No. 012 August 2018

THE ECONOMIC OUTLOOK || 3rd quarter 2017

CONTENTS

FOREWOD

« Douala Port Community pays attention to hinterland country operators»

The Cameroon National Shippers' Council (CNSC) monitors international trade performance indicators with a view to mastering trade and transport. This is done using the Transport Observatory, which is a key decision-making instrument.

Selected indicators describe the situation of transport and foreign trade of Cameroon. All modes of transport, including maritime and air transport are taken into account. The upcoming issues of this publication will also cover land transport.

CNSC's "The Economic Outlook" analyses the latest transport and trade news quarterly by monitoring the evolution of key indicators of the entire transport chain. It is therefore, an important decision-making tool for both private actors and public authorities.
This issue features a special dossier on goods in transit at the port of Douala.

It discusses the evolution of such traffic, the difficulties that are specific to them as well as solutions proposed by stakeholders to ensure a free flow of traffic.

The analysis of the evolution of the main indicators in terms of freight transport showed that in the third quarter of 2017, there were more ships at anchorage (an average of 14 ships per day; 3 more) than in the previous quarter.
Imported used vehicles spent at least 2 days longer in each car terminal.
Airfreight dropped by about 13% with 4,932 tonnes in the third quarter of 2017
This issue contains detailed information on these issues.

Have an enjoyable read!

Auguste MBAPPE PENDA

DOSSIER | TRANSIT AT THE DOUALA PORT

Background

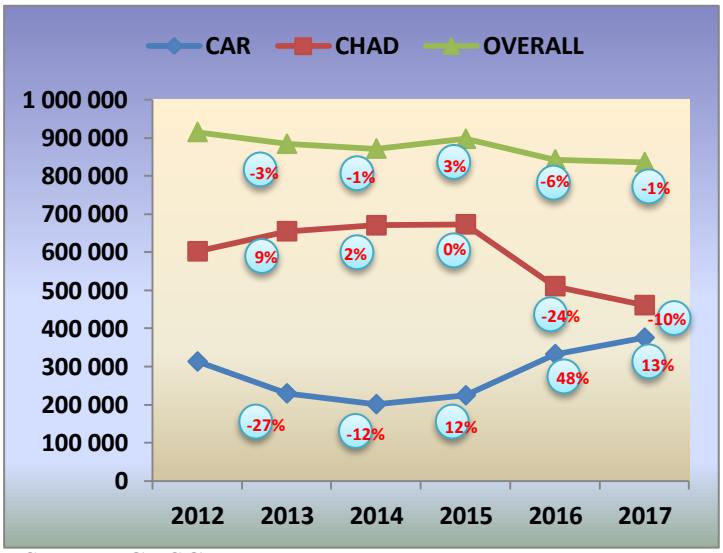
Transit refers to a customs, economic and suspensive procedure that allows goods to move from one country to another whilst customs duties, prohibitions and other applicable economic, fiscal or customs measures are suspended.

In Cameroon, this regime applies, inter alia, to goods transported to and from Cameroon's two geographically disadvantaged neighbouring countries namely Chad and the CAR. Indeed, Cameroon is at the heart of international trade of these two countries as it serves as the port of loading and port of destination for their goods that transit through the Douala port platforms before being transported to the Chadian or Central African border using Cameroonian infrastructure and services.

Air cargo chain actors

Since 2012, transit traffic at the Douala Port and to / from CAR and Chad dropped by nearly 80,000 tonnes. However, an analysis of the evolution of this traffic for each of these countries shows some peculiarities as shown in the graph below.

Graph: Evolution of transit traffic at the Douala Port between 2012 and 2017 (CAR and Chad)



Source: CNSC

Transit traffic to and from CAR recorded a substantial decrease in 2013 with an annual growth rate of -27%, following the outbreak of the crisis in the Central African Republic. This rate stood at -12% in 2014 and traffic leaped to +12% in 2015 with the gradual return to normalcy. In 2016, this traffic witnessed a marked improvement with a +48% growth rate. This growth continued in 2017 with a +13% rate. Thus, between 2012 and 2017, transit traffic from or to CAR witnessed a turnaround, plummeting during the crisis period and witnessing an upward trend after the crisis.

Between 2012 and 2015, transit traffic from or to Chad remained almost constant. In 2016, it recorded a substantial decline, with a -24% annual growth rate. This downward trend was maintained in 2017, with a growth rate of -10%. The decrease in transit traffic to and from Chad is attributable to insecurity in the northern regions of Cameroon, and even more to the stiff competition from the other logistics platforms serving that country.

However, it should be noted that the decrease in transit traffic, in general, poses a threat to the competitiveness of Cameroon's logistics platform. This is due, on the one hand, to the existence of competing ports such as Cotonou, Point Noire, Sudan port, etc and especially difficulties encountered by business persons of the hinterland countries in the delivery of their cargo, on the other hand, when they choose the port of Cameroon. This makes them to turn to competing ports.

Air cargo chain actors

Imports from the hinterland countries through the Douala Port must first of all fulfil all the port procedures before being transported along the corridors to their final destinations. Difficulties in transit can therefore be classified into two categories: those encountered within the port and those encountered along the corridor. In order to better understand the problems encountered by international trade actors, the Douala Port Community (Port Synthèse) organised tripartite fora between Cameroon, Chad and CAR to address problems encountered by users of Cameroon transit corridors.

The first of these meetings held in June 2012 in Yaounde and the second in December 2017 in Ndjamena. Additionally, a bipartite meeting between the Douala Port Community and actors of the logistics chain in the Central African Republic took place in February 2018.

During discussions, operators raised the following complaints:

Within the port area:

- Insufficient wagons as compared to (rail) traffic;
- Restriction on the sale of daily access tickets to the port of Douala;
- Rebates provided for but not granted regarding transit goods;
- Very long port dwell time;
- Trucks having to wait in long seaport lines to obtain port clearance ticket ;
- Trucks having to wait in long lines for GPS installation;
- Increased superposition of collateral;
- Non-application of official prices;
- • Double taxation of tax-free products;
- High GPS usage cost;
- Fines imposed on shippers during the extension of transit documents;
- Long waiting time regarding the release of guarantee;
- Complexity of customs procedures and the large number of documents required compared to other ports;
- Insufficient grace period of 11 days;
- Need to revise the CAR / Cameroon Convention.

Along the corridors:

- Harassments;
- Lack of facilities in Yassa to ensure safety, health and the decongestion of the site;
- Lack of popularisation of facilitation tools;
- Non-functional hotlines;
- No harmonisation of the port weighing system and those used along the corridors;
- Functional lapses observed in weighing stations with different results at different weighing stations;
- Multiplication of check points;
- Lack of Trucker Accommodation Centres;
- Insecurity in some of the corridors;
- Poor road infrastructure.

Proposed solutions

The problems that actors encountered along the Cameroonian transit corridors impact immensely on the Cameroonian economy. The diversion of transit traffic to other ports results in huge losses for the port of Douala and many other consequences notably along the corridors.

Faced with this situation, the State of Cameroon has undertaken to solve the problems raised by the operators of the hinterland countries in order to maintain the current traffic. All stakeholders have been integrated into this strategy and each of them has taken some actions and others are underway to make the port of Douala much more accessible for landlocked countries.

Some of the actions taken are listed here bellow according to the administrations concerned:

Customs:

- Collaboration between customs services of the three countries concerned ;
- Ongoing action for effective release of guarantee immediately after borders crossing ;

Forces of Law and Order (FLO):

- Training of FLO in safe conduct;
- Establishment of road awareness weeks;
- Popularisation of telephone numbers of FLO to be contacted in the event of harassments or other difficulties along the corridors;

CAMRAIL:

- Increasing rail freight transport services by putting into service 17 locomotives, 75 wagons including 50 container wagon and 25 oil tanks between 2013 and 2017;
- Establishment of online facilitation service via CAMRAIL website www.camrail.net

NATIONAL LAND FREIGHT MANAGEMENT BUREAU:

- Dematerialisation of procedures for obtaining an international waybill and safe conduct;
- Enlargement of the special identification stickers to be affixed on transit vehicles for better visibility;

PORT AUTHORITY OF DOUALA:

- Priority in issuing access tickets for the list of people and vehicles forwarded by trade unions;
- The provision of an area of 10 hectares to each of the two countries. These areas will be developed soon;
- 15% reduction on Customs Brokers' honorarium for the benefit of transit traffic;
- The establishment of Douala Port Authority country offices in N'Djamena and Bangui.

CAMEROON NATIONAL SHIPPERS' COUNCIL:

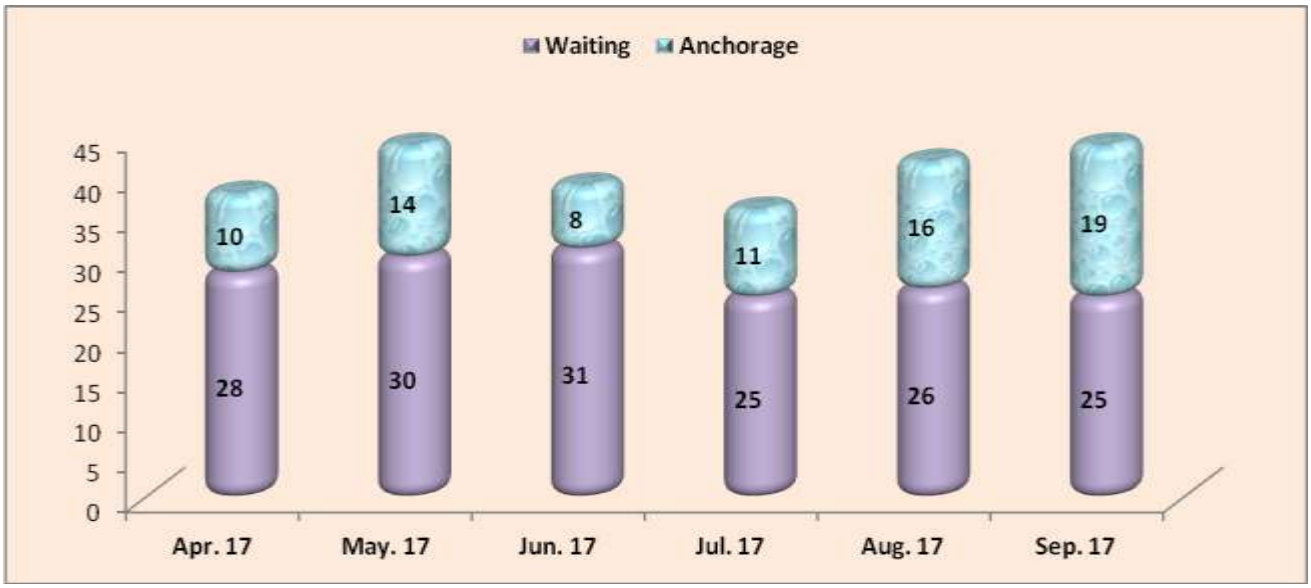
- The construction of a Trucker Accommodation Centre after the Dibamba Bridge with the assistance of the Douala City Council. The Kousseri Trucker accommodation Centre is under construction;
- Warehouses made available to hinterland shippers in and out of the Douala Port area;
- More collaboration between the Shippers' Councils of the three countries.

Several other measures being taken by other logistics chain actors are geared at improving infrastructure and increasing the performance of all stakeholders. This has the ultimate goal of reducing (port and corridor) transit costs and time.

SHIPS | Number of ships at anchorage/ awaited per day

In the 3rd quarter of 2017, the number of ships at anchorage grew over the months (19 ships a day in September)

Graph 1: *Average number of ships at anchorage /awaited per day*



Source : *PAD*

During the third quarter of 2017, the number of vessels waiting at the Douala Port anchorage averaged 14 per day, that is to say three ships higher than in the second quarter of 2017.

During the referenced period, the monthly trend remained bullish. In July 2017, an average of 11 ships was recorded at anchorage per day compared to 16 and 19 respectively for the months of August and September 2017. The month of July thus witnessed the least number of ships. Indeed, during this month, the number of ships at anchorage oscillated between 8 and 15. Moreover, one day out of two the number of ships at anchorage was less than 11.

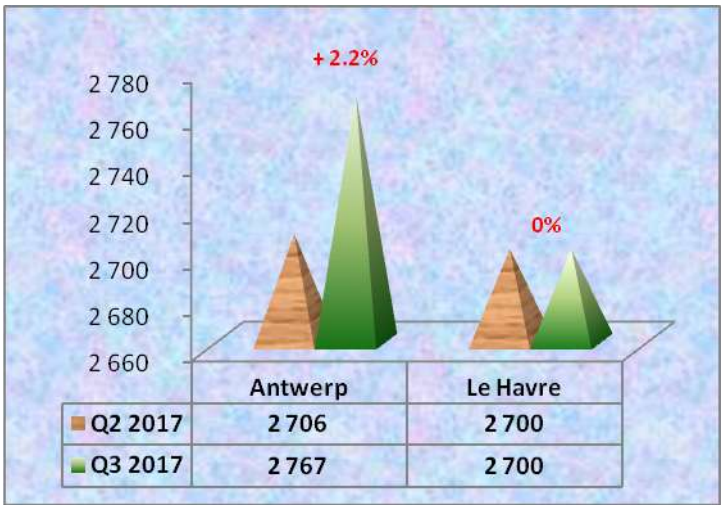
September was the month with the highest number of ships. The number of ships at anchorage was between 8 and 23 per day and only one out of four days registered less than 11 ships.

Concerning expected ships, Q3 2017 registered 26 vessels each day; showing 5 ships less than in the previous quarter. A monthly analysis showed a close similarity between the months of the quarter under study.

SHIPPING COST | Container 20'

4.4% decrease in the average cost of shipping one dry container from the Port of Valencia with near stability in Antwerp

Graph 2: *Average cost of shipping a 20' refrigerated container from the main ports of embarkation (en €)*



Source : *CNCC*

The cost of shipping a 20 foot refrigerated container from the port of Le Havre to the port of Douala remained the same between the 2nd and 3rd quarter of 2017 (€2,700).

In the port of Antwerp, shippers reportedly spent an average of €2,767 to ship their container during the third quarter of 2017, representing an increase of 2.2%. During the study period, the rates were less dispersed (more or less €140 of the average) compared to the 2nd quarter 2017 (more or less € 200 of the average).

Table 1: *Average cost of shipping a 20 'dry container from the main ports of loading (in €)*

COUNTRY	PORTS	Q2 2017	Q3 2017	Variation
Côte d'ivoire	Abidjan	1,210	1,249	3.2%
South Africa	Durban	1,288	1,358	5.5%
Germany	Hamburg	1,623	1,648	1.6%
Belgium	Antwerp	1,640	1,629	-0.7%
Spain	Valence	1,626	1,554	-4.4%
France	Le Havre	1,625	1,646	1.3%

COUNTRY	PORTS	Q2 2017	Q3 2017	Variation
China	Qingdao	1,972	2,076	5.32%
	Shanghai	2,038	2,035	-0.2%
India	Nhava Sheva	1,946	1,966	1.0%
UAE	Jebel Ali	1,998	2,011	0.6%
USA	Houston	2,516	2,534	0.7%

Source : *CNCC*

The cost of shipping a 20-foot dry container from the main African ports of loading to the port of Douala witnessed an average increase during the third quarter of 2017. Among the main European ports of loading, the port of Valencia recorded the lowest average cost of shipping. Shippers reportedly paid an average of €1,554 to ship their container to the port of Douala; representing a decrease of 4.4%. At the port of Antwerp, the trend was also bearish (-0.7%) and the average cost of shipping was €1,629. The cost of shipping at the ports of Hamburg (+1.6%) and Le Havre (+1.3%) increased on average. In each of these European ports, the average deviation sometimes reached €300 and half of the importers paid less than €2,000 shipping such a container.

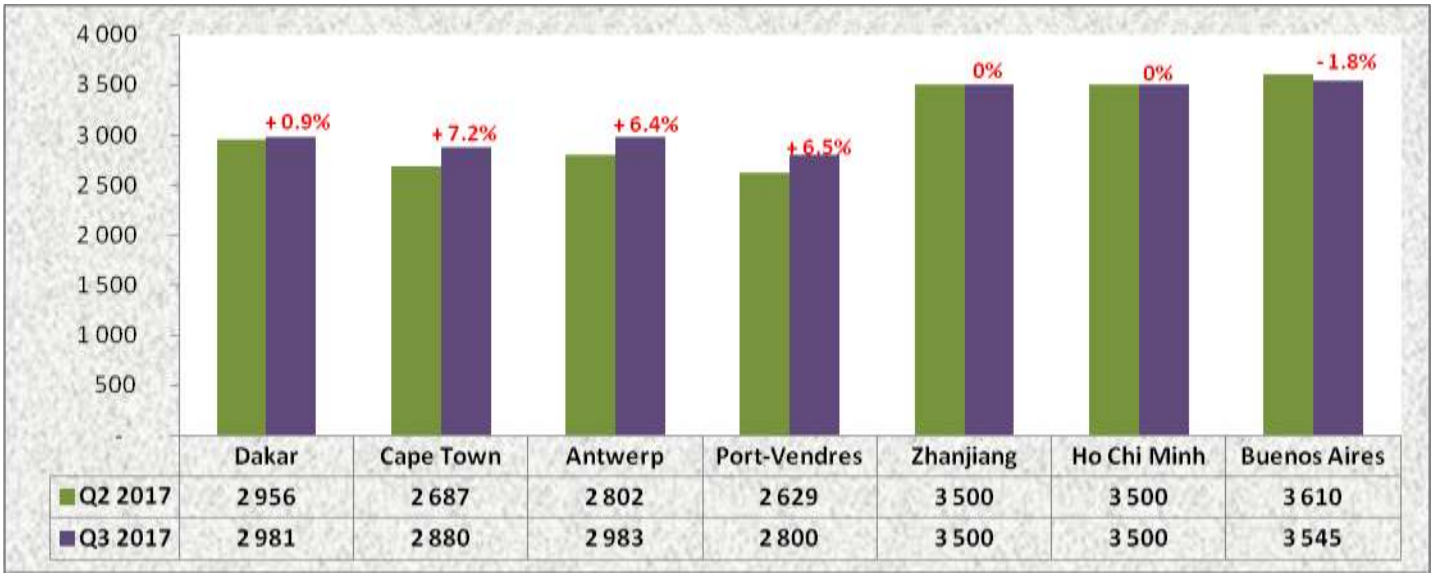
At the Port of Houston, the average cost of shipping was €2,534 in Q3 2017; representing a growth rate of 0.7%. One in four shippers who used this port paid exactly €2,500 for shipping their container.

At the main Asian ports of shipment, half of the shippers paid at least €2,000 to ship a 20-foot container. The port of Qingdao witnessed the most significant variation. The average cost of shipping from there rose from €1,972 to €2,076 between the 2nd and 3rd quarter of 2017. The port of Nhava Sheva (+1%) also recorded an upward trend. Here, the average shipping cost was €1,966. In the other ports, the variation was less significant. The rates offered during the two quarters were almost similar.

SHIPPING COST | Container 40'

6.5% increase in the average cost of shipping a 40' refrigerated container from the main European ports of loading

Graph 3: *Average cost of shipping a 40 'refrigerated container from the main ports of loading (in €)*



	Dakar	Cape Town	Antwerp	Port-Vendres	Zhanjiang	Ho Chi Minh	Buenos Aires
Q2 2017	2 956	2 687	2 802	2 629	3 500	3 500	3 610
Q3 2017	2 981	2 880	2 983	2 800	3 500	3 500	3 545

Source : *CNSC*

At the ports of Dakar and Cape Town, which are the main African ports of loading for the 40-foot refrigerated containers, the average shipping cost rose by 0.9% and 7.2% respectively. Like in the second quarter, at the port of Dakar, prices were fairly close (more or less €50 of the average) and half of the importers who used this port paid less than €2,970. At the port of Cape Town, where the average difference sometimes reached €450 (€150 more than in the second quarter of 2017), 50% of the shippers spent less than €2,500 to ship their container.

The main European ports of loading witnessed almost identical variations. In Antwerp, the average shipping cost rose from €2,802 to €2,983, representing an increase of 6.4%. Here, fares were more or less €450 from the average; that is to say, €150 more than in the previous quarter. In Port-Vendres, the average shipping cost rose by 6.5% to €2,800 in Q3 2017.

Half of the shippers who used these two ports reportedly paid less than € 2,800 for shipping their containers.

Fares at the main Asian ports of loading for 40-foot refrigerated containers remained unchanged (€ 3,500 per container).

At the port of Buenos Aires, the shipping cost dropped by an average of 1.8%. The prices charged were at most €150 from the average. One out of four shippers spent more than €3,500 for shipping their container to the port of Douala.

SHIPPING COST | Container 40'

Stability in the average cost of shipping a 40-foot dry container from the ports of Rotterdam and Antwerp

Table 2: Average cost of shipping a 40 'dry container from the main ports of loading (in €)

COUNTRY	PORTS	Q2 2017	Q3 2017	Variation
South Africa	Durban	1,954	2,034	4.1%
China	Ningbo	2,663	2,682	0.7%
	Qingdao	2,918	2,905	-0.4%
India	Nhava Sheva	2,756	2,745	-0.4%
UAE	Jebel Ali	2,906	2,857	-1.7%
Canada	Montréal	3,088	3,161	2.4%
USA	Baltimore	3,033	3,102	2.3%

COUNTRY	PORTS	Q2 2017	Q3 2017	Variation
Germany	Hamburg	2,555	2,644	3.5%
France	Le Havre	2,565	2,600	1.3%
Spain	Valence	2,598	2,613	0.6%
UK	Felixstowe	2,739	2,774	1.3%
Belgium	Antwerp	2,563	2,570	0.3%
Holland	Rotterdam	2,639	2,639	0.0%
Italy	Genoa	2,935	2,657	-9.5%

Source : CNSC

In Q3 2017, importers paid, on average, €2,034 to ship a 40 feet dry container from the port of Durban to the port of Douala, representing an increase of 4.1%. The dispersion of the rates remained the same during the referenced period (more or less € 200 of the average) compared to the 2nd quarter of 2017.

Of the main Asian ports of loading, excluding Ningbo Port, all others witnessed a lower shipping cost. In Ningbo, it cost an average of €2,682 to ship such a container; representing an increase of 0.7% compared to the 2nd quarter of 25017. In the other Chinese port, the average shipping cost rose from € 2,918 to € 2,905. Here, the tariffs are much more volatile (more or less € 350 of the average against € 250 recorded in Ningbo). At the port of Jebel Ali, which registered the most significant drop (-1.7%), the tariffs recorded the highest dispersion (more or less than € 400 of the average). At the ports of Nhava Sheva and Qingdao, the variation was quite insignificant (-0.4%). Apart from the port of Qingdao, 25% of shippers using one of the main Asian ports of loading paid more than €2,800 for shipping of one such container.

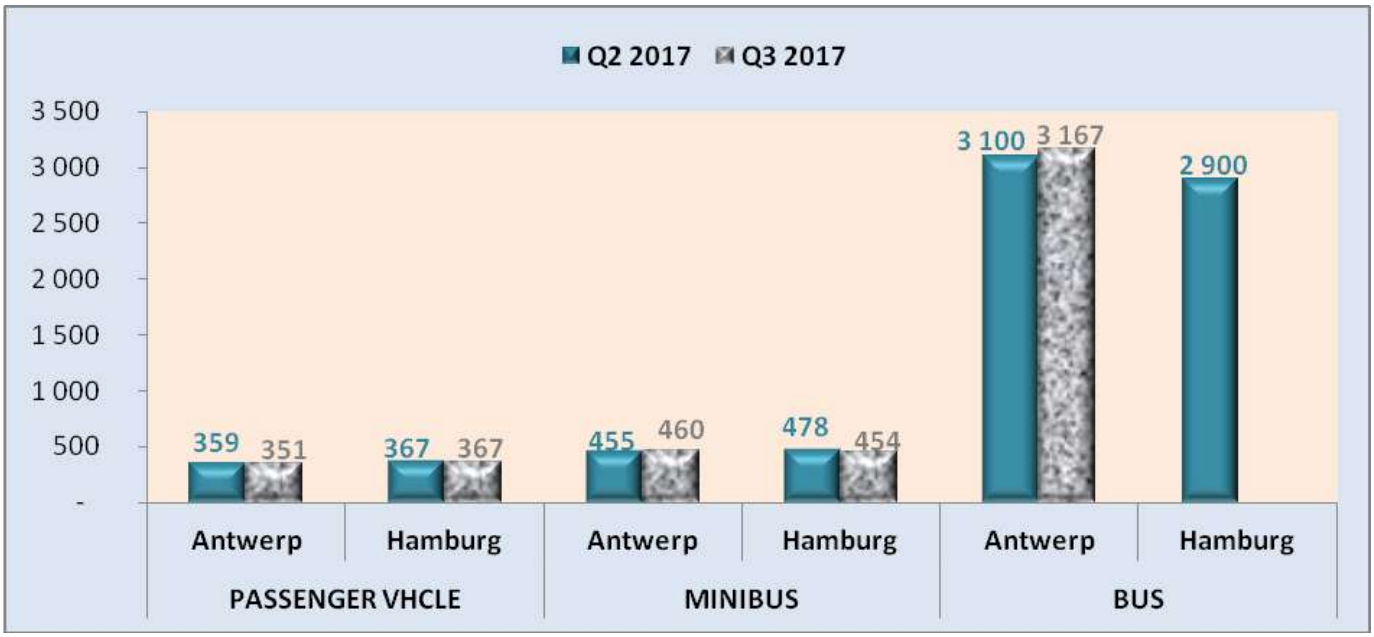
At the ports of Montreal (2.4%) and Baltimore (2.3%), the average cost of shipping a 40-foot dry container recorded an upward trend. In each of these major US ports of loading 40 feet dry containers, tariffs registered a maximum average dispersion of €250; representing €50 higher than in the previous quarter. At the Canadian port, half of the shippers spent at most € 3,000, while it took at least €3,100 to reach the same proportion at the US port.

In Europe, only the port of Genoa witnessed a decrease in the shipping cost. It dropped from €2,935 to €2,657; representing a decline of about 10%. This port recorded the most dispersed fares (more or less €500 of the average). The largest increase was recorded at the port of Hamburg. The growth rate therein stood at 3.5% and, on average, one importer spent €2,644 for shipping their container during the third quarter of 2017. The ports of Felixstowe (+ 1.3%) and Le Havre (+1, 3%) had identical variations. The other ports of Valencia, Antwerp and Rotterdam virtually maintained the same tariffs in the second quarter of 2017. In addition, these ports had the lowest dispersions; more or less €200 of the average.

SHIPPING COST| Vehicles

Stability in the average cost of shipping a passenger vehicle from Hamburg

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



Source : *CNSC*

As in Q2 2017, the average cost of shipping passenger vehicles from the port of Hamburg remained unchanged (€367) during the study period, In Q3 2017, the tariffs charged were much closer (more or less €50 of the average against € 90 in Q2 2017). At the port of Antwerp, the average cost of shipping a passenger vehicle dropped from €359 to €351; representing a decrease of 2.1%. The prices charged witnessed almost the same fluctuation rate as during Q2 2017 (more or less €100 of the average). In each of these ports, three out of four importers paid more than €350 to for shipping their vehicle.

In Q2 2017, the average cost of shipping a minibus increased by 1.1% at the port of Antwerp; rising from €455 to €460. The Port of Hamburg witnessed a reversed situation with shipping cost dropping from €478 to €454, representing a decrease of 5%.

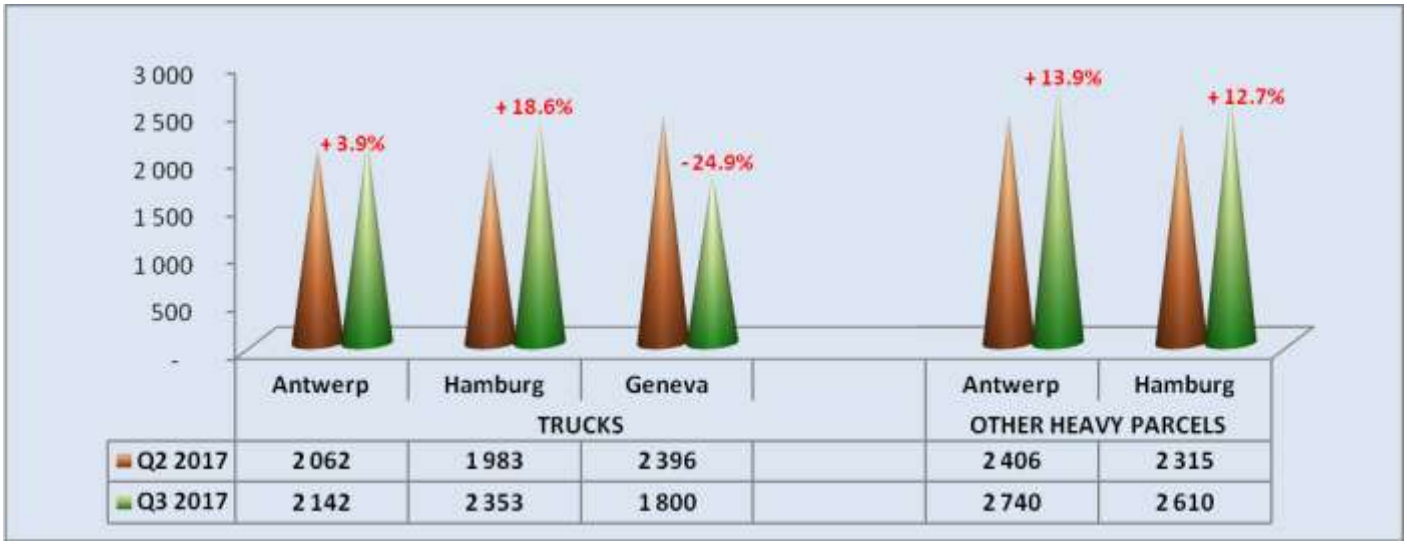
Like in Q2 2017, the rates charged at the German port were closer to each other than those charged by the Belgian port (more or less 40 € of the average against €200).

Concerning the shipping cost of buses, at the port of Antwerp, it rose from €3,100 to €3,167; representing an increase of 2.2%. No bus was imported from the port of Hamburg in Q3 2017.

SHIPPING COST | Vehicles

About 25% decrease in the average cost of shipping a truck from the port of Geneva

Graph 5: *Average cost of shipping trucks and other heavy equipment (in €)*



Source : *CNCC*

Unlike the previous quarter, of the main ports of loading of trucks to the port of Douala, only that of Geneva witnessed a decrease in the cost of shipping this type of vehicle. Indeed, in Q3 2017, shippers paid an average of €1,800 to ship a truck from the port of Geneva to the port of Douala, representing a significant decline of around 25% compared to Q2 2017.

At the port of Hamburg, it took an average of €2,353 to ship a truck to the port of Douala; representing an increase of 18.6% compared to the Q2 2017. The maximum difference with the average was €600; €100 more than in the previous quarter. One out of four shippers paid more than € 2,860 to ship their truck to the port of Douala.

Shipping a truck from the port of Antwerp to the port of Douala cost € 2,142 on average in Q3 2017, representing a growth rate of about 4%. The tariffs charged in this port were still as dispersed as in the previous quarter (more or less €700 of the average). Half of the importers who used this port declared that they did not spend more than €2,100 to ship their vehicle.

During Q3 2017, the average cost of transporting other heavy equipment increased in the two main ports of loading of other heavy equipment. In Antwerp, it rose from €2,406 to €2,740, representing an increase of about 14%. The average deviation recorded in this port for this type of machinery was most €800, as in the previous quarter. One in four importers spent more than €3,400 for shipping their vehicle.

At the port of Hamburg, the trend was also bullish. The average shipping cost rose from € 2,315 to € 2,610, representing an increase of 12.7%. The prices charged therein were less dispersed (more or less €500 of the average) compared to Q2 2017 (more or less €650 of the average). In addition, half of the shippers spent at most €2,200 to ship their vehicle to the port of Douala.

PORT CARGO DWELL | Containers

In Q3 2017, the month of July recorded the shortest turnaround time for import containers

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

	April-17	May-17	June-17	Q2 2017	Jul-17	Aug-17	Sept-17	Q3 2017
Average	20.3	16.6	12.9	**15.2**	13.6	15.5	17.4	**15.5**
Variation	**25.2%**	**-18.4%**	**-22.0%**	**-12.6%**	**5.3%**	**14.2%**	**11.9%**	**1.7%**
1er Quartile	7	7	5	**6**	5	7	8	**7**
2e Quartile	13	13	10	**11**	10	13	14	**12**
3e Quartile	28	21	16	**20**	18	20	23	**20**
Less than 11 days	42%	37%	56%	**46%**	52%	39%	39%	**43%**

Source : *National Trade Facilitation Committee (CONAFE)*

During Q3 2017, it took on average 15 and half days to remove a container from the port of Douala. This is similar to the dwell time observed in the Q2 2017. However, when looking at the quartiles, it is clear that extended stays were more frequent during the study period. Here, it took at least 7 days (one more day) to remove 3/4 of the cargoes that landed at the Douala Port. Additionally, in Q3 2017, 57% of shippers were able to remove their containers beyond the grace period (11 days), that is to say 3 points higher than in the previous quarter.

During the study period, the month of July featured the best scores. Indeed, it took an average of 14 days for the shipper to complete all formalities and remove their container from the port of Douala. In addition, 25% of importers reportedly removed their container within 5 days. It was also during this month that shippers were least exposed to parking penalties as more than half (52%) of the containers left the port in less than 11 days.

During the different months of the period under study, the average port transit time for import containers increased, making September the month with shortest dwell time. During this period, containers were removed within 17 days. One shipper out of two reportedly completed all the clearing formalities in more than 14 days. Like August, only 39% of containers were removed before the grace period.

PORT CARGO DWELL | Vehicles

Increase in average dwell time for used vehicles in both parks (2 days at SOCOMAR, 3 days at TMFD)

Table 4: *Dwell time for import second hand vehicles at the Douala Port (in days)*

Car Park	TMFD		SOCOMAR	
Period	Q2 2017	Q3 2017	Q2 2017	Q3 2017
Average	16.6	19.8	23.8	26
Variation	1.8%	19.3%	-1.7%	9.2%
1er Quartile	7	10	13	14
2e Quartile	10	16	29	22
3e Quartile	22	25	30	34
Less than 11 days	51%	33%	16%	14%

Source : *Douala Mixed Fruit Terminal (TMFD) / Société Camerounaise d'Opérations Maritimes (SOCOMAR)*

In Q3 2017, it took an average of 26 days to remove second-hand cars from the SOCOMAR car terminal i.e. 2 days longer than in Q2 2017. Half of the shippers reportedly completed all the clearing formalities in less than 22 days, while the same proportion did so in 29 days during Q2 2017. Vehicles that did not pay parking penalties accounted for 14%, representing 2% lower than in the previous quarter.

A monthly analysis did not reveal a significant difference between the various months of the quarter under study. However, the month of August recorded a slightly shorter dwell time. On average, turnaround time was 26 days, one day less than the other two months of the quarter, each averaging 27 days.

In addition, the month of September recorded the shortest extended dwell time with 26% of shippers removing their vehicles in less than 11 days, as against 10% in July and 8% in August.

.

During the third quarter of 2017, it took an average of 20 days to clear second-hand vehicles from the TMFD i.e. 3 days more than in the previous quarter. The study period registered longer turnaround times. One in four shippers reported having removed their vehicle at least 25 days after arriving at the park. On the other hand, most shippers paid penalties for exceeding the grace period (67% vs. 49% in the previous quarter).

The month of September recorded the worst dwell times. It took shippers an average of 21 days to clear their vehicle (against 19 days for the other two months). Whatever the month, a quarter of the vehicles were removed from the port in at most 10 days.

AIR CARGO | Tonnage

6.4% drop in air freight to Cameroon

In Q3 2017, air freight dropped by 12.4% with 4,932 tonnes.

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

TYPE OF GOODS	Q2 2017		Q3 2017		Variation
	Tonnage	%	Tonnage	%	
OTHERS PARCELS	1,298	57.6	1,141	54.1	-12.1%
CONSOLIDATIONS	365	16.2	337	16.0	-7.7%
DANGEROUS PRODUCTS	202	9.0	205	9.7	1.5%
PHARMACEUTICAL PRODUCTS	169	7.5	180	8.5	6.5%
PERISSABLES / FOOD	65	2.9	44	2.1	-32.3%
DIPLOMATIC PARCELS	19	0.8	29	1.4	52.6%
OTHERS	136	6.0	174	8.2	27.9%
TOTAL	**2,254**	**100**	**2,110**	**100**	**-6.4%**

Source : *ADC*

Cameroon airborne imports dropped from 2,254 tonnes in Q2 2017 to 2,110 tonnes in Q3 2017, representing a decrease of 6.4%. Import air freight accounted for 43% of the total air freight (import and export), representing 3 points higher than in Q2 2017.

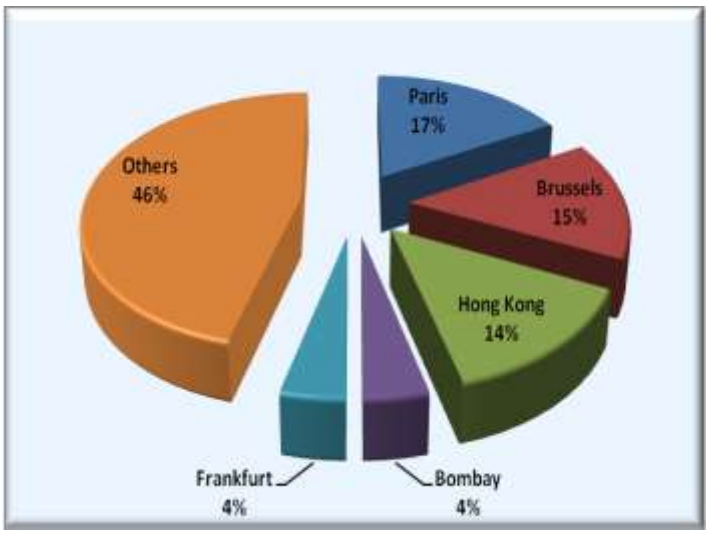
Classification by weight of goods remained unchanged. Miscellaneous parcels (54.1%) still ranked first, followed by consolidations (16%), Hazardous Products (9.7%), Pharmaceuticals (8.5%) and Perishable goods (2.1%).

Perishable goods, which stood at 65 tonnes in Q2 2017, dropped by 32.3% (the most significant) with some 44 tonnes in Q3 2017. Miscellaneous parcels (-12.1%) and consolidations (-7.7%) also showed a downward trend with 1,141 tonnes and 337 tonnes respectively during the study period.

Hazardous Products imported by air rose by 1.5% (3 tonnes); while that of Pharmaceuticals increased by 6.5% (11 tonnes).

Diplomatic packages registered the highest growth rate (+52.6%), leaping from 19 to 29 tonnes between the 2nd and the 3rd quarters of 2017.

Graph 6 : *Breakdown of import air freight by origin*



Source : *ADC*

AIR CARGO | Tonnage

16% drop in air freight from Cameroon

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

TYPE OF GOODS	Q2 2017		Q3 2017		Variation
	Tonnage	%	Tonnage	Tonnage	
PERISSABLES / FOOD	2,926	86.7	2,362	83.7	-19%
OTHER PARCELS	257	7.6	289	10.2	12%
FLOWERS	60	1.8	38	1.3	-37%
CONSOLIDATIONS	9	0.3	24	0.9	167%
PHARMACEUTICAL PRODUCTS	17	0.5	17	0.6	0%
DANGEROUS PRODUCTS	12	0.4	6	0.2	-50%
OTHERS	93	2.8	86	3.0	-8%
TOTAL	**3,374**	**100**	**2,822**	**100**	**-16%**

Source : *ADC*

During Q3 2017, Cameroon exports still dominated air freight with 57% of the total, i.e. 3 points lower than in the previous quarter. They dropped from 3,374 tonnes in Q2 2017 to 2,822 tonnes in Q3 2017, representing a16% decrease.

The top 3 according to the weight of the different types of airborne exports remained unchanged in Q3 2017. Foodstuff, which accounted for 83.7% of total export air cargo, maintained the first position, followed by Miscellaneous Packages (10.2%) and Flowers (1.3%).

Bulk goods and miscellaneous parcels were the only goods that recorded an increase in tonnage in Q3 2017. The former rose from 9 to 24 tonnes while miscellaneous parcels witnessed a 12% increase with 289 tonnes in Q3 2017. Pharmaceutical products exported by air recorded the same tonnage as in Q2 2017 (17 tonnes). All other commodity types had lower tonnage compared to the previous quarter.

Dangerous Goods dropped by half. Foodstuff dropped from 2,962 to 2,362 tonnes, representing a decline of 19%. The volume of flower exports stood at 289 tonnes in Q3 2017, representing a decrease of 37%.

Airborne exports mainly went to Paris (34%), Brussels (31%), Lagos (12%) and Orly (5%).

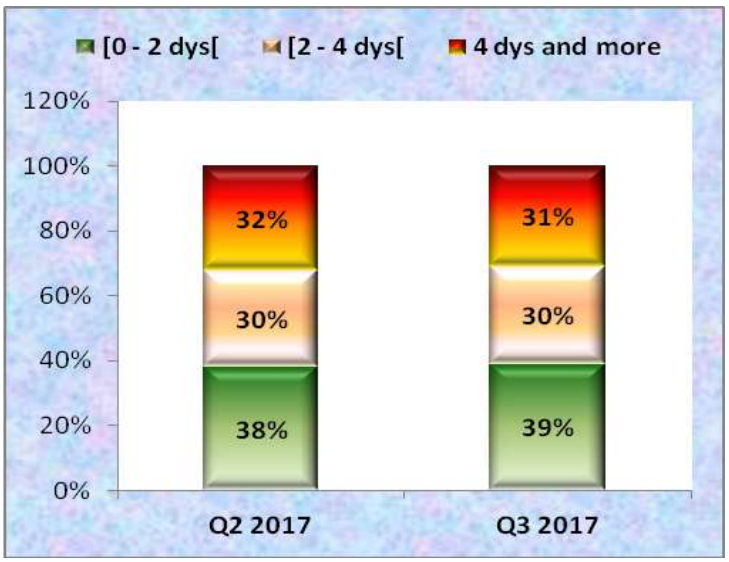
Graph 7 : *Breakdown of export air freight by destination*

Source : *ADC*

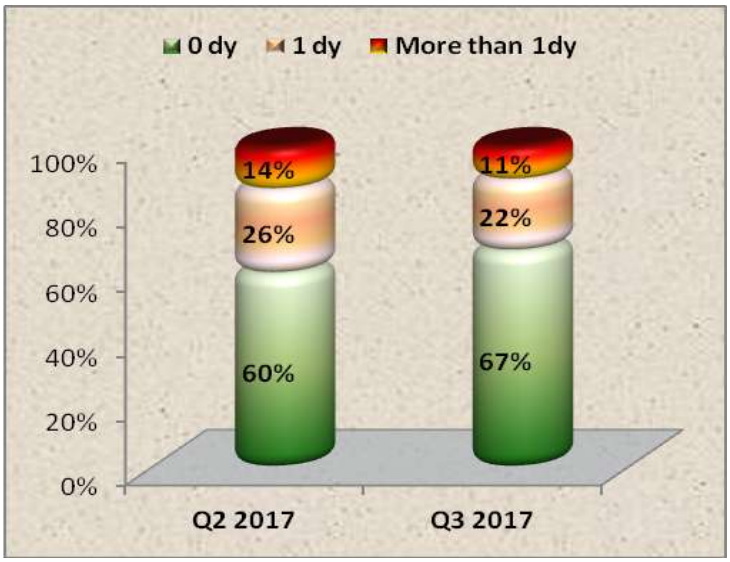
AIR CARGO | Air cargo dwell time

On the import side, cargo removal speed improved in Q3 2017 (it reduced by one day). On the export side, the same situation obtained during the two quarters under study (average time was one day)

Graph 8 : *Freight distribution according to airport dwell time*



IMPORT



EXPORT

Source : *ADC*

During the 3rd quarter of 2017, importers took an average of three days to remove their cargo from the airport terminal; a day less compared to Q2 2017.

Some 39% export goods spent less than two days at one of Cameroon's international airports; one point more than in the second quarter of 2017. Those that spent between 2 and 4 days accounted for 30% of the import freight; the same proportion as in the previous quarter. Finally, goods that stayed more than 4 days at the airport terminal accounted for 31%, 1 point less than in the previous quarter. Thus, it was observed that, overall, the 3rd quarter of 2017 witnessed shorter airport dwell times compared to the 2nd quarter of 2017.

Like in Q2 2017, export air cargo spent, on average, one day at the airport terminal in Q3, 2017.

During the study period, some 67% of airborne exports left the airport cargo terminal on the date of arrival therein, representing 7 points higher than in Q2 2017. Goods that left the airport one day after arrival at the airport accounted for 22% of total export freight, representing 4 points less than in the previous period. Finally, 11% of export freight spent more than a day before leaving the airport, against 14% in the previous quarter.

It is noteworthy that although the 2nd and 3rd quarters of 2017 witnessed an identical average dwell time, the 3rd quarter recorded the shortest dwell time for exports, considering the different proportions according to transit time.

The Cameroon National Shippers' Council (CNSC) extends its deepest gratitude to the following administrations that contributed to the drafting of this publication:

- **The Port Authority of Douala *(PAD)***
- **The National Trade Facilitation Committee *(CONAFE)***
- **The Douala International Terminal *(DIT)***
- **The Douala Mixed Fruit Terminal *(TMFD)***
- **The Cameroon Airports Company *(ADC)***
- **The Cameroon Maritime Operations Company (SOCOMAR)**

PUBLISHER :

Auguste MBAPPE PENDA

EDITOR-CHIEF :

Alex NKONDJE EKENGLO

EDITORAL STAFF:

Christopher Agwagwa Viyih

Elvis Donfack Tsaguim

Hermann Ngassa Nkengne

Jean Jacques Nkolo

Marguerite Lewono Mbassi

TRANSLATOR

Christopher Agwagwa Viyih

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

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

THE ECONOMIC OUTLOOK || 3rd Quarter 2017

PARIS OFFICE, FRANCE

3Rue du quatre septembre, 75002,

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

SOUTH REGIONAL OFFICE, KRIBI

Tel : (237) 222 46 16 37

SOUTH WEST REGIONAL OFFICE, LIMBE

Tel : (237) 233 33 21 36 / 233 33 21 38