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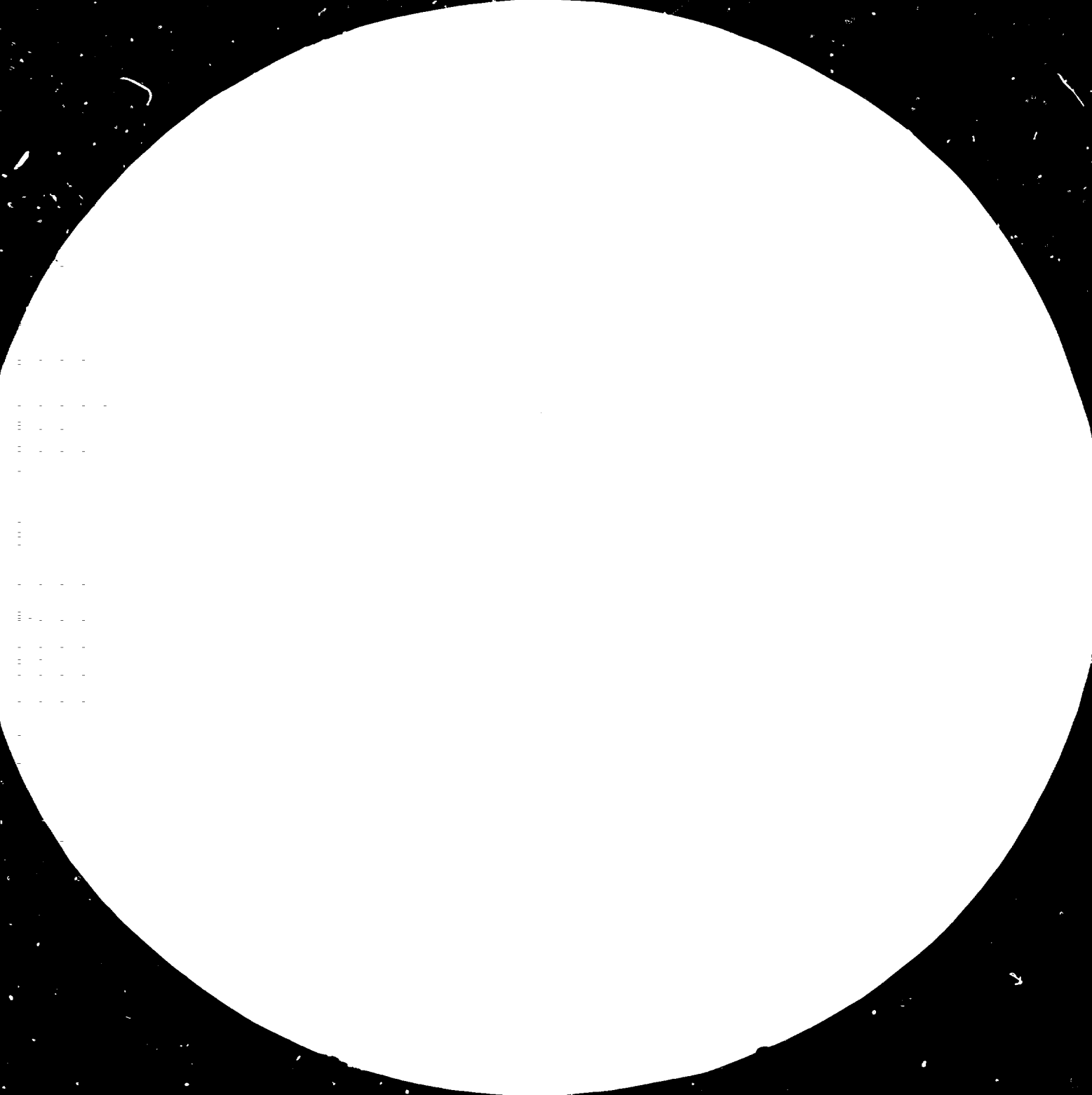
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MICROCOPY RESOLUTION TEST CHART

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\*/  
SENEGAL

Prepared by the  
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EXPLANATORY NOTE

This country brief, a desk study utilizing the data bank of the Regional and Country Studies Branch along with statistics from other sources, is intended to provide a recent overview of the manufacturing sector in Senegal. The brief lays stress on comparative data, thus enabling to measure the country's sectoral evolution relative to the African region as a whole. No attempt is made to reach conclusive recommendations. Instead, the brief should be regarded as a supplement to other sources of information such as mission reports, sector studies and publications of economic institutes.

ABBREVIATIONS

EXP Exports of goods and non-factor services  
GCF Gross capital formation  
GDP Gross domestic product  
GVT Government final consumption expenditure  
IMP Imports of goods and non-factor services  
LAB Labour force  
MVA Manufacturing value added  
POP Population  
PRI Private final consumption expenditure

International Standard Industrial Classification (ISIC)

3110	Manufacture of food
3130	Beverages industries
3140	Tobacco manufactures
3210	Manufacture of textiles
3220	Manufacture of wearing apparel, except footwear
3230	Manufacture of leather and leather products, leather substitutes and fur, except footwear and wearing apparel
3240	Manufacture of footwear, except vulcanized or moulded rubber or plastic footwear
331A (3310 + 3320)	Manufacture of wood and wood and cork products, manufacture of furniture, except primarily of metal
3410	Manufacture of paper and paper products
3420	Printing, publishing and allied industries
351A (3510 + 3520)	Manufacture of industrial chemicals (e.g. fertilizers and pesticides) and of other chemical products (e.g. paints, medicines, soap)
3530	Petroleum refineries
3540	Manufacture of miscellaneous products of petroleum and coal
3550	Manufacture of rubber products
3610	Manufacture of pottery, china and earthenware
3620	Manufacture of glass and glass products
3690	Manufacture of other non-metallic products (e.g. cement, clay products, concrete)
3710	Iron and steel basic industries
3720	Non-ferrous metal basic industries
3810	Manufacture of fabricated metal products, except machinery and equipment
3820	Manufacture of machinery except electrical
3830	Manufacture of electrical machinery, apparatus, appliances and supplies

3840            Manufacture of transport equipment

3850            Manufacture of professional and scientific, and  
measuring controlling equipment not elsewhere  
classified, and of photographic and optical goods

3900A           Other manufacturing industries (e.g. manufacture of  
(3900 +        jewellery, musical instruments, sporting articles) and  
3560)        manufacture of plastic products not elsewhere  
classified.



GENERAL ECONOMIC BACKGROUND

By virtue of wide variations in land fertility and infrastructure, and also because business and government activities are concentrated in Dakar, the capital, Senegal's population, about 5.4 million according to the 1978 estimate, is unevenly distributed over the 196,000 sq.km. which represent the country's total area. During the 1970's population grew at a rate of 2.9 per cent per annum, that is to say slightly above African average (Table 1). Labour force accounts for 2.2 million, or some 42 per cent of the population.

GDP rosed from \$1,692 million to \$1,861 million between 1970 and 1977, and experienced an average annual growth rate of 2.2 per cent during that period, a performance which was only half the African average. Lower than African average was also GDP per capita which, in 1978, amounted to \$346, against \$428 in Africa. In the case of gross capital formation (GCF), however, the situation was a little different. At the beginning of the 1970's both African and Senegalese GCF per capita was nearly at the same level, but from the middle of the decade on, when an upward trend started in Africa, Senegal failed to follow the movement.

Due to the negative effects of the drought which affected the economies of the Sahel countries, it took the Senegalese exports of goods and non-factor services five years to reach again the value realized in 1970. Petroleum products, groundnut oil, calcium phosphate, fish, preserved fish, oilseed cake, cotton and unrefined salt are among the main export commodities of the country. Partly, as a consequence of the drought, the value of the import goods and non-factor services, rose year after year much faster than the value of exports, thus causing a permanent negative trade balance. Import goods include food, drink and tobacco, fuels and lubricants, manufactures and semi-manufactures, consumer and capital goods as well as raw materials. In spite of the efforts in recent years to diversify foreign markets, France continues to play the predominant role in the Senegalese foreign trade. In 1977 the main buyers of Senegalese products and the main suppliers of the

**Table 1. Senegalese and African base economic data and trends, in constant 1975 US dollars**

Year	POP	LAB	GDP	GCF	EXP	IMP	GDP POP	GDP LAB	GCF POP	GCF LAB	EXP POP	IMP POP
	(millions)		(US \$ million)				(US \$)					
<b>1. Senegal</b>												
<u>Absolute figures</u>												
1970	4.27	1.89	1,692	303	649	794	396	894	71	160	152	186
1971	4.41	1.94	1,692	315	579	768	383	871	71	162	131	174
1972	4.55	1.99	1,796	344	731	813	394	902	76	173	161	179
1973	4.70	2.04	1,699	451	578	787	362	833	75	172	123	168
1974	4.84	2.08	1,758	380	614	801	363	843	78	182	127	166
1975	4.98	2.13	1,896	337	698	794	381	890	68	158	139	159
1976	5.11	2.17	2,034	390	972	1,034	398	936	76	179	190	202
1977	5.25	2.21	2,047	364	903	1,080	390	924	69	164	172	206
1978	5.38	2.26	1,861	393	646	917	346	825	73	174	120	170
<u>Annual growth rates (%)</u>												
1970	3.36	2.71	8.33	21.62	9.04	11.52	4.81	5.47	17.67	18.41	5.49	7.89
1971	3.30	2.59	-0.04	4.02	-10.87	-3.23	-3.23	-2.56	0.69	1.39	-13.72	-6.32
1972	3.22	2.52	6.18	9.43	26.40	5.84	2.87	3.57	6.02	6.74	22.46	2.54
1973	3.12	2.41	-5.44	2.02	-20.93	-3.22	-8.30	-7.67	-1.07	-0.39	-23.32	-6.14
1974	3.00	2.26	3.50	8.04	6.16	1.73	0.49	1.22	4.89	5.66	3.07	-1.24
1975	2.87	2.16	7.86	-11.15	12.39	-0.88	4.85	5.58	-13.63	-13.03	9.25	-3.65
1976	2.73	2.02	7.25	15.49	40.88	30.26	4.40	5.13	12.42	13.20	37.13	26.79
1977	2.62	1.93	0.67	-6.69	-7.15	4.48	-1.90	-1.24	-9.07	-8.46	-9.52	1.81
1978	2.53	1.85	-9.12	7.97	-28.47	-15.11	-11.37	-10.78	5.30	6.01	-30.24	-17.21
<u>Growth rate, 1970-1978 (%)</u>												
	2.93	2.22	2.21	2.83	3.49	3.54	-0.70	-0.01	-0.09	0.61	0.55	0.59

.../...

Table 1. Senegalese and African base economic data and trends, in constant 1975 US dollars

Year	POP	LAB	GDP	GCF	EXP	IMP	$\frac{GDP}{POP}$	$\frac{GDP}{LAB}$	$\frac{GCF}{POP}$	$\frac{GCF}{LAB}$	$\frac{EXP}{POP}$	$\frac{IMP}{POP}$
	(millions)		(US \$ million)				(US \$)					
	<u>Absolute figures</u>						2. <u>Africa</u>					
1970	330.40	129.46	126,438	21,438	46,669	30,839	383	977	65	166	141	93
1971	339.35	132.34	131,371	23,257	45,093	32,625	397	993	69	176	133	96
1972	348.68	135.31	135,054	25,129	45,976	33,670	387	998	72	186	132	97
1973	358.40	138.37	141,850	27,217	47,142	35,257	396	1,025	76	197	132	98
1974	368.53	141.55	145,569	34,291	43,229	44,720	395	1,028	93	242	117	121
1975	379.10	144.85	147,899	39,162	42,073	49,411	390	1,021	103	270	111	130
1976	390.11	148.28	161,059	41,464	49,845	52,629	413	1,086	106	280	128	135
1977	401.57	151.83	171,229	47,760	52,067	57,854	426	1,128	119	315	130	144
1978	413.48	155.51	177,100	48,893	51,477	57,374	428	1,139	118	314	124	139
	<u>Annual growth rates (%)</u>											
1970	2.67	2.21	9.18	16.52	13.07	14.07	6.34	6.82	13.49	14.00	10.13	11.11
1971	2.71	2.22	3.86	8.49	-3.38	5.79	1.12	1.61	5.62	6.13	-5.93	3.00
1972	2.75	2.25	2.80	8.05	1.96	3.20	0.05	0.54	5.16	5.67	-0.77	0.44
1973	2.79	2.26	5.03	8.31	2.54	4.71	2.18	2.71	5.37	5.91	-0.24	1.87
1974	2.83	2.30	2.62	25.99	-8.30	26.84	-0.20	0.32	22.53	23.16	-10.82	23.15
1975	2.87	2.33	1.60	14.20	-2.67	10.49	-1.23	-0.71	11.02	11.60	-5.39	7.41
1976	2.90	2.37	8.90	5.88	18.47	6.51	5.83	6.38	2.89	3.43	15.13	3.51
1977	2.94	2.40	6.31	15.19	4.46	9.93	3.28	3.82	11.90	12.49	1.48	6.79
1978	2.97	2.42	3.43	2.37	-1.13	-0.83	0.45	0.99	-0.58	-0.05	-3.98	-3.60
	<u>Growth rate 1970-1978 (%)</u>											
	2.84	2.32	4.32	12.04	1.46	9.48	1.43	1.95	8.94	9.50	-1.34	6.45

Source: UNIDO, Regional and Country Studies Branch, Industrial Statistics Data Base.

country were as follows:<sup>1/</sup>

<u>Exports to</u>		<u>Imports from</u>	
(Percentage of total value)			
France	49.1	France	40.0
U.K.	7.1	USA	8.4
Italy	4.6	West Germany	6.0
Mauritania	4.5	Italy	4.9
Ivory Coast	3.7	Algeria	4.0
Mali	3.5	Ivory Coast	3.7

Table 2 shows the ratios of selected aggregates. In relation to GDP the country's GCF except in 1974 and 1978 remained nearly constant during the 1970's, whereas developing Africa as a whole experienced a substantial improvement at the end of the decade. Also in relation to GDP both Senegalese exports and imports, respectively 31 per cent and 43 per cent in 1978 remained higher than the corresponding average values for the African region, 26 per cent and 32 per cent respectively.

Both Senegal and Africa as a whole seem to have neglected somehow agriculture for the benefit of industry between 1970 and 1978, since during the mentioned period the contribution of agriculture to GDP dropped, whereas the contribution of manufacturing to the same GDP grew (Table 3). Except for services the contribution of all other senegalese sectors to GDP witnessed a positive evolution, as in the case of manufacturing.

In spite of the opposite evolution of the country's manufacturing and agriculture, the latter has at no time been given less importance than in the years before. Unfortunately in addition to the already mentioned drought, pest and disease damage affected negatively the Senegalese primary sector, which consists of a commercial agriculture dominated by groundnut production, and of food crops such as millet and sorghum,

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<sup>1/</sup> Banque Centrale des Etats de l'Afrique de l'Ouest, Bulletin Statistique et Economique Mensuel, June 1981.

Table 2. Selected percentage ratios for Senegal and developing Africa, at current prices

Year	$\frac{\text{LAB}}{\text{POP}}$	$\frac{\text{GCF}}{\text{GDP}}$	$\frac{\text{GVT}}{\text{GDP}}$	$\frac{\text{PRI}}{\text{GDP}}$	$\frac{\text{EXP}}{\text{GDP}}$	$\frac{\text{IMP}}{\text{GDP}}$	$\frac{\text{EXP}}{\text{EXP+IMP}}$	$\frac{\text{EXP-IMP}}{\text{GDP}}$	$\frac{\text{NFY}}{\text{GDP}}$
<u>1. Senegal</u>									
1970	44.31	15.70	14.87	73.84	27.20	31.61	46.25	-4.41	-2.42
1971	44.01	16.20	15.70	75.08	26.70	33.74	44.18	-7.04	-2.14
1972	43.71	16.99	14.91	72.38	30.65	34.93	46.74	-4.27	-2.12
1973	43.41	18.91	15.74	75.56	28.47	38.68	42.40	-10.21	-2.34
1974	43.10	22.17	14.76	69.39	42.68	49.00	46.56	-6.32	-3.39
1975	42.80	17.79	15.21	72.47	36.39	41.86	46.51	-5.46	-2.78
1976	42.50	16.20	15.34	74.64	38.01	44.19	46.24	-6.18	-1.31
1977	42.21	15.81	15.46	74.22	39.05	44.54	46.72	-5.49	-1.83
1978	41.93	22.68	17.00	73.04	31.00	43.72	41.49	-12.72	-2.59
<u>2. Africa</u>									
1970	39.18	18.61	16.24	64.45	25.78	25.09	50.68	0.70	-2.91
1971	39.00	19.39	16.23	65.65	24.46	25.53	48.93	-1.07	-2.93
1972	38.81	19.93	15.98	63.71	25.06	24.68	50.38	0.38	-2.84
1973	38.61	21.13	15.65	62.72	27.10	26.59	50.47	0.51	-3.09
1974	38.41	24.55	13.92	56.79	33.87	29.13	53.76	4.74	-2.51
1975	38.21	26.48	16.83	61.65	28.45	33.41	45.99	-4.96	-2.38
1976	38.01	26.14	16.72	59.09	29.05	31.01	48.37	-1.96	-2.53
1977	37.81	28.15	16.56	58.41	29.48	32.61	47.48	-3.13	-2.09
1978	37.61	29.01	16.87	60.43	26.62	32.94	44.70	-6.32	-1.34

Source: UNIDO, Regional and Country Studies Branch, Industrial Statistics Data Base.

paddy rice, casava and maize. As a result of pest and disease damage, and also due to failure of the rains, the marketed volume of groundnuts in shell dropped from 768,200 tons in 1974/75 to 442,000 tons in 1977/78. During the same period production of millet and sorghum fell from 780,000 tons to 491,000 tons.

The country's primary sector includes also livestock and fishing activities. The livestock population which suffered badly from drought, was estimated at 2.3 million cattle, 1.7 million sheep and 196,000 pigs in 1975. Some 50,000 people are involved in fishing activities. This sub-sector grew rapidly, as shown by the catch evolution. In 1970 total catch amounted to some 169,000 tons, and it rose to 360,000 tons eight years later.

There are reliable indications that the desert affects the already modest forestry resources of the country. A reforestation project is therefore under way to control desertification, a concern which Senegal shares with its neighbouring countries, and which has led to sub-regional co-operation, also in other fields and with other countries.

Senegal is, inter alia, a member of the Organisation pour la Mise en Valeur du Fleuve Sénégal (OMVS); it is a signatory of the Lomé Convention which covers aid and trade between selected developing countries and the EEC; it also signed the treaty to create the Economic Community of West African States (ECOWAS).

## THE INDUSTRIAL SECTOR

### Endowments for industrialization

The industrial sector which employs some 30,000 people is predominately food-based; it gets impetus from agriculture mainly, and more specifically from groundnut production. Next in importance is mining, the present exploitation activities of which are, limited to phosphate and salt. The Thiès located Société Sénégalaise des Phosphates produced 185,000 tons alumina phosphates in 1979, and the Compagnie Sénégalaise des Phosphates de Taiba had an output of 1.6 million tons calcium phosphates the same year. Also in 1979 salt production amounted to 140,000 tons. Important iron ore deposits were discovered at Falémé near the Mali border. But its exploitation depends on development of transport and power facilities. Prospecting for oil, copper, gold and uranium are under way.

Presently the country is completely dependent on imported oil to generate electricity, the consumption of which was estimated at 559,000 MWh in 1980. In the future, however, hydroelectricity is expected to play an increasing role. In co-operation with Mali and Mauritania two dams are planned to be constructed on the Senegal river to provide electricity to the three countries. Pilot plants on solar energy are being implemented in Bakel and Diakhao.

Out of 14,500 km of classified roads, 3,000 km are tarred. The railway system extends to 1,200 km. Throughout the year the Senegal river is navigable for 220 km. The river Saloum is also a transport route for major groundnut producing centers. There are four airports, with that at Dakar being of international standard.

### The impact of industry

#### Recent evolution

With its 14.2 per cent contribution to GDP in 1978, manufacturing is one of the corner-stones of Senegalese economy. Particularly because of new important investments at the beginning of 1970's, MVA rose steadily

Table 3. Evolution of economic sectors and GDP in Senegal and developing Africa, at constant 1975 prices

	Agriculture		Mining		Manufacturing		Utilities		Construction		Services		GDP	
	(1)	(2)	(1)	(2)	(1)	(2)	(1)	(2)	(1)	(2)	(1)	(2)	(1)	(2)
<u>Annual growth rates (%)</u>														
1970-71	-11.6	4.1	37.2	-3.1	4.4	4.4	6.5	10.1	3.3	14.0	3.6	6.6	0.0	3.8
1971-72	18.5	0.9	-11.9	0.6	0.6	6.4	3.7	5.9	5.3	16.9	2.2	2.8	6.2	2.8
1972-73	-14.0	-2.6	24.5	6.0	-2.6	8.9	11.5	9.9	-10.1	16.0	-2.8	7.5	-5.4	5.0
1973-74	8.0	5.2	9.3	-11.4	8.4	3.6	8.8	3.1	2.0	5.0	-1.5	8.1	3.5	2.6
1974-75	15.4	-1.3	0.8	-6.0	9.4	2.9	0.6	8.4	7.2	12.9	3.3	4.8	7.9	1.6
1975-76	12.3	2.2	-5.0	15.6	7.2	9.1	21.8	10.8	13.4	16.8	3.7	8.6	7.3	8.8
1976-77	-6.7	1.9	-0.1	5.6	6.8	8.0	12.1	9.7	4.4	10.4	4.0	7.9	0.7	6.3
1977-78	-14.0	2.3	-0.7	-1.6	-12.9	7.4	3.1	9.7	1.8	1.6	-7.0	5.5	-9.1	3.4
<u>Shares in total GDP (%)</u>														
1970	32.8	27.9	3.7	21.4	12.9	8.4	12.1	20.8	5.0	4.5	44.2	35.3	-	-
1978	30.1	22.5	5.2	17.0	14.2	9.8	3.1	1.1	5.9	7.8	42.2	41.6	-	-

Source: UNIDO, Regional and Country Studies Branch, Industrial Statistics Data Base.

Note: (1) Senegal, (2) Africa



in absolute figures during the decade (Table 4). MVA per capita, \$49.2 in 1978 was higher than the African average, \$42.4, but the country's share in African MVA is still negligible; far from improving it dropped from 2.0 per cent to 1.5 per cent between 1970 and 1978. The mentioned new important investments related, inter alia, to a sugar mill at Toll, an export-oriented industrial zone in the Cap Vert region; the construction of a tanker repair plant and the local processing of the country's groundnut production.

In the recent years, however, the sector has not registered significant investments, and one notices a drop of industrial production in different key sub-sectors like oilseed processing, fertilizers and textiles, at least in comparison with production of 1977.<sup>1/</sup>

Index of industrial production (1969 = 100)

	<u>1977</u>	<u>1978</u>
1. <u>Drop in production</u>		
Soap, detergents, cosmetics	379.2	170
Fertilizers, pesticides	224.5	203.6
Oilseed processing	201.6	62.3
Sugar and confectionery	158.9	145.2
Textiles	128.4	105.8
Leather	70.7	40.1
2. <u>Increase in production</u>		
Beer and soft drinks	285.3	293.2
Water	202.5	209.3
Construction materials	170.8	198.5
Tobacco	162.5	180.1
Petroleum and refineries	134.2	138.8
Milling and baking	81.4	98.4

Thus, in the sub-sectors where they took place, the increases were modest and the drops substantial. The main causes of the latter seem to

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<sup>1/</sup> The Economist Intelligence Unit, Quarterly Economic Review of Senegal, Mali, Mauritania, Guinea. The Economist Intelligence Unit Ltd. Annual Supplement 1981, London, p.11.

Table 4. MVA and comparative indicators in Senegal and developing Africa, in constant 1975 US dollars

Year	MVA <sup>a/</sup>		MVA / POP <sup>b/</sup>		MVA / GDP <sup>c/</sup>		Country's share in African MVA <sup>c/</sup>
	(1)	(2)	(1)	(2)	(1)	(2)	
1970	219.5	10,789.8	51.4	32.5	12.9	8.4	2.0
1971	229.0	11,265.6	51.9	33.1	13.5	8.5	2.0
1972	230.4	11,981.8	50.6	34.2	12.3	8.7	1.9
1973	224.5	13,046.7	47.7	36.3	13.2	9.1	1.7
1974	243.3	13,521.5	50.2	36.6	13.8	9.2	1.7
1975	266.2	13,911.0	53.4	36.6	14.0	9.3	1.9
1976	285.2	15,183.1	55.8	38.8	14.0	9.3	1.8
1977	304.5	16,396.4	58.0	40.7	14.8	9.5	1.8
1978	265.1	17,608.5	49.2	42.4	14.2	9.8	1.5

Source: UNIDO, Regional and Country Studies Branch, Industrial Statistics Data Base.

Note: (1) Senegal, (2) Africa

a/ Million US dollars

b/ US dollars

c/ Per cent

have been, inter alia, a reduced availability of raw materials, a weaker domestic demand and mismanagement of public enterprises, a good deal of which runs at a loss. Different measures have been taken by Government in order to improve the situation. They include the revision of the investment code in favour of foreign investment, the establishment of industrial zones in Dakar and in other places, the reorganization of public enterprises and a greater encouragement to the private sector.

Manufacturing of food (ISIC 3110, Table 5) remains the branch with the highest value added. Next in importance is manufacture of textiles. It is interesting to notice that the combination 3810 through 3840 which represented only 5.8 per cent of the total value added in 1970 improved to 15.3 per cent in 1978.

#### Location of industry

Like in most developing countries, industrial concentration is very high in Senegal. Because of the availability of energy, physical and institutional infrastructure as well as other facilities, the large majority of the country's industrial enterprises are located in the capital, Dakar. As of 1979 the repartition of the main units over the country was as follows:<sup>1/</sup>

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<sup>1/</sup> Data gathered from Table 6.

<u>Location</u>	<u>Number of industrial units</u>
Dakar	55
M'Bao	3
Pout	3
Rufisque	3
Thiaroye	3
Zinguichor	3
Thiés	2
Dagane	1
Dagoudane	1
Diourbel	1
Djifere	1
Kahone	1
Kaolack	1
Kolda	1
Lyndiane	1
Medina	1
Savoigne	1
Sébikotane	1
Tambacounda	1
Toll	1
Velingara	1

Role of th State

State intervention in the country's process of industrialization is related to management of public enterprises and acquisition of shares in private enterprises, especially in key sectors. Table 6 shows the status of capital holding in Senegalese industry, as at 1979. It appears from

Table 5. Value added for Senegalese industrial branches, in 1,000 US dollars<sup>a/</sup>  
and percentage

ISIC	1970		1975		1978		1979	
	Value/Share		Value/Share		Value/Share		Value/Share	
3110	79,566	40.8	89,400	38.0	69,732	30.8	109,962	47.0
3130	4,600	2.4	9,200	3.9	11,408	5.0	12,880	5.5
3140	10,293	5.3	14,100	6.0	15,792	7.0	15,792	6.8
3210	29,760	15.2	37,200	15.8	30,132	13.3	31,620	13.5
3220	3,600	1.8	4,000	1.7	-	-	-	-
3230	2,912	1.5	2,600	1.1	1,196	0.5	1,300	0.6
3240	4,182	2.1	4,100	1.7	6,150	2.7	-	-
331A	9,831	5.0	8,700	3.7	9,222	4.1	10,788	4.6
3410	3,565	1.8	3,100	2.1	3,379	1.5	3,937	1.7
3420	5,750	2.9	5,000	2.1	5,450	2.4	6,350	2.7
3510	8,482	4.3	12,294	5.2	11,925	5.3	14,506	6.2
3520	3,690	1.9	4,194	1.8	-	-	-	-
3530	11,996	6.1	14,114	6.0	17,783	7.9	17,924	7.7
3540	0	0.0	0	0.0	0	0.0	0	0.0
3610	0	0.0	0	0.0	0	0.0	0	0.0
3620	0	0.0	0	0.0	0	0.0	0	0.0
3690	5,740	2.9	8,200	3.5	9,430	4.2	8,692	3.7
381c <sup>b/</sup>	11,280	5.8	18,800	8.0	34,592	15.3	-	-
Total	195,247	100.0	235,002	100.0	226,191	100.0	233,751	100.0

Source: UNIDO, Regional and Country Studies Branch, Industrial Statistics Data Base.

a/ in 1975 prices

b/ includes 3810, 3820, 3830 and 3840.

Table 6. Holdings in Senegalese industry, 1979

Enterprise	Registered capital (Mill.FCFA)	Capital holdings (in %)				Turnover (Mill.FCFA)
		National		Foreign		
		Public	Private	French	Other	
<b>1. Primary industries</b>						
<b>1.1. Food processing</b>						
SEIB	1,600	5	40	...	...	4,000 (1978)
Petersen et Cie	1,200	-	-	100	-	5,525 (1977)
GMD	1,180	-	-	100	-	7,585 (1978)
SODEC	1,084	...	...	...	...	900
SEIC	346	-	-	100	-	1,000 (1977)
CODIPRAL	330	...	...	...	...	5,200
MS	264	...	...	...	...	2,500 (1978)
SERAS	198	97	-	-	3	1,000 (1978)
SAPROLAIT	175	-	20	80	-	950 (1978)
Guieysee	165	-	-	100	-	2,500 (1978)
SIPL	730	100	-	-	-	1,200 (1978)
AGROCAP	81	...	...	...	...	886
BAA	16.8	-	-	-	100	330 (1980)
<b>1.2. Agro-industries</b>						
CSS	8,600	...	...	...	...	14,300 (1978)
SODEFITEX	750	78	...	...	...	4,000 (1978)
SNTI	150	100	-	-	-	...
SOCAS	145	...	...	...	...	1,000
<b>1.3. Fish industry</b>						
SODESINE	300	-	49	51	-	1,010
SNCDS	253.2	65	-	35	-	2,600 (1977)
ADRIPECHE	203	-	85	15	-	2,450
SOPESEA	150	-	100	-	-	360 (1977)
SAPAL	150	...	...	86	...	3,100
SARDINAFRIC	100	-	-	100	-	2,600
SAIB	100	-	-	100	-	2,000
SURGEL-DAKAR	99.9	...	...	...	...	1,100 (1978)
SPAC	60	...	...	41	...	636 (1977)
AMERGER	50.9	...	...	...	...	841 (1978)
AFRISEN	50	-	100	-	-	375 (1978)
Dakar-Pêche	50	-	100	-	-	308 (1978)
Ancienne CONALDA	24	-	-	100	-	...
SOSECHAL	21	...	...	...	...	345 (1978)
CRUSTAVIF	15	-	-	-	100	...
<b>1.4. Beverage industry</b>						
SOBOA	819.75	...	...	...	...	4,070 (1978)
SIERAS	700	-	-	100	-	4,600 (1978)

Table 5 (cont.)

Enterprise	Registered Capital (Mill.FCFA)	Capital holdings (in %)				Turnover (Mill.FCFA)
		National		Foreign		
		Public	Private	French	Other	
<b>1.5. Tobacco industry</b>						
MTOA	1,314	-	-	100	-	4,600 (1978)
<b>1.6. Textile industry</b>						
SOTIBA-SIMPAFRIC	2,052	...	...	...	...	7,000 (1978)
ICOTAF	400	...	...	47	...	3,000
STS	300	...	...	100	...	1,800
SIV	290	86	2	12	-	600
CCV	196.2	-	-	100	-	500
TMS	67.5	-	-	100	-	1,077 (1977)
SOSEFIL	52.94	-	-	100	-	1,000
SCT	...	...	...	...	...	600
<b>1.7. Leather industry</b>						
BATA	1,155	...	...	...	...	3,100 (1978)
<b>2. Chemical and petrochemical industries</b>						
SIES	1,668.75	-	-	67	33	4,600 (1978)
SAR	1,000	100	-	-	-	30,500
SSEPC	506.92	-	-	100	-	6,500 (1977)
NSOA	480	-	-	-	100	1,000
SIPOA	330	20	3	77	-	668
SEGOA	325	...	...	99.5	...	800
SDMPA	254	...	...	50	...	550
CAFAL	225	-	30	70	-	1,000
SAEC	212.5	-	2	98	-	1,000
SIGELEC	150	-	80	20	-	1,500
SAPEM	123	100	-	-	-	550
Seigneurie-Afrique	120	-	1	99	-	1,000
DICOPA	101.2	-	.25	99.75	-	600 (1978)
CSL	100	-	-	60	40	2,000
SAD	65	10	-	90	-	585 (1978)
VALDAFRIQUE	57.9	...	-	...	-	550 (1978)
SENEPLAST	26	-	100	-	-	...
PES	24	...	...	...	...	...
Croutchouc et Plastiques	24	-	...	-	-	...
SATEC	20.7	-	100	-	-	600
SPS	3	-	-	100	-	132 (1978)
<b>3. Building material industry</b>						
MASYDA	300	...	-	...	...	...
SENAC-ETERNIT	187.5	-	-	-	100	1,146
SABM	...	...	...	...	...	217 (1976)
PSOA	125	-	-	100	-	...
SABE	20	-	...	-	...	520
<b>4. Metalworking industries</b>						
Manutention africaine	500	...	...	...	...	7,600 (1976)
STD	415	-	-	-	100	435
ELMAF	396	-	-	100	-	1,800 (1978)
SISCOMA	307.8	50	-	50	-	2,300 (1976)
FUMOA	300	-	-	100	-	1,000 (1978)

Table 6 (cont.)

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<u>Enterprise</u>	<u>Registered Capital (Mill.FCFA)</u>	<u>Capital holdings (in %)</u>				<u>Turnover (Mill.FCFA)</u>
		<u>National</u>		<u>Foreign</u>		
		<u>Public</u>	<u>Private</u>	<u>French</u>	<u>Other</u>	
Berlier	210	10	-	90	-	2,800 (1978)
ACD	183	-	-	100	-	...
COSECA	160	27	-	73	-	760
ISENCY	720	20	13	67	-	350
CSTM	88.64	...	...	...	...	343
NEMAS	75	-	-	-	100	750
SOSEG	60	-	-	-	100	500
SACOME	24	-	-	100	-	...
PINSER	15	-	100	-	-	...
<u>5. Paper industry</u>						
La Rochette	500	-	-	100	-	1,344 (1978)
SIPS	140	-	-	100	-	1,344 (1978)
POLIPAC	27	-	-	-	100	140

Source: EDIAFRIC (Ed.), Le dossier de l'industrie africaine 1979, Paris 1980, pp. 15-55.

Note: For full name of enterprises, see Table 7.



the table that the State is predominantly involved in agro-industry, groundnut processing, seafood and food processing, chemical and petrochemical industries, and metalworking industries.

Apart from the banks there are 6 different national institutions dealing with industry.

- The Directorate of Industry:  
within the Ministry of Industrial Development and Handicraft, it prepares, proposes and monitors the implementation of industrial policies and strategies;
- The Société Nationale d'Etudes et Promotion Industrielles (SONEPI):  
the office aims at promoting small- and medium-scale enterprises;
- The Société Financière du Sénégal de Développement de l'Industrie et du Tourisme (SOFIDESIT):  
it provides terms loans and equity investment in industrial and tourism ventures;
- Zone Franche Industrielle de Dakar (ZFID):  
it aims at promoting export oriented industries in the zone;
- Bureau Organisation et Méthode (BOM):  
it assists the government in the organization and management of public administration and public enterprises;
- Ecole Supérieure de Gestion des Entreprises (ESGE):  
its main function is to train high level managers, especially those in public enterprises.

#### Status of industry

The overall turnover of industrial enterprises accounted for 197,850 million CFA francs in 1978. Chemical and petrochemical industries, (due to the increasing importance of the oil refinery) witnessed by far the most significant performance. The realizations of the different branches of activities were as follows:<sup>1/</sup>

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<sup>1/</sup> EDIAFRIC (Ed.), Le dossier de l'industrie africaine 1979, Paris 1980, June 2, p.3.

	<u>Turnover</u>
	(in million CFA francs)
Chemical and petrochemical industries	49,696
Food industries	20,188
Agro-industries	19,400
Mining industries	17,046
Seafood industries	16,520
Edible oil industries	15,880
Textiles industries	14,223
Metalworking industries	11,907
Electrical industries	11,866
Construction materials industries	6,165
Beverages industries	5,284
Tobacco industry	4,600
Footwear industry	3,100
Paper industry	1,956

The analysis of Table 7 reveals two remarkable facts, the dynamism of the 1970's in terms of new industrial investments and the general under-utilization of capacities. Up to independence in the early 1960's industrial activity was negligible and limited to groundnut oil transformation and some consumer goods industries. The same branches were reinforced, and a few others were created during the following decade. But industry gained its present importance in the 1970's thanks especially to new investments both in agro-industries and chemical and petrochemical industries. Among the most significant activities of that period are those of the oil refinery at M'Bao. The company, the Société africaine de raffinage was created in 1964, but the refinery unit came on stream only in 1974. The refinery is equipped to refine annually 800,000 tons crude oil. Mentioned should also be the Compagnie sucrière sénégalaise (CSS) which was set up in 1970, and offered jobs to no less than 6,000 people. Unfortunately CSS output is far from satisfactory. Although the unit is equipped to produce 170,000 tons of sugar a year, only 37,000 tons or less than 22 per cent, were produced in 1979. The proportion varies from one enterprise to another, but the fact is that nearly all Senegalese industrial units work far below capacity. The only

Table 7. Selected data of Senegalese main

<u>Enterprise</u>	<u>Unit location</u>	<u>Date of creation</u>
<u>1. Primary industries</u>		
<u>1.1 Food processing</u>		
Sté électrique et ind. du Baol, SEIB	Diourbel	1921 1956 1960
Ets Petersen et Cie	Dakar	1935
Grands moulins de Dakar	Dakar	1946
Sté de décorticage, SODEC	Lyndiane	1947
Sté électrique et ind. de la Casamance, SEIC	...	1930 1965
Cie de distribution de produits alimentaires, CODIPRAL	Dakar	1961
Sté Moulins SENTENAC, MS	Dakar	1942
Sté d'exploitation des ressources animals du Sénégal, SERAS	...	1962
Sté africaine des produits laitiers, SAPROLAIT	Dakar	1957
Ets Guieysse	Médina	1947
Sté ind. de produits laitiers, SIFL	Dakar	1970
Sté agricole du Cap-Voz, AGROCAP	Sébikotane	1978
Sté Biscuiterie et alimentation africaine, BAA	Dakar	1955
<u>1.2 Agro-industries</u>		
Cie sucriere sénégalaise, CSS	Toll	1970

manufacturing enterprises, 1979

<u>No. of employees</u>	<u>Product</u>	<u>Installed capacity</u>	<u>Production</u>
326	peeled peanuts	50,000 t	...
	refined oil	16,000 t	8,000 t
	vinegar	3.5 mio lit	...
...	peeled peanuts	150,000 t	...
265	flour	...	85,000 t
...	peanut oil	...	34,000 t
...	peanut oil	...	40,000 t
...	palm oil	...	...
162	condensed milk	1,200 t	...
131	flour	50,000 t	...
304	meat	...	...
150	milk	30 mio bot	...
	cheese	20 t	...
	yogurt	20 mio units	...
200	biscuits	9,000 t	7,000 t
...	milk	15,000 t	...
...	preserves	1,600 t	...
53	biscuits	3,000 t	1,930 t
6,000	sugar	170,000 t	37,000 t

Table 7 (continued)

<u>Enterprise</u>	<u>Unit location</u>	<u>Date of creation</u>
Sté de dével. des fibres textiles, SODEFITEX	Tambacounda	1970
	Kahone	1971
	Velingara	1973
	Kolda	1977
Sté nationale des tomates ind.,SNTI	Dagana	1979
Sté des conserveries alimentaires au Sénégal, SOCAS	Savoigne	1972
1.3 <u>Fish industry</u>		
Sté des pêcheries du Siné-Saloum, SOPESINE	Djifere	1977
Sté nouvelles conserveries du Sénégal; SNCDS	Dakar	1968
Armement dakarois pour le regroupement de l'ind. de la pêche, ADRIPECHE	Dakar	1971
Sté des pêcheries sénégalaises de l'Atlantique, SOPESA	Dakar	1969
		1973
Sté africaine des produits alimentaires, SAPAL	Dakar	1962
SARDINAFRIC	Dakar	1976
Sté africaine des ind. du bâtiment, SAIB	Dakar	1966
		1972
SURGEL - Dakar	Dakar	1967
Sté sénégalaise de produits alimentaires congelés, SPAC	Dakar	1969
Sté AMERGER-Casamance	Zinguichor	1967
Armement frigorifique sénégalais, AFRISEN	Dakar	1976
Dakar-Pêche	Dakar	1976
Sté nouvelle d'exploitation des anciens établissements CONALDA	Dakar	1977
Sté sénégalaise de chalutage, SOSECHAL	Zinguichor	...

<u>No. of employees</u>	<u>Product</u>	<u>Installed capacity</u>	<u>Production</u>
552	cotton seed	21,000 t	33,806 t
	cotton seed	17,000 t	
	cotton seed	20,000 t	
	cotton seed	20,000 t	
194	tomato extract	5,000 t	...
...	tomato extract	4,200 t	2,200 t
60	fish oil	2,000 t	1,200 t
	fish flour	10,000 t	7,500 t
408	tuna canning	30,000 t	5,700 (1977)
450	pilchard canning	12,000 t	8,700 t
	processed shrimps	1,800 t	...
306	processed fish	7,500 t	2,982 (1977)
423	canned tuna	60 t/day	7,900 t
54	frozen fish	9,000 t	8,500 t
620	pilchard canning	...	...
	tuna canning	...	...
100	frozen fish	2,000 t	2,672 t (1977)
330	frozen shrimps	45 t/day	2,614 t (1977)
152	frozen shrimps	14 t/day	965 t (1977)
	frozen sole		
...	processed shrimps	...	366 t (1978)
...	processed shrimps	...	301 t (1978)
...	canned pilchard	...	...
...	canned tuna	...	423 t (1978)
...	processed shrimps	...	336 t (1978)

Table 7 (continued)

<u>Enterprise</u>	<u>Unit location</u>	<u>Date of creation</u>
Sté CRUSTAVIF	Zinguichor	1970
Sté Brasseries de l'ouest Africain, SOBOA	Dakar	1928
Sté ind. de brasserie du Sénégal, SIBRAS	Dakar	1975
1.5 <u>Tobacco industry</u>		
Manufacture de l'ouest Africain, MTOA	Dakar	1951
1.6 <u>Textile industry</u>		
Sté de teinture, blanchiment, apprêt et d'impressions africaines, SOTIBA-SIMPAFRIL	Dakar	1951
Sté ind. cotonnière africaine, ICOTAF	Rufisque Degoudane	1949 1952
Sté textile sénégalaise, STS	Thies	1969
Sté sénégalaise pour l'ind. du vêtement, SIV	Dakar	1979
Sté cotonnière du Cap-Vert, CCV	Thiaroye	1952
Sté Tricotage mécanique du Sénégal, TMS	Dakar	1968
Sté sénégalaise de filterie, SOSEFIL	Dakar	1961
Sté cotonnière transocéanique, SCT	M'Bao	1957
1.7 <u>Leather industry</u>		
BATA	Rufisque	1940
2. <u>Chemical and petrochemical industries</u>		
Sté ind. d'engrais du Sénégal, SUES	M'Bao	1967

<u>No. of employees</u>	<u>Product</u>	<u>Installed capacity</u>	<u>Production</u>
...	frozen shrimp	700 t	...
538	beer	250,000 bl.	...
	soft drinks	250,000 bl.	...
130	beer	100,000 bl.	100,000 bl.
	soft drinks	100,000 bl.	200,000 bl.
418	cigarettes	140 mio. packs	100 mio packs
950	dyed fabric	18 mio met.	...
	sewing thread	900 t	...
	hosiery	300 t	...
	fancy work	35 mio met.	...
804	fabric	5.5 mio met.	8.5 mio met.
	fabric	4 mio metres	
470	spun fabric	1,500 t	1,500 t
	woven fabric	10 mio. met.	10 mio met.
320	ready-made clothes	1 mio pieces	0.2 mio pieces
137	thread	700 t	700 t
424	ropes	400 t	...
	string	300 t	...
	sacks	2,400 t	...
153	sewing thread	400 t	400 t
212	blankets	1 mio pieces	0.7 mio pieces
1,155	processed hides	122,500 pcs.	
	shoes	8 mio. pairs	3.6 mio pairs(1978)
343	fertilizers	130,000 t	114,000 t (1977)



Annex 7. (continued).

<u>Entreprise</u>	<u>Unit location</u>	<u>Date of creation</u>
Sté africaine de raffinage, SAR	M'Bao	1964
Sté sénégalaise des engrais et produits chimiques, SSEPC	...	1967
Sté nouvelles savonneries de l'ouest africain, NSOA	Dakar	1930
Sté ind. pharmaceutique de l'ouest africain, SIPOA	Dakar	1973
Sté sénégalaise d'oxygène et d'acétylène, SEGOA	Dakar	1930
Sté ind. moderne de plastiques africains, SIMPA	Dakar	1958
Cie africaine forestière et des allumettes, CAPAL	Thiaroye	1952
Sté africaine d'expansion chimique, SAEC	Dakar	1950
Sté ind. de générateurs électriques, SIGELEC	Pout	1972
Sté africaine d'applications plastiques et de mousse, SAPEM	Dakar	1979
La Seigneurie - Afrique	Dakar	1957
Distribution de cosmétiques et parfumeries, DICOPA	Dakar	1963
Cie sénégalaise de lubrifiants, CSL	Dakar	1969
Sté africaine de détergents, SAD	Dakar	1971
VALDAFRIQUE	Rufisque	1945
Sté plastiques et élastiques du Sénégal, PES	Dakar	1971

<u>No. of employees</u>	<u>Product</u>	<u>Installed capacity</u>	<u>Production</u>
206	gas oil	...	...
	diesel oil	...	...
	fuel oil	...	...
	petrol	...	...
608	insecticides	5,000 t	2,500 t
	animal feed	20,000 t	6,000 t (1977)
	special fertilizers	5,000 t	1,000 t
183	soap	28,000 t	24,700 t (1977)
70	pharmaceutical products	250 mio tablets	164 mio. tablets
64	oxygen	700,000 m <sup>3</sup>	456,000 m <sup>3</sup>
	acetylene	200,000 m <sup>3</sup>	103,000 m <sup>3</sup>
129	plastic items	2,500 t	2,200 t (1977)
169	matches	...	...
107	paint	3,500 t	2,070 t
222	batteries	25 mio. pieces	25 mio. pieces
62	foam	1,600 t	400 t
	plastic seats	10,000 pieces	...
63	paint	2,500 t	1,750 t
80	perfumery products	...	...
38	lubricants	20,000 t	16,000 t
30	detergents	500 t	78 t (1978)
	household powder	1,800 t	958 t (1978)
63	pomades	150 t	...
	insecticides	...	...
...	polyurethane foam	...	...

Table I (continued)

<u>Enterprise</u>	<u>Unit location</u>	<u>Date of creation</u>
SENEPLAST	Thiès	1969 1974
Sté Caoutchouc et plastiques	...	1955
Sté africaine de traitement électrochimique, SATEC	Thiaroye	1957
Sté de savon et produits similaires, SIS	Dakar	1966
<u>3. Building material industry</u>		
Sté Matériaux de synthèse à Dakar, MASYDA	Dakar	1976
SENAC-ETERNIT	Pout	1965
Sté africaine de béton manufacturé, SABM	Dakar	1948
Plâtres SIES de l'ouest africain, PSOA	...	1977
Sté africaine d'exploitation des brevets ERIES, SABE	Dakar	1948
<u>4. Metalworking industries</u>		
Manutention africaine	Dakar	1976
Sté des tréfileries de Dakar, STD	Dakar	1976
Emballages légers métalliques africains, EIMAF	Dakar	1957
Sté ind. sénégalaise de constructions mécaniques et de matériels agricoles, SISCOMA	Pout	1964
Fûts métalliques de l'ouest africain, FUMOA	Dakar	1946
Sté sénégalaise des automobiles Berliet	Dakar	1978
Ateliers et chantiers maritimes de Dakar	Dakar	1957

<u>No. of employees</u>	<u>Product</u>	<u>Installed capacity</u>	<u>Production</u>
...	plastic shoes	2.5 mio pieces	...
...	household items	600,000 pieces	...
...	plastic items	...	...
20	batteries	...	50,000 pieces
...	soap	...	...
...		...	...
199	asbestos cement	18,000 t	13,000 t
62	prefab items	30,000 t	...
...	flagstones	25,000 t	...
45	concrete items	200 t/day	...
550	mechanical items ship repair	...	...
128	wire-milling	20,000 t	6,000 t
149	metallic boxes	115 mio pieces	96 mio pcs (1978)
500	agricultural tools	100,000 units	...
70	barrels	200,000 pieces	131,000 pcs (1978)
87	van assembly	1,000 pieces	400 pcs (1978)
...	ship repair	...	...

Table 7 (continued)

<u>Enterprise</u>	<u>Unit location</u>	<u>Date of creation</u>	<u>No. of employees</u>	<u>Product</u>	<u>Installed capacity</u>	<u>Production</u>
Cie sénégalaise de construction automobile, COSECA	...	1976	28	car assembly	1,200 pieces	...
Sté ind. sénégalaise du cycle et du cyclomoteur, ISENCY	Kaolack	1976	50	bicycle and motor-cycle assembly	10,000 pieces 8,000 pieces	4,000 pieces 2,600 pieces
Cie sénégalaise pour la transformation des métaux, CSTM	Dakar	1962	95	household items nails	150 t 900 t	90 t 350 t
N elle émaillerie sénégalaise, NEMAS	Dakar	1968	198	enameled items	2,000 t	1,500 t
Sté sénégalaise d'émaillage et de galvanisation, SOSEG	Dakar	1968	209	enameled items	2,500 t	2,400 t
Sté africaine de construction métallique et d'entreprise, SACOME	Dakar	1959	...	metallic framework	1,200 t	...
Petites ind. sénégalaises réunies, PINSER	Dakar	1979	23	household items	...	...
<u>5. Paper industry</u>						
La Rochette	Dakar	1947	145	packaging cardboard	10,000 t	7,200 t (1978)
Sté ind. de papeterie au Sénégal, SIPS	Dakar	1973	80	packaging paper and cardboard	2,300 t	1,250 t
POLIPAC	Dakar	1970	25	paper cards	...	...

Source: EDIAFRIC (Ed.), Le dossier de l'industrie africaine 1979, Paris 1980, pp. 14-55.

exceptions are SIBRAS (beer and soft drinks), STS (fabric), CCV and SOSEFIL (thread) and SIGELEC (batteries).

#### Development prospects

The ongoing development plan (1981-1985) aims by means of different projects, at helping industry to achieve vertical and horizontal integration. In the textiles sub-sector for example, vertical integration will consist of processing local cotton to obtain thread and fabric for the use of cloth industry. Horizontal integration on the other hand has a threefold objective: valorize available industrial by-products, develop utility activities such as water and electricity, and promote inter-sectoral exchanges. The 10 main industrial projects relate to the following:<sup>1/</sup>

<u>Project</u>	<u>Investments</u> (in billion CFA francs)
Exploitation of iron ore	120
New oil refinery	90
Calcium phosphates production	50
SODAGRI agro-industrial complex	35
New cement factory at Pout	18
CSS extension (sugar production)	16
SEIB extension at Dioubel (refined oil)	12
SOTEXKA textile complex	8.5
Ammonia production	7
Steel-works	4.8

#### UNIDO assistance

Most of the mentioned projects offer room for UNIDO assistance. However, as in the past and in line with the SIDFA's recommendation, special stress will continue to lie on SONEPI which the current plan envisages to strengthen, to the extent that in addition to its promoting

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<sup>1/</sup> EDIAFRIC (Ed.), Le dossier de l'industrie africaine, 1979, Paris 1980, June 2, p.6.

small- and medium-scale industries, it will assist in the setting-up of industrial zones in areas other than Dakar, thus becoming a tool of the Government's decentralization policy. In addition, UNIDO's experience in the field of management training could be beneficial to the Ecole Supérieure de Gestion des Entreprises.

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