

SENEGAL



GENERAL ECONOMIC DATA	
Population - 2005	10.3 million
Area	197 000 Km ²
GDP - 2005	USD 8.3 billion
GDP per inhabitant - 2005	USD 738
Growth rate - 2005	6.2%
Inflation - 2005	1.8%
Trade balance (% of GDP) - 2005	-13.8%
Budget balance (% of GDP) - 2005	-3.4%
Investment (% of GDP) - 2005	23.3%
Domestic savings (% of GDP) - 2005	9.1%
Total debt (% of GDP) - 2005	49.5%
COFACE Country risk rating	B

Sources : World Bank, World Development Indicators database, April 2006
 BAfD/OCDE (2005), Perspectives économiques en Afrique
 Banque de France, Rapport annuel de la Zone Franc, 2006
 FMI, Perspectives Economiques Régionales, May 2006
 Missions Economiques, MINEFI - DGPTÉ
 CIA, The World Factbook - COFACE Rating

ECONOMY STRUCTURE

For several years, Senegal has experienced an annual growth, exceeding 5%, particularly owing to structural reforms and to the economic policies implemented. In April 2004, Senegal reached the completion point based on the HIPC initiative (Initiative for Heavily Indebted Poor Countries) and the Paris Club creditors decided on an additional allocation. Furthermore, the public budgets have benefited from the write off of debts to multilateral institutions decided by the G8 Heads of States in 2005.

The Senegalese economy is dominated by the services sector, especially transport and telecommunications. Industry represented 23.6% of GDP in 2005, due to the **dynamism of the Construction & Civil Engineering sector**.

Sectorial distribution:

- Primary (16.4 % of GDP at the market prices) : cotton, peanuts, sorghum, corns, rice, breeding, fishing
- Manufacturing industry (23.6 % of GDP at market prices) : **Construction & Civil Engineering (4% of GDP in 2004), building materials**, phosphate, agro-food, tourism
- Services (60 % of GDP at market prices) : telecommunications, transport, tourism

CONSTRUCTION & CIVIL ENGINEERING SECTOR

The Construction & Civil Engineering sector has featured **an annual growth exceeding 10% for the last 4 years** and actively contributes to GDP increase. This sector is sustained by public investments, the demand for housing construction and the development of infrastructures, partly financed by international donors. The investments in this sector amounted to over **EUR 820 million in 2003** of which 63% from the private sector.

The prospects seem to be promising as a result of the implementation of numerous construction projects: the new Ndiass airport (45 km from Dakar) the creation of a mining port, the development of the industrial pole of Diamniadio and the move of the administrative capital to Thiès. Moreover, Senegal obtained diversified financial supports from bilateral cooperation agencies and international donors (AFD, KfW, NDF (Nordic Development Fund), The European Union, the World Bank, the African Development Bank, the Islamic Development Bank ...).

PLAYERS

This sector is dominated by several companies, among which many subsidiaries of European groups such as FOUGEROLLE Sénégal (EIFFAGE Group), RAZEL (BILFINGER BERGER Group), SADE Sénégal (VEOLIA Group), SOGEA-SATOM Sénégal (VINCI Group), SINCO Sénégal (SINCO Spa Group), and by some Senegalese companies such as Consortium D'Entreprises (CDE), Compagnie Sahélienne d'Entreprise (CSE), Jean Lefebvre Sénégal (JLS) and Société Sénégalaise de Terrassement (SOSETER). These companies are the only ones able to implement major sites.

There are also various small companies, formal or informal, involved in smaller sites. However, during the last few years, new players have entered the Senegalese market, originating from Morocco, Côte d'Ivoire and China. Some fifty companies are members of the Professional Association of Construction and Civil Engineering Contractors of Senegal (SPEBTPS).

With respect to public players, several entities have been created so as to facilitate and promote the development of projects related to infrastructure and to the construction of buildings:

- **Agetip** (Executing Agency for Public Interest Works), intervenes as assistance work owner for the Government and local authorities. It supervises public utility projects financed by the Senegalese government and by donors.
- **APIX** (National Agency in charge of Investment Promotion and major projects), placed under the control of the Presidency of the Republic in order to foster the promotion of foreign investments, is also responsible for providing assistance to the delegated project management of the major Presidential projects (new airport, rehabilitation of the autonomous port of Dakar...).
- **AATR** (Autonomous Agency for Public Road Works) is in charge of the coordination of road development projects and has financial autonomy.

INFRASTRUCTURES

- **Roads:** the Senegalese road network covers 14,741 km, of which 4,722 km are asphalt coated. The PST2 (2nd Sectorial Transport Program) for 2000-2006 led to positive results both in terms of institutional reforms and investments within all sub-sectors (road, railway, port and maritime sub-sectors, air, environment and social sub-sectors, rural transport etc.). Several large sites are on-going mainly:
 - **the rehabilitation of the national road n° 1** between Mbirkelane and Tambacounda (about 137 km) financed by the EU
 - the rehabilitation of roads in Casamance Cap Skirring - Ziguinchor and Ziguinchor – Mpack (90 km), financed by the EU
 - **the execution of the first segment of the toll highway**, Dakar-Diamniadio, aiming at the decongestion of the interurban traffic of Dakar. In a second phase, the highway will connect Diamniadio to Thiès and will service the new international airport “Blaise Diagne ” of Ndiass.
- **Railways:** the network includes 906 km with a main axis linking Dakar to Bamako in Mali. Transrail SA, which manages this line, has executed many railways and equipment renovation works in view of increasing substantially the transport of goods. The major projects of the Government also include **the construction of new standard gauge railways for reaching the iron mines** of Falémé and the phosphate mines of Matam (CFA 400 billion).
- **Airports:** Senegal counts 9 asphalted airports and 11 non-asphalted airports. The international airport of Dakar (Léopold Sédar Senghor) has faced a significant traffic increase in the last years and currently features approximately 1.5 million passengers per year. **The construction project of the new International airport of Dakar** (Blaise Diagne) is one of the Presidential projects. In order to achieve this project, the Government intends to resort to a Public-Private Partnership (PPP).
- **Harbours:** the country has 4 maritime ports (Dakar, the second most important port in West Africa, St-Louis, Kaoloack, Ziguinchor). Two port infrastructure projects are under consideration:
 - **the modernisation and extension of the Autonomous Port of Dakar** (EUR 60 million).
 - **the construction of the mining port of Bargny** (offshore jetty of 4,400 m) which will be used for the existing mining traffics (phosphates from Thiès and Taiba) and the future mining traffics (phosphates from Matam, sulphur, iron and gold ore from Eastern Senegal...) and for oil products (SAR, Oil Wharf from PAD).
- **Water:** in 2005, 79% of the population has access to drinking water (90% in the urban area and 54% in the rural area). The sanitation network is characterised by insufficient infrastructures and in often obsolete. The Long Term Water Sectorial Project (PELT), launched in 2002 with a budget of approximately EUR 267 million, aims at ensuring the drinking water supply of Dakar in 2012 (with World Bank, AFD, KfW, AfDB and NDF contribution). The PELT also includes a section for the consolidation of water infrastructures in Dakar and Thiès (USD 130 million) and a section aimed at renovating and developing the sanitation network (USD 99 million). The SONES is in charge of the development of infrastructures by implementing the required investments. The operation of the drinking water services in 57 cities of the country is ensured by the SDE, held at 95% by private shareholders (63% SAUR and 32% by national shareholders). The Sanitation National Office (ONAS) provides the liquid and gas sanitation works.
- **Energy:** the average household electrification rate household was 40.7% in 2003 (76% in the urban area and 12% in the rural area). In 2006, the total installed capacity of the production park was of 601.5 MW, but the real power of the production park is only 528.4 MW. The interconnected network has 495 MW (66% produced by Senelec and 34% by private production). In order to develop this sub-sector and to meet the annual 8% demand increase, an ambitious investment program has been implemented to boost the production capacities (EUR 103 million until 2008 and EUR 123 million until 2013). Investments for transport and distribution are also scheduled.

As to rural electrification, the development of which is ensured by the Senegalese Agency for Rural Electrification (ASER), 18 concessions have been identified, nine of which are financed by the World Bank and 3 by the German Cooperation (KfW).

HOUSING AND FUNCTIONAL BUILDINGS

The construction of buildings is booming in Senegal, as a result of real estate development and commercial, industrial and tourism construction projects. On the other hand, the increasing urbanisation of the Senegalese capital in an already highly saturated urban space (Dakar concentrates 80% of industries, 75% of economic and administrative activities, 30% of the population), determined the authorities to develop a new town, the future political and administrative capital of Senegal.

- **Housing:** this sector is sustained by the Senegalese population's need to access private property and by the Government housing policy. This policy is implemented by the public real estate companies (SICAP, SCAT Urban and SNHLM) and financed by some entities such as the Housing Bank of Senegal (BHS). Moreover, private real estate promoters are also involved in the housing sector. Over the period 2003-2004, **5,317 dwellings were built**, of which 217 by SNHLM, 529 by SICAP and **4,571 by private promoters**.

The important achievements of the private promoters are partly due to the housing cooperatives, a mechanism implemented by the State to facilitate the access to housing for a higher number of families. The BHS has financed an annual average of EUR 60 million.

- **Functional buildings:** there are many public investments in the education field. The Government launched a follow-up of the program related to the construction of educational buildings initiated in 2000 (141 colleges and 26 high schools built in 4 years), and programmed the construction of 13 high schools, 79 colleges and 2,000 classrooms, on an average yearly basis (with the support of AFD, IDB, KfW, NDF, USAID).

There are also various commercial, industrial and tourism construction projects, among which:

- the development of a new industrial and residential area on the Diamniadio site on 2,500 hectares of land (private investments estimated at EUR 490 million).
- the urban development program for the rehabilitation and construction of hotels, of the conference centre and a road network for the Islamic Conference to be held in Dakar in 2007.
- the development of three new touristic areas (Joal Finio, Mbodiène and Pointe de Sarène).
- the construction of mining infrastructures for the new phosphate deposits in Matam and iron and gold deposits in Eastern Senegal.

BUILDING MATERIALS

- **Cement:** two companies are present in the cement market, which is constantly increasing given the strong development of the Construction & Civil Engineering sector:
 - SOCOCIM, privatised in 1999 and which is part of the French VICAT, producing over 2 million tons per year
 - les Ciments du Sahel (CDS), with an annual production capacity of 650,000 tons.
- **Other building materials:** most building materials are imported. However, Senegal has resources such as marble, serpentinite used for ornamental stones and granite. These deposits, located mainly in the South East, are still mainly unexploited.

KEY PLAYERS

Institutions:

Ministry for Infrastructures, Equipment, Inland Transport and Maritime Internal Transport

Ex Camp Lat-Dior Corriche Dakar BP 4014 - Tel : +221 823 8351 / 8276 - Fax : +221 823 82 79

Web : www.equipement.gouv.sn

- Department of Public Works : Tel : +221 823 46 01 - Fax : +221 823 82 92
Email : direction-travauxpublics@sunumail.sn
- Department of Ports and internal maritime transport - Tel : +221 849 07 60 - Fax : +221 823 82 79
- Department of General Administration and Equipment - Tel : +221 823 7456

Ministry for Mines and Energy

Building Administratif BP 4029 4è Etage, Dakar - Tel : +221 849 7000 / 823 8716 - Fax : +221 823 4470

- Department of General Administration and Equipment : Tel : +221 849 7347
- Department of Mines and Geology : Tel : +221 822 0419
- Department of Energy : Tel : +221 821 1542 - Fax : +221 821 1544

Ministry for Urbanism and Territory Planning

Ex. Camp Lat DIOR - Avenue Peytavin BP 4028, Dakar - Tel : +221 823 9127 / 32 78 - Fax : +221 823 62 45

Web : www.muat.gouv.sn

- Department of Urbanism and Architecture : Tel : +221 823 91 23 - Fax : +221 821 56 53
- Department of Territory Planning : Tel : +221 822 24 66 - Fax : +221 842 08 14

Ministry for Built Patrimony, Housing and Construction

Boulevard Dial DIOP, Place de l'ONU, Dakar - Tel : +221 869 15 26 / 15 47 - Fax : +221 864 59 32

Web : www.habitat.gouv.sn

- Department of Housing : Tel : 867 24 42 / 867 24 41
- Department of Constructions and school and sanitary equipment
- Department of Construction : Tel : +221 822 5201 / 842 74 79

Construction & Civil Engineering Contractors:

AGETIP – Executing Agency for Public Interest Works

Bd Djily MBAYE X Berranger Ferraud, BP 143, Dakar - Tel : +221 839 0202 - Fax : +221 821 0478

Email : agetip@agetip.sn

BATISSE S.A

KM 8 du Bd du CCD, BP 7089, Dakar - Tel : +221 832 8726 - Fax : +221 832 8254 - Email : batisse@sentoo.sn

Compagnie Sahélienne d'Entreprises (CSE)

Rocade Fann Bel-Air, BP 609, Dakar - Tel : +221 859 03 00 - Fax : +221 832 03 95

Email : cse.sn@groupecse.com - Web : www.groupecse.com

Consortium D'Entreprises (CDE)

Av Felix Eboué, Bd Maritime de Bel Air, BP 2384, Dakar - Tel : +221 839 5959 - Fax : +221 832 8610

Email : cde@sentoo.sn, cde@sonatel.senet.sn

Entreprise de Bâtiment Ibra Seck (EBIS)

Km 11 route de Rufisque Dakar, BP 18055 - Tel : +221 834 06 22 - Fax : +221 834 05 88

Email : ebis@sentoo.sn

FOUGEROLLE Sénégal

Av Felix Eboué x Route des brasseries, BP 737, Dakar - Tel : +221 839 7339 - Fax : +221 832 7152

Email : fougerolle@fougerolle.sn - Web : www.fougerolle.sn

Générale d'Entreprise (GE):

Adresse: Km 11 route de Rufisque Dakar BP : 8782 Dakar -Tel : +221 839 83 83 - Fax : +221 834 16 04

Email : dt_ge@sentoo.sn

Jean Lefebvre Senegal (EJL):

rue 3 x B Point E Dakar, BP 106 - Tel : +221 824 81 52 - Fax : +221 824 47 64 - Email : eljsen@sentoo.sn

Matforce

BP. 397, Dakar - Tel : +221 839 95 00 - Fax : +221 839 95 50 - Email : matforce@matforce.com

Web : www.matforce.com

Nouvelle Société Mine et Travaux Publics (NSMTP)

2, route du Front de Terre Dakar, BP 53 65, Dakar - Tel : +221 827 91 50 - Fax : +221 827 40 94

Email : stone@sentoo.sn

RAZEL

Route de N'Gor, Route des Almadies, BP 2064 Dakar - Tel : +221 820 02 32 - Fax : +221 820 16 19

SADE

BP 3397, KM 11, Route de Rufisque, Dakar - Tel : +221 834 0587 / 02 40 - Fax : +221 834 0615

Email : sadesen@arc.sn

SAUDEQUIP

BP. 3364, Dakar - Tel : +221 832 06 83 - Fax : +221 832 56 60 - Web : info@saudequip.com

SOGEA SATOM

Route de Rufisque, Km 6,5 Boulevard du CCD, BP 5571 Dakar, Tel : +221 865 22 45 - Fax : +221 832 32 37

SINCO Spa

57 Av Albert Sarraut, BP 3360, Dakar - Tel : +221 821 04 21 - Fax : +221 821 55 17

SOCETRA

KM 7,5 du Bd du Centenaire de la Commune, Dakar - Tel : +221 823 39 99 - Fax : +221 832 39 36

Email : socetra@sentoo.sn

SOECO

KM 4,8 Bd du Centenaire de la Commune de Dakar - BP 2865, Dakar - Tel : +221 859 9090 - Fax : +221 832 2760

Email : soeco@sentoo.sn, soeco@soeco.sn - Web : www.soeco.sn

Société Sénégalaise de Terrassement (SOSETER)

Km 18 Route de rufisque, BP 1699 Dakar - Tel : +221 839 82 62 - Fax : +221 834 83 74 -

Email : soseter@sentoo.sn

Control**ALPAGES**

BP. 17693, Dakar, Tel : +221 824 77 39 - Fax : +221 824 51 28 - Email : alpages@tpsnet.sn

BIVAC INTER.

BP. 592, Dakar, Tel : +221 865 13 74 - Fax : +221 865 13 75 - Email : bivac-dkr.lo@sn.bureauveritas.com

BUREAU VERITAS

BP. 592, Dakar - Tel : +221 865 12 20 - Fax : +221 864 05 72 - Email : bvdakar@sn.bureauveritas.com

Web : www.bureauveritas.com

SGS SENEGAL

BP. 2734, Dakar - Tel : +221 849 43 43 - FAX : +221 849 43 33 - Email : sgs_senegal@sgs.com

Web : www.sgs.com

SSIC

PL. Indépendance, Dakar - Tel : +221 889 40 40 - Fax : +221 822 78 10 - Email : ssic@sentoo.sn

Civil Engineering Studies**AFID**

BP. 1618, Dakar - Tel : +221 825 52 02 - Fax : +221 825 52 16 - Email : afid@telecomplus.sn

BACG

7, AVE SARRAUT, Dakar - Tel : +221 842 37 65

BAERA

BP. 21211, Dakar - Tel : +221 822 95 15 - Fax : +221 821 96 95 - Email : baera@sentoo.sn

BATIR

BP. 21555, Dakar - Tel : +221 822 96 29 - Fax : +221 821 94 24 - Email : batir@telecomplus.sn

BDA

25, Av Senghor, Dakar - Tel : +221 823 14 29 - Fax : +221 822 47 00

BET PLUS

BP. 8117, Dakar - Tel : +221 820 85 25 - Fax : +221 820 39 65 - Email : betndir@telecomplus.sn

BUREST

25, Av Pompidou, Dakar - Tel : +221 822 95 55 - Fax : +221 822 95 75 - Email : burest@syfed.refer.sn

CET ROUTE

35, W Scat Urbam, Dakar - Tel : +221 827 97 27 - Fax : +221 827 97 27 - Email : cet-route@sentoo.sn

EERI

BP. 10335, Dakar - Tel : +221 824 14 78 - Fax : +221 824 14 82 - Email : eeri@telecomplus.sn

ERECO

BP. 21176, Dakar - Tel : +221 821 86 98 - Fax : +221 821 92 53 - Email : ereco@sentoo.sn

GROUPE ATEPA

BP. 2191, Dakar - Tel : +221 865 11 11 - Fax : +221 824 90 72 - Email : atepa@sentoo.sn

Web : www.atepa.com

GTD

BP. 3911, Dakar - Tel : +221 821 15 00 - Fax : +221 823 89 67 - Email : ac@telecomplus.sn

Web : www.architecture-et-climat.com

GTK INTER.

1, PL. Indépendance, Dakar - Tel : +221 585 40 66 - Email : gtkconsulting@yahoo.fr

TABEX

BP. 7472, Dakar - Tel : +221 831 03 03 - Fax : +221 831 03 33 - Email : tabex@sentoo.sn

TROPIS

BP. 26405, Dakar - Tel : +221 823 42 91 - Fax : +221 823 42 91 - Email : acoly@refer.sn

Intermediary Organisations**APIX- National Agency in Charge of the Promotion of Investments and Major Projects**

52-54 rue Mohamed V, BP 430, CP18524, Dakar - Tel : +221 849 0555 - Fax : +221 823 9489

Email : contact@apix.sn - Web : www.apix.sn

ODAS - Order of architects of Sénégal

17 boulevard de la République, Dakar, BP 6384 - Tel : +221 821 04 76 - Email : mberthe@sentoo.sn

SEBTPS - Professional Association of Construction and Civil Engineering Contractors of Senegal

7, Rue Jean Mermoz, BP 1520, Dakar - Tel : +221 823 2508 - Fax : +221 823 8021

SNBTP - National Association of Construction and Civil Engineering Companies

5 Avenue Carde, BP 3819, Dakar - Tel : +221 823 0974 - Fax : +221 869 2649 - Email : cnes@sentoo.sn

Real Estate**SICAP – Real Estate Company of CAP**

BP 1094, Dakar - Tel : +221 865 1600 - Fax : +221 824 8860 - Email : sicap@sicap.fr

SNHLM – National Company of Moderate Rent Housing

Rue 34, Colobane, B.P : 401, Dakar - Tel : +221 889 6000 - Fax : +221 - Email : snhlm@snhlm.sn

Web : www.snhlm.sn

Water / Energy / Transport**AATR – Autonomous Agency for Road Works**

Fann Résidence, Rue David Diop, BP 25242, Dakar Fann - Tel : +221 869 0751 - Fax : +221 864 4833

Email : atr@sentoo.sn

CETUD – Executive Council of Urban Transport of Dakar

Ex TP-Som Rte du Front de Terre Hann, BP 17265, Dakar Liberté - Tel : +221 859 4720 / 4722

Fax : +221 832 5686 - Email : cetud@cetud.sn - Site : www.cetud.sn

Autonomous Port of Dakar

21, Bd de la Libération, BP 3195, Dakar - Tel : +221 849 4545 - Fax : +221 822 6296 - Email : pad@portdakar.sn

Web : www.portdakar.sn

SDE - Sénégalaise des Eaux

Centre de Hann. Route du Front de Terre, BP 3251, Dakar - Tel : +221 839 3703 - Fax : +221 839 3705

Email : eau@sde.sn

SENELEC - National Electricity Company of Senegal

Hann, Route des Pères Maristes, BP 93, Dakar - Tel : +221 839 9430 - Fax : +221 832 0489

SONES - National Water Company of Senegal

Route du Front de Terre. Hann, BP 400, Dakar - Tel : +221 839 7800 - Fax : +221 832 2038
Email : sones@primature.sn

Banks**BHS – Banque de l’Habitat du Sénégal**

Bd du Général de Gaulle, BP 229, Dakar - Tel : +221 839 3333 – Fax : +221 823 8043 - Email : bhs@bhs.sn
Web : www.bhs.sn

BICIS - Banque Internationale pour le Commerce et l’Industrie du Sénégal

2, avenue Léopold Sédar Senghor, BP 392, Dakar - Tel : +221 839 0390 / 0391 - Fax : +221 823 3707
Email : bicis@africa.bnpparibas.com - Web : www.bicis.sn

CBAO – Compagnie Bancaire de l’Afrique Occidentale

1 Place de l’Indépendance, BP 129, Dakar - Tel : +221 839 9696- Fax : +221 823 2005
Email : cbaonet@sentoo.sn

Citibank

2, Place de l’Indépendance, BP 3391 Dakar - Tel : +221 849 1111 - Fax : +221 823 8817

Crédit Lyonnais

Bd El Hadji Djily Mbaye X Rue Huart, Dakar - Tel : +221 849 0000 - Fax +221 823 8430
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SGBS - Société Générale de Banques au Sénégal

19, Avenue Président Léopold Sédar Senghor, BP 323, Dakar - Tel : +221 839 5500 - Fax : +221 823 9036
Email : mailing.sgbs@socgen.com

BST - Banque Sénégal-Tunisienne

97, Avenue Peytavin, BP 4111, Dakar - Tel : +221 849 60 60 - Fax : +221 823 82 38 - Email : bst@bst.sn