ANALYSIS NOTE — AGRICULTURAL AND LAND POLICY

Creating State farms on the national domain: land availability and impact on food sovereignty

Analytical essay — the potential of the North and of the other regions, quantified data and impact scenario

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EXECUTIVE SUMMARY · *Résumé analytique*

The idea of State farms rests on a credible land argument: Senegal has about 3.8 million ha of arable land, of which only ~65% is cultivated, and an irrigable potential estimated at ~350,000 ha of which only ~130,000 ha has been developed. Since **95% of land falls under the national domain**, the public lever is theoretically powerful.

But the national domain is not empty land: it is occupied under customary tenure, with very weak land security (7.5% of the farming population holds recognised rights). Recent history (657,753 ha transferred to 17 firms between 2000 and 2012) is a reminder that a poorly framed public land grab **would reproduce the risk of dispossession**.

The stakes are enormous: imported rice cost 315 billion FCFA in 2024 (~40% of food imports). The "North and other regions" axis reveals two distinct vocations: the **South holds ~75% of rice-growing areas** (rainfed, low yield), to be developed; the **irrigated North dominates production** (7–10 t/ha), to be extended.

The decisive condition is not land but **governance**: a *nucleus-outgrower* model (kick-starting and pulling along family farms) rather than a competing enclave, and scrupulous respect for customary rights. **The real question is not "should there be State farms", but to do what, with what governance, and how far.**

1. Land availability: a credible argument on paper

The idea of State farms starts from a finding that is hard to contest: private agricultural investment remains insufficient and poorly directed, favouring exportable cash crops and already secured areas at the expense of food production and of heavy schemes with deferred returns. And the land figures do, at first sight, lend credibility to public intervention. Senegal covers about 19.7 million hectares, of which arable land accounts for 19% of the territory, i.e. nearly 3.8 million hectares *(Rioux et al., 2011; IED Afrique, 2011)*. Only about 65% of this land is actually cultivated: the country sows on average only 2.4 to 2.5 million ha per year *(IED Afrique, 2011)*, leaving a theoretical reserve of more than one million hectares.

The public lever is, moreover, legally powerful: about 95% of land falls under the national domain, the remaining 5% being shared between the State and private third parties *(IPAR, 2026)*. The most strategic reservoir remains irrigation. The national irrigable potential is estimated at about 350,000 ha, but agriculture remains 95% rainfed, with only 130,000 ha of developed area — barely more than a third of the

potential *(FAO, 2012)*. This gap between potential and use, concentrated in the North but real elsewhere, is precisely what the proposal seeks to close.

Table 1. Irrigable potential and schemes actually developed, by zone.

Zone	Irrigable potential (ha)	Developed (ha)	Comments
Senegal River Valley	~240,000	~76,000	Productive heartland; ~72% of developed schemes
Gambia River basin	~65,000	n.a.	Under-exploited potential
Casamance (Lower/Middle)	~20,000	~15,000	Rainfed rice + lowlands
Anambé (Kolda)	included in South	~4,000	2nd historic irrigated hub
Niayes (coast)	n.a.	~10,000	Intensive horticulture
Eastern Senegal	n.a.	~600	Marginal
NATIONAL TOTAL	**≈ 350,000**	**≈ 105,000–130,000**	**≈ 1/3 of the potential in use**

Sources: EnQuête+ (2012); IED Afrique (2011); FAO (2012). n.a. = not available. The national irrigable potential (~350,000 ha) is an old estimate that has not been comprehensively recalculated (EnQuête+, 2012).

Statistical update — structural data

The regional distribution of arable land inherited from the 1998 National Agricultural Census is replaced here by the areas actually sown during the 2022-2023 campaign, the latest available Annual Agricultural Survey *(DAPSA, 2023)*. Nationally, cereals cover 1,895,834 ha (millet 51%, rice 20%, maize 15%, sorghum 14%) and groundnut 1,225,172 ha, the leading crop with more than a third of total sown area. The groundnut basin (Kaffrine, Fatick, Kaolack) and natural Casamance concentrate most of the area, confirming the geography inherited from the 2013 RGPHAE and its 755,500 farm households *(DAPSA, 2021)*.

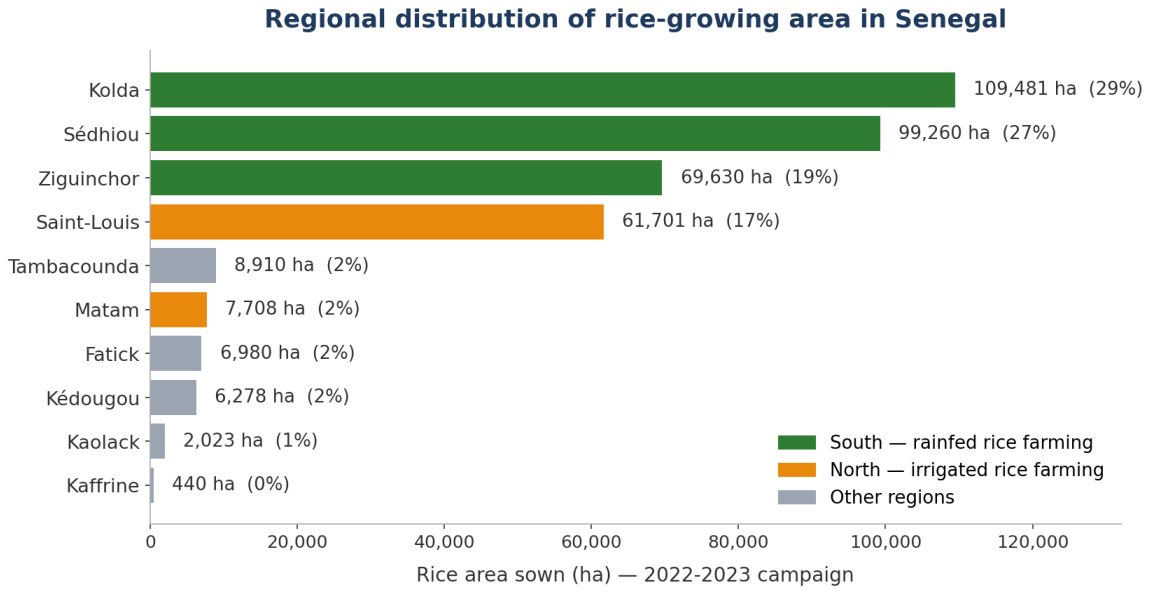
Table 2. Areas sown by region — 2022-2023 campaign (ha).

Region	Cereals — total (ha)	of which Rice (ha)	Share of nat. rice (%)	Groundnut (ha)
Kaffrine	257,807	440	0.1	228,368
Kolda	243,595	109,481	29.4	126,188
Sédhiou	236,639	99,260	26.7	58,709
Fatick	230,387	6,980	1.9	185,396
Kaolack	199,853	2,023	0.5	168,663
Diourbel	130,346	0	0.0	68,222
Tambacounda	128,072	8,910	2.4	116,049
Thiès	124,244	0	0.0	85,955
Louga	106,027	0	0.0	126,108
Saint-Louis	80,160	61,701	16.6	13,086
Ziguinchor	77,735	69,630	18.7	32,013
Matam	47,733	7,708	2.1	3,307

Region	Cereals — total (ha)	of which Rice (ha)	Share of nat. rice (%)	Groundnut (ha)
Kédougou	32,654	6,278	1.7	11,904
Dakar	582	0	0.0	1,204
SENEGAL	**1,895,834**	**372,413**	**100**	**1,225,172**

Source: DAPSA (2023), Annual Agricultural Survey 2022-2023, tables 1 and 3. Green rows: the rice hubs of the South (mostly rainfed rice farming); orange row: Saint-Louis, the heart of irrigated rice farming in the North.

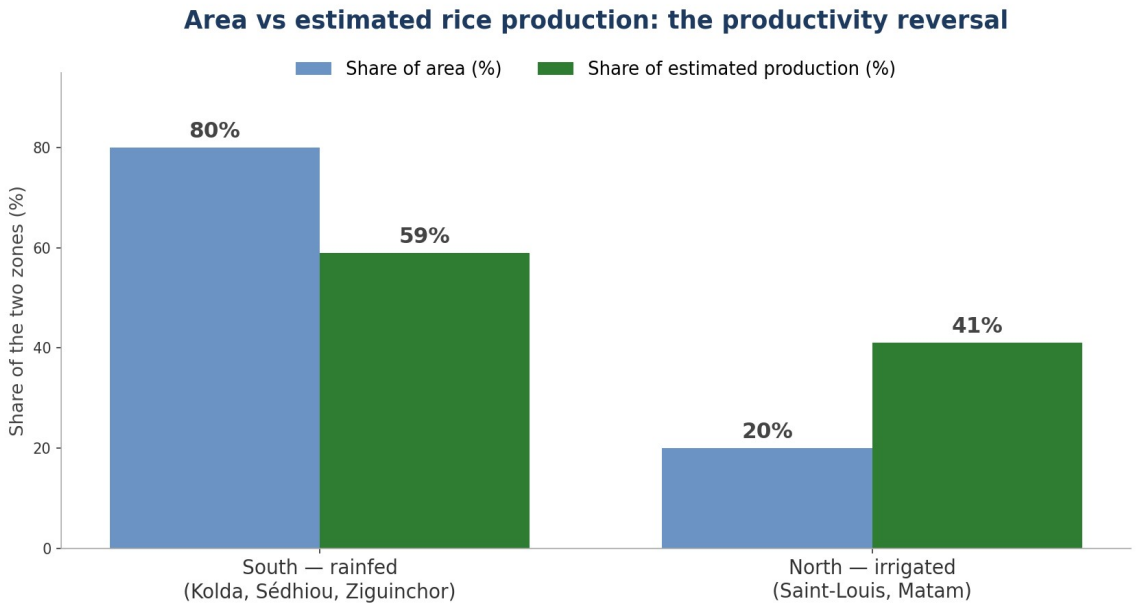
This table sheds direct light on the "North and other regions" axis. In terms of **area**, rice farming is first and foremost a southern matter: Kolda (109,481 ha), Sédhiou (99,260 ha) and Ziguinchor (69,630 ha) together account for nearly 75% of the 372,413 ha of national rice area, essentially rainfed. The North (Saint-Louis, 61,701 ha) carries only about 17% of the area — but dominates **production and yield** thanks to controlled irrigation (7 to 10 t/ha against 2 to 3 t/ha rainfed), with rice leading the cereals with 1,409,120 tonnes produced in total *(DAPSA, 2023; Le Soleil, 2025)*. For State farms, this suggests two distinct vocations: high-yield irrigated intensification in the North, and securing and developing the rainfed lowlands in the South, where the area already exists but productivity remains low.



Source: DAPSA (2023), Annual Agricultural Survey 2022-2023, table 3. National total: 372,413 ha.

Figure 1. Rice area by region and by cropping system (DAPSA, 2023).

Once areas are corrected by yields, the picture is reversed. Under documented yield assumptions (2.5 t/ha rainfed, 7 t/ha irrigated), the rainfed South holds about 80% of the area of the two main rice zones but only around 59% of estimated production, while the irrigated North, with barely 20% of the area, would supply nearly 41% *(estimate; areas DAPSA, 2023; yields Le Soleil, 2025)*. This productivity gap is the real message for a State-farm policy: in the South, gains will come from developing and intensifying areas that are already cultivated; in the North, from extending an irrigated model that already performs very well.



Estimate. Areas: DAPSA (2023), AAS 2022-2023. Production estimated under yield assumptions of 2.5 t/ha (rainfed) and 7 t/ha (irrigated), within the documented ranges.

Figure 2. Share of area vs share of estimated rice production, by zone (estimate based on DAPSA, 2023).

Corroboration by the accounts of the development agencies (SAED / SODAGRI)

North (SAED, River Valley). The 2025 hot off-season campaign alone produced 420,000 t of paddy (a record), against about 343,000 t in 2024, with yields of 7 to 9 t/ha *(Le Soleil, 2025)*. This level confirms, and even exceeds, the irrigated yield assumption (7 t/ha) used in Figure 2.

South (SODAGRI, Casamance / Anambé). SODAGRI supervises rice farming in Kolda, Sédhiou, Ziguinchor, Tambacounda and Kédougou. Its production has been estimated at around 200,000 to 270,000 t on 60,000 to 100,000 ha, with 5 to 5.5 t/ha in the Anambé irrigated scheme alone but a yield of about 3 t/ha in rainfed conditions *(SODAGRI, 2018-2019)*. This confirms the low rainfed productivity of the South posited in Figure 2.

Limitation. SAED publishes by campaign (the Valley practises double cropping each year) and SODAGRI only for the producers it supervises: there is no strictly comparable annual breakdown between zones. The shares in Figure 2 therefore remain an estimate — now corroborated as regards the orders of magnitude of yields, which are the core of the argument.

2. The flip side: the national domain is not empty land

These same figures carry the main risk in outline. The 95% of the national domain is occupied and farmed by communities under customary law, whereas, for some 14 million Senegalese, only 152,000 land titles have been issued *(IPAR, 2026)*. Recent history serves as a warning: under the previous regime (2000-2012), 17% of arable land — i.e. 657,753 hectares — was granted to 17 private companies under often opaque conditions, to the detriment of smallholders *(IPAR, 2026)*; and about 270,908 hectares, i.e. 3% of arable land, are today managed by foreign investors *(CIRAD, 2023)*. A State that installed its own farms on these lands would reproduce the same risk of dispossession and of conflict over use, this time in its own name —

undermining precisely the land rights that the reform seeks to secure. The scale of the problem is confirmed by the most recent data: according to the 2022-2023 Annual Agricultural Survey, only 7.5% of the farming population holds recognised ownership or use rights over their plots (13% of men, barely 1% of women) *(DAPSA, 2023)* — a very low level of land security, which makes communities all the more vulnerable to a poorly framed public land grab.

3. If everything works: what impact on food sovereignty?

The impact would be considerable, because the dependence is massive and quantifiable. In 2024, rice imports cost 315 billion FCFA (nearly 565 million dollars) for 1.38 million tonnes, with rice alone accounting for about 40% of food imports *(ANSD, 2025)*. More broadly, the ten most imported foodstuffs accounted for nearly 950 billion FCFA in 2024 *(Sikafinance, 2025)*. A public scheme that closed the rice deficit and diversified into horticulture, maize, milk and meat would therefore strike directly at the heart of a dependence that weighs on the trade balance, whose overall deficit reached 3,984 billion FCFA in 2023 *(Sikafinance, 2024)*.

Beyond the foreign exchange saved, the effect would be threefold. First, the **securing of the food supply** and the cushioning of international price shocks — decisive for households that devote on average nearly half of their budget to food *(Sikafinance, 2022)*. Second, the **creation of rural jobs** in areas where rural underemployment is around 25% *(EnQuête+, 2012)*. Third, a **knock-on effect on growth**: rice self-sufficiency alone is estimated at about three points of GDP *(Ndar Info, 2025)*. As a recent illustration, the Senegal River Valley has already demonstrated the productive potential, with a 2024-2025 campaign estimated at 492,626 tonnes of paddy and yields of 7 to 10 t/ha *(Le Soleil, 2025)*.

4. The decisive condition: governance, not the mobilisation of land alone

This potential will translate into results only under strict conditions. Developing land is costly and slow: moving from the current 130,000 irrigated ha towards the 350,000 ha of potential requires heavy hydraulic investment *(FAO, 2012)*, and international experience with State farms (Ghana, Tanzania, Ethiopia, Nigeria) shows that administrative management quickly degrades productivity, through the absence of market sanction, the disempowerment of managers and clientelist capture. Maximum impact will therefore be reached only if public farms play a role of **kick-starting and of nucleus** — developing, demonstrating and supplying a fabric of surrounding family farms (the *nucleus-outgrower* model) — rather than of an enclave competing with farmers, and if they are underpinned by autonomous, contract-based governance as well as scrupulous respect for customary land rights. In plain terms: the available land and the import bill make the stakes enormous and the tool potentially decisive, but it is the **governance model**, and not the mobilisation of land alone, that will determine whether these hectares are converted into real sovereignty. The real question is not *whether there should be State farms*, but *to do what, with what governance, and how far*.

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Methodological note: the amounts and areas come from public sources (statistical institutions, research, economic press) and cover different reference years (1998–2025); they should be consolidated with the most recent ANSD/DAPSA data before any official use.