%	100%
Give employees at least 12 working days' annual leave?	35%	65%	100%
Pay employees at least 100% of their salary during annual leave?	35%	65%	100%

In general, companies that supply farm inputs do not offer their workers many social benefits. In many cases, they do not offer medical cover, housing, transport or (vocational) training.

[18] In accordance with the national Labour Code, annual leave is granted to all employees after one year's service. An employee is entitled to paid annual leave of 24 working days after completing at least twelve months' service. The length of leave increases with the length of service in accordance with the regulations in force or the provisions of collective agreements. During annual leave, workers are paid the equivalent of 1/12 of their annual salary, i.e. they receive one month's pay (excluding other allowances) for 24 days' annual leave. (*Source: Art. 148-155 of the 1997 Labour Code*).



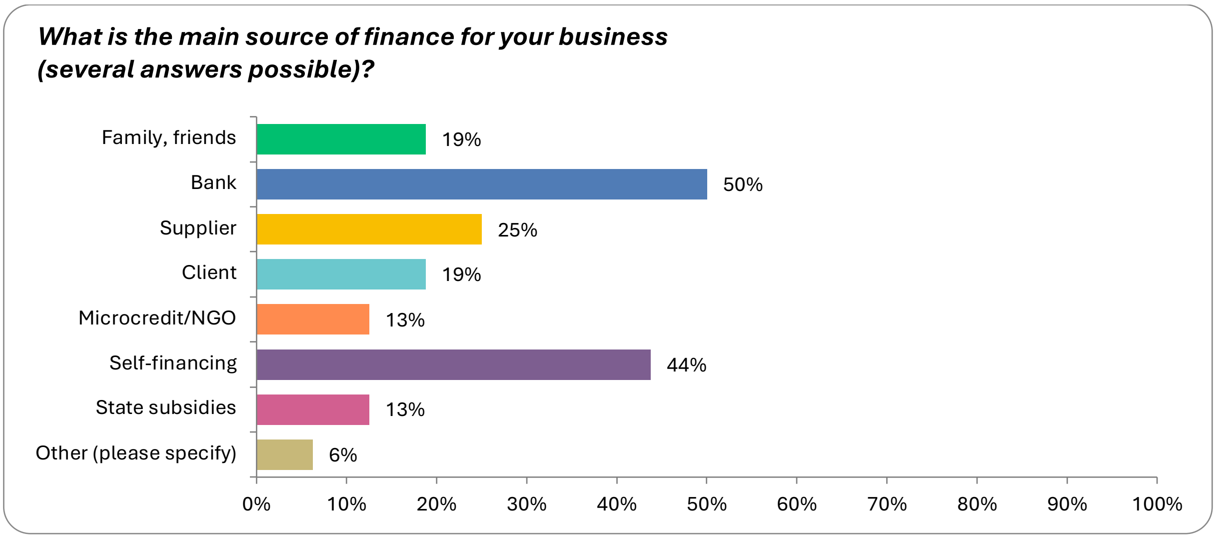
Despite the fact that many input suppliers do not offer written labour contracts and numerous social benefits, the majority of them do not have much difficulty finding and keeping their workers. The current situation of the Senegalese labour market, with a relatively high unemployment rate, particularly among the young population[19] , offers individual workers and job seekers a weaker bargaining position vis-à-vis employers.

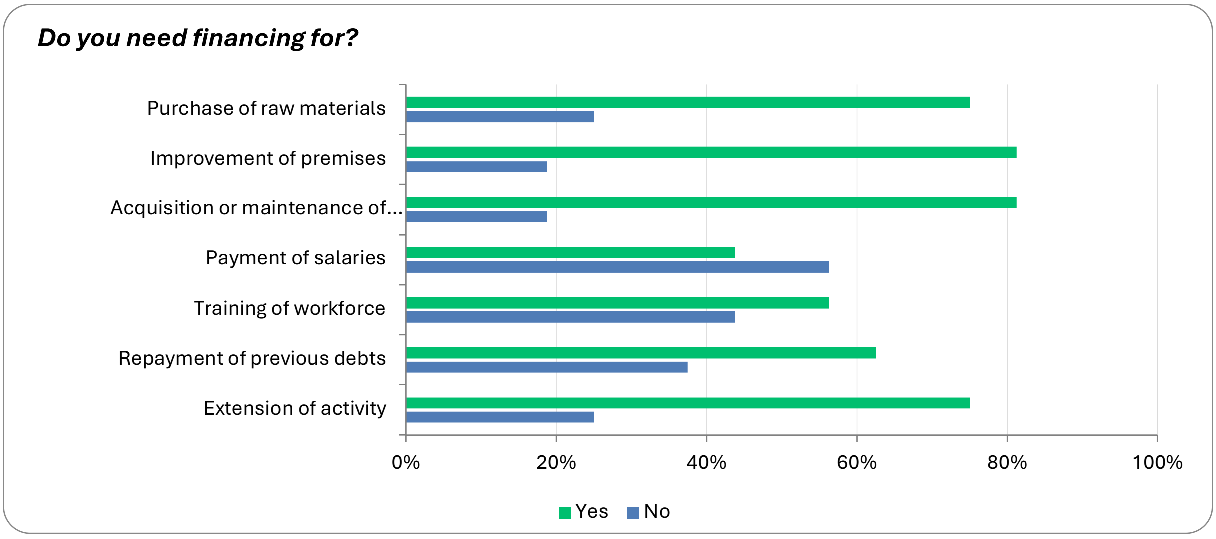


5.3 Finance

Agricultural input suppliers have two main sources of finance for their business activities: commercial banks and their own savings. The financial support of family and friends and the possibility offered by their suppliers to pay on credit are additional means of financing their business activities. Funds are mainly used by businesses to improve their premises, purchase raw materials and acquire or maintain necessary equipment. Investment in labour is made by employers to a lesser extent.

[19] The national unemployment rate in the first quarter of 2024 was 23.7%. For people aged between 15 and 24, the national unemployment rate in the first quarter of 2024 was 34.4%, while in rural areas it was 43.8%. (*Source: ENES, ANSD*).



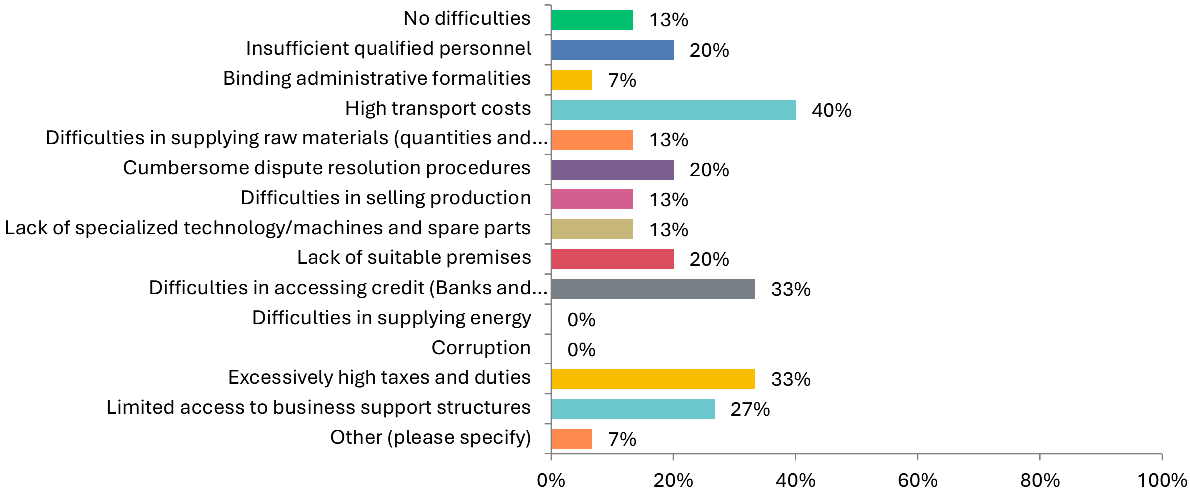


5.4 Commercial constraints

The business climate in Senegal is difficult for most input suppliers. They face a wide variety of constraints that hamper their business activities. The main constraints are high transport costs (43%), followed by difficulties accessing bank credit (29%) and high taxes (29%). According to the ANSD's Enterprise Survey 2016[20] , including formal and informal[21] , the three main constraints on businesses in all economic sectors in Senegal are insufficient demand, lack of suitable premises to carry out activities and high taxes. The constraint of high transport costs was mentioned by 6% of all businesses (formal and informal). Input suppliers' reliance on trucks to transport their products to farmers across the country means that they are more influenced by the cost of petrol than many other businesses.

[20] Rapport global du Recensement général des Entreprises 2016 (RGE 2016), ANSD, January 2017
[21] The informal economy refers to all activities that produce goods and services outside the control or regulation of the State. Companies in the informal sector are not subject to legislation, particularly tax legislation (it
(*Source: Programme pays de promotion du travail décent du Sénégal 2018 - 2022 - Passage méthodique de l'informel au formel, June 2018*).

What are the main constraints you encounter in your business (several answers possible)?

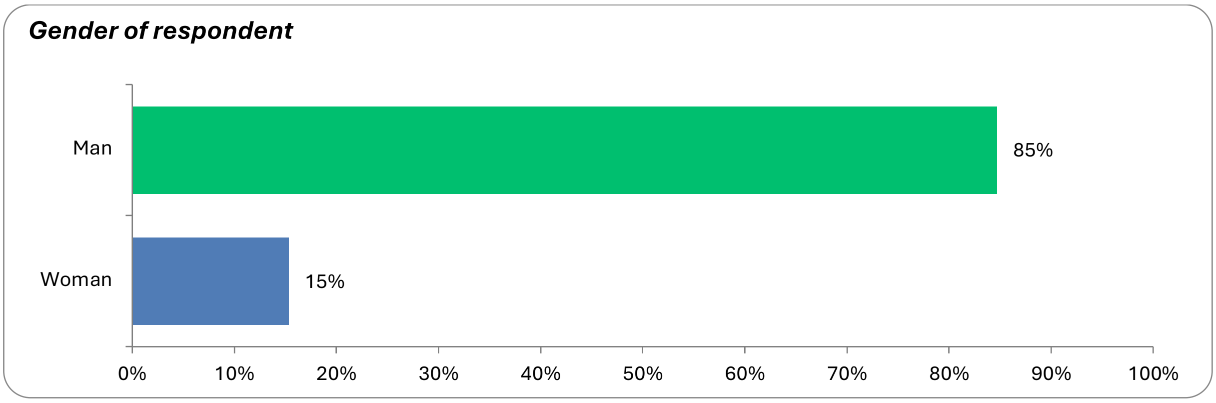


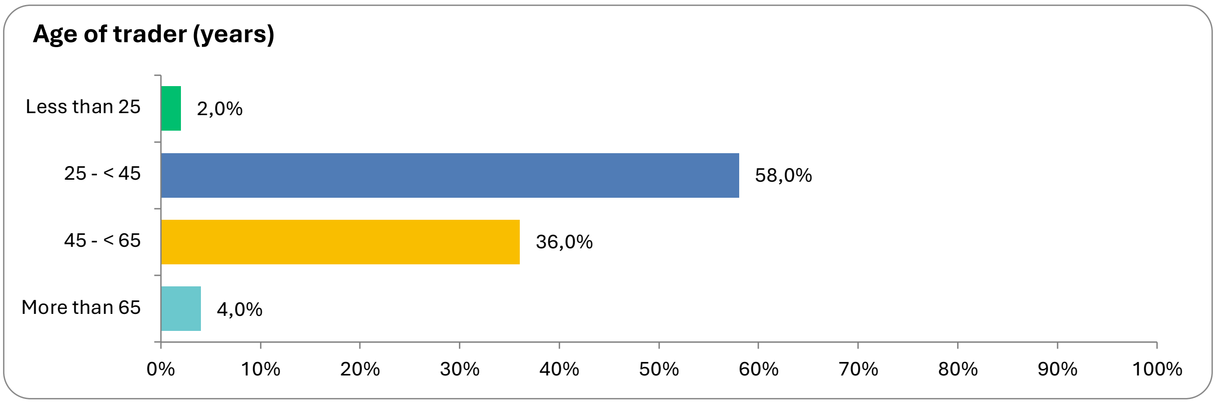
6. Commercial traders

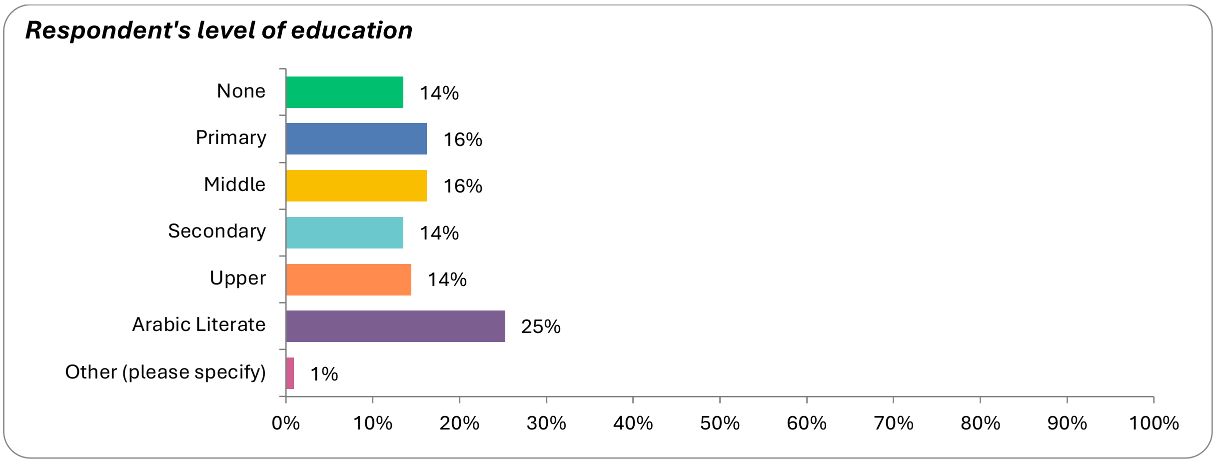
6. Commercial traders

6.1 Personal profile

The average commercial trader active in the horticultural sector in Senegal is a man, aged 44, with no higher education. The majority of traders have at most attended primary school or a Koranic school. Only 2% of traders are under the age of 25.

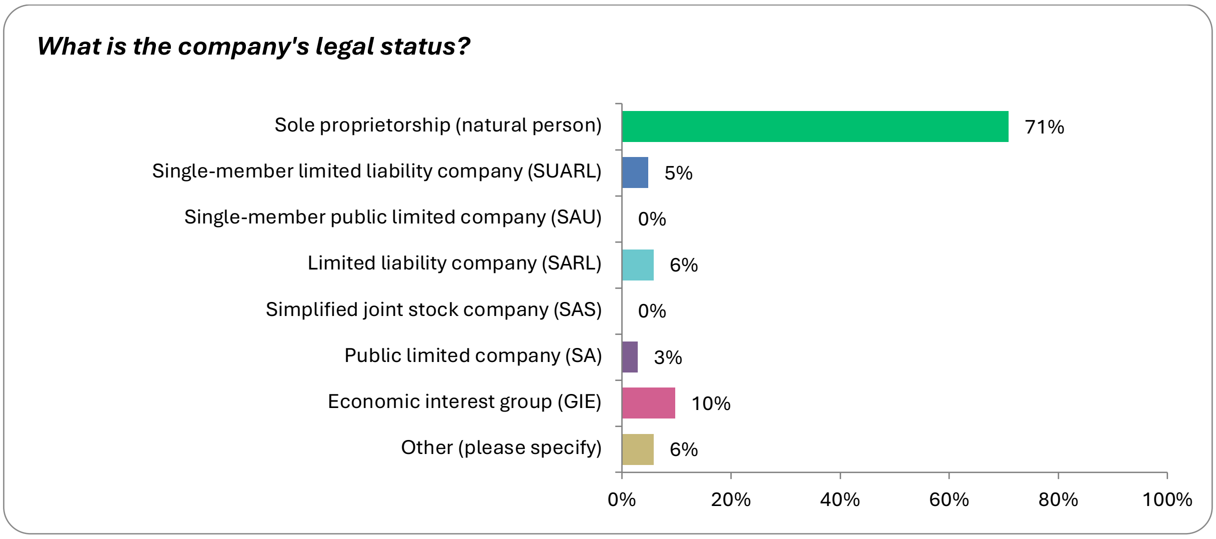


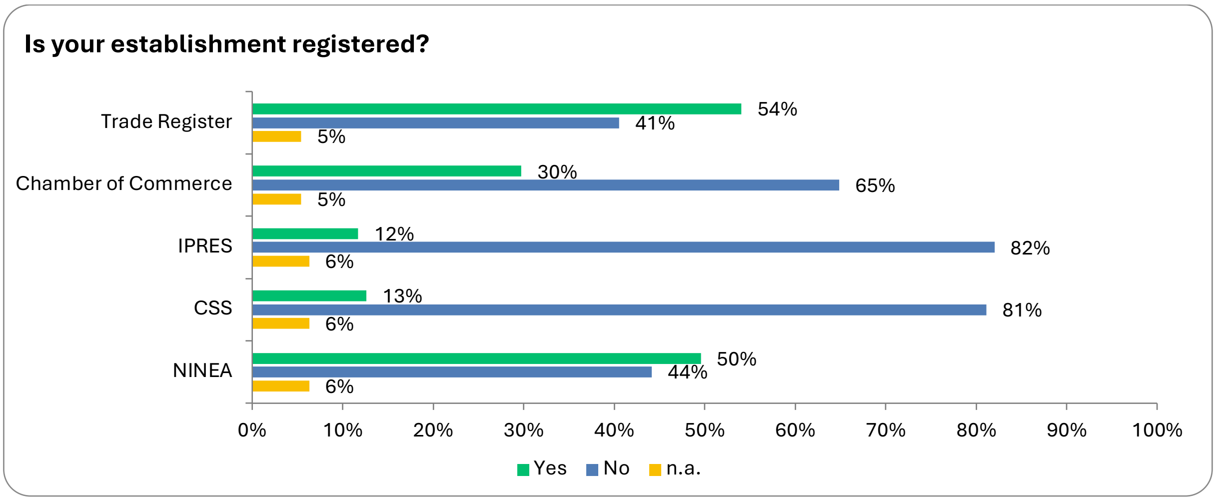




6.2 Company profile

The majority of horticultural traders started their business during the last 15 years, a period of strong growth in national horticultural production in Senegal. Over 70% of trading companies are sole proprietorships, followed by a GIE (10%) or a limited liability company (6%). Just over half of the traders (54%) are registered in the trade register, but 65% are not listed in any of Senegal's fourteen chambers of commerce.[22] In addition, more than 80% of the traders are not registered with either the *Institut de prévoyance retraite du Sénégal* (IPRES) or the *Caisse de sécurité sociale* (CSS)[23] . Both social security benefits are available to workers in the formal sector and to non-civil servants in the public administration. Only half of the horticultural traders have a NINEA (*Numéro d'Identification National des Entreprises et des Associations*), which means that a large number of horticultural trading businesses (44%) operate outside the formal economy and pay neither tax nor social security for their employees.[24] In comparison, three quarters of businesses operating in Senegal's formal sector are registered with CSS and IPRES.[25]

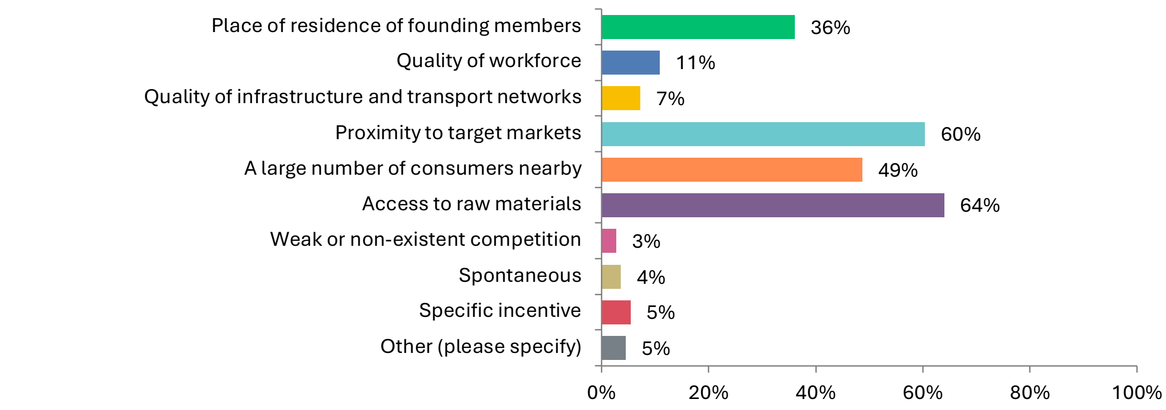




The main reasons why horticultural traders choose to locate in their current locality are access to product supplies, and proximity to target markets and consumers. Only one in ten traders cited the quality of the local workforce as a reason for locating in their current community.

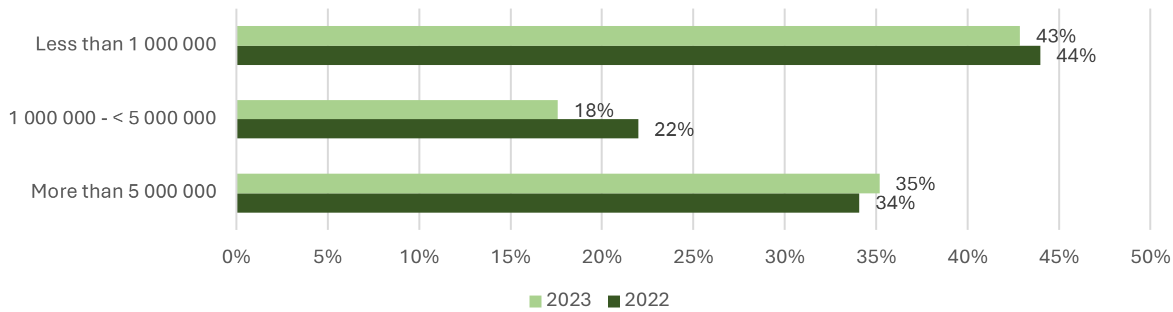
[22] Senegal's 14 chambers of commerce are members and represented by the Union Nationale des Chambres de Métiers du Sénégal (UNCM).
[23] The CSS is responsible for the prevention of accidents at work and benefits for accidents at work, occupational illnesses and family allowances.
[24] This relatively low proportion of informal traders registered with IPRES or CSS is consistent with a previous study by ANSD, *Evaluation de la contribution des PME au Produit Intérieur Brut (PIB), à l'emploi et au commerce extérieur, ANSD, January 2019.*
[25] Rapport de l'enquete sur l'emploi, la remuneration et les heures de travail au Sénégal (EERH 2018), February 2019, ANSD

What is your main motivation for setting up a business in this locality (several answers possible)?



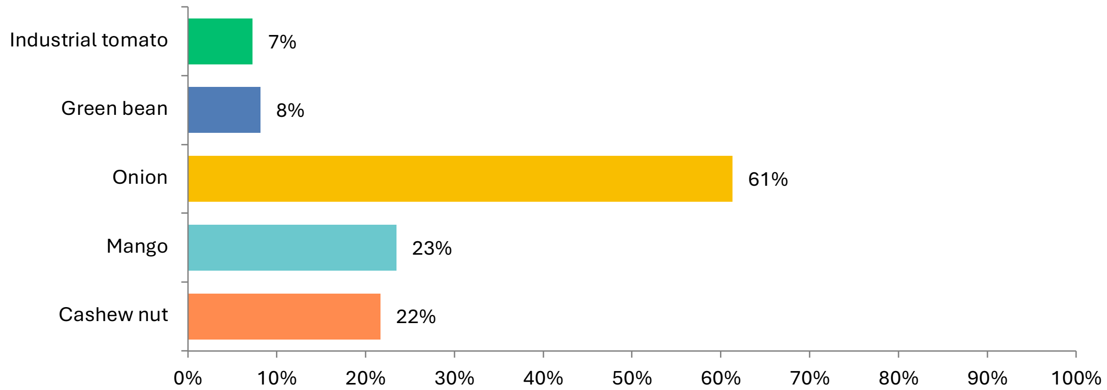
More than forty per cent of commercial traders generated gross annual sales of less than one million FCFA in 2023. Almost the same percentage as in 2022. A third of the trading companies had annual sales of more than five million FCFA. A relatively small number of businesses will have annual sales of more than FCFA 65 million in 2023. Examples include an export company in Thiès with an annual turnover of FCFA 900 million, an agri-food company in Ziguinchor buying and selling cashew nuts with a turnover of FCFA 600 million, and the *Association des planteurs de l'arrondissement de Diouloulou* (APAD), a GIE located in the town of Diouloulou (Casamance) producing and selling mangoes, with a turnover of FCFA 200 million.

What is your turnover (in FCFA)?



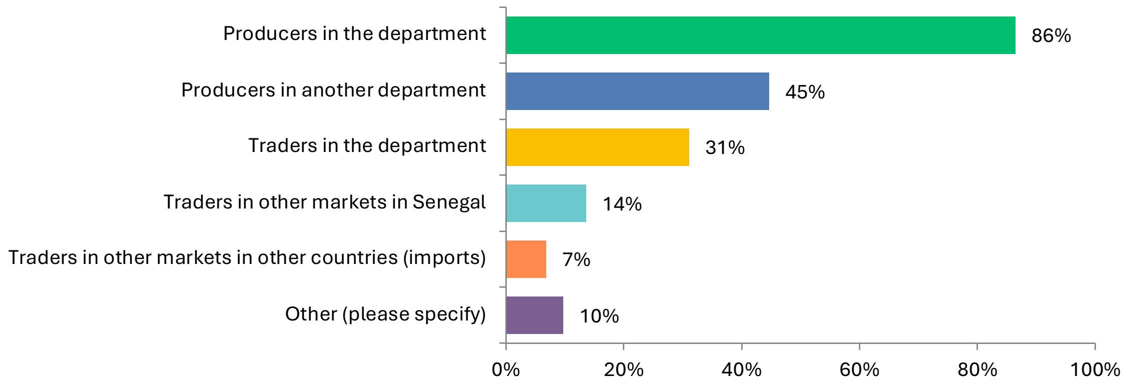
The traders' main activities are buying and selling horticultural produce. The most important product they market is onions, followed by mangoes and cashew nuts. Only a relatively small number of companies market tomatoes for the processing industry or green beans. The latter two products are mainly produced in the north of the country (Saint-Louis). Some large companies produce and sell green beans on the national and international markets, including Europe. These include SCL and West Africa Farms, which are responsible for their own production and marketing. These two companies are based in the northern region of Saint-Louis. Three quarters of the country's industrial tomato production is sold to three major tomato processing companies, SOCAS, AGROLINE and TAKAMOUL, all based in Dakar.

Please indicate in which sector(s) you operate (several answers possible) :



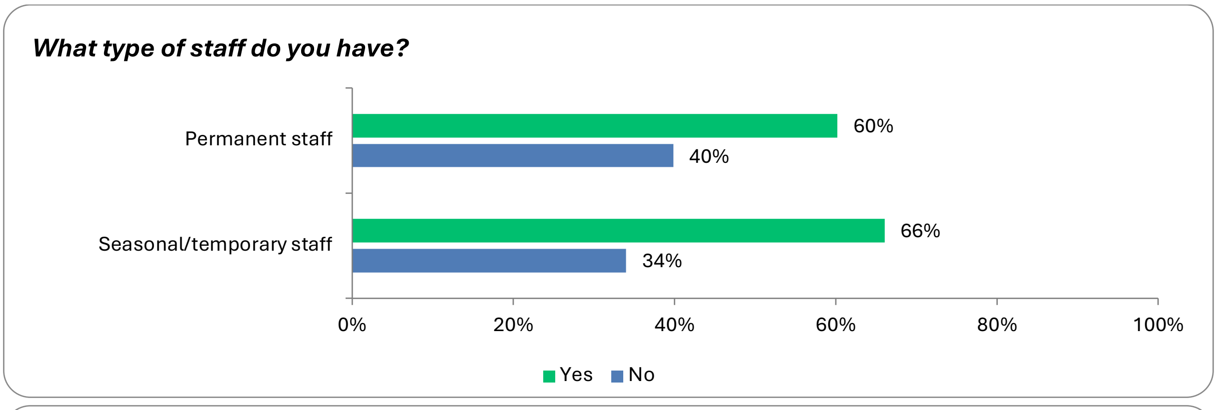
Traders are strongly connected to a local network of suppliers of horticultural products. Four out of five trading companies buy directly from growers located in the same area (department). They also often buy from growers located in other departments, but in the same region. In terms of the frequency with which they buy horticultural products, a third of the traders buy on a daily basis or let their purchasing decision depend on the availability of products. The high frequency of daily purchases of horticultural products is mainly due to the lack of storage facilities at the vast majority of retailers and wholesalers. Without adequate cold storage, it is very difficult to maintain product quality at the same level for more than a few days in Senegal's hot climate.

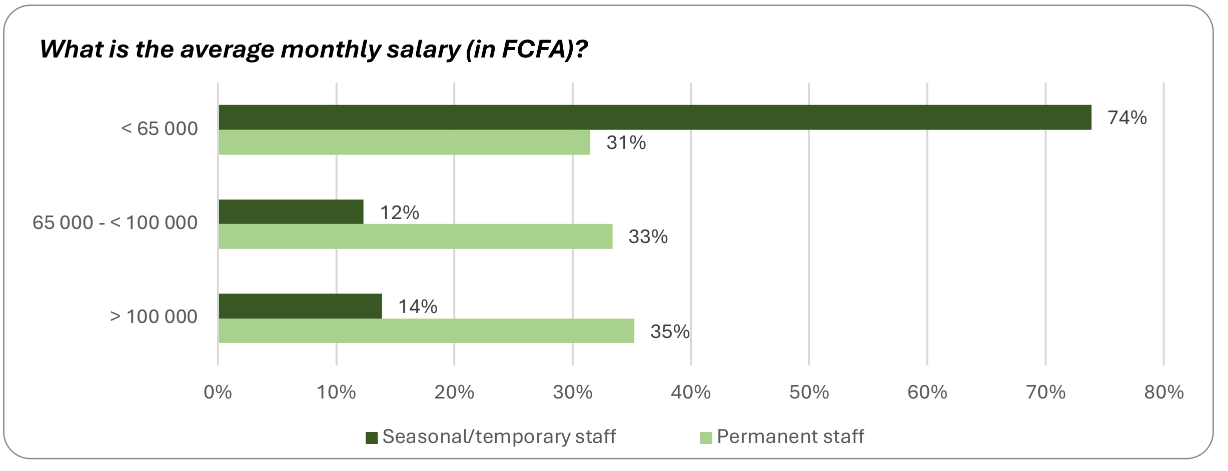
What is your current main source of this product (where does the retailer obtain supplies) (several answers possible)?



6.3 Employment

The seasonal nature of the supply of horticultural products to traders has an impact on the demand for labour. Two-thirds of the commercial traders use seasonal or temporary labour alongside permanent staff. The average size of the workforce in these trading companies is 9 employees, 90% of whom receive a salary. There are a few exceptions where the workforce is much larger than these averages. One example is Miname Export SA, based in Pout, which produces and sells mainly green beans, onions and watermelons for the national and international markets, providing work for 1,000 people, over ten per cent of whom are women. The APAD cooperative in Diouloulou has 218 workers, 98 (45%) of whom are women. SAV Agricole, a SUARL based in Ziguinchor and active in the marketing of cashew nuts, relies almost entirely on unpaid workers.[26] Of the 53 employees, more than half are unpaid. Most of them are women.[27] Another cashew nut trader in the town of Ziguinchor employs 45 people, 20 of them women. Qualité Fruits Sénégal (QFS), based in Mont-Rolland (Thiès region), produces and exports, among other things, green beans and mangoes to Europe with around 1,350 employees (a third of whom are permanent staff).

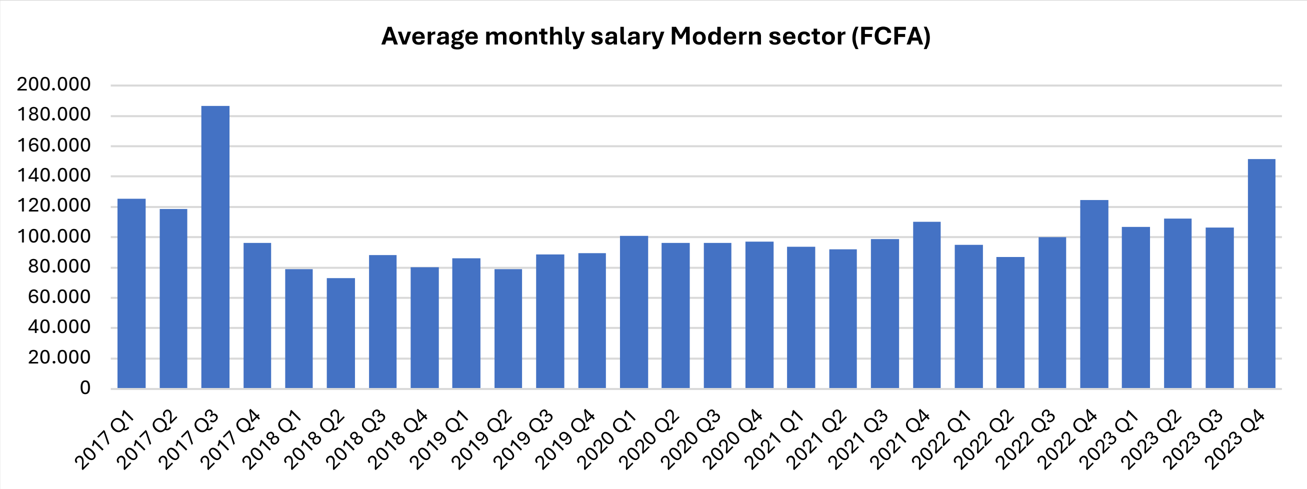




Around a third of permanent workers in trading companies earn a monthly salary of less than FCFA 65,000, a third between FCFA 65,000 and FCFA 100,000 and a third more than FCFA 100,000.[28] Temporary workers in a trading company are much more likely to earn less than FCFA 65,000. The average number of hours worked per week in trading companies is 34, but varies widely between 8 and 60 hours. In Senegal, the legal working week in the non-agricultural sector is 40 hours, which is equivalent to 8 hours a day for a standard working week from Monday to Friday. Beyond these 40 hours, workers in Senegal are officially entitled to paid overtime.[29]

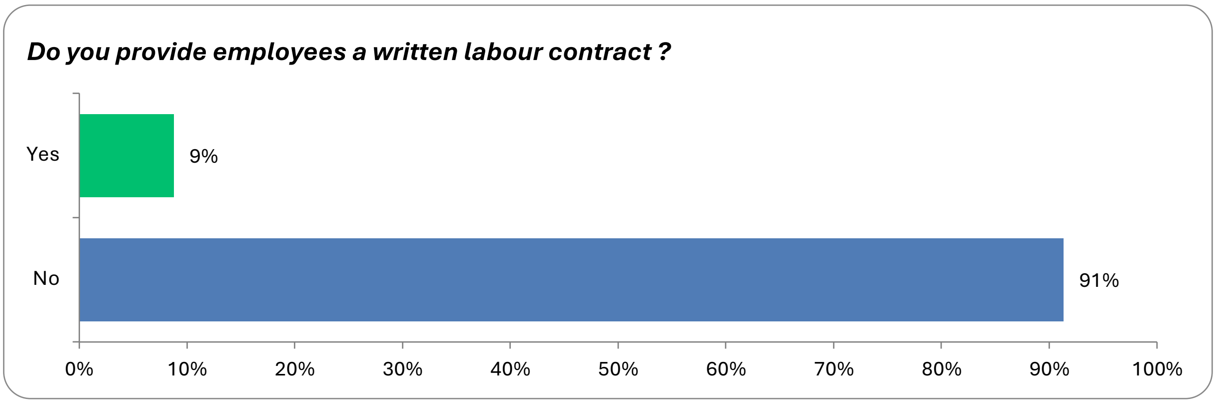
[26] Unpaid work is a value-added service provided by an individual outside the market, generally within the domestic sphere. It differs from paid work in that it does not give rise to any explicit remuneration (monetary or in kind) and differs from leisure according to the third-person criterion, which assumes that unpaid work can be substituted by a market service if circumstances allow. Unpaid work is therefore defined as activities that are performed free of charge, but which could also be performed for payment by a third party. The majority of unpaid work relates to routine domestic tasks (preparing meals, shopping for one's own household, washing dishes, doing the laundry and ironing, etc.), unpaid care services such as childcare or care for dependents, and other unpaid activities such as voluntary work, including the provision of water and fuel (Source: Enquête Nationale sur l'Emploi du Temps au Sénégal (ENETS), ANSD, September 2022).
[27] These high percentages of unpaid workers are in line with the ANSD's ENETS survey. This survey revealed that 72% of Senegalese contribute to unpaid activities, compared with 40% for paid activities. Women participate much more than men in unpaid activities (90% compared with 54%). As for paid activities, men contribute 50% compared with 31% for women (*Source: Enquête Nationale sur l'Emploi du Temps au Sénégal (ENETS), ANSD, September 2022*).
[28] The hourly rate of the guaranteed minimum wage (SMIG) for non-agricultural workers subject to the statutory forty-hour working week is set at 370,526 FCFA, or 64,223 FCFA per month, by the Senegalese government in 2023 (*Source: APS*).
[29] Labour Code, Title 10 - Working conditions Chapter 1 - Hours of work

The average monthly wage of a worker in the modern formal sector[30] in Senegal is around FCFA 110,000, although in the last quarter of 2023 it jumped to over FCFA 150,000. The average number of weekly hours worked per employee in the modern sector has remained fairly stable at around 41 hours, giving an average hourly wage of FCFA 670.

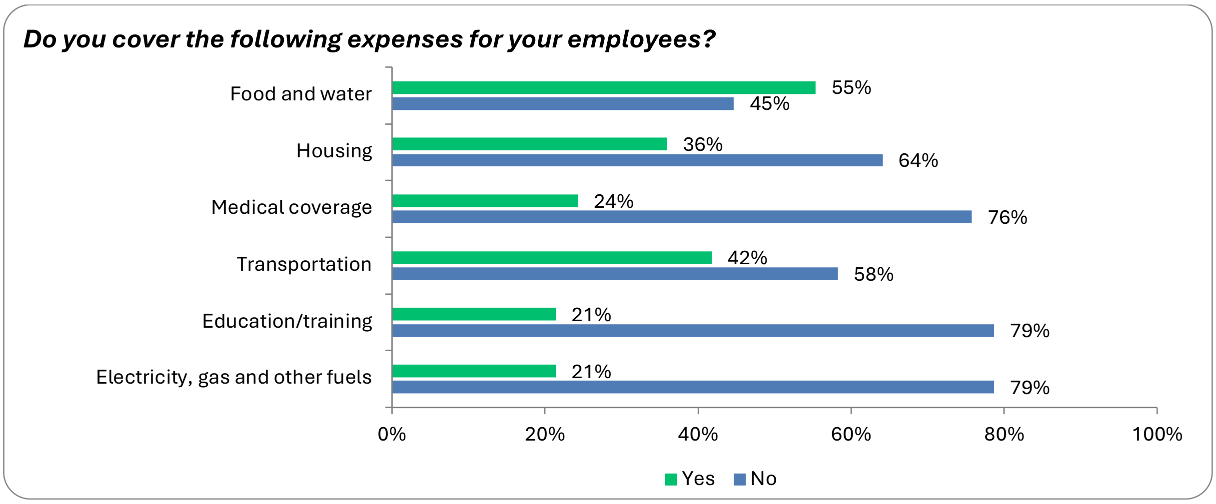


Source: ANSD-ENES

Despite the fact that 90% of employees in trading companies receive a salary, only 9% of employers offer them a written labour contract. This overlaps with the high percentage of companies that are not officially registered with the IPRES or CSS and therefore do not fund pensions or other social benefits. Where these social benefits are divided into contributions paid by the employer to his employees for food, water, housing, healthcare, transport, training or energy (electricity, gas), the majority of commercial traders - with the exception of food and water - do not pay these types of expenses to their employees. It is up to the individual worker to meet these expenses, which means that his or her social safety net depends almost entirely on family, relatives and friends.



[30] Companies whose activities are excluded are mainly involved in agriculture, fishing, services to private households, religious organisations, public international organisations and other public extra-territorial organisations, as well as the defence services sector.



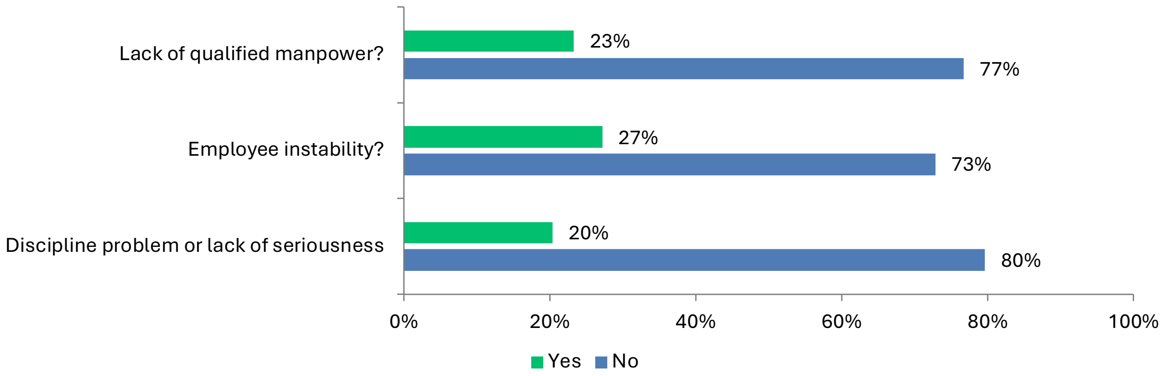
As well as not offering their employees a social safety net, most commercial companies do not grant (paid) time off for public holidays or weekly rest days either. This is contrary to the legal right to receive a bonus for working on public holidays or weekends, if more than 6 hours and 40 minutes per day or 40 hours per week are worked.

Do you :	**Yes**	**No**
Give employees a weekly day off?	28%	72%
Give employees paid leave on national public holidays?	20%	80%
Pay a bonus to employees when they work on a day off or a public holiday?	15%	85%
Give employees at least 12 working days' annual leave?	8%	92%
Pay employees at least 100% of their salary during annual leave?	12%	88%

The official unemployment rate in Senegal in the first quarter of 2024 was 23.2%[31] . In rural areas, the unemployment rate is considerably higher (31.7%). In addition, the unemployment rate for women is three times higher than that for men. These relatively high unemployment rates give Senegalese employers a strong bargaining position vis-à-vis individual workers and (young) people seeking paid employment. As a result, trading companies in general do not have many problems with their employees. Only a quarter of these companies in the horticultural sector are faced with an unstable workforce or have difficulty finding qualified staff.

[31] The National Statistics Office (ANSD) uses the following definition for unemployment: people of working age who are available for work, but are not employed or are not seeking work for reasons deemed to be beyond their control.

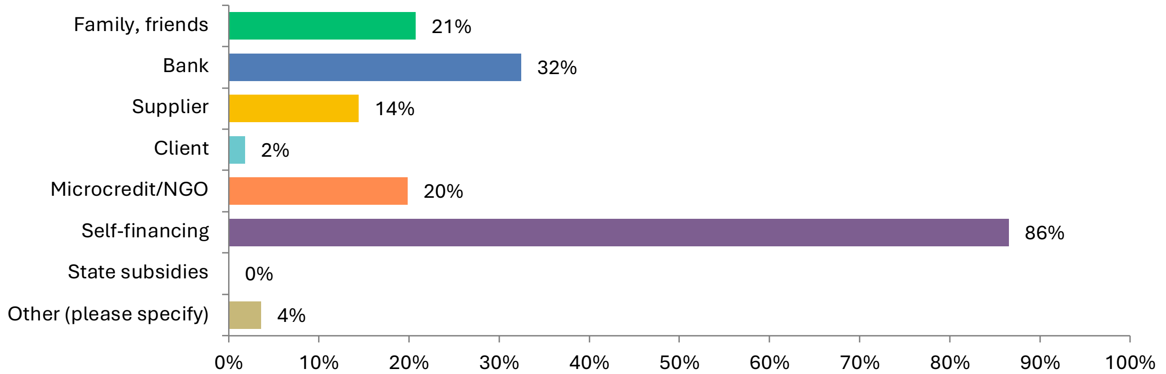
Do you have any problems with your workforce?



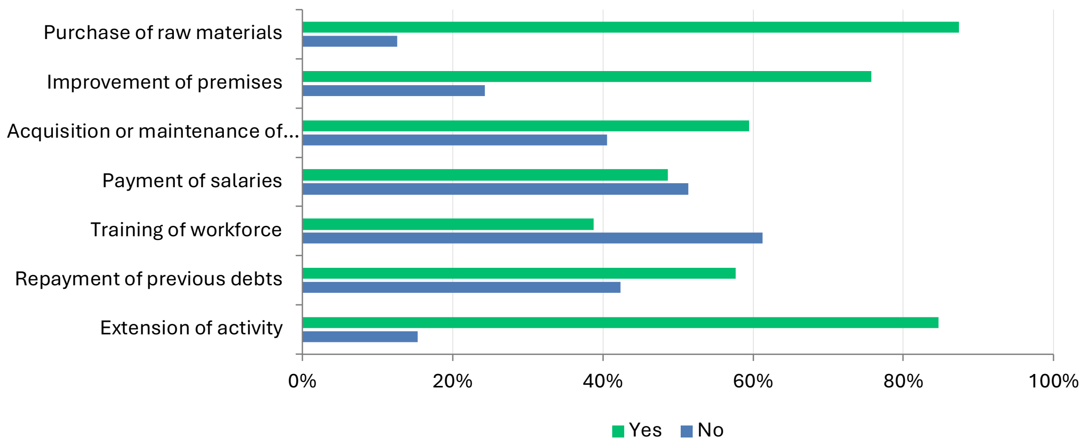
6.4 Financing

To finance their business activities, 86% of horticultural traders use their own funds. They also turn to family (21%) and suppliers (14%) for funds. Only 32% of the traders also turn to a bank or micro-credit institution (20%). State subsidies are non-existent for commercial traders in horticultural products. Funds are used for a wide variety of investment activities, such as purchasing raw materials, expanding the business and improving premises. Investments in the workforce, such as training and wage increases, are given less of a priority.

What is the main source of finance for your business (several answers possible)?

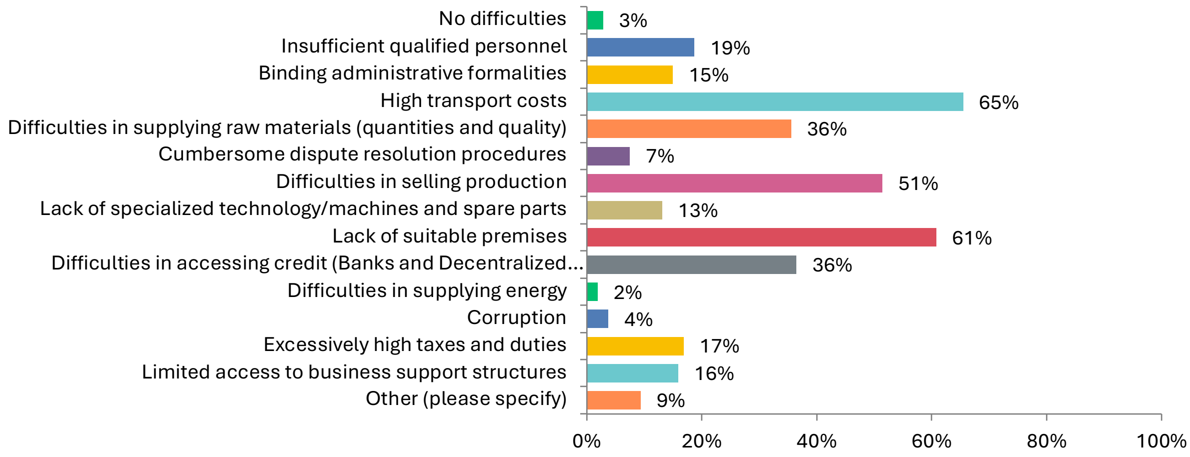


Do you need financing for : (several answers possible)



The business climate in Senegal is difficult for horticultural trading companies, the majority of which are SMEs operating in the informal economy without (much) government support. The three main obstacles these companies face in their day-to-day business activities are high transport costs, lack of suitable premises and difficulties in selling their products on the (inter)national market. As mentioned earlier, the lack of qualified staff is not perceived by many commercial traders as a major constraint to doing business (19%). This percentage is almost the same as constraints related to high local taxes (17%) and limited access to business support structures (16%). Corruption is mentioned by only 4% of businesses as a major obstacle. This relatively low percentage is in line with the results of Transparency International's annual Corruption Perceptions Index (CPI)[32] . Senegal ranks among the African countries with the lowest perception of public corruption.

What are the main constraints you encounter in your business (several answers possible)?

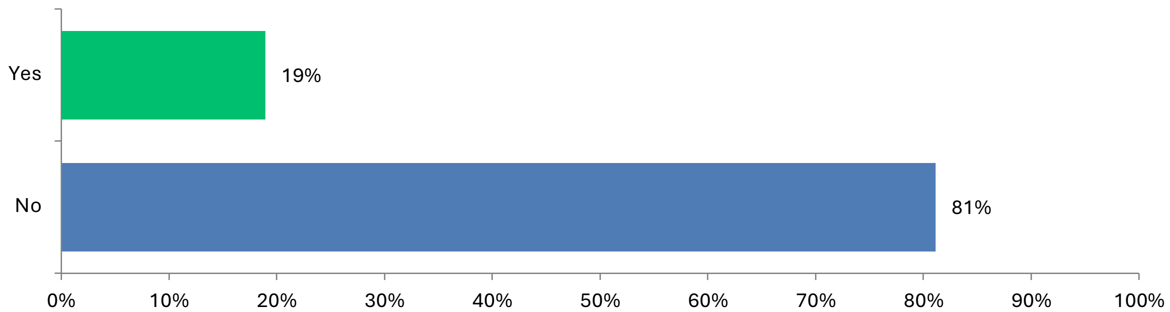


6.5 Exporting

As far as exports are concerned, 19% of horticultural trading companies are involved in exporting. Overall, of Senegal's total export value of FCFA 3,224 billion in 2023, just over five per cent - or FCFA 172 billion - came from exports of fresh fruit and vegetables.[33]

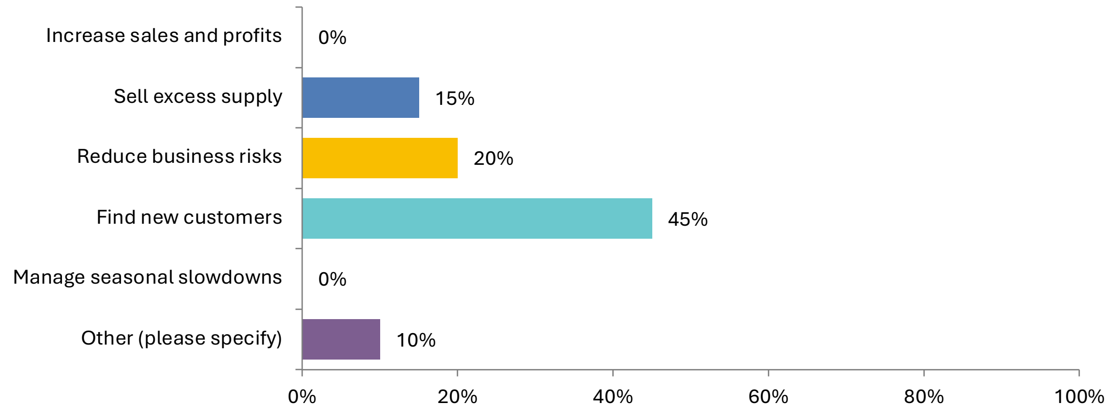
There are many reasons why a commercial trader might become involved in exporting, but the most important is to increase sales (90%), followed by the search for new customers (45%).

Do you export?



[32] The CPI ranks 180 countries and territories around the world according to their perceived levels of public sector corruption, scoring them on a scale from 0 (very corrupt) to 100 (very clean).
[33] Bulletin Mensuel du Commerce Extérieur, fevrier 2024, ANSD

What are the main reasons for exporting (several answers possible)?

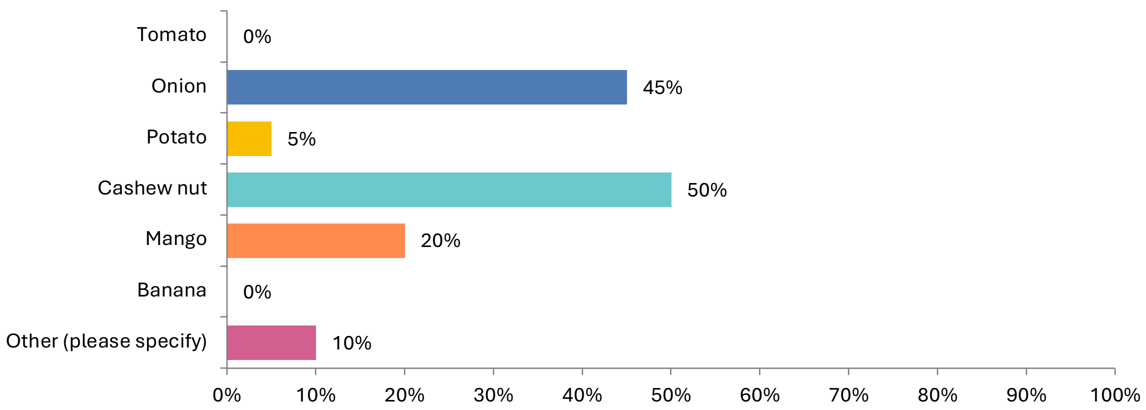


The most important horticultural products exported by commercial companies are cashew nuts (50%) and onions (45%). According to national statistics from the National Statistics Office (ANSD), the largest export volumes (measured in tonnes) in 2023 are cashew nuts, melons, mangoes and onions. A number of major producers of these horticultural products also export, and therefore do not use external trading companies. Examples include Grands Domaines du Sénégal (GDS) - a local subsidiary of the French multinational Compagnie Fruitière - which is strong in tomato and mango exports, and SANEPRO based at Notto Gouye Diama (Thiès region) which produces green beans and mangoes for export. Trading companies that buy from a local network of farmers and export directly to Europe or Asia include the Dakar-based trading company A.N.S. Inter Export, which exports certified green beans and mangoes, and Diop distribution et services - located near Dakar - which buys and exports onions, generating annual export sales of FCFA 30 million in 2023.

In Senegal, forty exporting companies are active in the fresh mango sector, ten of which have a plantation, their own packaging plant and cold storage facilities. Cayor Fruits and SAFINA (*Société Africaine Industrielle et Agricole*) are the leaders in this sector, followed by SEPAM, Blue Skies and SANEPRO. These exporting companies are often certified according to international market demand (GLOBALG.A.P, organic certification, SMETA, Tesco, Fairtrade and Rainforest Alliance). Around 50% of their production is sold on the international market (particularly the EU market), with the remainder sold to local processors and other exporters. The collective packing station run by the Fondation Origine Sénégal/Fruits & Légumes (FOS/FL) at Dakar airport plays an important role in fresh mango exports, with 50% of fresh mango exports passing through this facility.[34]

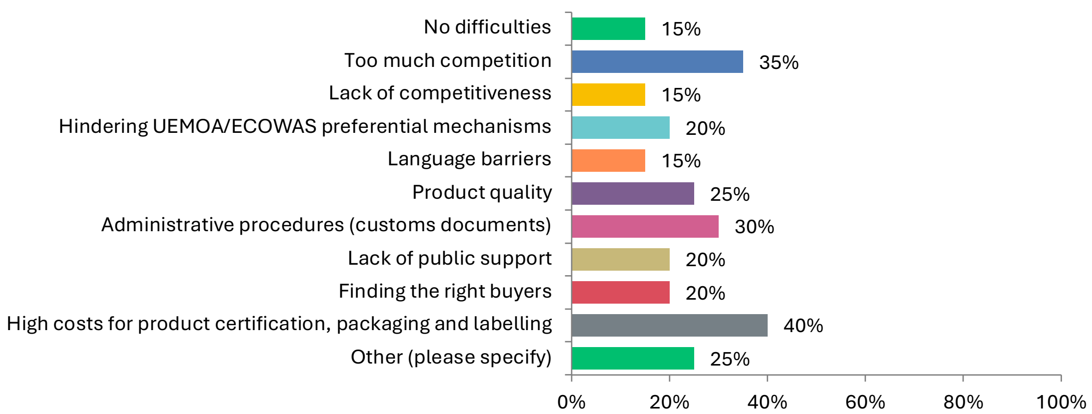
[34] West Africa Competitiveness Report Programme Regional Investment Profile Mango Value Chain, ITC, 2022

Which product(s) do you export (several answers possible) ?

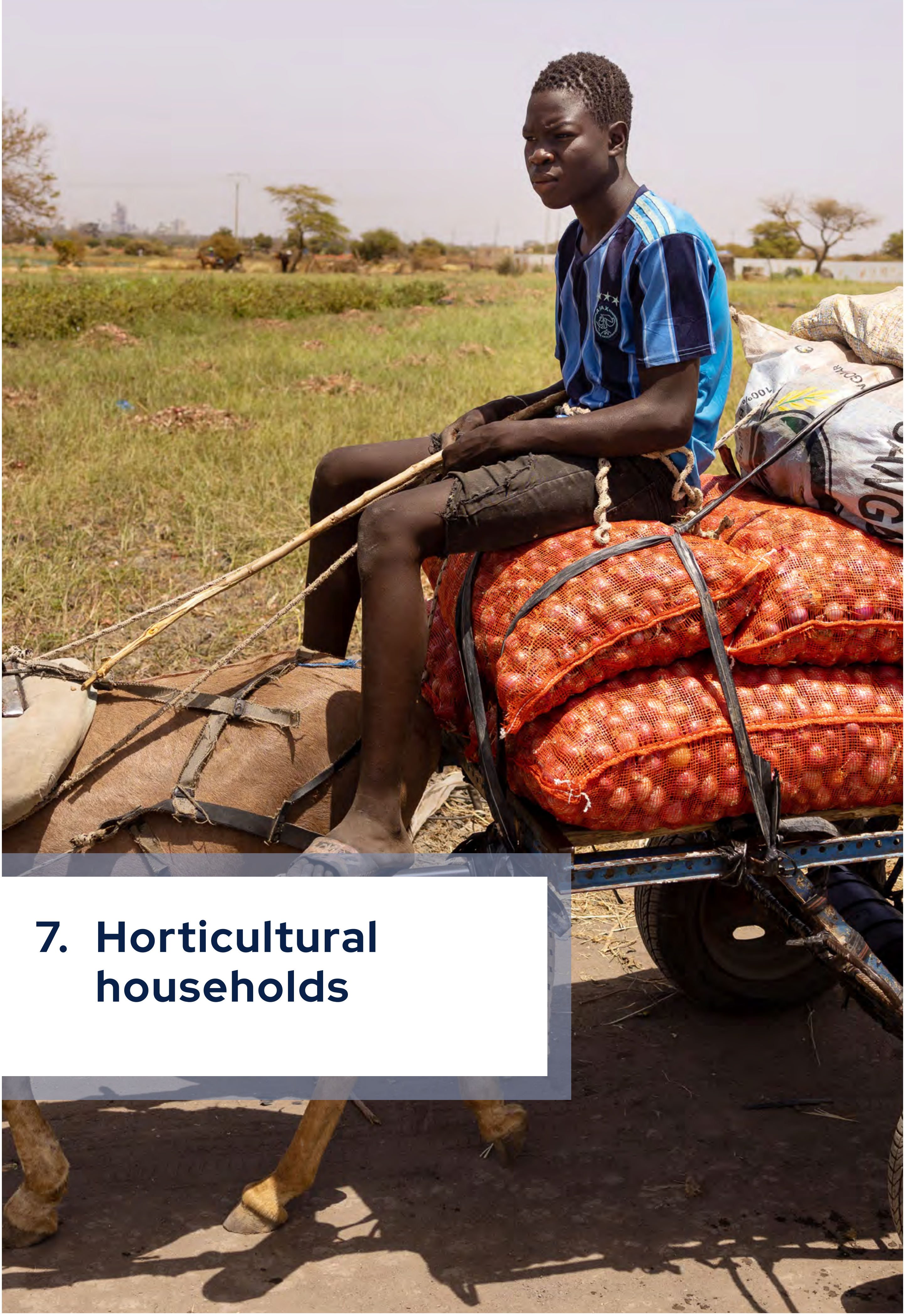


Almost all exporting companies face one or more obstacles when exporting horticultural products from Senegal. The three most common difficulties are the high costs of certification, packaging and labelling (40%), followed by strong competition from other countries in the target markets (35%) and customs administrative procedures (30%). Despite these various export problems, the majority (60%) of commercial horticultural exporters do not work with a foreign partner in Senegal.

What are the difficulties associated with your export business (several answers possible)?



The average number of people working in the export department of trading companies is 7, but there are exceptions such as Miname Export, in the town of Pout, with 500 employees, i.e. 50% of its total workforce working in export, and APAD with 25 people working in the export of cashew nuts and mangoes to Ghana and Europe.

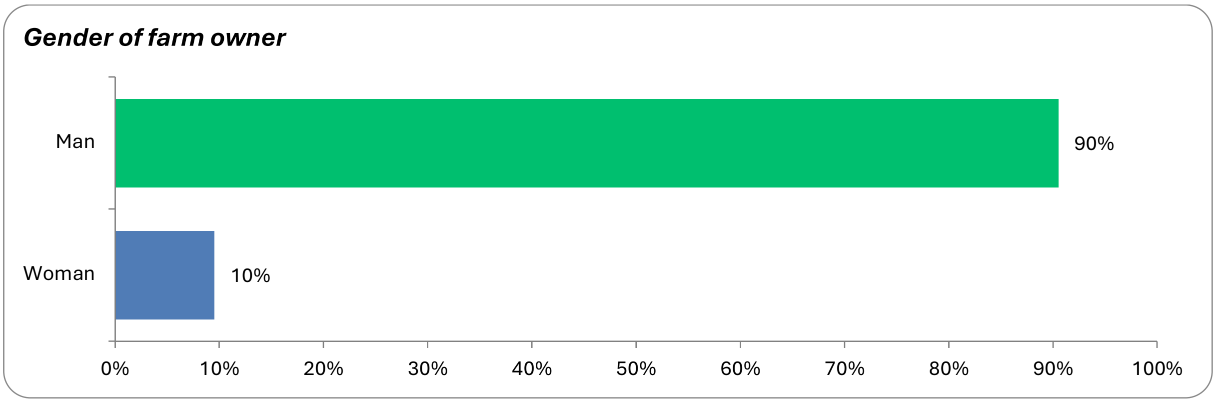


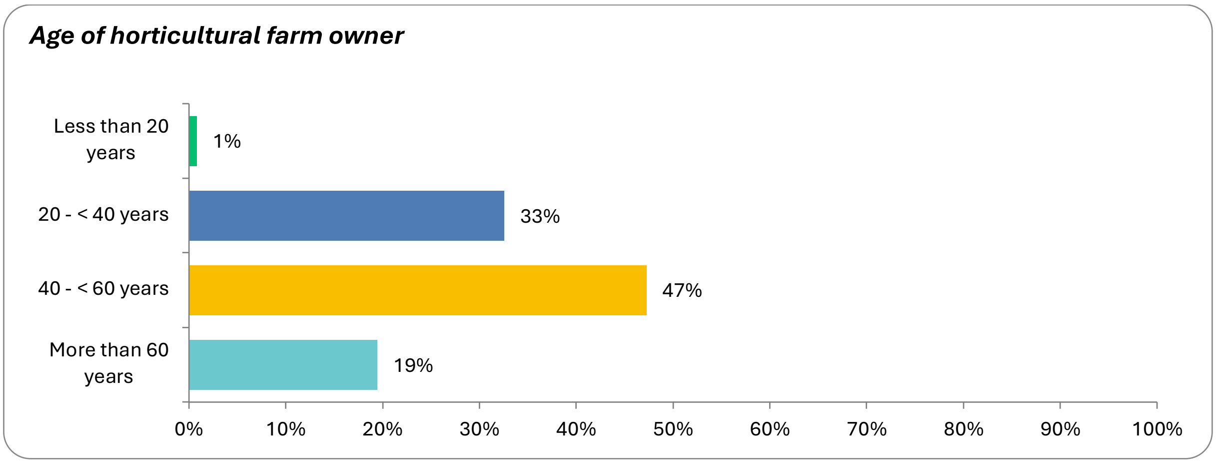
7. Horticultural households

7. Horticultural households

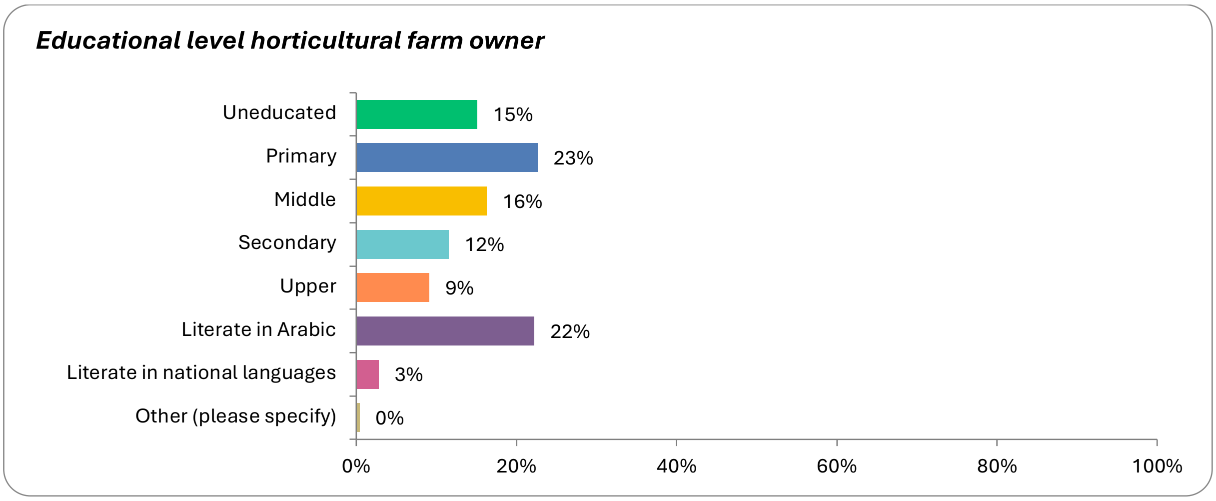
7.1 Profile of horticultural households

With around 145,000 households engaged in horticulture (RGPH-5, 2023), they play a key role in the horticultural supply chain in Senegal. The vast majority (90%) of these households have a man as the owner of the farm plot[35] , and the majority are aged between 40 and 60 years, with little education. The average size of a horticultural household is 12 members. Young farm owners are less common in the horticultural sector in Senegal. An earlier survey of households in the Niayes by the Ministry of Agriculture in 2012[36] found a similar distribution by gender and age of plot owner. Education levels have improved somewhat over the past ten years. In the 2012 survey, 16.7% of households in the Niayes could read and write. In this survey, 12% of owners had reached secondary level and 9% higher.

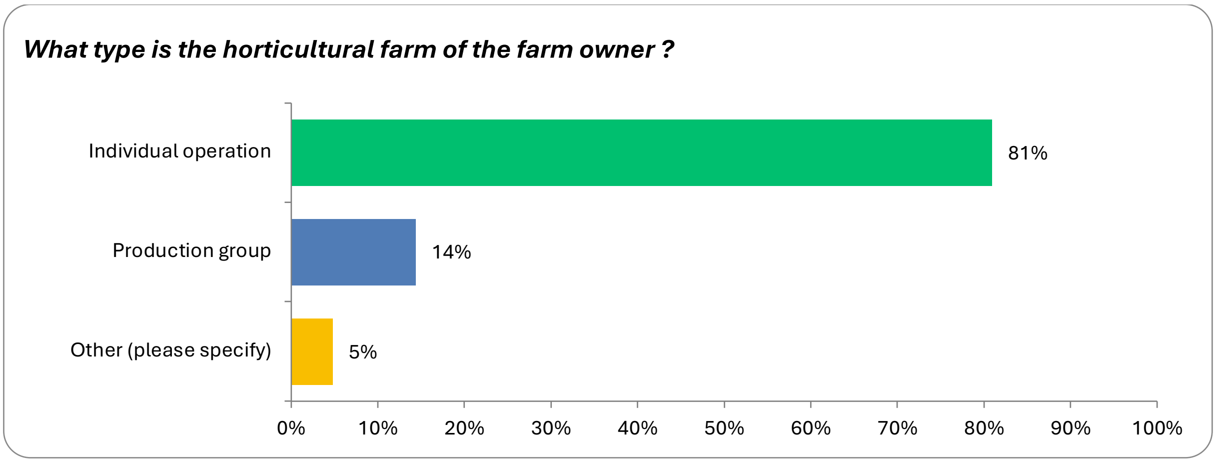




[35] This corresponds to the results of the RGPH-5 general population census carried out in 2023.
[36] Recensement de l'horticulture dans les Niayes, Direction de l'Horticulture, Ministère de l'Agriculture, mars 2013



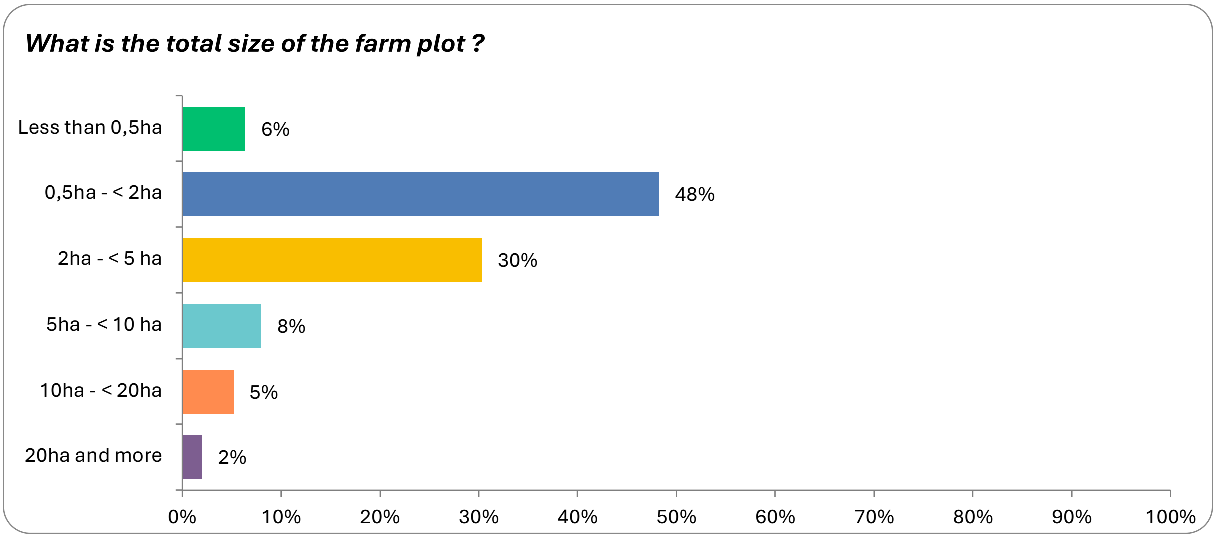
Over 80% of horticultural households are run by a single person. Only 14% of households work together in a producer group or are run by several family members.



7.2 Farm plot

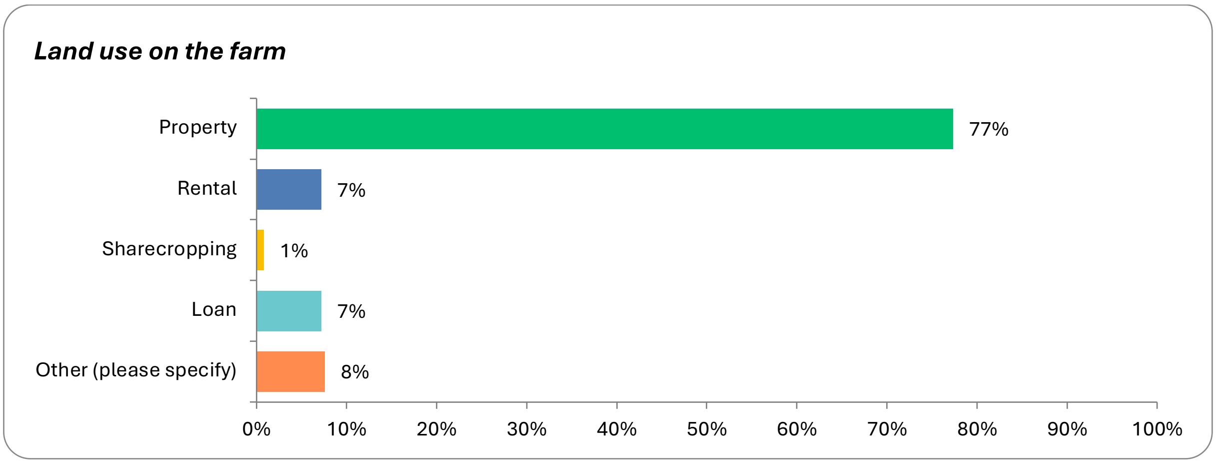
More than half of the horticultural farm plots cultivated are less than 2 hectares in size, and 30% are between 2 and 5 hectares. Senegal has a limited number of large horticultural farms of over 10 hectares (7%).[37] The largest farms of over 20 hectares are often managed by foreign capital or managers and are export-oriented. For example, Lion Agricole du Diobass, near the town of Thiès, is a 100-hectare farm producing mainly onions for export to Europe. The owner of this farm is Dutch and works alongside 2,000 (seasonal) workers from neighbouring villages.

[37] This distribution corresponds to the results of the latest population census RGPH-5, 2023.

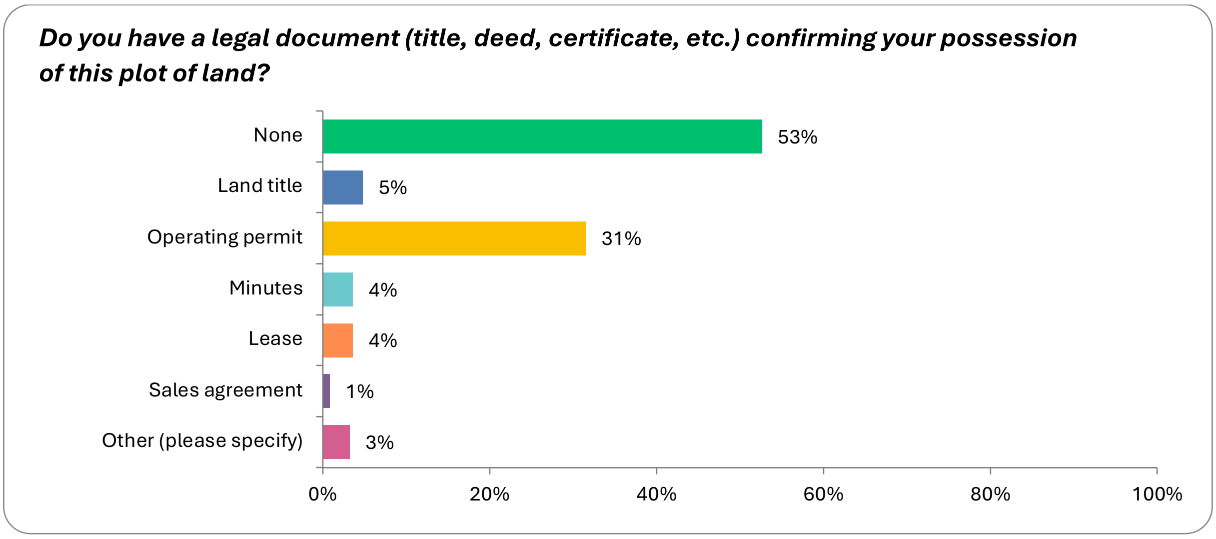


The distribution according to the size of the farm plot has not changed much over the last decade. The results of the 2013 population census (RGPHAE) showed a similar distribution in the three main horticultural areas: 94% of farmers in Ziguinchor had a farm plot of less than 5 hectares, for Thiès it was 76% and Saint-Louis 93%. For the country as a whole, the figure was 75%.

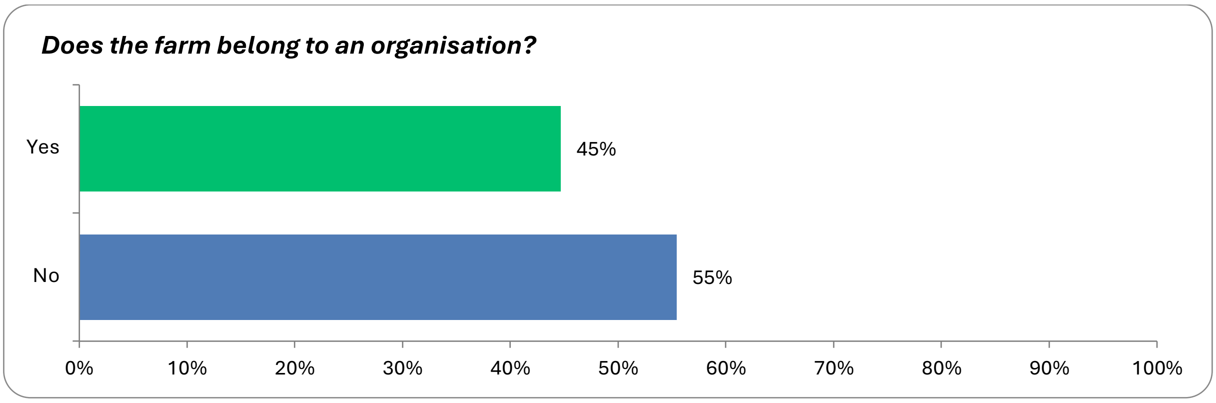
In Senegal, private ownership of agricultural plots is most common (77%), followed by renting, leasing or inheriting land. Although three-quarters of horticultural households claim to own the land, the majority have no legal documents justifying this land ownership right[38] . When a legal dispute over land arises, for example when more land is needed for housing projects to accommodate Senegal's growing urban population, this puts many horticultural households in a fragile legal position.



[38] The relatively low percentage of plots secured by a land tenure document is in line with the results of the Ministry of Agriculture's 2021-2022 *Annual Agricultural Survey* (EAA). According to this survey, at national level this percentage is 3%. This suggests that producers are more likely to hold customary rights through verbal agreements without a written record. This could support the hypothesis that most of these exploited plots are inherited and that farm owners often do not take the necessary administrative steps to protect their assets.



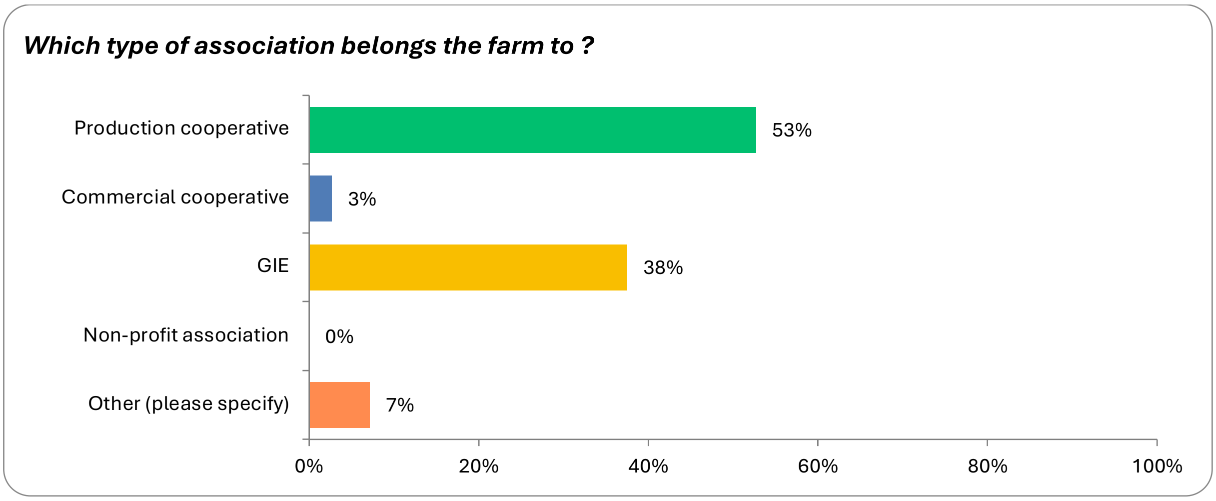
More than half of horticultural households in the country's three main horticultural zones do not belong to any collective organisation. When a household is a member of a collective organisation, the two most common types of organisation are a producers' cooperative (53%) or a GIE (*Groupement d'Intérêt Economique*)[39] (38%). This percentage of membership of a collective organisation is considerably higher than the results of the national agricultural survey carried out by the Ministry of Agriculture in 2022[40] . According to this national survey, 17% of farm households nationwide are members of a collective organisation. The figures for the Ziguinchor region are 12%, Thiès 12.4% and Saint-Louis 41.5%. These differences can be explained by the fact that this survey focuses on 5 particular commodity chains, where the degree of organisation in the mango and cashew sectors is higher than in most other market gardening and arboriculture sectors. Another study[41] also reveals that in the regions of Saint-Louis, Thiès and Casamance, farmer membership of producer organisations is among the highest in the country.



[39] An Economic Interest Group (GIE) is a group of individuals or legal entities whose purpose is to facilitate the economic activity of its members. Although it has legal personality, a GIE is neither a company nor an association. It can only be set up for a limited period and its purpose must not be to make profits for itself. A GIE must be registered with a chamber of commerce.

[40] Annual Agricultural Survey (EAA) 2021-2022, Ministry of Agriculture

[41] Institutions of Collective Action and Smallholder Performance: Evidence from Senegal, Chapter 8, Fleur Wouterse and Amy Faye, ReSAKSS Annual Trends and Outlook Report 2020



In addition to a difference in the proportion of households that are members of a collective organisation, the Ministry of Agriculture's EEA 2021-2022 annual agricultural survey also revealed that the majority of farm households that are members of such an organisation are linked to a GIE (54%), followed by a non-profit association (23%) and a producers' cooperative (22%). This means that household members in the 5 selected sub-sectors are organised differently from the agricultural sector as a whole.

Participation in a GIE is necessary for most farmers in Senegal to gain access to formal credit. Membership of a GIE, therefore, also reduces the financial risks faced by small-scale farmers in relation to formal creditors such as agricultural banks.

A GIE differs fundamentally in terms of the economic responsibility of the cooperative. Under Senegalese law, a cooperative is a limited liability company which must fulfil a number of obligations designed to provide guarantees to third parties and its members. Cooperatives are both economic enterprises and democratic associations. They are created to provide services to their members and not to generate a surplus for themselves. Co-operative laws provide that this surplus is distributed to the members, generally in proportion to their activities within the co-operative.

There are a large number of farmers' organisations active in Senegal. These organisations focus on a particular region/department/village, a sub-sector (e.g. rice, market gardening, arboriculture, fisheries, livestock) or represent the country's entire agricultural sector. Within horticulture (market gardening, arboriculture), this division of member organisations by geography and sub-sector is also visible. An important organisation at national level that defends the interests of farmers in general is the association CNCR (*Conseil National de Concertation et de Coopération des Ruraux*) based in Dakar. The CNCR has 27 members, which are federations or unions focusing on a particular agricultural sub-sector and/or region. For example, FPMN (*Fédération des Producteurs Maraîchers des Niayes*) and APOV (*Association des Producteurs d'Oignon de la Vallée*). In addition, the AUMN (*Association des Unions Maraîchères des Niayes*) plays an important role in representing the interests of market-gardening farmers in the Niayes. The AUMN has 21 members, each of which is made up of a number of farmer groups. In total, 633 farmers' groups are affiliated, representing around 31,000 individual farming households. The AUMN office is located in the city of Thiès.

Source: CNCR

7.3 Crop production

Market gardening in Senegal is divided into two growing seasons: the cold dry season and the hot dry season. Normally, the cold dry season begins in early October, although rainfall is still possible during this period, and lasts until the end of March the following year. The hot dry season runs from the beginning of April to the end of June. However, due to climate change, the start and end of the rainy season is becoming more unpredictable, which has an impact on the sowing and harvesting of crops. Onions and tomatoes are particularly grown during the cold dry season by households in the Ziguinchor, Thiès and Saint-Louis regions. National onion production over the past five years has averaged around 400,000 tonnes. The Niayes and northern regions account for all national production.[42] Around 65% of onion demand is met by local production. The remaining volume has to be imported outside the onion import freeze period.[43]

[42] DAPSA, Ministry of Agriculture

[43] The usual freeze period for onion imports, particularly from the Netherlands as the main supplier, is from January to August, although this period is sometimes modified by the Senegalese government when domestic onion production is much lower than domestic demand.

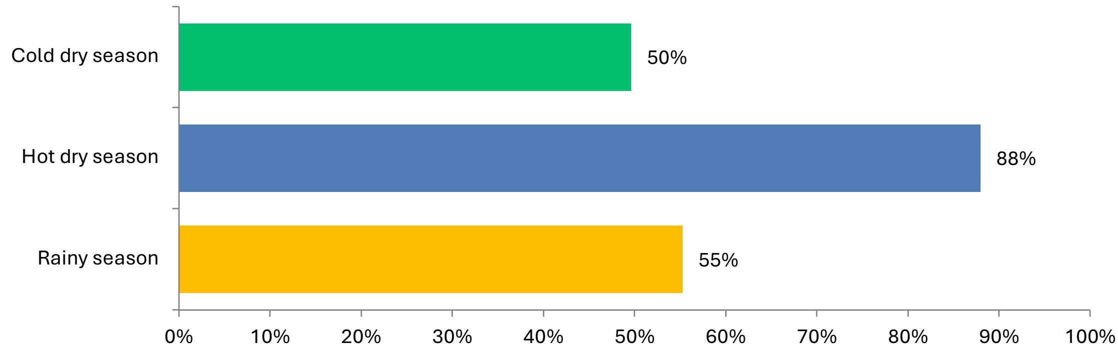
The number of households in the three horticultural zones that are active in green bean cultivation is almost the same during the cold season as during the dry season.[44] Annual national production over the last five years has been around 20,000 tonnes, almost all of which is exported. The Netherlands and Italy are the two main export markets for Senegalese green beans.

The main mango-growing regions are Casamance and Niayes. Around 50-55% of national production comes from the Casamance alone.[45] This sub-sector provides employment to around 20,000 people, half of whom are women. The mango production period in Senegal[46] is the longest in West Africa. While Mali and Côte d'Ivoire produce mangoes for export over 4 months (March to June), Senegal produces mangoes over 6 months (April to September), depending on the region, with an export window of 3 to 4 months, the bulk of exports being concentrated in June and August. In the Niayes region, production extends over the July-August-September window, enabling Senegal to take over from West African production. Depending on the year, production can be early (starting in mid-June) and/or later (lasting until the end of October). In the Casamance, in the Sine Saloum area and on the Petite Côte, production is earlier (May-June-July). Fresh mango exports account for around 14% of national production.

In addition to mango production, the Casamance is also the main cashew nut producing region in Senegal. Around 90% of the total annual production of around 20,000 tonnes comes from this region. A favourable climate with sufficient water (soil, surface) provides the right conditions for these crops. The cashew harvest season runs from May to August.

Sixty per cent of growers in the three horticultural zones practise crop rotation. Horticultural farm households who grow onions in particular often plant a second crop on the same plot after harvesting the onions, so as to have two harvests during the dry season and repeat the process the following year. This type of crop rotation increases the risk of seed exhaustion and pest problems.

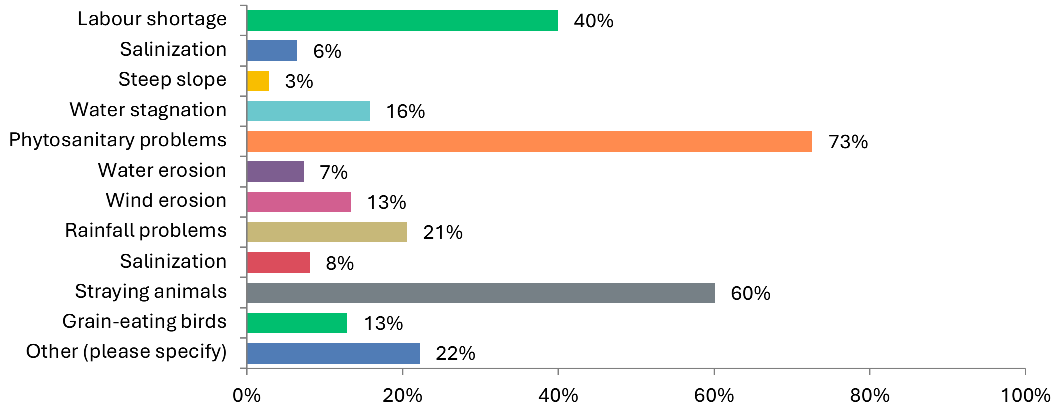
When are you active in horticultural production (several answers possible)?



Horticultural growers face a number of constraints in producing crops. The three main problems are phytosanitary problems (insects, rodents, weeds, fungi), followed by roaming animals (goats, cows) that devour their crops, and lack of labour. As a result, losses during the growing season can be as high as thirty per cent.

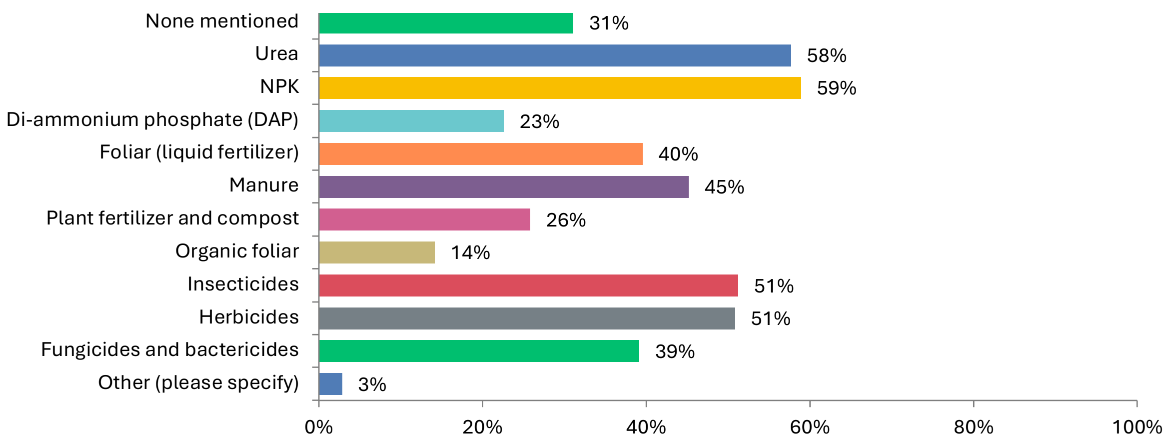
44 RGPH-5, 2023
45 Étude sur le profil d'opportunités de la chaîne de valeur mangue en Casamance Qualitative analysis, IPAR, May 2023
46 Over the last 5 years, annual mango production has been around 125,000 tonnes (*Source: ANSD*).

Which of the following production constraints are identified in the plot (several answers possible)?

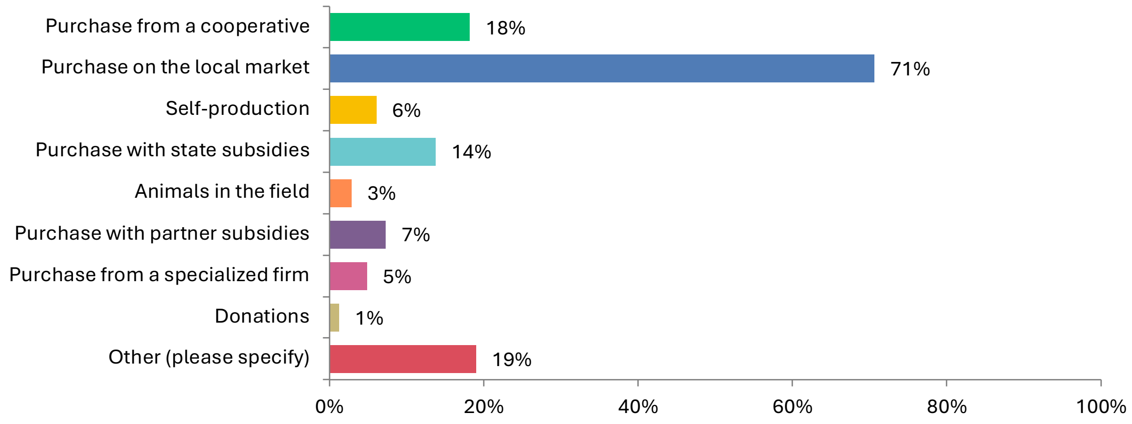


To increase yields and reduce crop losses, farmers use a wide variety of products. The main products are mineral fertilisers (NPK, urea), insecticides and herbicides. Farmers also use organic fertilisers such as chicken manure. They buy these agricultural inputs mainly on the local (informal) market (71%), followed by agricultural cooperatives (18%). Only 5% of farmers buy from specialist suppliers of agricultural inputs. There is also a relatively large group of farmers who do not use any inputs to improve production. This is often due to a lack of money or knowledge about using products to protect crops or improve yields.

Which of these types of inputs are used by the farm household (several answers possible)?



What has been the main source of inputs purchased since the beginning of the crop year (several answers possible)?

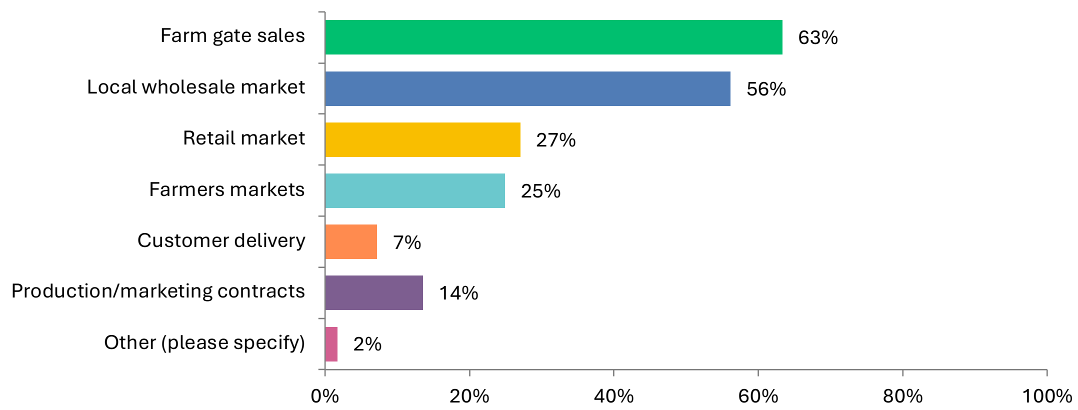


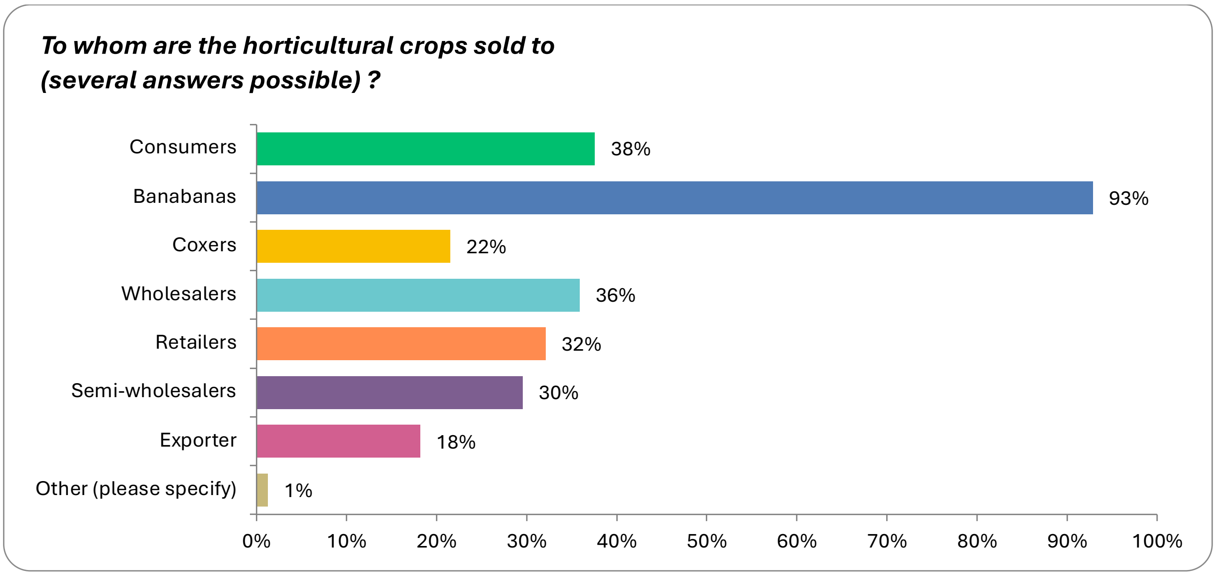
7.4 Marketing

The most important sales outlets for horticultural producers are sales from their own farms and the local wholesale market. Other types of market (retail shops, farmers markets) are less important. Contract production is mainly carried out by industrial tomato growers in the Saint-Louis region. Around 60-70% of the national annual production of around 85,500 tonnes (2023) comes from this region. An estimated 15,000 tomato growers are active in this region. These farmers sell three-quarters of their harvest at a price pre-set by Senegal's tomato processing industry. This local volume is not sufficient to fully satisfy the processing capacity available and therefore consumer demand, resulting in annual imports of between 12,000 and 14,000 tonnes of tomato concentrate over the last five years. Mainly imported from China.

By far the most important buyer group for horticultural farmers are the banabanas (itinerant traders), followed by individual consumers and wholesalers. Direct sales to exporters is done by 18% of the farmers.

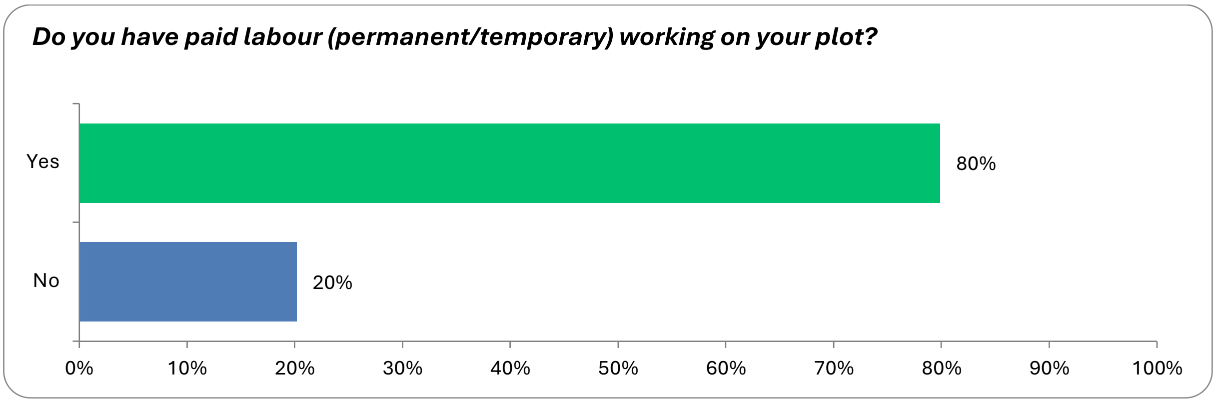
Indicate the most important sales network used for horticultural sales (several answers possible)?

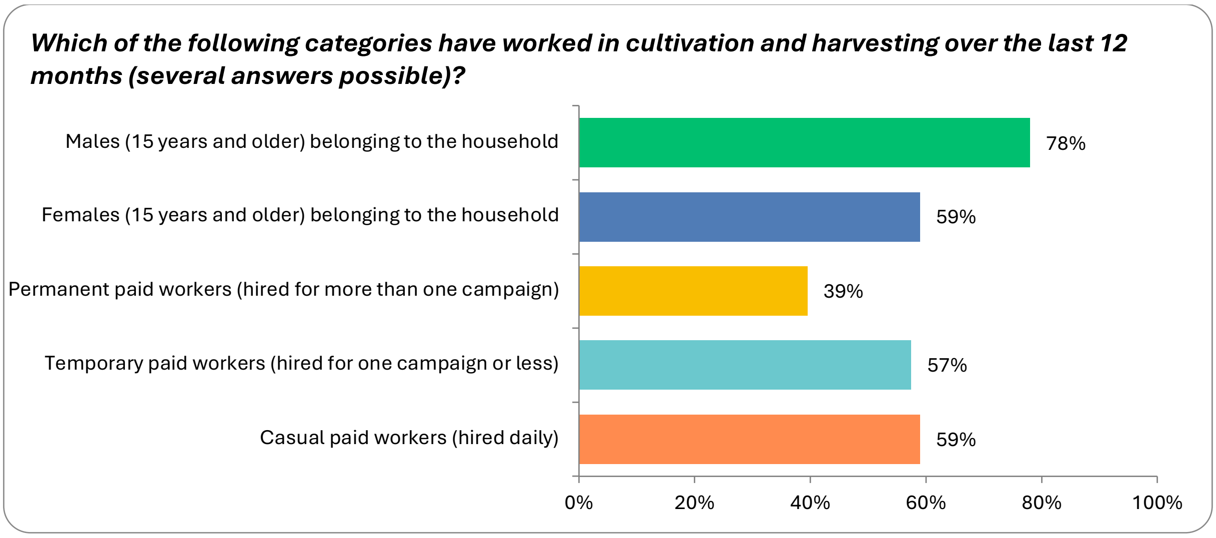




7.5 Employment

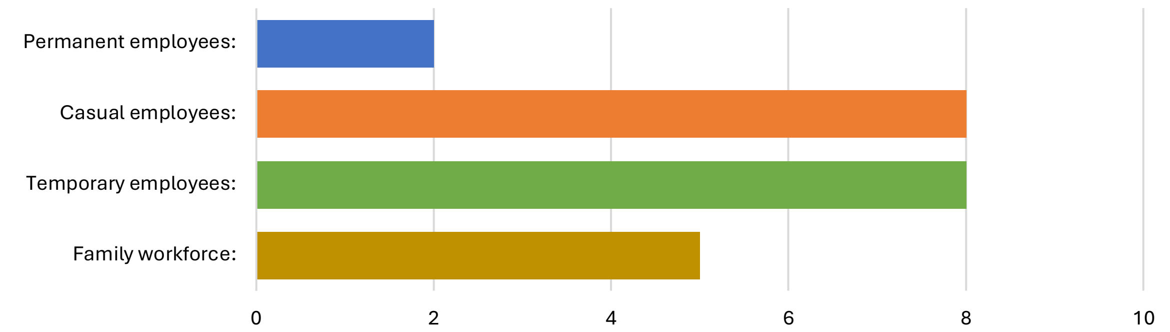
Horticultural households are essential for providing much-needed (paid) employment in rural areas. Eighty per cent of farmers use different types of paid workers. The most common group of paid workers used by landowners are male and female members of the household aged 15 and over, followed by casual workers hired on a daily basis and seasonal workers working for a horticultural season (3-4 months). Only a third of the landowners use permanent paid workers to help them cultivate the land.



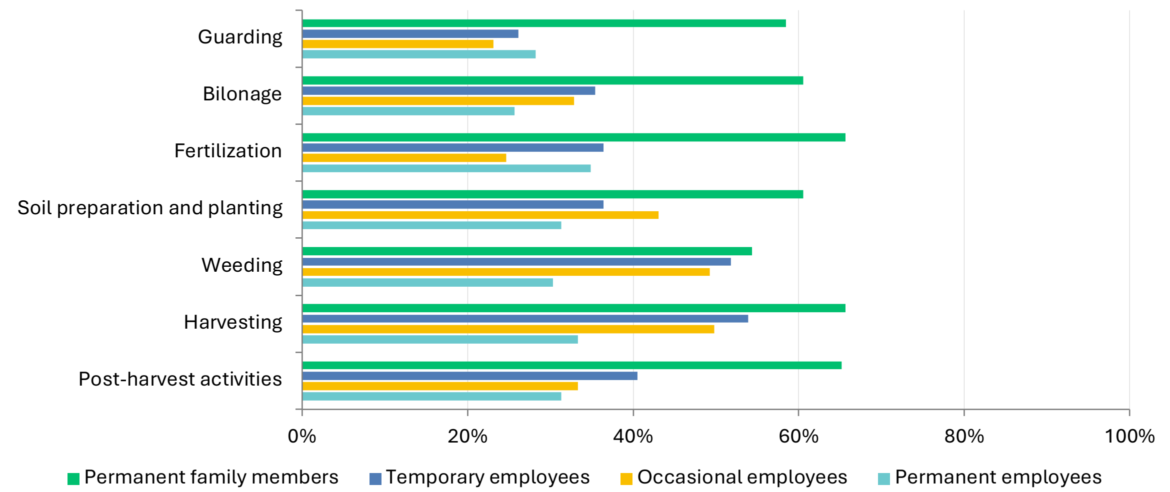


Although most often used by landowners, the average number of family members working on the farm plot (5 people) is lower than the average number of casual or seasonal workers used (8 people). In addition, large farms use many more seasonal/occasional workers than family members or permanent workers. For example, several farmers located near the town of Pout, with plots between 5 and 10 hectares producing onions and green beans, hire several hundreds of temporary workers during the horticultural season, while their permanent staff is less than 10 people. Temporary workers, hired on a daily or seasonal basis, are mainly put to work preparing the soil, planting, weeding and harvesting crops. Family members are put to work during all activities on the farm plot. On average, one third of the total workforce is made up of women.

Average number of labourers on the farm plot

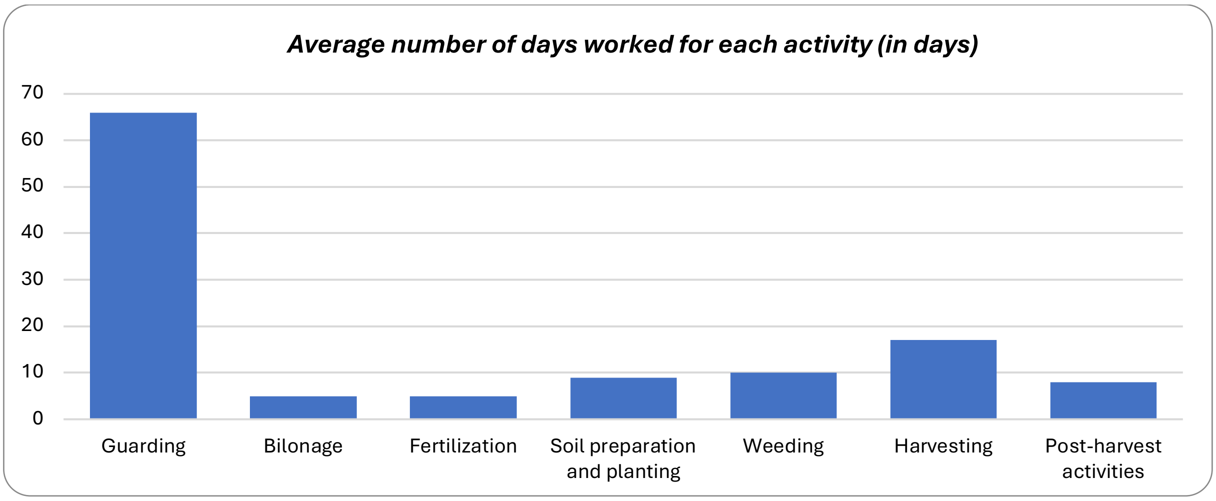


What type of labour does the farm owner use for what type of work (several answers possible)?

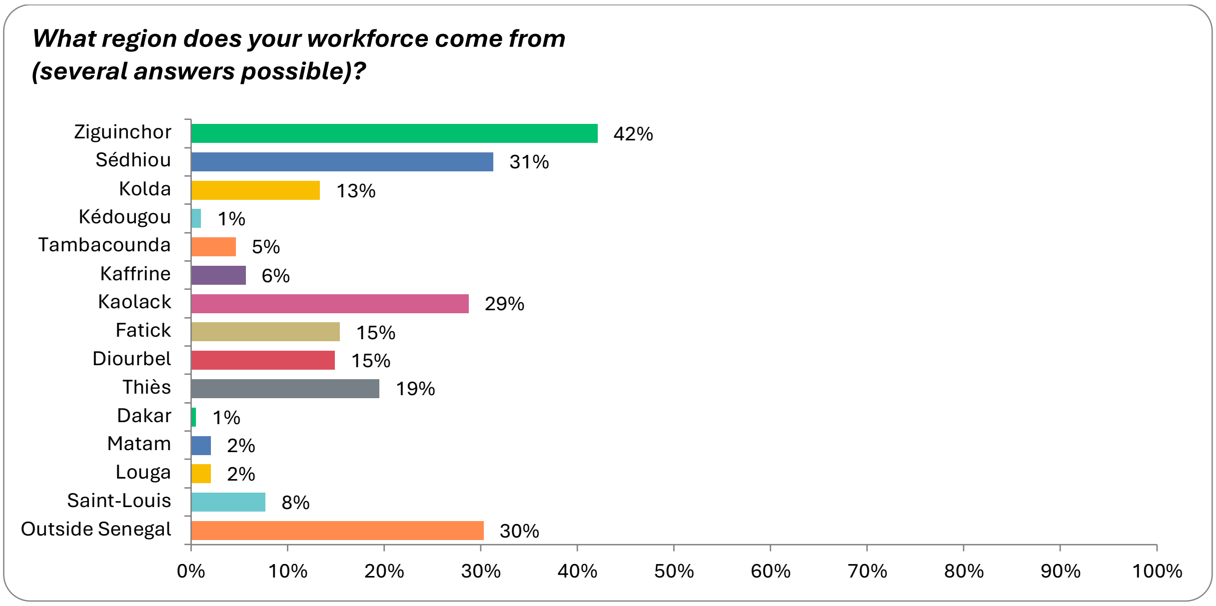


The most labour-intensive activity on the farm is guarding the plot. On average, 66 days are spent guarding the farm against stray animals and unwanted people trying to get onto the land and eat or steal crops. This activity is mainly carried out by family members, and for many farmers it is a continuous activity throughout the year or throughout the growing season. After guarding the farm, harvesting is the most labour-intensive activity. On average, the owner and his workers spend 17 days harvesting crops. This is generally an activity for which the owner hires outside seasonal and casual workers to support him and other family members.[47]

[47] According to a survey of farming households in the Niayes and Senegal River Valley carried out as part of the *Agricultural Policy Support Programme* (PAPA) in 2017, the average number of hours worked per week by male heads of household is 51 hours. Female heads of household work an average of 45 hours per week.



Owners of horticultural farms located in the Ziguinchor, Thiès and Saint-Louis regions hire their workers mainly from the same region or neighbouring regions.[48] A further 30% of farm owners employ workers from outside Senegal. These are often farms located in the Ziguinchor region that have a lot of cross-border activity with neighbouring Guinea and Guinea-Bissau, including Guineans looking for work in Senegal. In addition, many people from Mali come to Senegal in search of (better) work in the horticultural sector.[49]

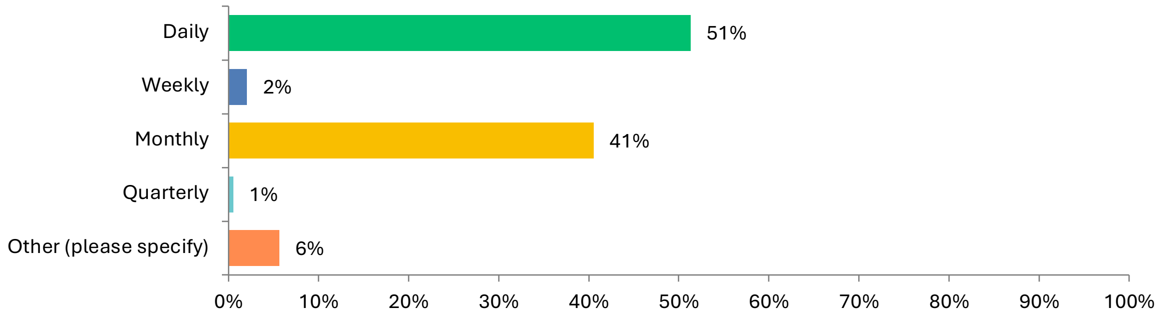


Due to the large number of casual workers on horticultural farms, more than half of the farm owners pay their wages on a daily basis. 41% pay on a monthly basis, either to family members or seasonal workers. More than 70% of farm owners pay less per hour than the official minimum hourly wage in the agricultural sector (SMAG) of 236,865 FCFA.

[48] According to the latest population census (RGPH-5, 2023), the number of internal migrants, i.e. those who do not live in the same place (region, department, town) where they were born, represents 12.5% of Senegal's total population of around 18 million people. The region where the balance between people leaving (outflows) and entering (inflows) is the most negative (more people leaving) is Ziguinchor, followed by Louga and Fatick.

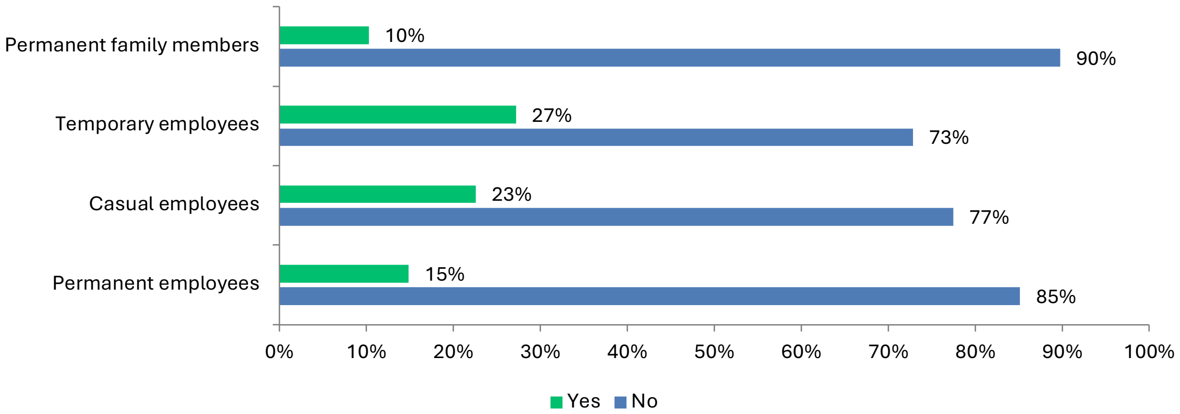
[49] Senegal currently has around 300,000 international immigrants (i.e. people living in Senegal but not born in Senegal), more than half of whom live in Dakar (58.6%), followed by Thiès (6.4%) and Ziguinchor (5.4%). This includes the diaspora (45.2% of all international immigrants). Non-Senegalese migrants are mainly from Guinea, Mali and Guinea-Bissau (RGPH-5, 2023).

How often are employees paid?



Unlike the non-agricultural sector, where the formal working week is a maximum of 40 hours, in Senegal's agricultural sector the government has set a maximum of 2,352 working hours per year with a maximum legal weekly working time depending on the agricultural season[50] .

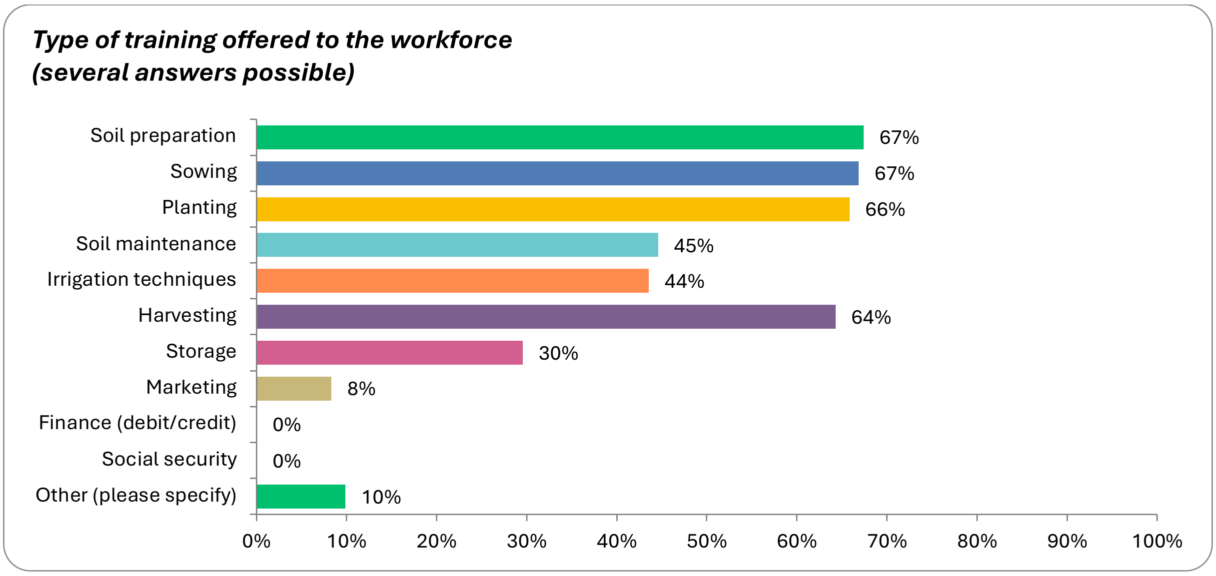
Do you pay your workers more than the SMAG (official minimum wage in agriculture) set at 236,865 FCFA per hour?



As the majority of farmers pay their workers either by the day or by the month, the wage they calculate is often between 1,500 and 2,500 FCFA per day or between 30,000 and 75,000 FCFA per month. This wage depends on the type of worker (family member, temporary, permanent) and the hours devoted to a particular activity during the horticultural season.[51]

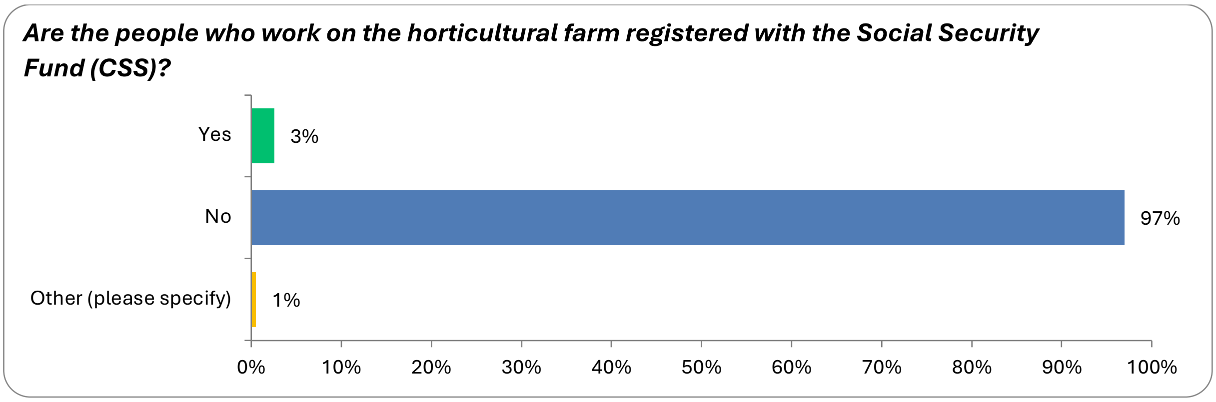
All horticultural farmers offer (vocational) training to their workers. The types of training offered cover the subjects that are important for good cultivation, such as soil preparation, sowing, planting and harvesting. Post-harvest activities such as storage and marketing are much less popular. Farm owners in the horticultural sector do not offer training on social security and finance at all.

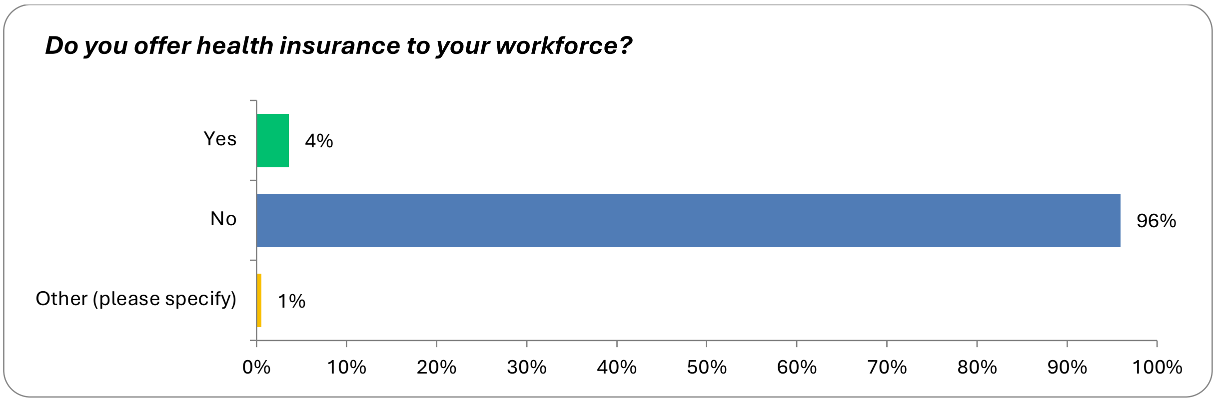
[50] National Labour Code, Ministry of Justice Senegal
[51] According to the Ministry of Agriculture's EAA 2021 *Annual Agricultural Survey*, the average gross income of farming households in Senegal is around FCFA 977,000 (net FCFA 785,000). For smallholders (< 5 hectares), the average gross income in Senegal is FCFA 283,000. In the Casamance and the VFS, this figure is higher, while in the Niayes it is lower than the national average.

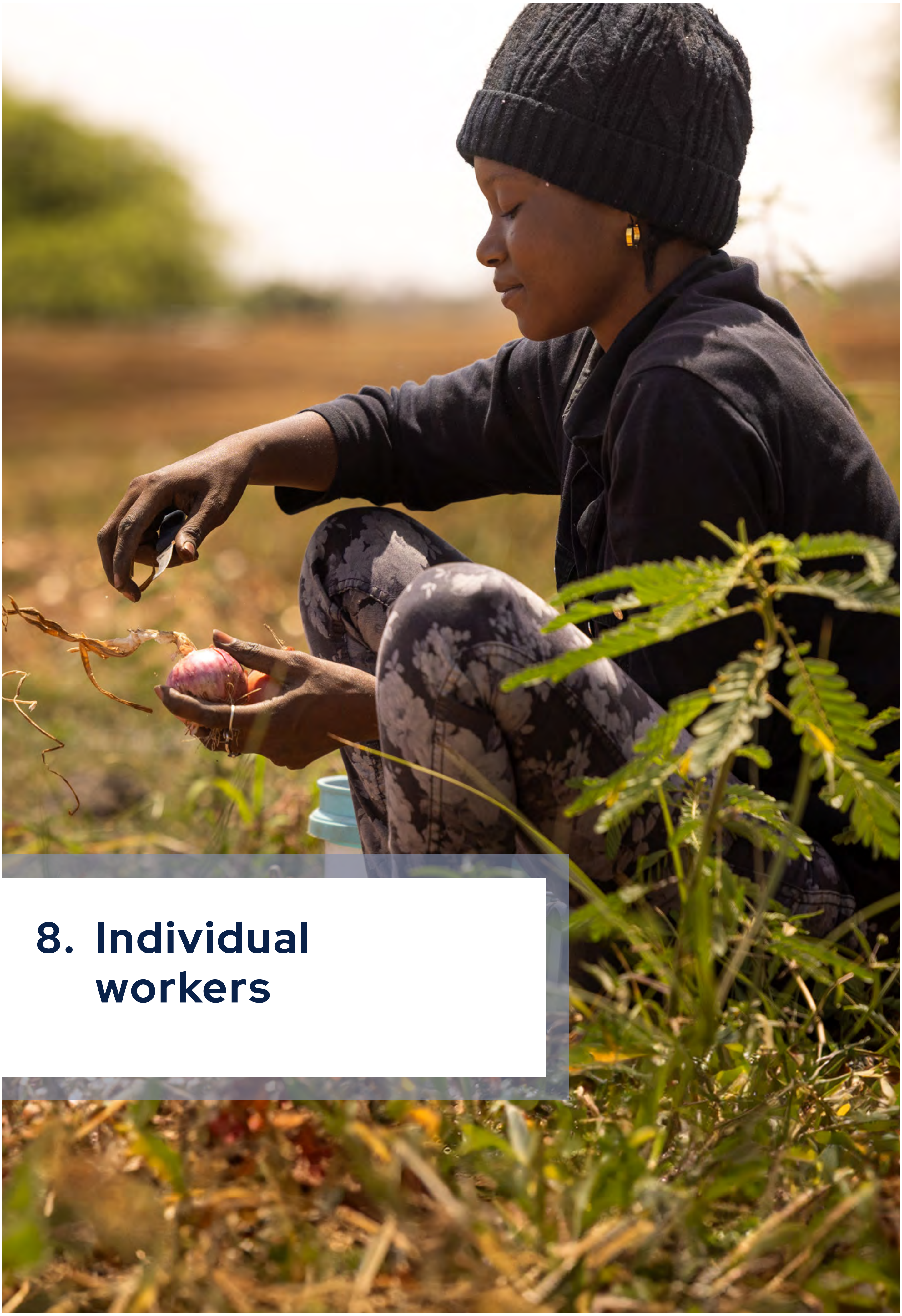


7.6 Social security

Most farm owners do not register their employees with the *Social Security Fund* (CSS). What's more, they do not offer their workers health insurance. This means that most horticultural workers are entirely dependent on their family, relatives or friends in the event of illness or any other event occurring at work that would prevent them from working for a certain period. As a large proportion of jobs in the horticultural sector are seasonal, not being able to work for a few weeks can mean missing an entire horticultural campaign, resulting in a significant loss of household income.







8. Individual workers

8. Individual workers

To gain a better understanding of the decent working conditions of workers in the horticultural value chain in the three regions, a representative group of 374 individual workers were surveyed in the five selected sub-sectors, 18 of whom did not answer the questions on decent working conditions. In total, 356 people answered all the survey questions.

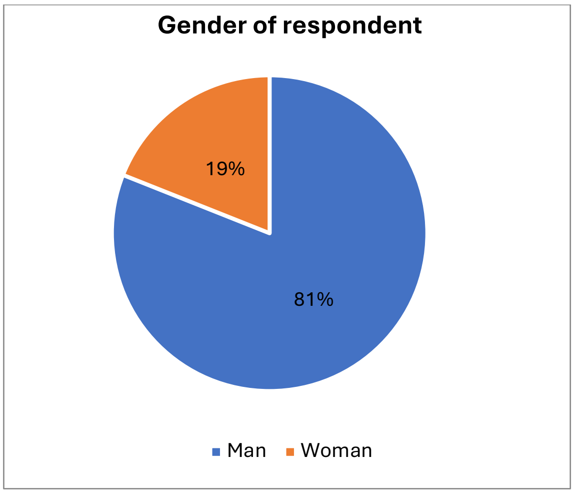
The breakdown of this group of workers was as follows:

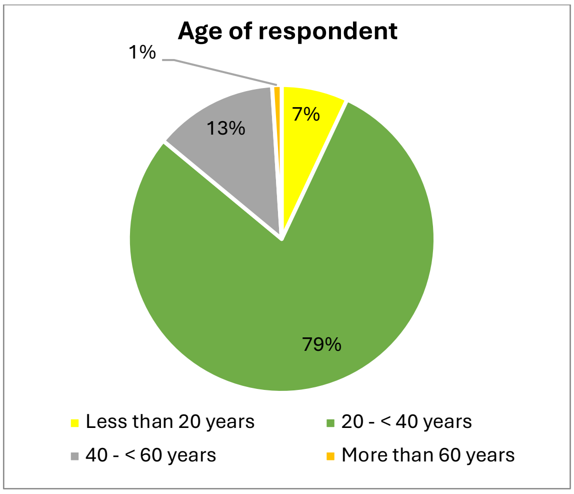
Sub-sector	Share of total*
Industrial tomato	7%
Onion	51%
Green bean	11%
Mango	12%
Cashew nuts	20%
TOTAL	**100%**

Note: (*) Due to rounding, the total does not add up to 100%.

8.1 Individual worker profile

More than 80% of individual external workers hired in the five horticultural sub-sectors of the three different horticultural zones are men. This contrasts with a recent survey[52] of the entire Niayes horticultural sector, which found that 46% of workers (family and non-family) are women.

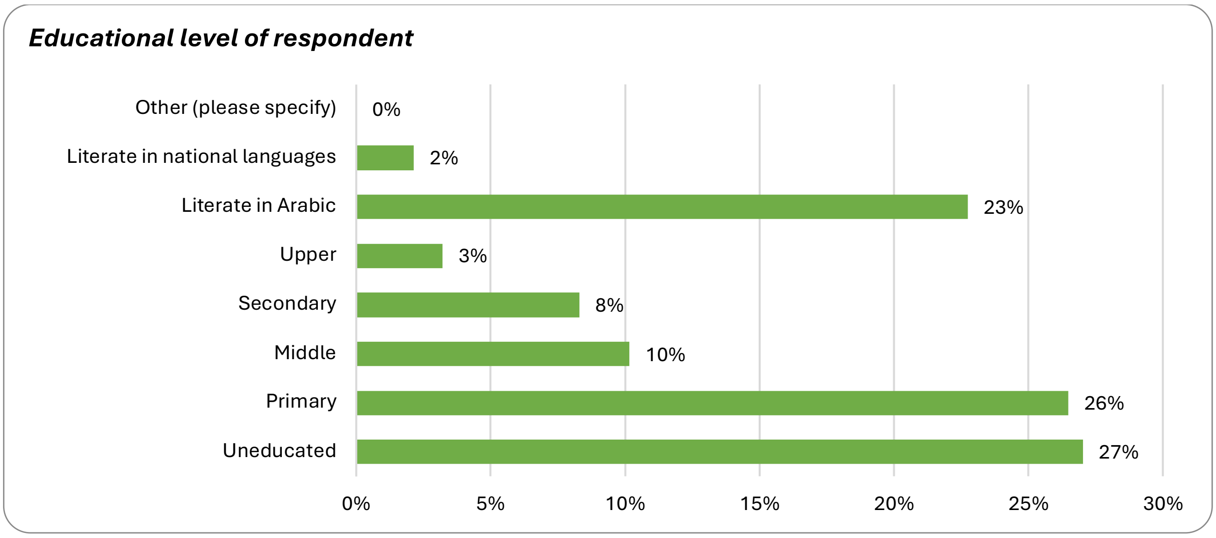




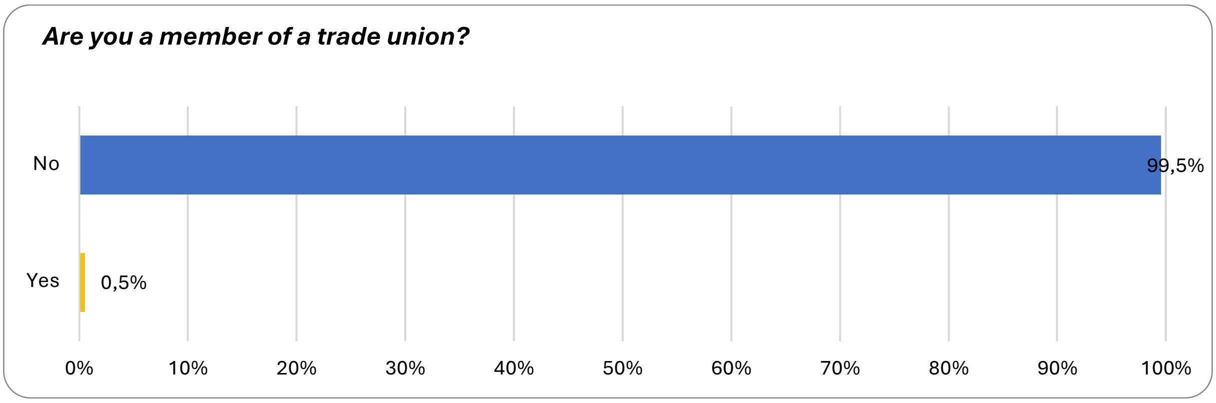
The majority (79%) of workers are aged between 20 and 40, followed by those aged between 40 and 60 (13%).

[52] Rapport du recensement de l'horticulture dans la zone des Niayes pour la mise en plan 'd'un système permanent des statistiques horticoles année 2022, Ministère de l'Agriculture - Direction de l'Horticulture, mai 2023

More than a quarter (27%) of horticultural workers in the five sub-sectors have no education at all, followed by 26% with only primary education and 23% with Koranic education. Only 3% of the workers have higher education.



Membership of a labour union[53] is almost non-existent among horticultural workers in the Saint-Louis, Thiès and Ziguinchor regions. Less than 1% are members. This percentage is relatively much lower than that of an earlier study carried out by ANSD[54] in the informal sector as a whole, where it was found that 6.6% of workers in rural areas were union members. At national level, the unionisation rate was 9.4%.[55] One explanation for this difference is that the ANSD study calculated the unionisation rate among workers in companies (non-agricultural households) in the informal sector where there was an active union. This qualitative research asked individual workers in any organisation (including horticultural households with paid non-family workers) whether or not there was an active union, focusing on five horticultural sub-sectors.



8.2 Decent work conditions

The ILO defines decent work as "productive work for women and men in conditions of freedom, equity, security and human dignity". In general, work is considered decent when it provides a fair income;

[53] There are twenty-four (24) trade union centres at national level. The representativeness of the workers' trade union centres is determined on the basis of general representativeness elections held every five (05) years.
[54] Enquête régionale intégrée sur l’emploi et le secteur informel, 2017
[55] The unionisation rate is calculated for employed persons working in a company where there is a trade union organisation (ANSD).

guarantees a secure form of employment and safe working conditions; ensures equal opportunities and treatment for all; includes social protection for workers and their families; offers opportunities for personal fulfilment and promotes social integration; and workers are free to express their concerns and to organise.

In the following sections, respondents were asked questions about these different dimensions of decent work in their current workplace. Responses were given on a 5-point Likert scale, ranging from "strongly disagree" to "strongly agree".

8.2.1 Freedom of work

Freedom of work underlines that work should be freely chosen and not imposed on individuals and that some forms of work are not acceptable in the 21st century. This means that forced and slave labour as well as unacceptable forms of child labour must be eliminated as agreed by governments in international declarations and labour standards. It also means that workers are free to join workers' organisations.

QUESTION	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	TOTALLY AGREE	TOTAL
Thanks to my work, I can improve professionally	23%	21%	13%	31%	12%	100%
Professionals like me can create our own jobs	16%	20%	17%	35%	12%	100%
My work schedule allows me to manage my life well	16%	38%	14%	25%	7%	100%

Most workers (44%) in the five horticultural sub-sectors find it difficult to improve professionally and would like to have more freedom to create their own work. In fact, they would like to be considered and treated as professionals by their employers. More than half of the workers (54%) say that they do not have the ability to manage their own personal agenda. They often find it difficult to speak out against the employer, as many workers mentioned that there are no trade unions or other formal organisations that represent or defend the interests of individual workers.

As several of the horticultural workers interviewed said about *freedom of work*:

- *There is real freedom of expression on the farm, but the employer does not address these concerns. No organisation*
- *None of the employer's concerns are taken into account. The way things work on the farms. There can be farm workers' organisations.*
- *Only the owner's decisions matter. The concerns of farm workers are collected but not often applied by the employer*
- *The concerns of farm workers are not followed up. Secondly, the only voice allowed on the farm is that of the employer.*
- *I get on well with my boss. He supports me as far as he can, even if not all his concerns are met. I've never tried to join an agricultural workers' organisation.*
- *The concerns of farm workers are taken on board by the employer, but are never addressed to improve the workers' working conditions. I've been in the business for over 18 years in different areas. But it's always the same concerns but never any solutions. I've never seen any attempt to set up any kind of association to deal with these problems.*

- *Freedom of expression is limited, as the owners do not like to be contradicted in the way they operate. Farm workers' concerns are often the least of the employer's worries. No organisation on the farms to take workers' concerns into account.*
- *There is no ban on freedom of expression, but concerns are not taken into account most of the time by the employer. As far as organisation is concerned, this is not yet on the agenda for agricultural workers, especially those working in the informal sector.*
- *No problem with my employer*
- *The concerns of farm workers are often the least of the employer's worries. Even if he listens to them, it is rare that he settles them. He always finds a pretext to absolve himself of his concerns.*
- *Too many concerns not addressed by the employer. In any case, the major problems of the farm worker are not taken care of. There is no organisation in the field of agricultural workers*
- *No problems with the employer. Concerns are managed by the boss, even if not everything is perfect.*
- *Workers' concerns are voiced without any problem. But they are never fully met. You can't get organised under recruitment conditions*
- *No problem with the boss. He takes concerns as far as possible. To my knowledge, there is no workers' organisation in the commune.*
- *There's no ban on giving your opinion, but unfortunately the employer doesn't give any credence to our concerns. Out of twenty requests made, only one is settled, and often it's the least important. But organisation*
- *There are many concerns, but little action. Employers receive them but do not react.*
- *There is no ban on voicing concerns, but they are not often followed up by the employer. For the time being, there is no organisation in place to deal with them.*
- *There is no ban on voicing concerns. Often the employer listens to them but does not take action to rectify the shortcomings.*
- *We have no problem expressing our concerns, but they are never met. The employer notes them but never changes the way staff are managed. No organisation to take this into account.*
- *No problem with my employer. He helps me as much as he can. But within the agricultural perimeter there is no organisation*
- *It's not forbidden to speak out or get organised. Unfortunately, owners don't attach much importance to concerns. As far as I know, no organisation has tried to do anything about it.*
- *There is no ban on expressing concerns, but most of the time the employer does nothing about it.*
- *Farm workers can voice their concerns but most of the time they are not followed up. The way recruitment is done makes it difficult to organise. Everything is managed individually according to the owner*
- *My concerns are taken into account to a greater or lesser extent by the owner in order to improve the work.*
- *Farm workers are not prevented from voicing their concerns, but these are not met by the employer. No organisation to deal with concerns*
- *Concerns not addressed by the employer. No workers' organisation to deal with this contempt*
- *Owners care little about our concerns. They focus more on their own interests. No organisation and the youngest farm workers only follow in the footsteps of their predecessors.*
- *We have the intellect to carry out any given task, but we lack the means to create our own jobs*

Source: Field research

8.2.2 Fairness at work

Fairness at work represents the need for workers to benefit from fair and equitable treatment and opportunities at work. It encompasses freedom from discrimination at work and in access to work, as well as the ability to reconcile work and family life.

QUESTION	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	TOTALLY AGREE	TOTAL
In general, the decision-making processes concerning my work are fair	12%	45%	19%	18%	6%	100%

I think I have prospects of increasing my salary/benefits	10%	40%	22%	24%	4%	100%
At the moment, I think there are job opportunities for a professional like me.	9%	35%	14%	36%	6%	100%
I think I have opportunities for professional development (promotions, skills development, etc.)	9%	33%	18%	33%	6%	100%
In my work, I am accepted for who I am (regardless of my gender, age, ethnic origin, religion, political orientation, etc.).	5%	6%	6%	58%	24%	100%
In my professional activity, there is an opportunity for all those involved to participate equitably in decision-making.	12%	40%	23%	21%	4%	100%
My financial income from my work is fair	14%	48%	14%	21%	3%	100%

Most workers in the horticultural sector are dissatisfied with the opportunities available to them to develop as a professional, in terms of skills and knowledge, as well as personal income. Almost two-thirds of the workers feel that they do not receive a fair wage for the work they do. Half of the workers are unsatisfactory about their possibility to participate on an equitable basis in workplace decision-making processes. They would like to be more involved instead of being sidelined by their employer. Despite the fact that most workers do not feel involved in many aspects of their work, 82% indicated that they are accepted for who they are (regardless of gender, age, religion, etc.).

As a number of workers in the horticultural sector interviewed said *about fairness in the workplace*:

- *There is no equality of opportunity between workers. The boss decides everything, including pay.*
- *There is no equality of opportunity between workers, as the only voice allowed is that of the boss. He treats staff according to his moods and the relationship he has with the worker.*
- *No equal opportunities for workers. Agricultural workers are listed according to their behaviour towards the employer.*
- *No equal opportunities for workers. Women and men are not treated in the same way on the same farm.*
- *I hope I'll get my chance. Despite the boss's efforts, I recognise that there are inequalities in treatment.*
- *I've worked in different areas. But in practice, the situation is the same. Opportunities are not equal and workers are treated differently. The softest are pampered to the detriment of the toughest and the most demanding.*
- *There is no equality of opportunity between workers. The employer treats his family better and the workers follow.*
- *There is no equality of opportunity. On the same farm, the owner may favour some over others. Those who obey without thinking are treated worse than other hard-headed workers*
- *Even though I don't have many problems with my employer. You have to recognise that there is no level playing field when it comes to exploitation. There is also a disparity in the treatment of workers*

• *It is to see farm workers trained to move up a level. The farm worker is always confined to the same. Professionally, the odds are stacked against them, and this is reflected in the way they are treated.*
• *There is no equality of opportunity within the perimeter. Some members are treated better than others because of family relationships. Salary treatment is also based on similar parameters*
• *Opportunities and treatment are not equal. But there is hope that this will be corrected by the employer*
• *There can be no equal treatment for all and no equality of opportunity. The employer favours certain workers to the detriment of others, especially those from his family. Workers are forced to perform only certain tasks*
• *Chances are not equal but there are opportunities to improve professionally to be seized. We must also admit that there is a difference in treatment between workers*
• *There is no equality of opportunity, because for the employer, the worker has to be content with the labour tasks assigned to him from 7am to 7pm. Workers are treated unequally, and family members who own their own home work harder.*
• *Although I hope to learn and acquire other skills, opportunities are not equal for all workers. Not everyone is treated equally.*
• *Opportunities are not equal for all. There is discrimination between workers, with some being favoured to the detriment of others. In terms of pay, some workers may earn 2,000 CFA francs a day for 10 hours' work, while others earn 1,500 CFA francs a day for the same amount of time.*
• *There was no equality of opportunity between farm workers and those from the owner's family. As for treatment, it leaves much to be desired*
• *Opportunities are not equal. There is discrimination between farm workers and those from the owner's family. Even pay is the same.*
• *Even if I expect a bit more from the employer in terms of opportunities to progress in the job. The same goes for the salary.*
• *No equal opportunities. Members of the owner family are favoured in terms of work and pay on the farm.*
• *There is no equality of opportunity between farm workers and those from owner families. The same applies to my treatment.*
• *There is no equal opportunity for farm workers. On family farms, they are at a disadvantage compared with workers from the owner's family. Salaries also follow the same logic*
• *Even if the playing field is not level, there is a slight improvement in the wages paid to farm workers compared to other farms.*
• *Equal opportunities are non-existent. Farm workers have no chance of promotion.*
• *Opportunities are not equal. Farm workers have no chance of promotion at the expense of members of the owner's family. Salary treatment is in the same situation*

Source: Field research

8.2.3 Safety at work

Safety at work takes into account the need to help safeguard health, pensions and livelihoods, and to provide adequate financial and other protection in the event of unforeseen health or other contingencies. It also recognizes the need for workers to limit the insecurity associated with the possible loss of their jobs and livelihoods.

QUESTION	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	TOTALLY AGREE	TOTAL
At work, I'm protected from risks to my physical health	37%	38%	8%	13%	4%	100%
I can look forward to a worry-free retirement	47%	48%	5%	0%	0%	100%

I consider the average number of hours I work per day to be adequate/appropriate	16%	42%	15%	22%	6%	100%
I feel protected in the event of unemployment (unemployment insurance, social benefits, social programmes, etc.).	51%	43%	5%	1%	0%	100%
I feel that my family is protected by my social protection system (public or private)	54%	35%	10%	1%	0%	100%
I consider that the pace of my work/work is appropriate	10%	46%	14%	26%	5%	100%
I feel protected in the event of illness (social security or equivalent, public assistance, health insurance, etc.).	49%	32%	14%	6%	0%	100%
In my work, there is trust between people	4%	12%	31%	39%	15%	100%
I have everything I need to work safely	31%	39%	7%	16%	7%	100%
In general, I enjoy safe environmental conditions at work (temperature, noise, humidity, etc.).	25%	28%	9%	36%	3%	100%

Safety at work is perceived as unsatisfactory by the majority of workers in the horticultural sector, in almost all areas. Particularly when it comes to social security, over 80% of the workers say they are more than dissatisfied with the situation at work. The lack of unemployment and sickness/disability insurances make them uncertain about the solidity of their personal financial situation and that of their families, now and in the future. 95% of the workers say they have financial worries when they retire, as eight out of ten companies are not registered with IPRES, operate in the informal economy and do not pay or provide many social benefits to their workers. These risks are perceived by workers in the horticultural sector as leading to significant dissatisfaction with the pace of their work. Accidents can easily happen and without social protection, mistakes can have a huge impact on their financial situation. Most workers (54%) are positive about trust among themselves.

As several of the horticultural workers interviewed said about *safety at work*:

- *Precarious employment. Unfair breach of contract, even if verbal. Poor working conditions and lack of adequate equipment for certain tasks on the farm. No social security cover. Unknown to the social security fund.*
- *Precarious employment. The employment relationship can be terminated at any time. Working conditions are ruthless. Workers can work more than 10 hours a day and end up with 2,000 francs when they get off. No one knows*

about social protection. No matter how serious their illness or that of their family, it's up to the worker to take care of themselves.
• *There are no safe working conditions. Agricultural workers are often exposed to accidents. Yet we know that there are no guarantees when it comes to work, because the relationship can be terminated at any time without any possibility of prosecution. Medical care is the responsibility of the worker for himself and his family.*
• *There is no job security. If you disagree with your employer, you can be sacked. Working conditions on the farms are not very good and there are risks of accidents. Yet there is no social protection for workers and their families.*
• *The work isn't stable, but you have to take it. The working conditions are not good, but the employer supports me in certain situations. In the event of illness, they contribute as much as possible towards the cost of prescriptions, but not for my family back in the village. So there's no social security cover.*
• *To benefit from social protection, you have to join the social security fund. To look after themselves, farm workers buy the smallest medicine they can find. But working conditions are difficult and risky. They don't have the right equipment to do certain jobs, yet they do them.*
• *Precarious work. No job guarantees. Poor working conditions. Workers and their families look after themselves. The employer runs the business informally and pays social security contributions.*
• *No guarantee of employment. The contract is verbal between the two parties. Threat of dismissal of the farm worker at any time in the event of disagreement. Employers do not cover farm workers in the event of illness or accident on the farm.*
• *The wages are low, even though we work well over 10 hours a day. But you're safe from being sacked by the farm owner if you disagree. Working conditions are not the best. Often the farm worker is used for two jobs and only one salary is paid. No social protection or pension payments. Farm workers are basically left to their own devices.*
• *Agricultural workers cannot benefit from social protection if their employer does not pay social security contributions on their behalf. Work only depends on the boss's mood. When you refuse to do certain tasks, he fires you. So there's no guarantee of a job. Working conditions on the farms are very difficult.*
• *Farm workers are exposed to redundancy. This shows that there is no job security. Working conditions are borderline inhumane. Farm workers work from 6am to 7pm. There is no social protection. Farm workers take care of themselves and their families in the event of illness.*
• *Nothing is guaranteed in what I do. As things stand, the ideal working conditions are not there. Nor is social protection. But we're holding out hope until we see something better.*
• *Job security and working conditions leave much to be desired. No written contract between the two parties. Threat of dismissal at any time, etc. Housing conditions are very difficult. In the event of illness, it is the worker who takes care of himself, regardless of the seriousness of the illness. Most of the workers do not live together with their families, who often remain in the village.*
• *Admittedly, employment is precarious, but we have no choice but to support our families. Farm workers are aware of the harsh working conditions in the fields and the lack of social protection, but they have no choice but to get by.*
Most farm workers have unstable and risky jobs. None of the jobs can be lost at the whim of the boss. Working conditions are not safe. We are housed in the fields in very difficult conditions and the food is of poor quality. No social protection.
• *Employment is very insecure. There is no job security. You can be fired if you disagree with your employer. Working conditions leave much to be desired. There is no social protection for workers or their families.*
• *The work is very precarious. There are no guarantees, there's always a sword hanging over the farm worker's head. Worse still, they take responsibility for themselves and their families in the event of illness.*

Source: Field research

8.2.4 Human dignity at work

Dignity at work requires that workers be treated with respect at work and that they be able to express their concerns and participate in decision-making about their working conditions. An essential element is the freedom of workers to represent their interests collectively.

QUESTION	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	TOTALLY AGREE	TOTAL
I have everything I need at work to maintain my physical integrity	28%	40%	6%	17%	9%	100%
What I earn from my work allows me to live with dignity and independence	12%	44%	18%	24%	2%	100%
What I receive for my work enables me to bring well-being to those who depend on me	10%	52%	16%	21%	1%	100%
What I get from my work gives me a personal sense of well-being	7%	45%	21%	26%	1%	100%
My work helps to ensure the future of new generations	15%	39%	26%	19%	1%	100%
My job allows me to have time for my family/personal life	12%	47%	12%	26%	3%	100%
My work contributes to my personal and professional development	8%	47%	19%	24%	2%	100%
In my work, I am treated with dignity	5%	28%	23%	30%	13%	100%
The work I do helps to create value for my organisation	6%	5%	7%	62%	21%	100%
I consider the work I do to be worthy	6%	30%	17%	32%	15%	100%

The majority of workers in the horticultural sector are not satisfied with what they earn to live decently. Not only for themselves, but also for their families. Now and in the future. Over 80% of workers see themselves as creating value for their organisation, but what they get in return is far less satisfying. There is an imbalance between what they give to the employer and what they get in return in terms of decent pay and benefits. Workers are waiting for the government to step in and check that employers are paying at least the legal minimum wage for the agricultural sector (SMAG) and are not working more than is formally stipulated in the National Labour Code.

As several of the horticultural workers interviewed said about *human dignity at work*:

- *Do everything possible to restore human dignity to farms. Farm workers work hard without being rewarded for their hard work*
- *Support and formalise farms to restore dignity to farm workers. They are tired and do not earn a fair wage*
- *The State must intervene to re-establish order on farms and force employers to comply with the relevant legislation. Farm workers must regain their dignity and earn a fair income.*
- *We need to correct and reform sectors where there is exploitation of man by man. We must work to ensure that workers are paid a fair wage for what they do.*
- *Increase wages, improve working conditions for farm workers and provide them with more vocational training*

• *The sector needs to be reformed and formalised. Otherwise, workers will continue to live in inhuman conditions.*
• *Human dignity is being abused. Farm workers do more than 10 hours of hard labour with all the risks associated with the job. Yet at the end of the day, they are paid 2,500 CFA francs, or 2,000 CFA francs in some market gardens. We are calling on the public authorities to intervene so that the workers can regain the dignity of their work and be treated fairly.*
• *Reform the sector by introducing strict compliance with the minimum wage. Work to ensure that agricultural workers earn fair wages for their work. Strengthen their skills so that they can undertake their own business.*
• *Reorganise and formalise the sector and require employers to comply with legislation. Farm workers work hard and deserve a fair income.*
• *Sanction farms to bring them into line with current legislation. So that farm workers can regain the dignity of their work*
• *In any case, the farm worker is too belittled. As long as farms continue to operate in this way. There will never be any chance of earning a fair wage or better working conditions.*
• *Invite the government to force employers to provide farm workers with good working conditions and to oblige them to treat employees fairly in relation to the work provided.*
• *Enhance the value of workers' jobs and offer them decent wages and opportunities for professional development*
• *Reform the sector to correct inequalities between workers and ensure fair treatment for all*
• *There is almost an exploitation of man by man. The sector needs to be reformed to ensure greater respect for human dignity. The authorities must intervene to force employers in the sector to comply with the regulations. Workers work an average of more than 10 hours a day for low wages.*

Source: Field research

9. Individual workers large farms

9. Individual workers large farms

Large farms of more than 20 hectares often have a different commercial dynamic compared to small farms. They are more capital-intensive, have a high percentage of salaried staff, are vertically integrated (production, storage, packaging, marketing) and are strongly export-oriented. Their numbers are relatively small. In general, less than 1% of all farming households in Senegal belong to this category (RGPH-5, 2023).

Despite their relatively small numbers, they are important to the country's agricultural sector for the creation of paid employment, investment, innovation and exports. Most large farms are also registered, having at least the compulsory NINEA. These differences from most small farms are a reason to design a separate questionnaire on decent work conditions for individual workers who are employed by a large farm located in one of the three horticultural zones.

The large farms selected for interviews with individual workers are :

- West Africa Farms (WAF): a subsidiary of the British company G's Fresh, set up in 2011 in Yamane (Saint-Louis region) has over 2,000 workers growing onions, radishes and green beans for export to the EU and the UK ;
- Société Grand Domaine du Sénégal (GDS): a subsidiary of the international French company Compagnie Fruitière, GDS was set up in 2003. Located in Ndiawdoune (Saint-Louis region), it has 1,600 employees and produces and exports tomatoes, bananas, mangoes and sweetcorn on 644 hectares;
- Société de Cultures Légumières (SCL): located in the Saint-Louis region, SCL covers 1,500 hectares with over 6,500 workers growing certified maize, green beans, peppers, onions and carrots for domestic and international markets. By 2022, SCL will have achieved an annual turnover of FCFA 21 billion.

In addition to interviews with workers from these three large farms, workers from the following (larger) agro-industrial units were also interviewed:

- Casa Industries SA: set up in 2021 and based in Ziguinchor, Casa Industries processes and markets cashew nuts, mangoes, cereals, tomatoes and other products;
- Société de commercialisation de produits locaux SA (SCPL SA): set up in 2001 and based in Ziguinchor, SCPL specialises in processing and marketing (including export) cashew nuts;
- Association des Planteurs de l'Arrondissement de Diouloulou (APAD): based in Diouloulou in the Ziguinchor region, APAD has 200 producer members and 150 workers in the collection and processing of mangoes and citrus fruit;
- GIE Demir: based in the Ziguinchor region, GIE Demir collects and processes cashew nuts for the domestic market, employing women in particular;
- Union Régionale Santé Yalla: The Union Régionale Santé Yalla (URSY) was created in 1991 and brings together 47 women's groups, representing over 1,000 individual women members, mainly involved in processing cashew nuts for the local market. These groups are based in three different departments of the Ziguinchor region;
- GIE Diyito Di Maleguene[56] : created in 2004, but becoming commercially active in 2007, located in the village of Mandina Mancagne (Ziguinchor region), GIE Diyito Di Maleguene is active in cashew

[56] GIE Diyito Di Maleguene is a SME, but their workers were interviewed as they are a relatively important player in the mango supply chain in the region of Ziguinchor

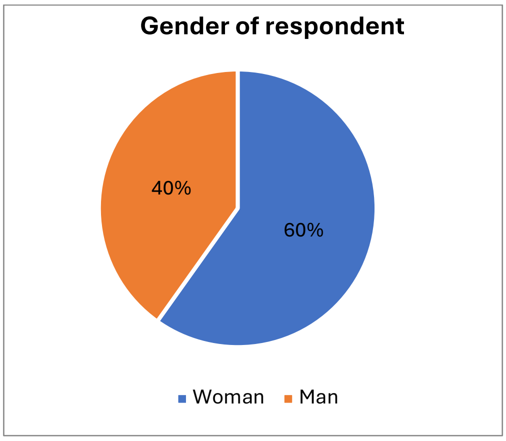
nut and mango processing. They are members of the Coopérative Agroalimentaire de la Casamance (CAC);

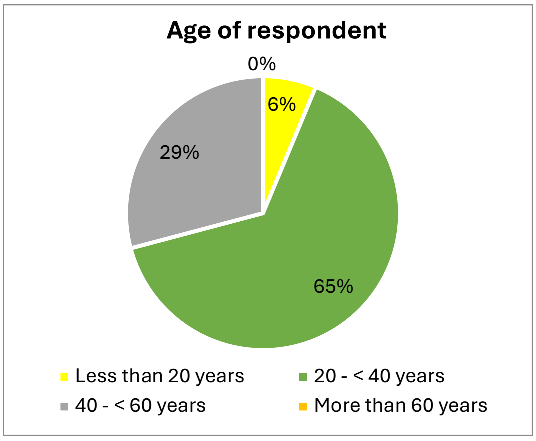
- GIE Agropastoral: GIE Agropastoral specialises in processing local produce (mangoes, sweet potatoes, etc.) and training young people and women, and is an approved distributor of the Diam'O brand in Ziguinchor.

Workers interviewed at two other companies did not want to mention the name of their business, simply stating that one is based in Diacounda and the other in Senghalene. Both villages are in the Ziguinchor region.

9.1 Personal profile individual worker

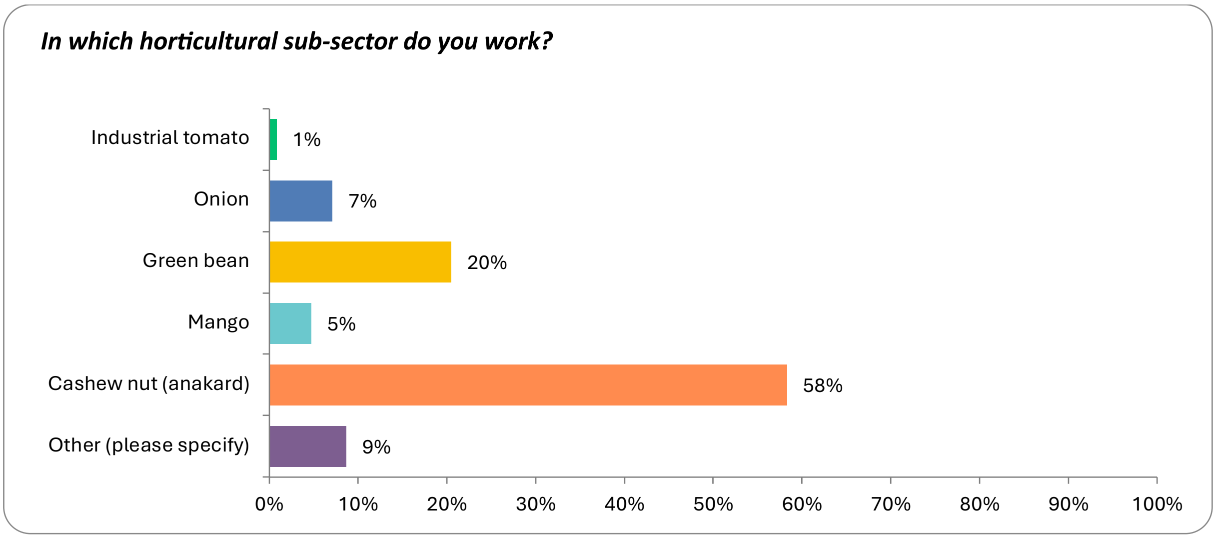
Broken down by gender, 60% of respondents were women and 40% men. More than two-thirds were aged between 20 and 40. None was over 60, the official retirement age in Senegal.

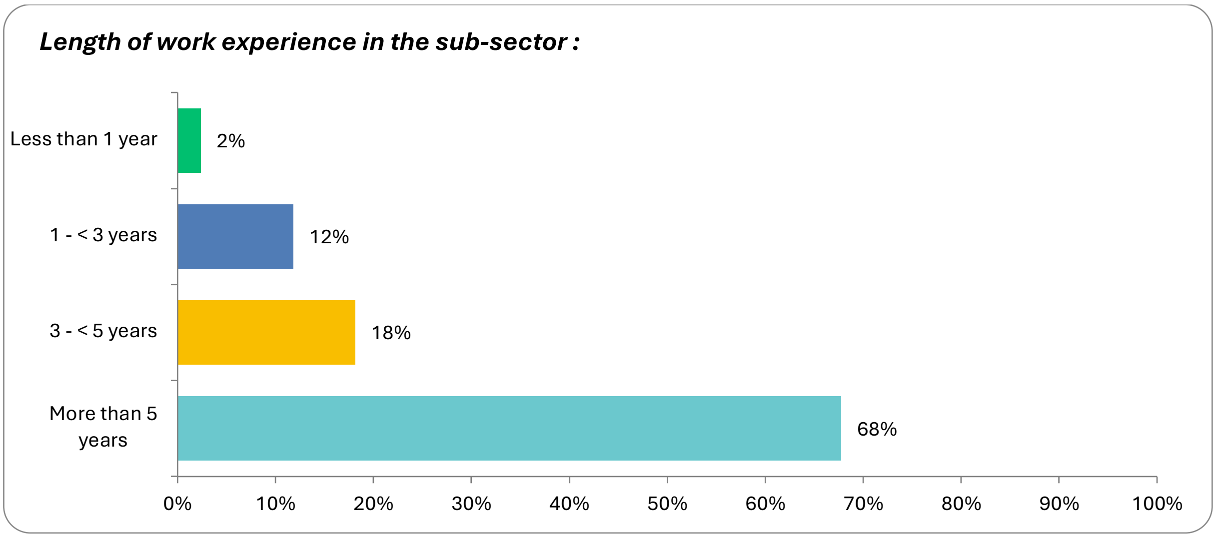




The companies employing the workers are mainly active in the production and processing of cashew nuts and green beans. More than two-thirds of the workers have been employed by their company for more than five years. While this may be a sign of decent work on large farms, at the same time there is a lack of (well)paid alternatives for workers outside agriculture. Especially in Casamance, where the unemployment rate is among the highest in the country.[57]

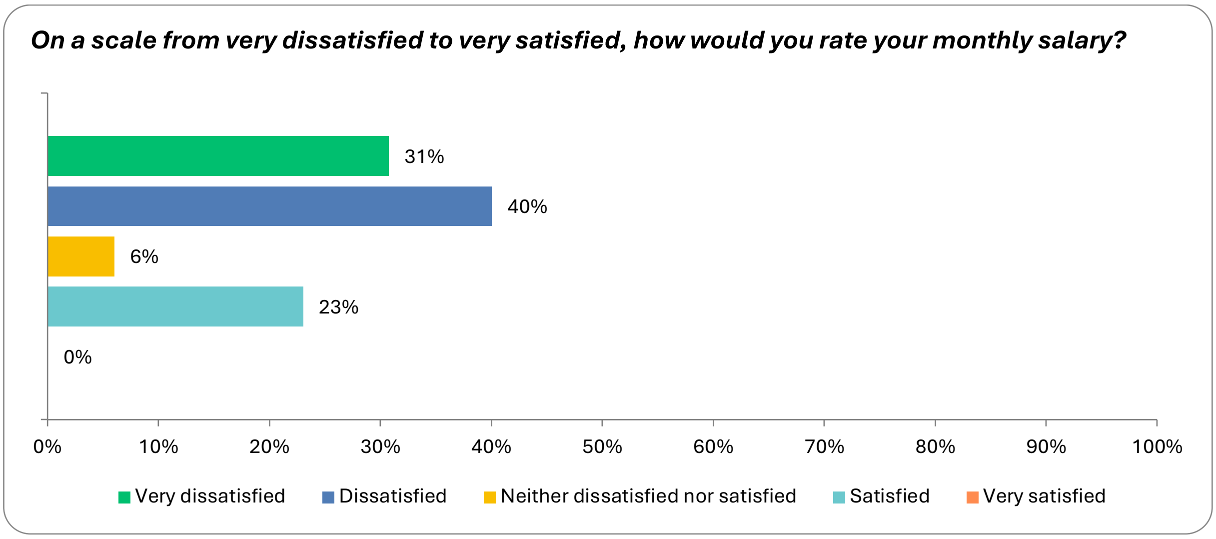
[57] For a more precise definition of 'unemployment', Senegal uses the ILO definition of the potential labour force. The potential labour force is made up of three mutually exclusive groups: jobseekers who are not available, i.e. unemployed people who are looking for work but are not available; potential jobseekers who are available, i.e. unemployed people who are not looking for work but are available; and potential jobseekers who want to work, i.e. unemployed people who are not looking for work and are not available but want to have a job. The combined rate of unemployment and potential labour force is estimated at 55.2% in the Ziguinchor region. This means that more than half of the total active population (active population + potential workforce) is unemployed. Unemployment is slightly higher in urban areas (56.4%) than in rural areas (54.2%). Unemployment is also higher among women (66.6%) than men (45.9%). (*Source: ANSD*)

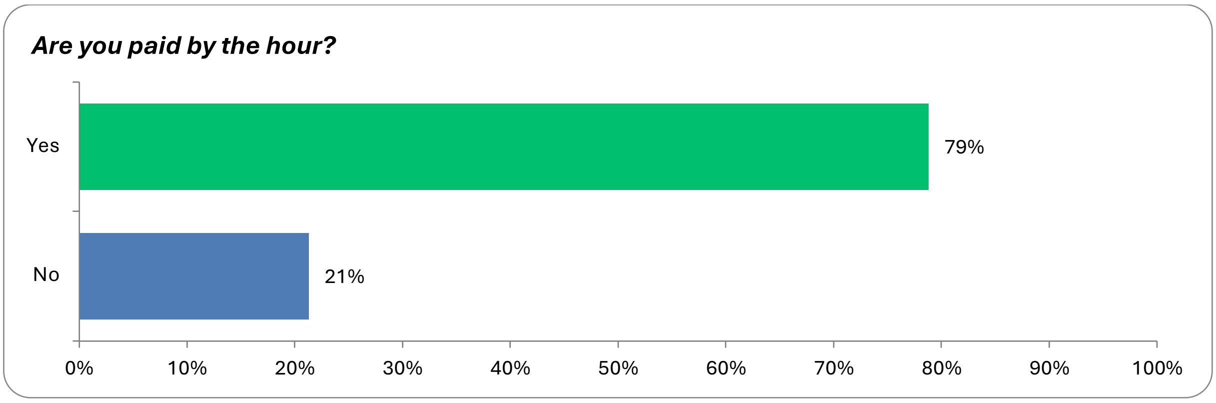




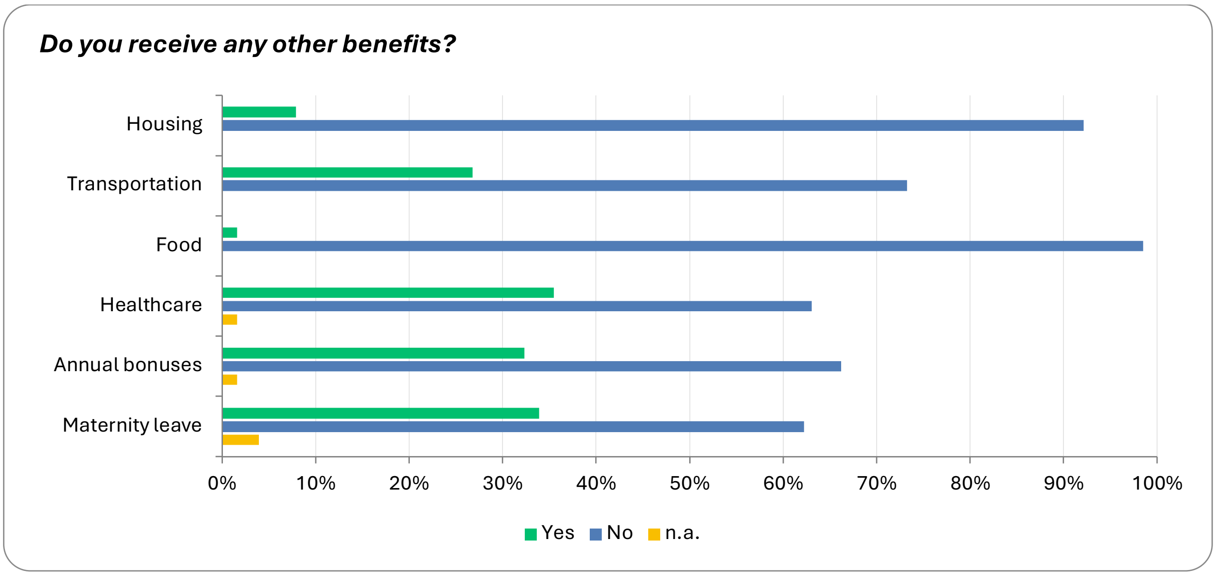
9.2 Payment

Almost three quarters of the workers on large farms and in agri-food processing units in the five horticultural sub-sectors are not satisfied with their monthly pay. This perception of wages is not very different from that of workers on small farms in the horticultural sector and in SMEs. Nearly 80% of workers on large farms and in agri-food processing units are paid by the hour.

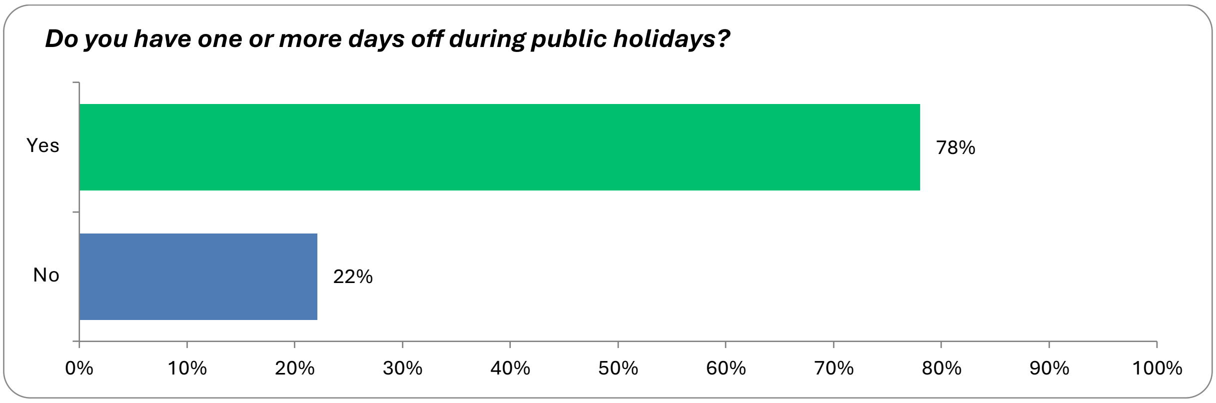


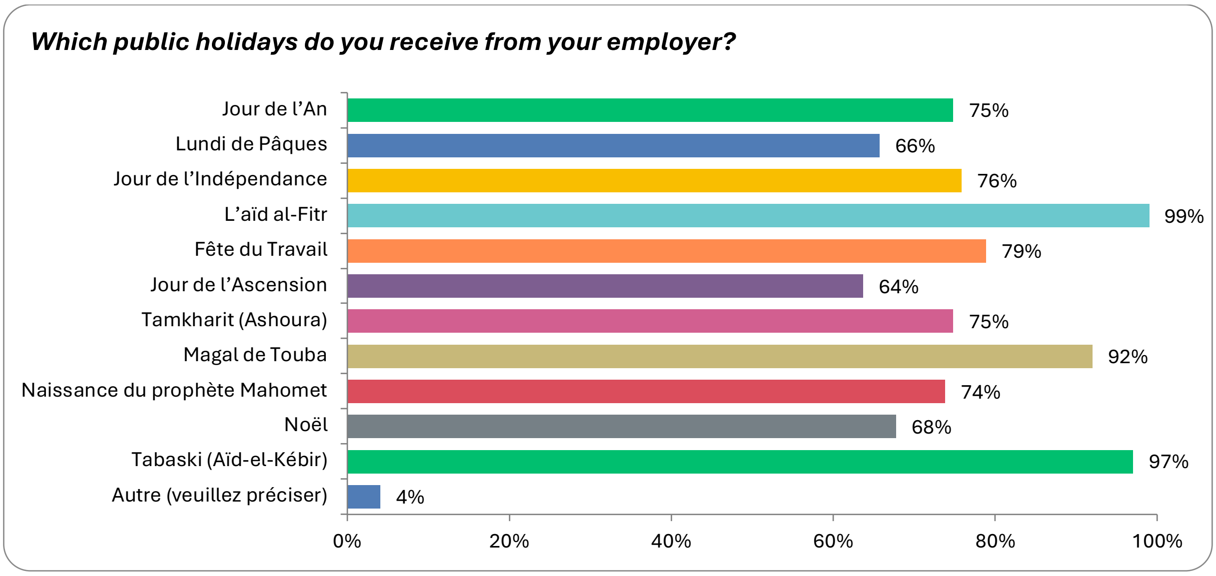


Apart from receiving remuneration for their work, workers on large farms and in agri-food processing units do not receive many other benefits from their employers. When it comes to housing, transport and food, over 70% do not receive these types of (paid) benefits. Although health care, annual bonuses and maternity leave are more often provided by the employer, this applies to less than 40% of workers.

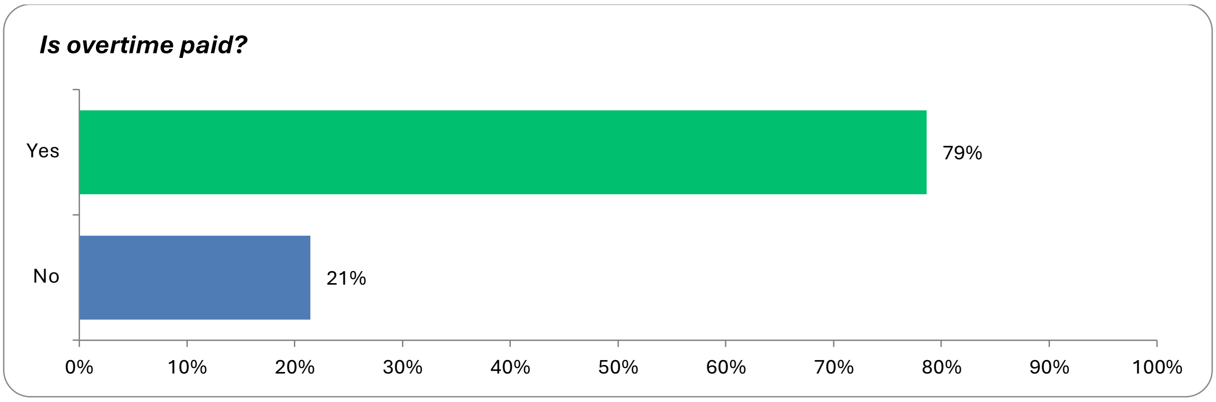


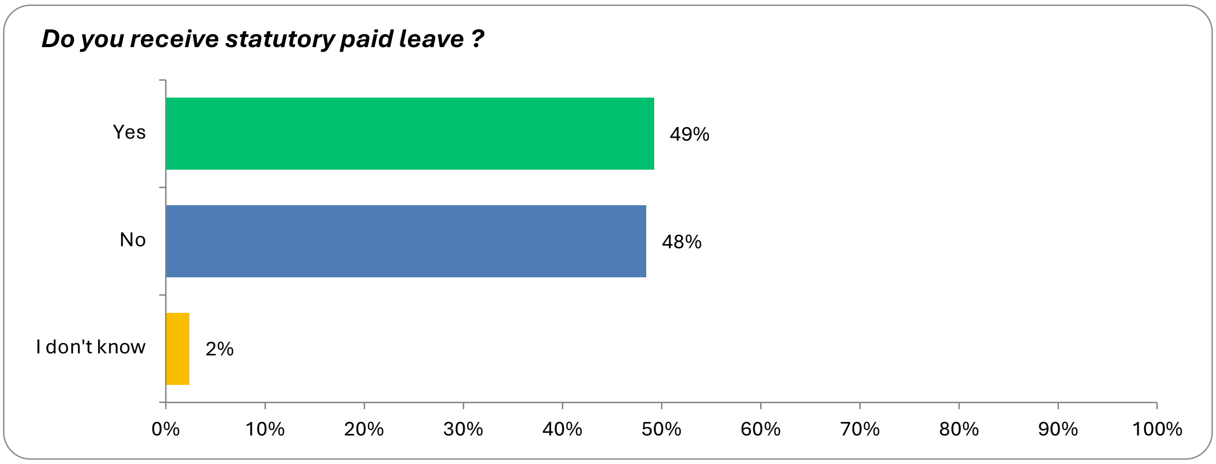
Three quarters of the individual workers are given one or more days off on public holidays. When workers are given one or more days off by their employer, it is most often on Islamic holidays such as Eid el-Ftir, Tabaski and the Magal de Touba.





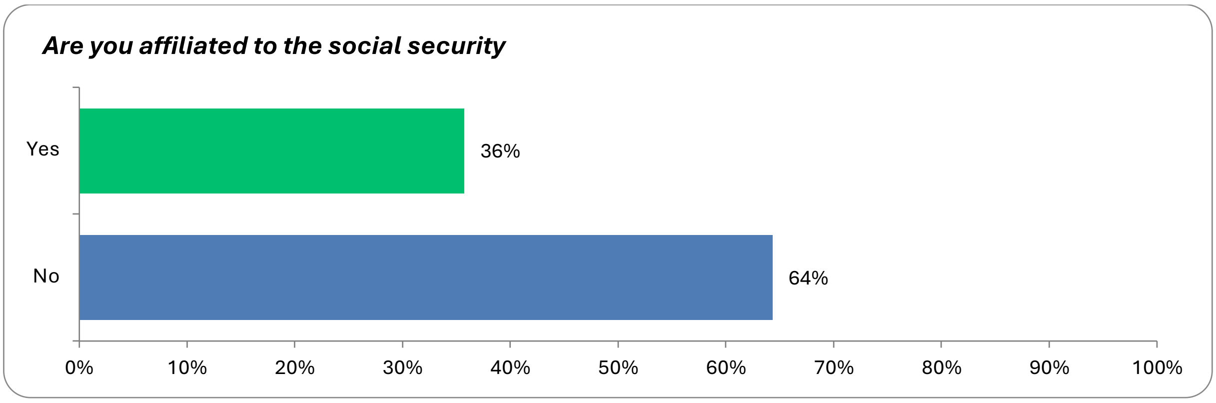
Most workers on large farms and in agri-food processing units work 7 or 8 hours a day, with exceptions of up to 10 hours a day. Most employers (79%) pay for extra hours worked in addition to their labour contract. Almost half of the workers surveyed on large farms and in agri-food processing units receive statutory to paid leave, in accordance with Senegal's labour code. At the same time, almost the same number do not receive paid leave.

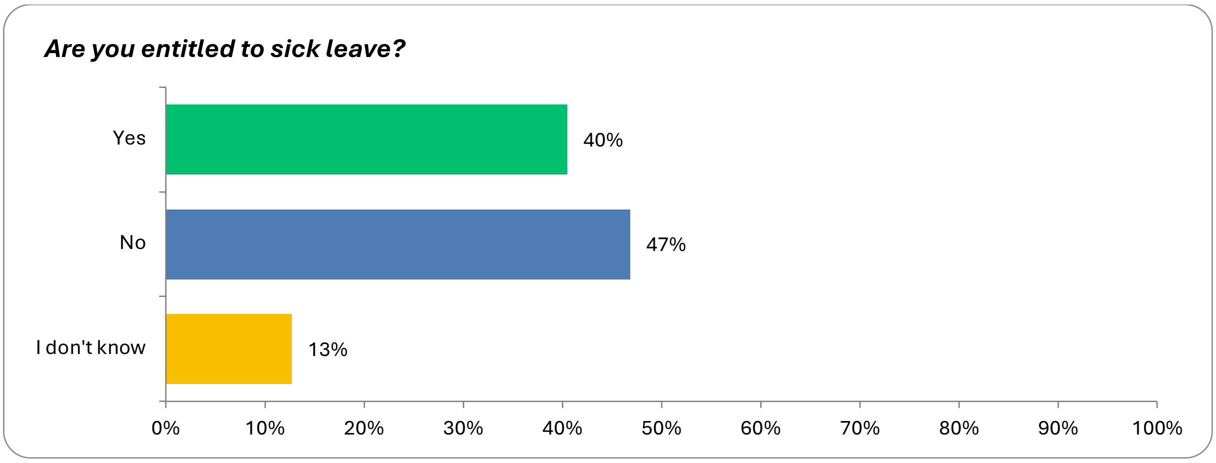


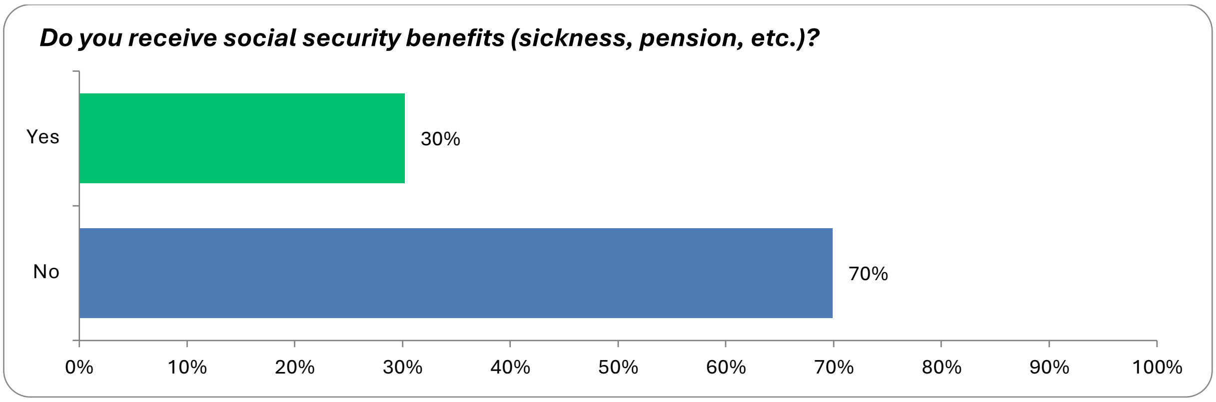


9.3 Social security

Social security for workers on large farms and in agri-food processing units is not for everyone. Just over a third of workers are affiliated to some form of social security system at their place of work. As a result, only 40% are entitled to sick leave and almost the same percentage (30%) receive social security benefits, e.g. sickness, pension, etc. A relatively large number of workers (13%) do not even know if they are entitled to sick leave. The vast majority of workers do not receive any social security benefits from their employer in the event of sickness or retirement. This means that their employer is not registered with CSS or IPRES, which is compulsory for economic organisations operating in Senegal.

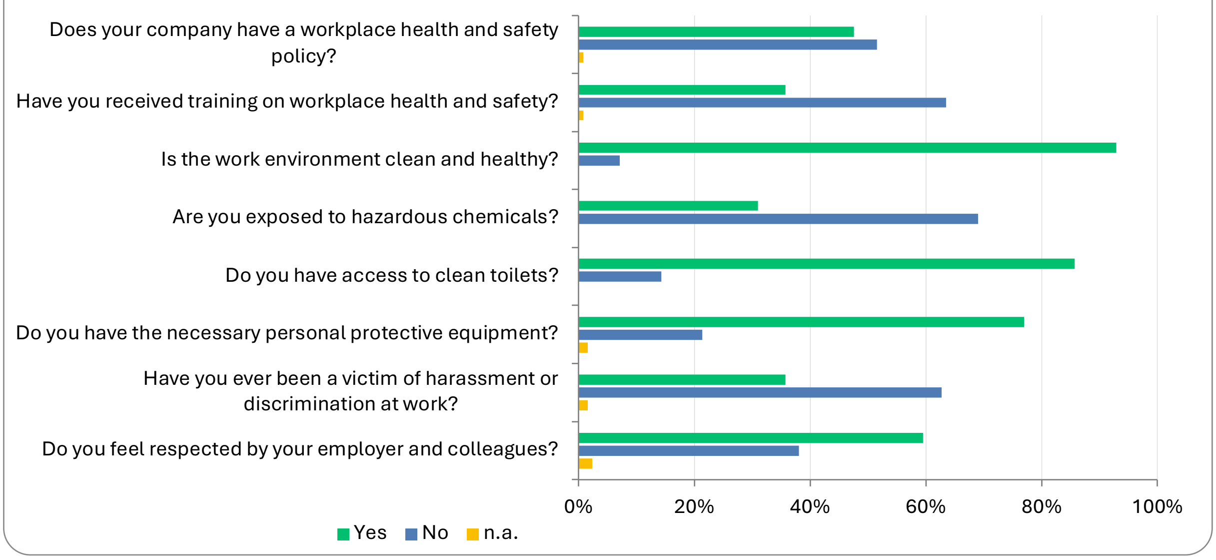






As far as decent work conditions are concerned, less than half of workers on large farms and in agri-food processing units say that their employer has a health and safety policy, for which a third of workers have received training, and that their working environment is clean and safe. Three quarters of workers said that they have access to equipment that protects them personally in the course of their work. Around a third of workers said they had experienced harassment or discrimination at work. At the same time, 60% of individual workers on large farms and in agri-food processing units feel respected by their employer and colleagues.

The following questions concern the working environment / health and safety at work:



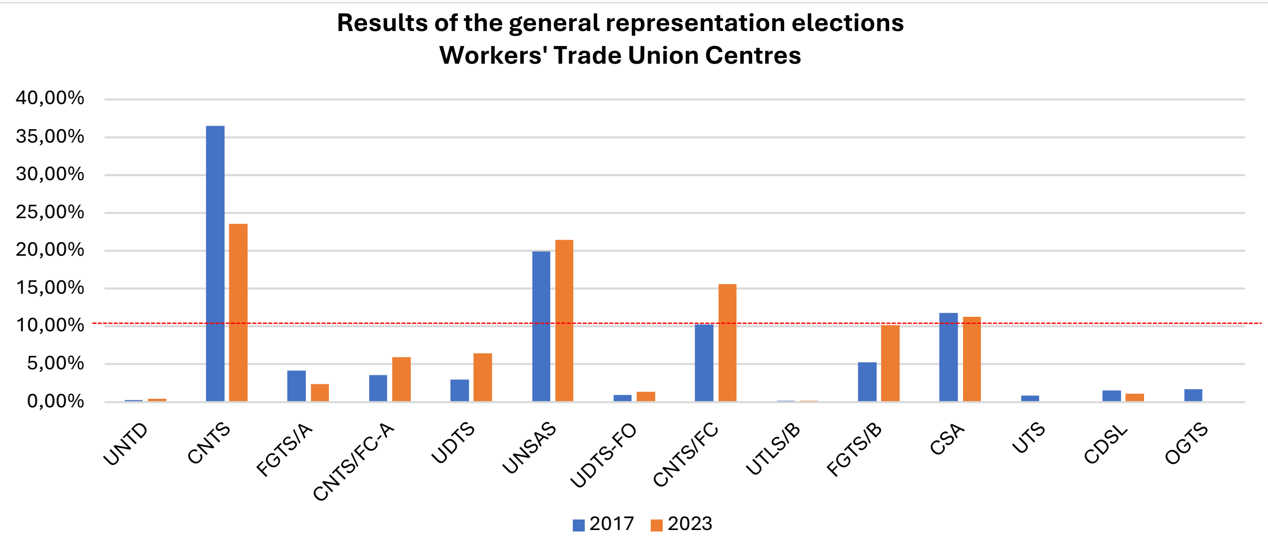
9.4 Employee representation

Worker representation by a labour union is relatively limited in large farms and agri-food processing units. Only one in five workers (22%) mentioned that there was an active union in their company. Where there is an active union, the following unions are found:

- CNTS
- FGTS/B
- UDTS

FGTS/B and CNTS were the most frequently cited. The majority of workers who indicated that there was an active labour union in their company were also members of that union.

To decide which unions will be allowed to sit at the national and international negotiating table to represent workers in Senegal, general union elections were organised by the Ministry of Labour on 12 December 2023. The threshold set by the Ministry of Labour was 10% of the votes cast.

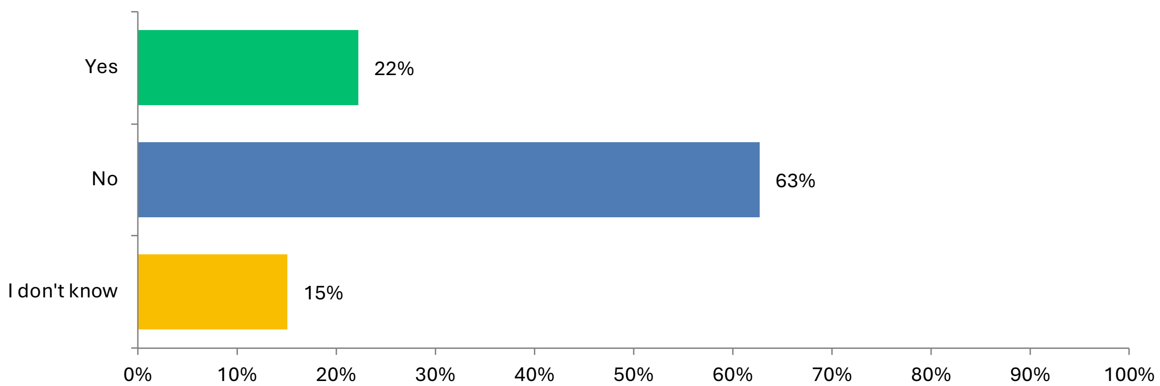


Source: Ministry of Labour

The Confédération nationale des travailleurs du Sénégal (CNTS) came first. They received 23.57% of the votes, followed by the Union nationale des syndicats autonomes du Sénégal (UNSAS) with 21.43%. The Confédération Nationale des Travailleurs du Sénégal/Force du Changement (CNTS/FC) came third with 15.59% of the votes, followed by the Confédération des Syndicats Autonomes (CSA) with 11.25% and the Fédération Générale des Travailleurs du Sénégal (FGTS/B) with 10.18% of the valid votes. The other central organisations that took part in the general representation elections obtained less than the 10% threshold. These were the Union Démocratique des Travailleurs du Sénégal (UDTS) with 6.46% of the votes, the Confédération Nationale des Travailleurs du Sénégal/Force du changement (CNTS/FC.A) with 5.95% of the votes, the Fédération Générale des Travailleurs du Sénégal (FGTS/A) with 2.39% of the votes, the Union Démocratique des Travailleurs du Sénégal/Force Ouvrière (UDTS/FO) with 1.37%, the Confédération démocratique des syndicats libres du Sénégal (CDSL) with 1.19% of the votes, the Union Nationale des Travailleurs Démocratiques (UNTD) with 0.42% of the votes and the Union des Travailleurs Libres du Sénégal (UTLS/B) at the bottom of the table with 0.19% of the votes.

There is also a relatively large group of workers (15%) who do not know if there is an active labour union in the organisation where they work.[58]

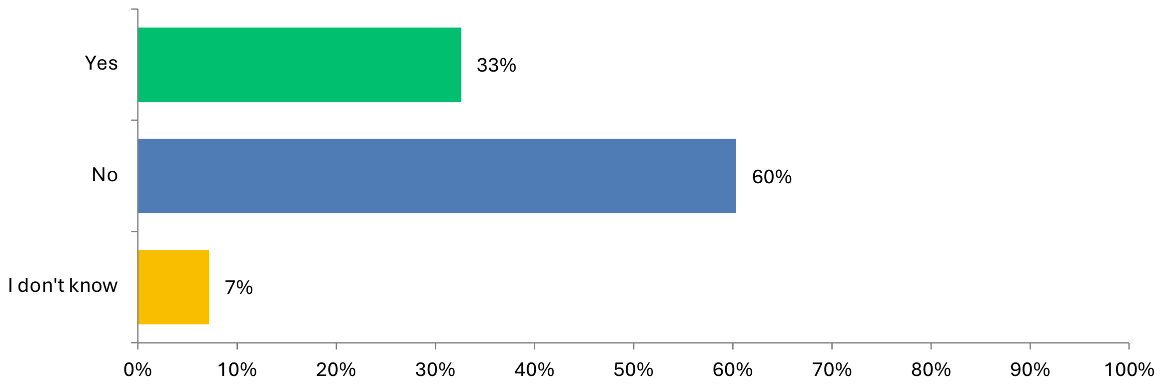
Are there any labour unions in your company?



Although there are no labour unions at the majority of large farms and processing units in the five horticultural sub-sectors active, staff representatives who deal with workers' demands are more common, although this remains a relatively limited phenomenon. Where there are staff representatives, 85% of workers in these companies said that there were discussions between representatives and employers about working conditions. But these discussions are not perceived by the workers as a level playing field. Four out of five employees are dissatisfied with the level of protection afforded to employee representatives against (possible) discriminatory action taken by the employer against these representatives.

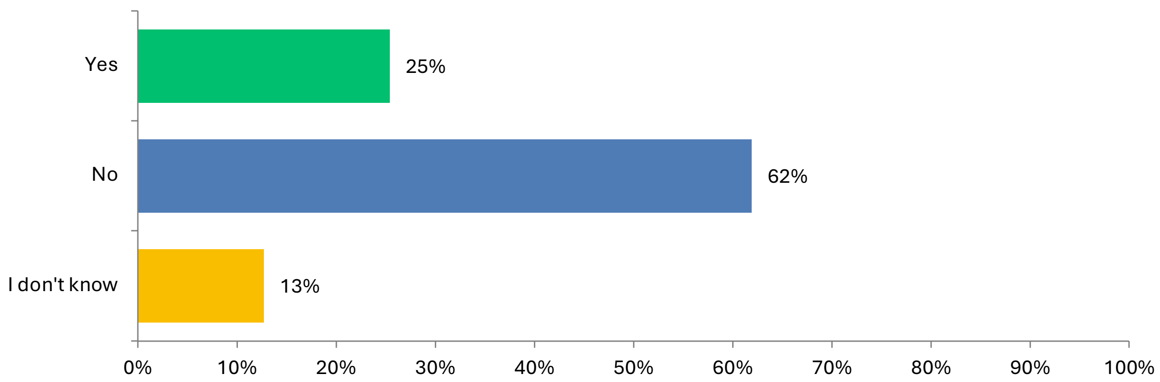
[58] Senegal has 14 trade union centres. Five of these are members of the International Trade Union Confederation (ITUC): the Confédération Nationale des Travailleurs du Sénégal (CNTS), the Confédération des Syndicats Autonomes (CSA), the Union Démocratique des Travailleurs du Sénégal (UDTS), the Union Nationale des Syndicats Autonomes du Sénégal (UNSAS) and the Confédération Nationale des Travailleurs du Sénégal - Forces du Changement (CNTS-FC). To strengthen their position with employers and the government, since 2012 these five unions have also joined forces and created a "Coalition of trade union centres".

Are there any staff representatives to deal with workers' grievances?

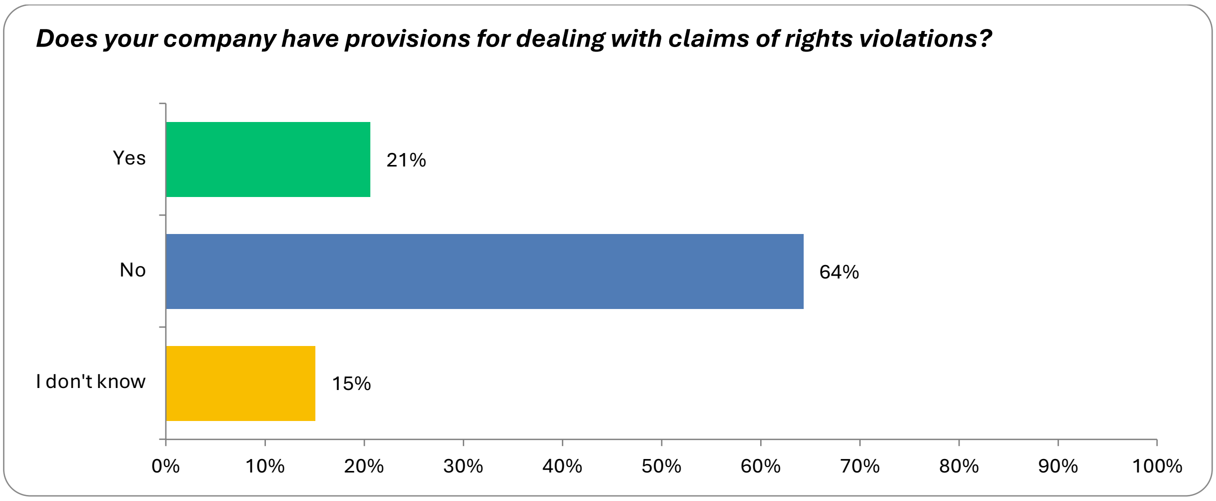


Work councils, where staff representatives and the employer work together, exist in only a relatively small number of companies (25%). Over sixty per cent of the employees surveyed said that they did not have such work council in their organisation. In organisations with work councils, the majority of employees (75%) said that the representatives on these councils are democratically elected by the employees and that all types of employees are represented. As with the low level of protection for employee representatives, four out of five employees are dissatisfied with the level of protection for their works council representatives against discriminatory action by the employer against these employee representatives. In both cases this could be an important reason why most of the organisations operating in the five horticultural sub-sectors do not have any form of employee representatives.

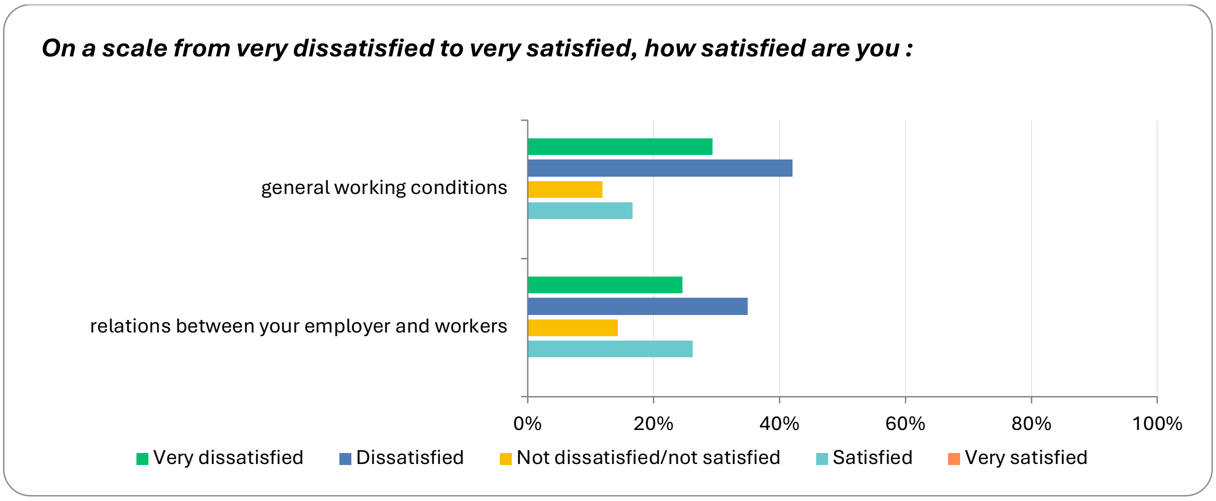
Are there any work councils comprising representatives of employees and your employer?



The relatively low level of worker representation in organisations in the horticultural sector is reflected, among other things, in the fact that only one in five workers said that their company had measures in place to deal with complaints about violations of workers' rights. The vast majority (64%) indicated that there were none, and 15% of the workers questioned did not even know whether such measures existed in their organisation. Where such measures are in place, none of the workers in these organisations were satisfied with the decision-making process regarding complaints, and none of the workers indicated that the employer fully respected the complaints mechanism.



Overall, the vast majority (71%) of workers on large farms and in agri-food processing units in the five horticultural sub-sectors are not satisfied with the general working conditions in their workplace. Similarly, the majority (60%) of workers are not satisfied with relations with their employer.



When workers are asked about the main improvements that could be made to their working situation, the most common response is a rise in salary and having a written labour contract. Some comments from the workers interviewed are:

- *Support for lessors. Ongoing training for technicians. Salary enhancement*
- *Encouraging the company to take on board the concerns of permanent and non-permanent employees*
- *Draw up employment contracts. Strengthening the company as a partner*
- *Increase in daily wages. Respect for workers' rights. Make employment contracts*
- *Increase daily rates. Draw up employment contracts for employees*
- *Draw up employment contracts for employees. Increase daily rates. Provide certain social benefits*
- *Employment contract for employees. Increase in daily rates*
- *Capacitation of workers. Employment contract for employees. Accident and risk premiums for employees*
- *Employment contract. Increase in daily rates*
- *Increase in daily rates. Capacity building for employees. Employment contracts for workers*
- *Drawing up employment contracts for employees*
- *Employment contract for employees. Increase in daily rates*
- *Capacity building for workers. A viable career plan for workers*

- *Logistical support for the company. Capacity-building for workers. Drawing up employment contracts*
- *Capacity building for employees. Introduce risk premiums in the event of accidents. Provide employees with a genuine career plan.*
- *Contractualization of workers through service contracts or fixed-term contracts, which encourages better management of workers' working conditions*
- *Improved working conditions. Risk and safety bonuses. Employment contract for employees*
- *Drawing up benefit contracts that guarantee employees' social security*

Most large farms export (part of) their production to the EU, in particular to the Netherlands. Thanks to its two major ports, Rotterdam and Amsterdam, Schiphol international airport and its strong logistics, it is often the hub for imports of Senegalese fruit and vegetables to other EU markets. Due to the increase in international (legal) obligations of Dutch importing companies with regard to good business conduct (Corporate Social Responsibility - CSR and Responsible Business Conduct - RBC) in their supply chain[59] , the research team interviewed one of the major Dutch trading companies importing green beans from Senegal on how it checks whether decent work is being implemented by its Senegalese supplier:

Interview Dutch trading company: importer of green beans

The Dutch trading company imports fresh fruit and vegetables from Africa for sale in the Netherlands and neighbouring countries. The company has its own farm and works with growers in Africa, notably in Senegal for onions, green beans, bananas, red peppers, mangoes and carrots, and with growers in Europe. The company has mainly been importing green beans from Senegal to the Netherlands since 2008. In addition, a significant proportion of production is destined for the domestic market. They use road and sea transport to export from Senegal to the Netherlands. It takes around 8 days for goods to arrive in the Netherlands by road. The company started its own cultivation in 2018. To this end, a farm has been set up with a total cultivation area of around 300 hectares in the Thiès region. The cooperative's management is made up of Senegalese nationals. In total, around 1,000 employees work there, with this figure rising to 1,300 during a harvest season. Because of the wide variety of produce grown, the fields are worked almost all year round. Compared with many other agricultural companies in Senegal, which often pay their workers for a single season of 3 to 4 months, the Dutch company pays its workers a salary for 8 to 10 months' work. This gives them greater income security than seasonal workers. For the Dutch trading company, the definition of a living wage should above all focus on offering work and therefore income security over a longer period. High wages for a single harvest season do not guarantee such security. As well as offering a certain wage above the legal minimum wage in the agricultural sector, the Dutch trading company has also invested heavily in "equipment", including a modern packing station where employees package green beans for export in good conditions, good health care for employees and their families in the surrounding villages and the provision of training. The company is audited annually in accordance with SMETA (Sedex Members Ethical Trade Audit), the internationally recognised certification of Sedex's corporate social guidelines.

Training in crop management is provided by the Dutch trading company itself, drawing on its years of experience of growing crops in Africa. Knowledge is shared between countries. Their experience also shows that the average Senegalese is keen to learn and that the standard of graduates from the country's agricultural universities is high. Each year, they start with six trainees who work in the company for 6 to 12 months. At the end of the traineeship period, a decision will be taken in consultation with local management as to whether or not they will join the company.

What strikes the trading company about the business climate in Senegal is that the number of Dutch companies setting up here is virtually unchanged from ten years ago. Few Dutch companies are leaving Senegal, but virtually no new companies are setting up here. At most on a project basis, but not with structural investments. Good logistical connections with Europe, political stability, a favourable climate and the availability of a large number of employees are the reasons why commercial companies decide to set up in Senegal.

[59] The Dutch government expects Dutch companies doing business abroad to adopt responsible business conduct (RBC). To do so, they must follow the OECD Guidelines for Multinational Enterprises on Responsible Business Conduct and the UN Guiding Principles on Business and Human Rights (*Source: RVO*).

One of the Senegalese government's objectives is food sovereignty, i.e. an end to food imports. Especially onions from the Netherlands. The Dutch trading company believes that the potential is there. There is enough farmland and water, but to increase current production from an average of 400,000 tonnes a year to the desired 600,000 tonnes, major improvements need to be made in a number of areas, such as onion quality and storage. In addition, there is not always a coherent and transparent policy on the part of the ARM (Agence de Régulation des Marchés) when it comes to regulating markets in the horticultural sector: when and for how long borders open or close for the import or export of a specific horticultural product, intervention in the market price of certain horticultural products, when and for how long. This is not conducive to the desired business climate for local farmers and foreign investors in the horticultural sector. Nevertheless, the Dutch trading company is present in Senegal for the long term and advises other Dutch entrepreneurs in the horticultural sector to come and examine the opportunities that exist in Senegal.

10. Conclusions

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Decent work is defined by the International Labour Organisation (ILO) and endorsed by the international community as "productive work for women and men in conditions of freedom, equity, security and human dignity. Decent work implies employment opportunities that: are productive and provide a fair income; ensure safety at work and social protection for workers and their families; provide opportunities for personal development and promote social integration; give people the freedom to express their concerns, to organise and to participate in decisions that affect their lives; and ensure equality of opportunity and treatment for all."

Decent work has been on the political agenda in Senegal since 2012. The agenda was set through two four-year programmes called the Decent Work Country Programme (*Programme Pays de Promotion du Travail Décent* - PPTD). The first PPTD ran from 2012 to 2016, and the second from 2018 to 2022. Many of the objectives of PPTD1 on decent work were not achieved. Consequently, PPTD2 built on the lessons learned from PPTD1 by focusing on 2 national policy priorities:
Priority 1: Promoting the creation of decent jobs for men and women ;
Priority 2: Strengthening and extending social protection.
The evaluation of PPTD2 is not available at the time of writing, but the results of this qualitative research on decent work in the horticultural value chain provide an initial picture of how decent work conditions are being implemented in one of the country's main agricultural sub-sectors.

The horticultural value chain in Senegal is made up of many different actors and a wide variety of crops produced. This qualitative research focused on the main group of value chain actors - farmers, traders, farm input suppliers and individual workers - operating in the three main zones for horticultural production in the country: Niayes, VFS and Casamance. Around 80% of the country's horticultural production comes from these three zones. In addition, the five most important horticultural sub-sectors, measured by annual volume produced, employment generated and share in horticultural exports, were selected for this research. These five sub-sectors are onion, tomato, green bean, mango and cashew. Together, they provide more than 40% of national horticultural production.

In Senegal, only 3% of the non-agricultural sector is part of the formal economy, while almost 100% of agriculture is informal. Informal is defined as not being registered in the trade register, not having a fiscal number (NINEA) and not having a formal accounting system. As a result, the vast majority of employers in the five selected sub-sectors of the horticultural value chain offer no written labour contracts and limited to none social benefits, despite the fact that since 1997 there has been a labour code in Senegal, applicable to all economic actors who employ paid workers in the formal and informal economy, which makes this compulsory for employers. Between 70% and 90% of small-scale farmers pay their workers less than the official minimum wage for the agricultural sector, and almost none of them offer social benefits. But not only do farm owners offer little or no job security to their workers, the vast majority of SME traders and farm input suppliers do not provide formal written labour contracts, pay less than the legal minimum wage and social benefits are ignored. Many of these businesses are not registered with CSS or IPRES.

For workers on large farms and in agri-food processing units, decent work conditions are relatively better than for workers on small farms and in trading companies, but even so, the majority said they felt underpaid and received limited social security benefits.

The poor coverage of social security offered by many employers to their workers in the five selected horticultural sub-sectors has a huge impact on how decent work conditions, as defined by the ILO and adopted by the Senegalese government, are perceived by workers. The vast majority of workers are dissatisfied with the opportunities offered by their employers to develop as professionals. Most workers also do not feel recognised as professionals by their employer. They give a lot of their work to the company, but feel they get little in return. Most employers in the horticultural sector do not pay the legal minimum wage and offer almost no social benefits, even though the Senegalese labour code stipulates, for example, that workers are entitled to paid holidays and to work a maximum number of hours per day, per week or per year. The absence of a written labour contract for the majority of workers, the lack of social security benefits and the fact that they often do not have adequate equipment to protect themselves against dangerous situations at the workplace mean that many workers are more than a little worried about their personal safety and therefore the likelihood of being unable to work and earning an income. Not only for themselves, but above all for their families who depend on their salary. Now and in the future, most workers are not enrolled in the official IPRES pension scheme.

Trade union membership is almost non-existent among workers on small farms and in SMEs. On large farms and in agri-food processing units, some unions are active, such as the CNTS, UDTS and FGTS/B, but membership is low. Other forms of worker representation are also very limited, leaving individual workers to negotiate with employers over wage payments, benefits and safety issues, while unemployment rates in rural areas are among the highest in the country. In addition, the majority of workers have little or no formal education, making it difficult for them to read and understand their legal rights to decent work. This situation does not give horticultural workers a strong bargaining position towards employers, and employers in the horticultural value chain are well aware of this situation. It is not without reason that they claim to have little difficulty in finding and retaining new workers. Workers who are active in staff representation do not really feel protected against the whims of the employer. So becoming an employee representative is not something that attracts many workers.

The paid workforce of small farmers and SME traders is made up of family members and externally hired employees. The latter group is made up of permanent, seasonal and casual workers. Seasonal workers are hired for the entire horticultural season, usually 3 to 4 months, while casual workers are hired on a daily basis for a particular task, with a weekly or daily wage. Many of these temporary workers come from outside the region where the farm or trading company is located. This means that they are less personally linked to the owner of the farm or business than family members. A majority of non-family workers feel disadvantaged by their employer compared to family members in terms of personal development, pay and the opportunity to have a say in the work they do. They do not see that they have the same opportunities to work.

Overall, despite the existence of a legal system of social security and labour rights, and the priority given by the Senegalese government to decent work in the formal and informal economy, the majority of individual workers on small farms and in SMEs in the horticultural sector in Senegal are not protected by this system. But it's not just in small businesses; workers on large farms and in agri-food processing units are also mostly dissatisfied with their working conditions and their relationship with their employer. Worker representation in organisations is weak or non-existent.

Many employers in the horticultural value chain are not registered with the CSS or IPRES, or even with the trade and tax register, and are therefore unaware of their legal obligations towards their staff. The question is whether this is voluntary or not. The low level of education among owners of farm plots and small businesses, and little or no contact with labour unions or public bodies that promote decent work, are all factors that may explain employers' lack of knowledge rather than their deliberate disregard for social rights. The lack of employment opportunities, particularly for young people and women, in rural areas only reinforces this situation.

11. Recommendations

11. Recommendations

Decent work conditions, as defined by the ILO and adopted by the Senegalese government, are difficult to find in the majority of farms and SMEs in the five horticultural sub-sectors: onion, tomato, mango, green bean and cashew nut. These five sub-sectors provide more than 40% of national horticultural production and generate jobs for more than 0.5 million workers on tens of thousands of farms and in trading companies. Implementing decent work in these sub-sectors will have an enormous social impact.

The legal context for decent work is present in Senegal. There is a Labour Code, a formal social security and pension system, legal minimum wages for the agricultural and non-agricultural sectors, and the political will to promote decent work throughout the economy (formal and informal). What is currently lacking, however, is concrete and verifiable political action at local and regional level, and a comprehensive monitoring system to check whether employers are complying with national labour legislation. Not only in the formal non-agricultural sector, but especially in the informal agricultural sector.

The overall aim should be to **formalise the informal sector** in selected horticultural sub-sectors. This means that owners of small farms should be considered and treated more like entrepreneurs, with at least a NINEA and a registration in the commercial register. The same applies to SME traders. In addition, the payment of at least the legal minimum wage (SMIG, SMAG) to all types of workers and compliance with the maximum number of working hours as defined in the national labour code should be (more) carefully monitored by inspectors of the Ministry of Labour, labour unions and other types of workers' representation. Sanctions should be imposed by the government on employers who are unwilling to comply. For example, not receiving state subsidies or government contracts.

The role of labour unions in promoting decent work among employers and employees in the five horticultural sub-sectors is currently weak. Particularly in small farms and SMEs active in the horticultural value chain, where hardly anyone is a member of a labour union. Many employers are unaware of their (legal) obligations regarding decent work conditions for their employees. Workers, for their part, do not know or understand their legal labour rights. CNV Internationaal, in collaboration with its local labour union partner, can play an important role in passing on this knowledge to both sides through on-site vocational training, by having a representative office in the main towns in the three horticultural zones. Many workers and employers cannot read or write properly. Therefore, having a physical presence in the horticultural zones is far more important than having a website, being active on social networks, distributing leaflets or writing articles in newspapers.

The unions mentioned by individual workers on large farms during the interviews were UDTS, SNTS and FGTS/B. These three unions are all members of the International Trade Union Confederation (ITUC). SNTS and FGTS/B are also selected labour unions, on the basis of the latest national elections of workers' unions (12 December 2023), to represent workers in negotiations with the Ministry of Labour and other national and international bodies. Therefore, in order to discuss directly with the Ministry of Labour the promotion and implementation of decent work in the horticultural sector, CNV Internationaal should establish cooperation with SNTS or FGTS/B.

To reach employers and employees of small-scale farmers in the three horticultural zones, CNV Internationaal and its local partner union can best collaborate with farmers' organisations at local, regional and national level. CNCR at national level, APOV (*Association des producteurs d'oignon de la vallée*) and AUMN (*Association des Unions Maraîchères des Niayes*) at regional level are good examples. At local level, agricultural cooperatives such as APMK, which has 800 active members in the Kayar region, and SOCOPA (*Société Coopérative des Femmes Productrices de Potou Guèye*), a women's cooperative specialising in horticultural crops such as onions, potatoes and carrots, could be interesting organisations to work with. These cooperatives know their members better. Although many farmers are not member of any collective, working with a producers' collective to promote decent work in horticultural sub-sectors is a good starting point for CNV and its partner union.

The approach for promoting and implementing decent work at large farms such as SCL, GDS, West Africa Farms, QFS and QVS might be different. CNV Internationaal and its local partner union can contact them directly to discuss decent work on their farms. Main points to be discussed with the owners of these large farms are written labour contracts for all paid workers, wages paid at least at the level of SMAG, professional development for workers, training for workers in occupational health and safety measures, social security benefits for workers (sickness, retirement, pregnancy), staff representation and protection for staff representatives. When decent work is implemented, these large operations can serve as an example to other farms and businesses.

Horticultural traders are much less organised. CNV Internationaal and its local labour union partner should therefore promote decent work by organising workshops in the various towns where most of the traders are located, such as Thiès, Ziguinchor and Saint-Louis. These workshops should be very practical and discuss not only about employers' legal obligations but also about the benefits of implementing decent work on their premises.

To promote decent work among employers and employees in the five horticultural sub-sectors, it is important to produce a practical guide (in Wolof) containing information on employers' legal obligations, employees' rights and the definition and objectives of decent work. This guide should be available in print and online.

Public denunciation by CNV Internationaal and its local labour union partner of individual horticultural companies that do not currently apply decent work will not work. These companies will react by blocking any attempts to reach out to employees, and for the employees the situation will not change. A co-operative approach will always be more beneficial, especially in the long term.

In addition to direct dialogue with individual stakeholders in the five horticultural sub-sectors, CNV Internationaal and its local labour union partner should discuss with the Ministry of Labour the promotion and implementation of a specific agenda for decent work in these five sub-sectors. An agenda that should not only focus on increasing wages in these sub-sectors, although this is what workers are mainly referring to as a social improvement, but also on health and safety measures in the workplace, training for professional development, social protection for workers against the whims of employers, written labour contracts and equal treatment of all workers by employers. In short, an agenda that includes the four pillars of the ILO's decent work programme. To measure improvements in this decent work agenda for the five horticultural sub-sectors, specific indicators must be designed that are SMART (specific, measurable, achievable, realistic and time-bound). This sectoral agenda must be an integral part of the third national PPTD for Senegal.

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