N° 009 november 2017

THE ECONOMIC OUTLOOK || 4th Quarter 2016




CONTENTS

FOREWORD

« Mastering key indicators for better action »

One of the key concerns of the Cameroon National Shippers' Council (CNSC) is the continuing monitoring of international trade performance indicators with a view to mastering information relating to import, export and transit operations.

A regular analysis of these indicators and some highlights of transport and foreign trade updates in Cameroon are of great importance for us since we are committed to helping sector players anticipate their logistics arrangements and to make relevant decisions for the success of their activities.

The Economic Outlook, a publication of the CNSC, which is a supply chain monitoring tool that seeks to provide full information on a regular basis regarding the evolution of data throughout the entire chain, therefore seeks to provide inputs into private and public policy design.

The special feature of this issue focuses on road transport agreements between Cameroon and Chad, on the one hand and between Cameroon and the Central African Republic on the other.

It also focuses on their scope of application, the key of cargo sharing arrangements and the conventional transit roads.

This publication also contains an extensive analysis of the evolution of key freight transport indicators. It shows that the situation in the fourth quarter of 2016 was less disturbing than in that of the previous quarter. Indeed, the average number of ships that waited at anchorage in Q4 2016 was 13 per day, 4 less than in the previous quarter. Imported containers stayed an average of 17 days at the port of Douala, half a day less than in the third quarter of 2016.

Air freight was not left out with an increase of 9% due mainly to the exportation of more goods by air (+ 15%).

This issue also contains details concerning these indicators.

Have an enjoyable reading !

Auguste MBAPPE PENDA

DOSSIER | Road transport agreements between Cameroon - Chad and Cameroon - CAR

Transit traffic from or to CAR and Chad

The Central African Republic and Chad are the only two landlocked countries in the Central African Sub Region. Consequently, both countries are bound to use road corridors in coastal nation in order to carry out international trade. Thus, goods to be transported to or from the Central African Republic pass through Cameroon, Congo or the Democratic Republic of Congo. As for Chad, its access corridors go through Cameroon, Sudan and to a certain extent Nigeria.

In the faced of this competition, Cameroon must put in place effective policies and structures for managing the Douala - N'Djamena and Douala - Bangui corridors in order to capture most of this traffic. This will be helpful for our ports (Douala and Kribi), in particular, and our economy, in general.

Presentation of the two corridors

The Douala-N'Djamena and Douala-Bangui corridors are now the major trade routes for Chad and the Central African Republic. The volume of goods transiting through Cameroon to the Central African Republic and Chad is on the rise in spite of problem of insecurity at the borders. In fact, transit goods bound for the CAR witnessed a 48% increase in 2016, after leaping from 224,394 tonnes (99,849 tonnes for exports and 124,546 tonnes for imports) in 2015 to 332,411 tonnes (203,834 tonnes for exports and 128 577 tonnes for imports). That of Chad stood at 510,712 tonnes (19% imports and 81% exports) in 2016 against 672,914 tonnes (14% for imports and 86% for imports) in 2015, representing a decrease of 24%. The main products transported for export were: wood logs, cotton, gum arabic and unroasted green coffee.

Concerning imports, the main products transported were: food products, industrial equipment, transport equipment and textiles. With regard to the itineraries, Douala-N'Djamena corridor is 2100 km long by road and as concerns combined transport it is 922 km of rail and 1178 km of road. It takes between 6 and 8 days to cover this distance. The itineraries of this corridor are as follows:

In Cameroon

a) Roadways

i) Douala - Yaounde - Nanga/Eboko - Bertoua - Garoua Boulai - Meiganga - Ngaoundere - Garoua - Maroua - Kousseri – Chadian border;

ii) Douala - Yaounde - Abong/Mbang - Bertoua - Garoua Boulai - Ngaoundere - Garoua - Figuil - Chadian border;

iii) Douala - Yaounde - Abong/Mbang - Bertoua - Garoua Boulai - Ngaoundere - Touboro ;

iv) Douala - Yaounde - Abong/Mbang - Bertoua - Garoua Boulai - Ngaoundal - Chadian border.

b) Combined routes (rail)

i) Douala - Ngaoundéré by railway;

ii) Ngaoundere - Garoua - Figuil - Chadian border;

iii) Ngaoundere - Garoua - Maroua - Kousseri - Chadian border;

iv) Ngaoundere - Touboro - Chadian border;

v) Douala - Ngaoundere by railway;

vi) Ngaoundal - Meiganga - Chadian border.

In Chad

Roadways

i) Ngueli - Ndjamena ;

ii) Lere - Moundou - Sarh ;

iii) Larmanaye - Moundou - Sarh ;

iv) Gadjibian - Doba - Moundou.

Concerning the Central African Republic, Douala-Bangui corridor is 1500 km long by road and for combined road / rail transport, it is 867 km by road and 922 km by rail. The duration of the trip varies from 2 to 14 days. It has the following itineraries:

In Cameroon territory.

a) Roadways

i) Douala - Yaounde - Nanga/Eboko - Bertoua-Garoua Boulaï ;

ii) Douala - Yaounde - Abong/Mbang - Bertoua - Batouri Kentzou

iii) Douala - Yaounde - Bertoua - Batouri Yakadouma Ngoka Border;

b) Combined routes (Rail - Road)

i) Douala - Belabo - Bertoua - Garoua Boulaï ;

ii) Douala - Belabo - Bertoua - Batouri - Kentzou ;

iii) Douala Ngaoundere - Meiganga - Garoua Boulaï.

In Chadian territory

Roadways

i) Bangui - Bouar - Baboua - Beloko ;

ii) Bangui - Camot - Berberati - Gamboula ;

iii) Bangui - Bossangoa - Pende - N'dim - Bouar - Beloko ;

iv) Nola - Tomori frontière

Institutional framework

Cognisant of the importance that access to the sea through the Port of Douala plays in their economies, the governments of Cameroon, the Central African Republic and Chad expressed their political will on the occasion of the negotiation and signing of the two " Conventions on Road Transport "between Cameroon and Chad (13 April 1999), on the one hand, and between Cameroon and the Central African Republic (22 December 1999), on the other hand.

The two agreements amended and supplemented the two previous freight agreements signed in Yaounde in April 1975 with Chad and in August 1989 with the Central African Republic respectively.

The two 1999 Conventions, which refer to the UNCTAD Convention of 8 July 1965 on Transit Trade of Landlocked States and the Acts of UDEAC adopting (i) the Convention regulating land transport in UDEAC (19 December 1984), and (ii) the Inter-State Convention on the Road Transport of Various Goods (5 July 1996), seek to provide reliable, fast and competitive transit transport in terms of tariffs, quality of service and security.

The objectives of the two conventions, which deal with road transport regarding carriage of transit freight, are to:

- define transit freight routes: select legalised land transport routes: entirely road or a combination of road and rail;
- formalise the application of freight quotas, for Cameroonian carriers and landlocked countries for goods to be transported from Douala, as follows: with Chad: 65% for Chadian carriers and 35% for Cameroonian carriers. With the Central African Republic: 60% for Central African carriers and 40% for Cameroonian carriers;
- institute a special sticker for trucks and an international safe conduct document in addition to the international way bill for each trip made by a vehicle in transit;
- determine single checkpoints which should bring together all the administrations that check the transit of goods along the routes, the aim being to reduce the number of checkpoints for vehicles.

These agreements also provide that:

- the responsibility for sharing transit freight, issuing waybills and managing any other transit transport facilitation instrument is entrusted to the Cameroon Land Freight Management Office (BGFT) the Central African Land Freight Management Bureau (BARC) and the Chadian National Freight Bureau (BNF);
- regular exchanges of statistical data on international land transport flows and their distribution among carriers are carried out between the bodies mentioned above;
- the Permanent Joint Technical Committee on Transport shall be responsible for taking stock of transport relations along the said corridors and for resolving any difficulties that may arise in the application of these conventions. This commission shall meet at least once a year;
- the Ministers of Transport of the signatory countries shall be responsible for the application of this Convention.

Procedures for the transit of goods and their control on leaving the territory

A Ministerial Order of 2 January 2003 signed by the Cameroon Minister of Finance and Budget on customs regulations on the transit of goods improves the transit system by speeding up the clearance procedure.

This Instruction shows that in Cameroon, transit is by land (road and rail) under model IM8 of customs declarations and according to the following rules:

- the routes set out in the Conventions are the only accepted routes. CAR / Cameroon and Cameroon / Chad conventions on land transport of goods are the only accepted routes for transit to the CAR and Chad;
- a "transit permit" is issued when the goods are collected and signed by Head of the Transit Department when the goods are loaded on a means of transport;
- The "transit permit" becomes the customs document identifying precisely the goods in transit and has the same value as a D15 (a copy of which is attached to the transport document).
- where shipments are combined road/rail with a break at Belabo or at Ngaoundere, new documents, cancelling those at the start, are issued to accompany the goods on the Belabo/RCA and Ngaoundere/Chad routes;
- the customs services only control goods at the checkpoints set up under the conventions;
- the customs officers on duty at check points ensure that the seals have not been broken , the transit documents have not been altered, and the numbers refer to the goods being transported;
- customs officers sign transit permits to say that the seals are not broken, and indicate the number of parcels that are being transported;
- however, if the seals are broken, the transport documents shall be noted to this effect and the customs officers shall verify the shipment and make an official report. A report may be validly drawn up by a gendarmerie unit or an administrative authority;
- on crossing the border the transport document shall be signed (and not in Bangui or N'djamena as it is currently the practice) and sent to Douala directly for settlement.
- the settlement is made in the customs office where the transport document was issued on presentation of the transit permit at the different check points up to the destination.
- all D15 declarations shall be covered by a bank guarantee covering the duties and taxes, with the

exception of special waivers granted by the Minister of Finance and Budget.

Facilitation instruments: customs documents

Each truck must carry the following Customs documents:

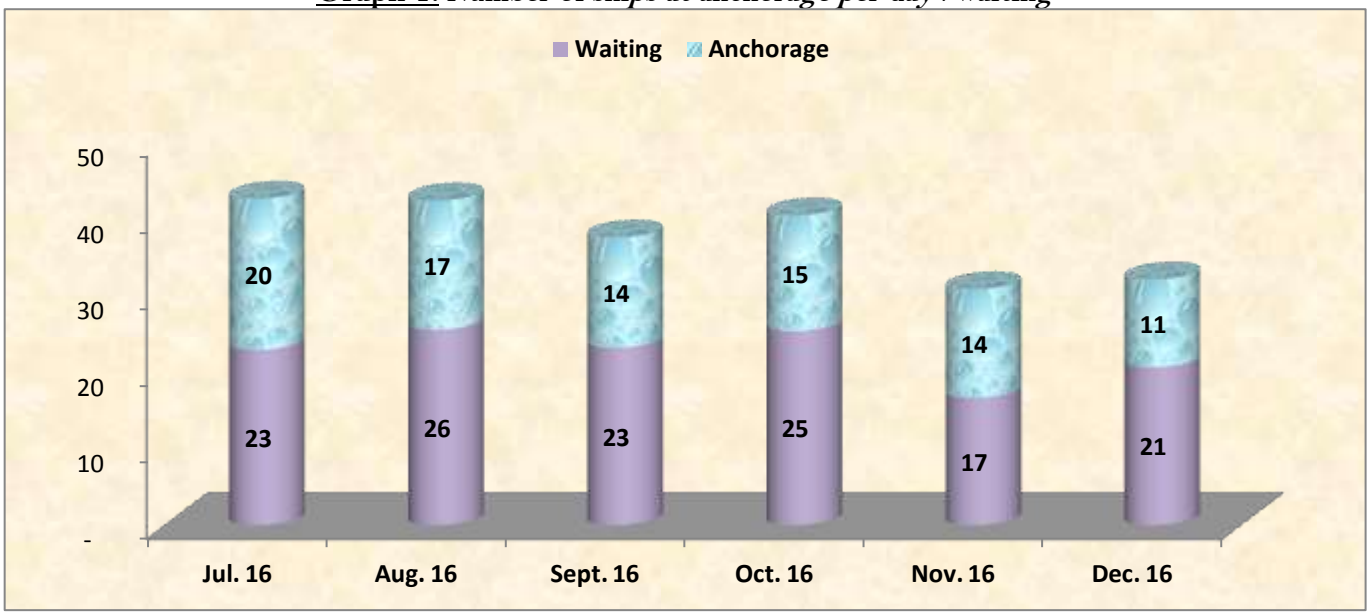
- the road manifest prepared by the freight forwarders.
- D15 or the « transit permit » prepared by the Cameroon Customs;
- road map which is the customs document prepared either by the Central African or Chad Customs when the truck is entering the country.

Each of these documents has its own format and different provisions as to the areas to be filled out.
For further information on the transit procedure in Cameroon, please see the CNSC foreign trade information portal, the Cameroon Trade Hub, using the following link: www.cameroontradehub.cm

SHIPS | Number of ships at anchorage per day / waiting

Gradual decrease of ships at anchorage (11 ships on average per day in December)

Graph 1: ***Number of ships at anchorage per day /waiting***



Source: *CNSC / PAD*

During the second half of 2016, the average number of ships waiting at anchorage per day decreased. On the other hand, the average number of ships expected seesawed. Concerning awaited vessels, their number decreased between the 3rd and 4th quarter of 2016 (24 ships on average per day against 21). The number of vessels announced at the Harbour Master's Office peaked in August (an average of 26 vessels per day), and reached its lowest ebb in November (an average of 17 vessels per day).

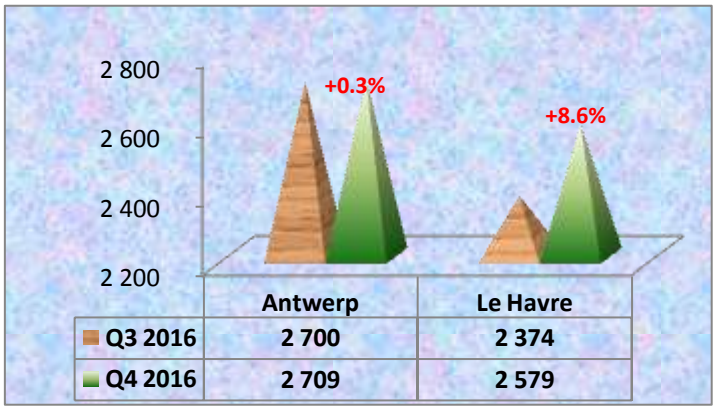
As for the ships waiting at anchorage, the same observation was made between the 3rd and 4th quarters of 2016. It dropped from an average of 17 ships to 14 ships per day. The month of July registered the highest number of ships at anchorage, with a daily average of 20 vessels.

It is noteworthy that the peak recorded during the second quarter (26 vessels in one day) was observed during this month. The month of December, however, witnessed the lowest number of ships in the second half of 2016. During this month, the number of ships at anchorage ranged between 8 and 17, with a daily average of 11 vessels.

SHIPPING COST | 20' Container

Average shipping cost increased by 20% at Le Havre port (8.6%) and stabilised in Antwerp

Graph 2: *Average cost of shipping 20' refrigerated container (in €)*



The cost of shipping a 20-ft refrigerated container from the main ports of shipment increased on average. During the fourth quarter of 2016, shippers reportedly paid an average of 2,579€ for shipping a container from Le Havre to the port of Douala. This represents an increase of 8.6% compared to the 3rd quarter of the same year. At the port of Antwerp the increase was insignificant; a difference of about € 10 was observed during the study period. In the two main ports of shipment of this type of cargo, 3 out of 4 containers were shipped to the port of Douala for less than 2,700€.

Source : *CNSC*

Table 1: *Average cost of shipping a 20'dry container (in €)*

COUNTRY	PORTS	Q3 2016	Q4 2016	Variation	COUNTRY	PORTS	Q3 2016	Q4 2016	Variation
Ivory Coast	Abidjan	1,237	1,224	-1.0%	China	Qingdao	1,973	1,964	-0.5%
South Africa	Durban	1,375	1,328	-3.5%		Shanghai	2,010	2,029	0.9%
Germany	Hamburg	1,640	1,673	2.0%	India	Nhava Sheva	2,002	1,996	-0.3%
Belgium	Antwerp	1,648	1,620	-1.7%	EAU	Jebel Ali	1,969	1,999	1.5%
Spain	Valence	1,626	1,633	0.5%	USA	Houston	2,309	2,355	2.0%
France	Le Havre	1 637	1 650	0.8%					

Source : *CNCC*

The main African ports of loading shipping cost witnessed a decrease; 1% in Abidjan and 3.5% in Durban.

In Europe, the port of Hamburg witnessed a 2% increase in the average shipping cost. The average shipping cost in the port of Antwerp witnessed a 1.7% drop. Those of Valence and Le Havre remained almost stable with variations lower than 1%. During the study period all these European ports witnessed a higher volatility in the tariffs charged; more or less 300€ of the average against 100€ in the previous quarter.

Just as in the previous quarter, the cost of shipping one container on four was at least 1800€.

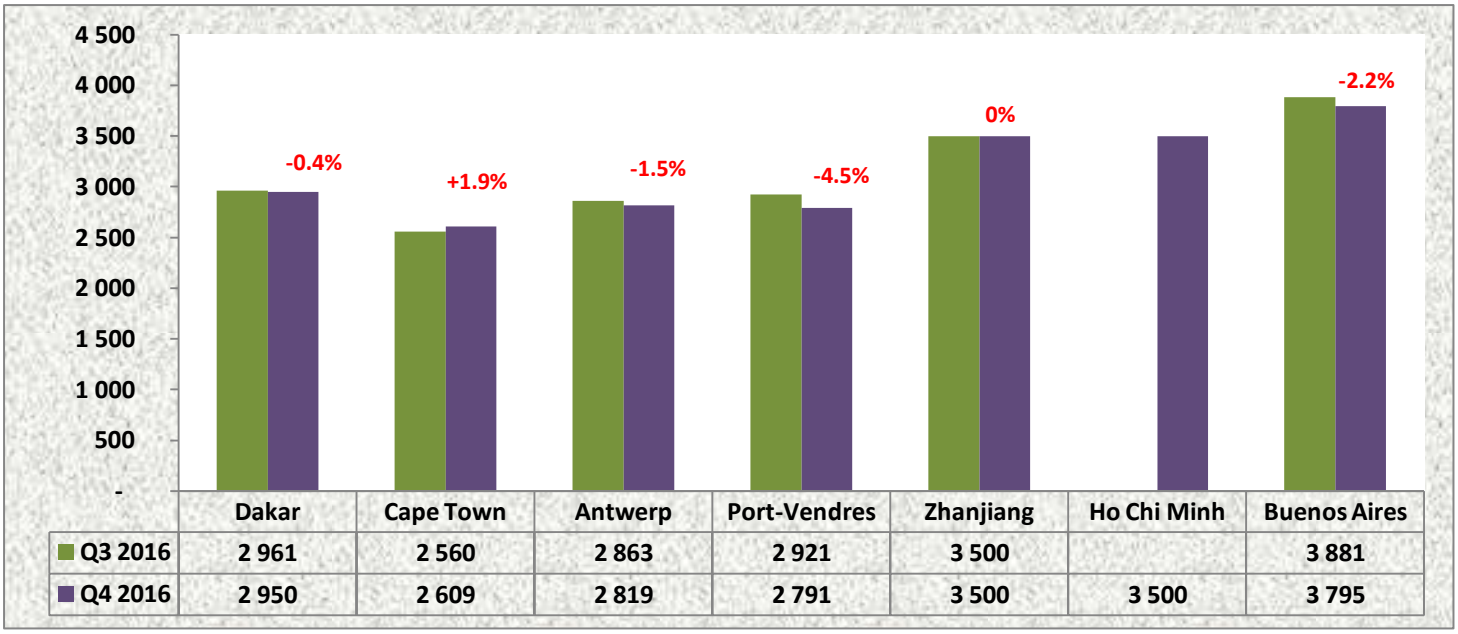
Apart from the port of Jebel Ali, the change in the cost of shipping 20-foot dry containers from Asia averaged less than 1%. The port of Jebel Ali recorded an increase of 1.5%. During the quarter under review, shipping one container out of two cost less than 2,000€.

At the Port of Houston, the average cost of shipping such a container rose from 2,309€ to 2,355€; representing an increase of 2%. During the fourth quarter, the prices charged were more dispersed than in the previous quarter. Indeed, the maximum difference was 350€ against 250€ for the third quarter of 2016.

SHIPPING COST | 40' container

A 4.5% drop in the average cost of shipping a 20' refrigerated container to Port-Vendres and stability registered at the ports of Dakar and Zhanjiang

Graph 3: *Average cost of shipping a 40' refrigerated container (in €)*



	Dakar	Cape Town	Antwerp	Port-Vendres	Zhanjiang	Ho Chi Minh	Buenos Aires
Q3 2016	2 961	2 560	2 863	2 921	3 500		3 881
Q4 2016	2 950	2 609	2 819	2 791	3 500	3 500	3 795

Source : *CNSC*

The cost of shipping a 40-foot refrigerated container to the port of Dakar remained almost the same between the 3rd and 4th quarter of 2016. On average, there was a slight variation (-0.4%). Moreover, the rates were fairly close (more or less 50€ of the average) and as in the 3rd quarter, a shipper out of two reportedly paid exactly 2,970€ for shipping one container .The port of Cape Town witnessed a 2% increase of 2% in the rates charged during the 4th quarter of 2016.

In the main European ports of loading, the average cost of shipping a 40-foot refrigerated container dropped.
In the port of Antwerp, shippers reportedly spent an average of € 2,819 for shipping a container to the port of Douala.

This shows a decrease of 1.5% compared to the previous quarter. In Port-Vendres, the decline was more pronounced (-4.5%). Here, the average cost dropped from 2,921€ to 2,791€.

In the main Asian ports of loading 40' refrigerated containers, the tariff structure remained unchanged. A shipper paid 3,500€ for shipping a container to the port of Douala.

At the Port of Buenos Aires, the average cost of shipping dropped from 3,881€ to 3,795€, representing a decrease of 2.2%. On average, the 4th quarter of 2016 witnessed the lowest cost. However, during this period, the rates charged were more volatile (more or less 300€ of the average against 250€ in the previous quarter). Here, 50% of the containers each cost about 3,700€ to be shipped to the Douala Port.

SHIPPING COST 40' Container

A drop in average cost of shipping a 40 feet dry container from the port of Antwerp (-1.8%)

Table 2: Average cost of shipping a 40' dry container (in €)

COUNTRY	PORT	Q3 2016	Q4 2016	Variation
South Africa	Durban	2,008	2,038	1.5%
China	Ningbo	2,754	2,706	-1.7%
	Qingdao	2,913	2,821	-3.1%
India	Nhava Sheva	2,826	2,940	4.0%
UAE	Jebel Ali	2,987	2,940	-1.6%
Canada	Montréal	3,152	3,117	-1.1%
USA	Baltimore	3,253	3,136	-3.6%

COUNTRY	PORTS	Q3 2016	Q4 2016	Variation
Germany	Hamburg	2,622	2,658	1.4%
France	Le Havre	2,568	2,571	0.1%
Spain	Valence	2,567	2,641	2.9%
UK	Felixstowe	2,480	2,640	6.4%
Belgium	Antwerp	2,708	2,658	-1.8%
Netherlands	Rotterdam	2,480	2,664	0.5%
Italy	Genoa	2,760	2,852	3.3%

Source : CNSC

During the fourth quarter of 2016, shippers reportedly spent an average of 2,038€ for shipping a 40-foot dry container from the port of Durban to the port of Douala. This represents an increase of 1.5% compared to the previous quarter.

Apart from the port of Nhava Sheva (+4%), which witnessed an increase in the average cost of shipping this type of container, all the main Asian ports of loading experienced a drop in shipping costs. In Qingdao (-3.1%), where the decrease was most significant, the average cost of shipping dropped from € 2,913 to 2,821€ between the 3rd and 4th quarter of 2016. The ports of Ningbo and Jebel Ali registered similar variations (less than 2%) with average shipping costs of 2,706€ and 2,940€, respectively.
In all the main Asian ports of loading, 50% of containers were shipped for a price ranging from 2,200€ to 2,800€.

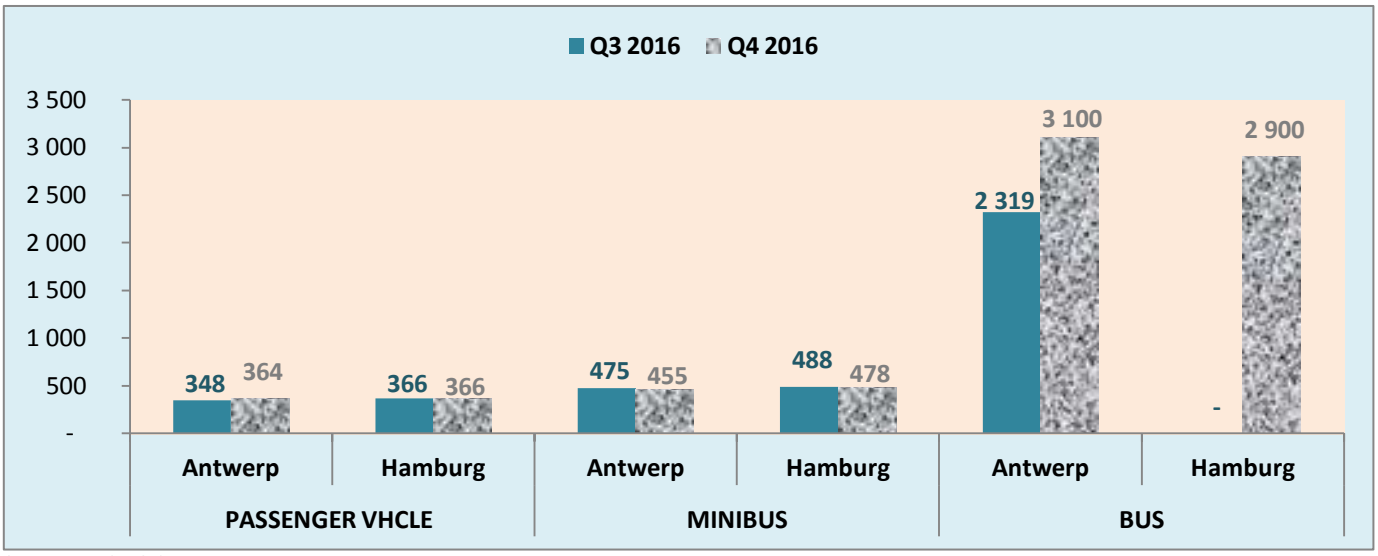
In the Americas, the main ports of loading recorded an average reduction in the cost of shipping this type of packaging. At the Port of Montreal, the variation was 1.1% and the average shipping cost in the fourth quarter of 2016 was 3,117€. One Shippers out of three reportedly spent exactly 3,000€ for shipping a container to the port of Douala.

At the port of Baltimore, which registered a 3.6% drop, the rates were more dispersed (more or less 320 € of the average, 50€ more than the port of Montreal). Here, one shipper out of three paid exactly 3,125€ for shipping a container to the port of Douala.
Of all the main European ports of loading 40-foot dry containers, only the port of Antwerp registered a lower average shipping cost (-1.8%). At the ports of Rotterdam and Le Havre, the rates charged were almost the same between the two quarters considered. The most significant variations were observed in Felixstowe (+ 6.4%), Genoa (+ 3.3%) and Valencia (+ 2.9%). 75% of shippers who used European ports to ship their cargo paid between 2,000€ and 2,800€ for each of their containers.

SHIPPING COST | Vehicles

Increase in the average cost of shipping a passenger vehicle from the port of Antwerp (+ 4.6%) against stability in Hamburg

Graph 4: *Average cost of shipping a passenger and public transport car (in €)*



Source : *CNSC*

The average cost of shipping a passenger vehicle in the fourth quarter of 2016 remained the same at the port of Hamburg (366€). The prices charged therein remained unchanged with a maximum average difference of 100 € and 50% of the tariffs paid were equal to 350€. The average cost of shipping a passenger vehicle at the port of Antwerp witnessed an increase of about 5%. It went from 348€ to 364€ between the 3rd and 4th quarter 2016. 75% of the rates charged for the shipping a passenger vehicle to the port of Douala ranged between € 300 and € 350.

The cost of shipping minibuses from the two main ports of loading, on average, witnessed an increase. At the port of Antwerp, the decrease was more pronounced (-4.2%), the average cost of shipping a minibus dropped from 475€ to 455€. The average difference sometimes reached 200€. However, it was observed that only 25% of the tariffs were above 450€.

At the port of Hamburg (-2.1%) fares were more dispersed in the 4th quarter of 2016 (more or less than 180 € against 75€ in the 3rd quarter of 2016).

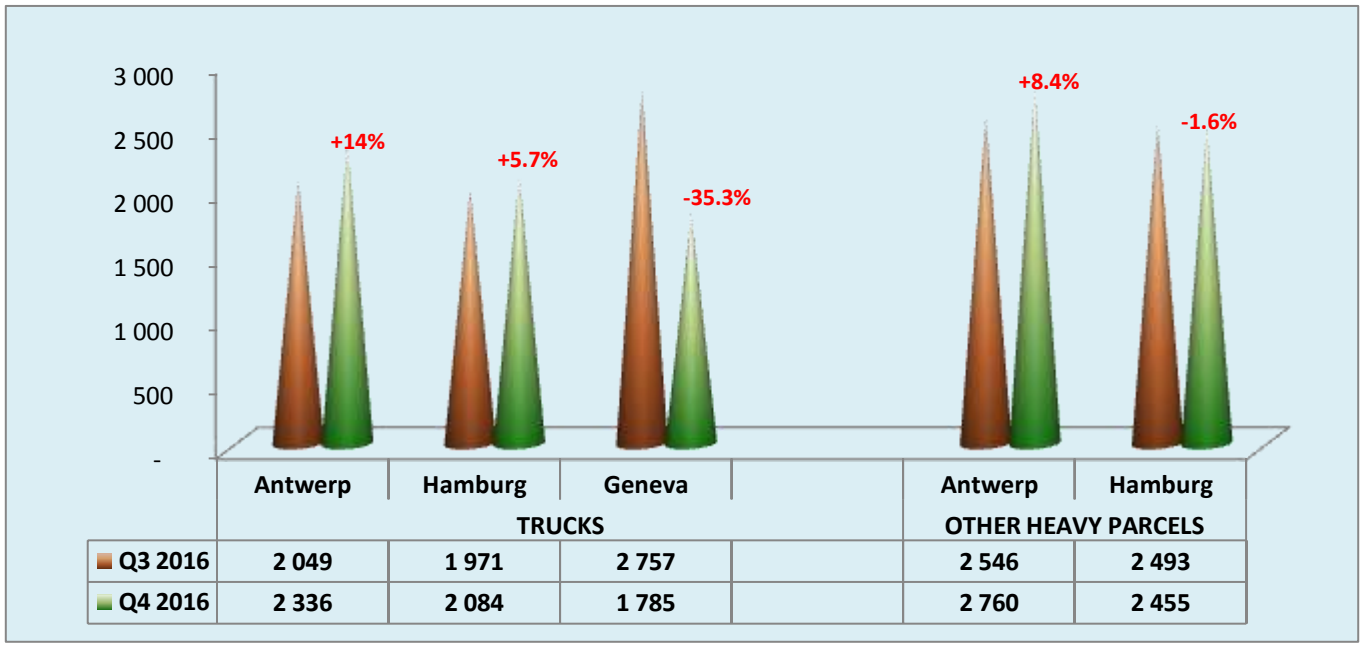
Three out of four minibuses were shipped for less than 490€. With regard to buses, it should be noted that the port of Hamburg, which did not ship this type of vehicle during the third quarter of 2016, did so during the period under study. Shippers reportedly paid an average of 2,900€ for shipping their vehicle.

At the Belgian port, the average cost of shipping a bus dropped from 2,319€ to 3,100€, representing an increase of 33.6%. Indeed, during the 4th quarter of 2016, the tariffs charged registered a great disparity, the average difference sometimes reaching 1,500€, twice more than in the 3rd quarter of 2016. Additionally, the cost of shipping one bus out of two was at least 4,700€.

SHIPPING COST | Vehicles

Of the main ports of loading trucks, only that of Geneva (-35.3%) registered a decrease in the average shipping cost

Graph 5: *Average cost of shipping a 40' dry container (in €)*



	TRUCKS				OTHER HEAVY PARCELS	
	Antwerp	Hamburg	Geneva		Antwerp	Hamburg
Q3 2016	2 049	1 971	2 757		2 546	2 493
Q4 2016	2 336	2 084	1 785		2 760	2 455

Source : *CNSC*

Of the main ports of loading of cargo transport vehicles, only the port of Geneva witnessed a decrease (- 35.3%) in the average cost of shipping this type of vehicle. Indeed, it dropped from 2,757€ to185€ between the 3rd and 4th quarter of 2016. Close to 75% of the amounts paid by shippers as shipping costs oscillated between 1,200 € and 1,900€. In Antwerp (+ 14%) and Hamburg (+ 5.7%), the average shipping cost witnessed an increase and values in the fourth quarter of 2016 amounted to 2,336€ and 2,084€ respectively. The dispersion of the tariffs practiced in these two ports was the same (more or less 800 € of the average). At the Belgian port, one out of two shippers reportedly paid more than 2,150€ for shipping their vehicle. In the German port, 25% of shippers spent at least 2,500€ for shipping their vehicles to the port of Douala.

The average cost of shipping building and public works machinery from the port of Antwerp rose from € 2,546 in the third quarter of 2016€ to 2,760€ in the fourth quarter of 2016, representing an increase of 8.4%. One out of four shippers paid at least 3,500€ for shipping machinery to the port of Douala. At the port of Hamburg, there was less variation between the 3rd and 4th quarter. Indeed, the average cost of shipping construction equipment increased from 2,493€ to 2,455€, showing a decrease of 1.6%. 75% of importers reportedly paid less than 2,850€ for shipping their machines from the German port to the port of Douala.

PORT DWELL TIMLE| Containers

During Q4 2016, December showed the worst record regarding the removal of import containers

Table 3: *Port dwell time for containers bound for Cameroon (in days)*

	Jul.-16	Aug.-16	Sept.-16	Oct.-16	Nov.-16	Dec.-16
Average	16.3	17.6	18.2	17.7	14.1	18.8
Variation	3.2%	8%	-3.4%	-2.7%	-20.3%	33.3%
1st Quartile	8	8	8	8	6	10
2nd Quartile	14	14	14	13	12	16
3rd Quartile	21	23	23	24	19	24

Source : *National Trade Facilitation Committee (CONAFE)*

In the fourth quarter of 2016, the average dwell time for import containers at the port of Douala was approximately 17 days, that is to say half a day less than in the previous quarter.

The transition between these two quarters showed a decrease (-2.7%) in the average import container dwell time. In fact, during the month of October 2016, imported containers spent an average of 17.7 days at the DIT terminal, that is to say half a day less than in September 2016.

The month of November witnessed the shortest dwell time with an average of 14 days. In addition, a quarter of the containers released this month spent less than 6 days. Also, less than 25% of shippers spent more than 21 days to complete all customs clearance formalities. This was a first for the whole of the second half of 2016.

During the month of December 2016, the average dwell time for an import container at the import witnessed an increase of 33.3% (approximately 19 days). During this month, it took 10 days to remove 25% of shipments from the port. It took more than 21 days to remove three out of ten containers from the DIT. The month of December recorded the longest dwell time in the second half of 2016.

PORT DWELL TIME| Vehicles

In the fourth quarter of 2016, December witnessed the shortest time for the removal of used cars.

Table 4: *Port dwell time for imported used cars at the Douala Port (in days)*

	Jul.-16	Aug.-16	Sept.-16	Oct.-16	Nov.-16	Dec.-16
Average	15.9	14.4	16.8	19	13.2	12.8
Variation	4.6%	-9.4%	16.7%	13.1%	-30.5%	-3%
1st Quartile	7	6	7	7	7	4
2nd Quartile	11	11	11	16	10	9
3rd Quartile	18	17	22	25	17	16

Source : *Douala Mixed Fruit Terminal (TMFD)*

During the fourth quarter of 2016, imported used vehicles spent an average of 15 days at TMFD like in the previous quarter. However, a monthly analysis shows a difference during these two periods. In the third quarter of 2016, the dwell time seesawed with an average ranging between 14 and 16 days. However, the last three months of the year witnessed a downward trend; ranging from 19 days to just under 13 days.

During the fourth quarter of 2016, imported used vehicles spent an average of 15 days at TMFD like in the previous quarter. However, a monthly analysis shows a difference during these two periods. In the third quarter of 2016, the dwell time seesawed with an average ranging between 14 and 16 days. However, the last three months of the year witnessed a downward trend, ranging from 19 days to just under 13 days.

The period from September to October witnessed a 13.1% increase in the average dwell time. Indeed, it rose from about 17 days to 19 days.

These two months recorded the longest car removal time. In October 2016, there was a significant drop in vehicle removal time at the TMFD. Half of the shippers reportedly removed their cars at least 16 days after their arrival at the car park. The month of November recorded less disturbing results.

Shippers reportedly spent an average of 13 days to remove their cars from the TMFD that is to say 6 days less than in October of the same year. Additionally, in November, 50% of vehicles left the park after less than 10 days.

December undoubtedly recorded the fasted car clearance time in the second half of 2016. Shippers completed all the necessary car clearance formalities in an average of 13 days. During this period, 25% of shippers were able to remove their vehicles from the TMFD Park in less than 4 days. Additionally, one out of four shippers reportedly needed at least 16 days to complete customs clearance formalities for their vehicle.

AIR FREIGHT | Tonnage

1.6% increase in air freight to Cameroon

Following an 11.3% decrease in air cargo recorded during the 3rd quarter of 2016, this freight witnessed approximately 9% increase in 4th quarter of 2016. In fact, it rose from 5,267 to 5,723 tonnes between the last two quarters of 2016.

Table 5: *Import air cargo by type of goods (in tonnes)*

Type of goods	Q3 2016		Q4 2016		Variation
	Tonnage	%	Tonnage	%	
OTHERS PARCELS	1,380	54.5	1,515	58.8	9.8%
CONSOLIDATION	567	22.4	559	21.7	-1.5%
DANGEROUS PRODUCTS	256	10.1	226	8.8	-11.7%
PHARMACEUTICAL PRODUCTS	79	3.1	87	3.4	9.6%
PERISSABLES	48	1.9	35	1.4	-26.4%
DIPLOMATIC PARCELS	22	0.9	27	1.1	23.5%
OTHERS	181	7.1	126	4.9	-30%
TOTAL	**2,534**	**100**	**2,575**	**100**	**1.6%**

Source : *ADC*

Concerning imports, the tonnage of goods transported by air increased from 2,534 tonnes in the third quarter of 2016 to 2,575 tonnes in the fourth quarter of 2016. This represents an increase of 1.6%. The volume of goods imported by air was smaller in the fourth quarter; representing 45% of total airfreight as against 48.1% in Q3 2016.

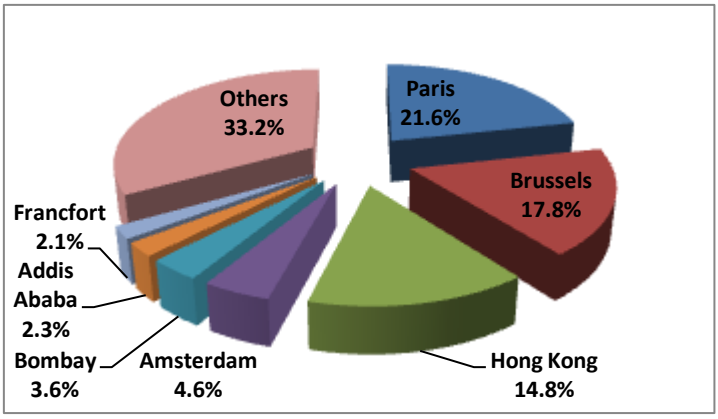
The composition of import air cargo did not change; miscellaneous parcels (58.8%) still ranked first followed by consolidations (21.7%) and dangerous goods (8.8%).

Perishable goods recorded the most significant variation with their tonnage dropping from 48 to 35 representing a decrease of 26.4%. Diplomatic packages recorded a similar variation but in the opposite direction. In the forth quarter of 2016, 27 tonnes of diplomatic cargo were offloaded at one of Cameroon's international airports.

Pharmaceuticals and miscellaneous parcels each registered an increase of approximately 10%.

Consolidations, which recorded the most significant variation in the third quarter (+ 65%), dropped and were estimated at 559 tonnes in the fourth quarter of 2016, representing a decrease of 1.5%.

During the period under study, air cargo bound for Cameroon originated mainly from Paris (21.6%), Brussels (17.8%), Hong Kong (14.8%) and Amsterdam (4.6%). Lagos, which accounted for 8% of air cargo imports in Q3 2016, contributed only 0.7% during the referenced period.



AIR FREIGHT | Tonnage

15% increase in air freight from Cameroon

Table 6: *Export air freight per type of goods (in tonnes)*

Type of goods	Q3 2016		Q4 2016		Variation
	Tonnage	%	Tonnage	%	
FOOD	1,586	58.0	1,617	51.4	2%
PERISSABLES	584	21.4	919	29.2	57%
OTHERS PARCELS	355	13.0	392	12.5	10%
FLOWERS	41	1.5	69	2.2	67%
CONSOLIDATIONS	35	1.3	27	0.9	-23%
PHARMACEUTICAL PRODUCTS	15	0.6	22	0.7	45%
DANGEROUS PRODUCTS	6	0.2	8	0.3	41%
OTHERS	110	4.0	94	3.0	-15%
TOTAL	**2,733**	**100**	**3,148**	**100**	**15%**

Source : *ADC*

During the fourth quarter of 2016, goods exported by air accounted for 55% of overall airfreight, which is 4 points higher than the previous quarter. Its tonnage rose from 2,733 tonnes in the third quarter of 2016 to 3,148 tonnes in the fourth quarter of the same year; representing an increase of 15%.

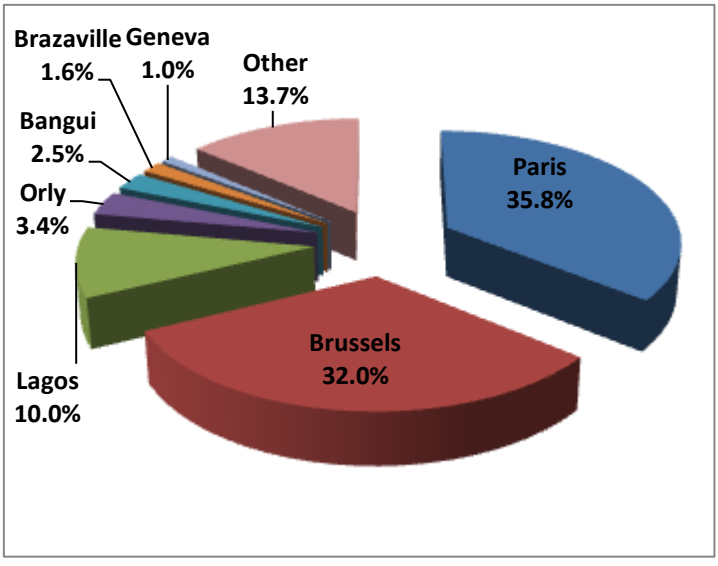
Like import air freight, the composition of air export cargo did not change. It comprised mainly food (51.4%), perishable goods (29.2%) and miscellaneous parcels (12.5%). Other types of cargo each accounted for less than 3% of export air cargo.

Apart from consolidations whose tonnage dropped by 23%, all other types of goods with of more than 0.3% volume registered a positive variation in their volume.

Flowers (+ 67%) recorded the most significant variation, with their tonnage rising from 41 to 69. Perishables (+ 57%) also increased by more than half, leaping from 584 tonnes in the 3rd quarter of 2016 to 919 tonnes in the fourth quarter of 2016.

Food, which was the main type of cargo exported by air, recorded the least significant variation, with 1,617 tonnes exported in the fourth quarter of 2016, representing a 2% increase.

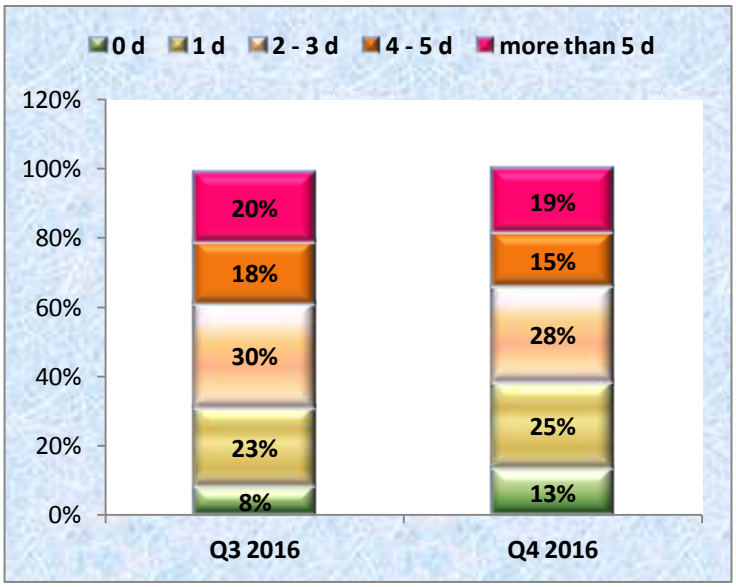
The main destinations for exported products were Paris (35.8%), Brussels (32%) and Lagos (10%).



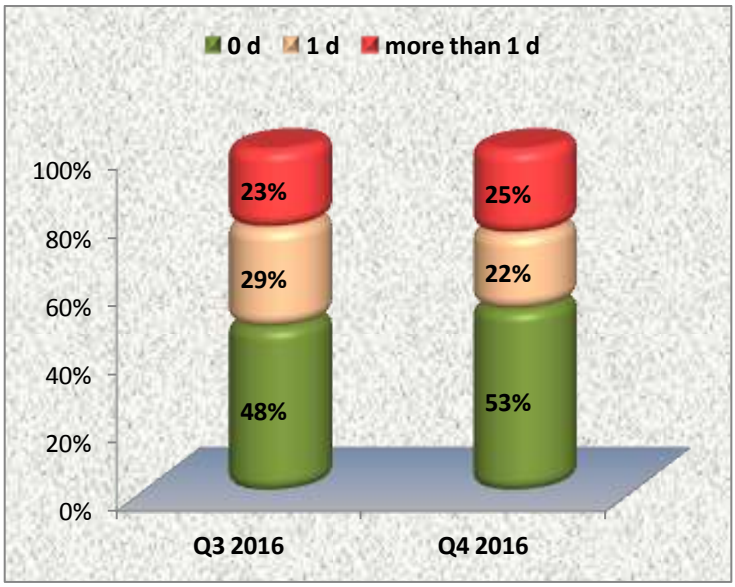
AIR FREIGHT | Airport dwell time

Slight improvement in airport dwell time for imports and exports

Graph 6: *Freight distribution according to airport dwell time*



IMPORT



EXPORT

Source : *ADC*

After a fairly-stable airport dwell time for import cargo shipments in the 3rd quarter of 2016, the last quarter of the 2016 witnessed a significant variation. Clearing such goods at various international airports was faster in the fourth quarter of 2016 compared with the previous quarter.

The proportion of goods that were removed the same day they were shipped rose from 8% to 13%, representing an increase of 5 points. The quantity of goods removed from the airport one day after landing represented 25% of import air cargo during the 4th quarter of 2016, 2 points more than in the 3rd quarter of the same year. Additionally, it is noteworthy that import cargoes that stayed more than one day accounted for a smaller share compared to the third quarter of 2016.

Indeed, those that spent 2 to 3 days lose 2 points while those with duration of 4 to 5 days dropped by 3 points. Cargoes having stayed more than 5 days at one of Cameroon's international airports accounted for 19% of import air cargo in the fourth quarter compared to 20% in the previous quarter.

Export goods presented a mixed picture. More goods were forwarded on the day of their arrival at one of the international airports, representing 53% of air cargo exports in the fourth quarter of 2016, 5 points higher than in the third quarter of 2016. On the other hand, export goods that spent more than one day at the airport accounted for 25% in Q4 2016, 2 points higher than in the previous period. Those which were dispatched the day after their arrival at the airport represented 22% in the period under study against 29 in the preceding period.

The Cameroon National Shippers' Council (CNSC) extends its deepest gratitude to the following institutions that helped in drafting this publication.

- **National Trade Facilitation Committee *(CONAFE)***
- **Douala International Terminal *(DIT)***
- **Douala Mixed Fruit Terminal *(TMFD)***
- **Airports of Cameroon *(ADC)***

PUBLISHER :

Auguste MBAPPE PENDA

EDITOR-IN-CHIEF:

Alex NKONDJE EKENGLO

EDITORIAL STAFF :

Elvis DONFACK TSAGUIM

Hermann NGASSA NKENGNE

Jean Jacques NKOLO

Christopher AGWAGWA

CAMEROON NATIONAL SHIPPERS4 COUNCIL (CNSC)

HEAD OFFICE

P. O. Box 15 88 DOUALA

TEL: (237)233 43 67 67 / 233 43 67 69

FAX: (237)233 43 70 17

WEB SITE: www.cncc.cm / EMAIL: info@cncc.cm

THE ECONOMIC OUTLOOK || 4th quarter 2016

PARIS OFFICE,

3Rue du quatre septembre, 75002,

Tel : +33 (0) 142210626 / email : representation@cncc.cm

South Regional Office, Kribi
Ngoye, Opposite TRADEX
Tel: 222 46 16 37 Kribi

South West Regional Office, Limbe
3rd Floor, CDC Credit Union Head office
Opposite Customs Office Bota
Tel: 237 233 33 21 36/233 33 21 38
Limbe