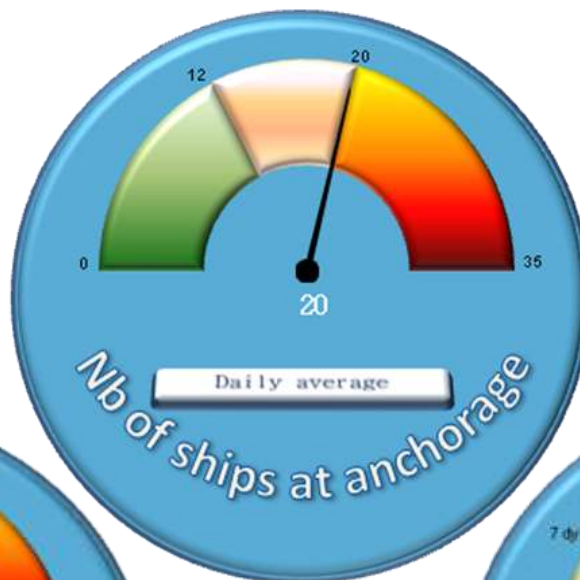




THE ECONOMIC OUTLOOK || 1st quarter 2018



[0 - 7 dys] = 30% ; [7 - 11 dys] = 15% ; 11 dys and more = 55 % of trafic

TMFD PARK



[0 - 7 dys] = 32% ; [7 - 11 dys] = 20% ; 11 dys and more = 48 % of trafic

DIT PARK

■ Good
 ■ Watch out
 ■ Bad

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FOREWORD



« CNSC into the facilitation of truck movements within the Douala Port »

The Cameroon National Shippers' Council (CNSC) monitors a number of 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 publication **"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's special dossier focuses on the seminar on facilitating the checking of goods delivered by

trucks at the Douala port as a follow up to the recommendations of a study that the CNSC Transport Observatory conducted on the "harassments encountered by truckers within the Douala Port."

The analysis of the evolution of the main transport indicators reveals that an average of 23 ships waited at anchorage per day in the 1st quarter of 2018 (4 vessels more than in the previous quarter). At the TMFD Car Park, the average dwell time for imported second hand cars dropped by 4 days and stood at 16 days during the period under study.

In the 1st quarter of 2017, air cargo stood at 5,327 tones, representing a 4% decrease. The average airport dwell time for imports was 4 days i.e. 1 day high than in the previous quarter.

This issue contains detailed information on these different issues.

Have an enjoyable read!

Auguste MBAPPE PENDA

DOSSIER | CNSC into facilitating the checking of goods delivered by trucks at the Douala port

Facilitating the checking of goods delivered at the port of Douala is a major worry to foreign trade operators and stakeholders in Cameroon. Moreover, taking into account the fact that the port of Douala is one of the main gateways for goods coming from or going to the Central African Republic and Chad, one can say that it helps in increasing the attractiveness of this port.

This therefore justifies the multiple complaints that transporters submit to the Cameroon National Shippers' Council (CNSC) decrying harassment suffered by truckers at the port.

In response to such complaints from carriers and as part of its mission to provide assistance to and protect the interests of shippers, the CNSC used its follow up and monitoring instrument to conduct a statistical study on abnormal practices on logistics platforms in order to identify the reality decried.

The survey on port harassment at the level of truckers was conducted by CNSC's Transport Observatory Service in order to:

- Identify all checkpoints that truckers go through within Douala Port ;
- Estimate the time spent at each checkpoint;
- to determine the existence of illegal fees and possibly evaluate them.

Key findings of the study

This study reviewed most of the checkpoints that truckers go through within the port of Douala. However, it should be noted that due to the difficulties encountered, the upstream area of the port was not covered by this survey. Thus the checkpoints following were taken into account by the study:

- ❶ Maersk access (*Gendarmerie / PAD*);
- ❷ Messa Presse (*Gendarmerie*);
- ❸ Messa Presse (*MINFOF*);
- ❹ Rond Point DIT (*Police / PAD*);
- ❺ Downstream entry gate (*Police*);
- ❻ SEPBC Entry gate (*Customs*).

In addition, the following general trends were observed:

65% transported wood as conventional goods

32% containerised goods

3% conventional goods

76% belonging to a union

19% belonging to individuals

52% spent less than one day at the port

Those that spent more than one day were carrying wood as conventional cargo

Specifically, the study found that all truckers surveyed paid (illicit) charges at checkpoint within Douala Port. These ranged between 500 FCFA and 11 000 FCFA, with an average of about 5,000 FCFA (more precisely 4,880 FCFA). The table below shows the proportion of truckers who paid illegal charges at each checkpoint as well as the average charge per truck.

Check point	% trucker that paid illegal fees	Average illegal charges paid (FCFA) per truck
Maersk Access point (<i>Gendarmerie / PAD</i>)	77%	2, 250
Messa presse (<i>Gendarmerie station</i>)	3%	1, 000
Messa presse (<i>MINFOF station</i>)	50%	500
Rond point DIT (<i>Police / PAD</i>)	45%	3, 500
DIT Entry gate (<i>Police</i>)	14%	5, 000
SEPBC Entry gate (<i>Customs</i>)	78%	850

The study revealed the need to sensitise transporters, truckers, licensed customs brokers and other stakeholders on the rules to be observed when transporting goods with the port of Douala. As a result, it was recommended that an awareness seminar be organised to specify the documents to be presented during inspections as well as the penalties for non-compliance with rules governing the movement of trucks within the port of Douala.

Awareness raising seminar



In accordance with the recommendation of the study, the CNSC organised and hosted an awareness seminar on the theme "facilitating the checking of goods delivered by trucks at the Douala port" on 17 September 2018 at the SAWA Hotel. This was a first in the area of logistics where it is very rare for attention to be focused on truck movement within the port. The purpose of the seminar was to inform and raise the awareness of stakeholders on trucking delivery system and how to cross checkpoints at the port of Douala. The seminar that was attended by 150 participants considered six topics. The paper, which was presented by the CNSC, set the scene by presenting the study conducted by the CNSC's Transport Observatory (TO-CNSC). The other five presentations presented by the administrations in charge of controls namely the Ministry of Forestry and Wildlife (MINFOF), the Port Authority of Douala (PAD), the Ministry of Defence (SED), the General Delegation for National Security (DGSN) and the Directorate General of Customs (DGC), focused on the following areas:

- the role of the administration within the port;
- the regulatory bases for the intervention of public administration;
- the penalties provided for non-observance of regulations;
- the procedures to follow or contact persons in case of disputes;
- the difficulties encountered during checks and possible solutions.

Discussions and recommendations

During discussions, the CNSC defined the term "illicit charges", outlined the difficulties encountered in carrying out the survey and specified that a contradictory survey was not carried out with the administrations because it was envisaged that during the seminar each one of them would during their presentation, outline the difficulties encountered during checks and to propose possible solutions.

In addition, the various administrations clarified the regulations in force and frowned at some of the abnormal practices of truckers, while listing penalties that await both truck drivers that flout laid down regulations and unscrupulous agents.



At the end of the meeting participants came up with a battery of recommendations directed at the following public administrations.

PAD

- Improve the infrastructure for heavy duty vehicles at the port and develop upstream infrastructures for vehicles waiting to unload at the port;
- Accelerate the project to set up a public transport system to facilitate users' movements in the port area and check the double payment of access rights for vehicles and pedestrians;
- reduce processing time for port access requests;
- put in place a car roadworthiness technical inspection point in the port to carry out all technical checks and reduce accidents;

SED

- Hold regular meetings with the carriers and the gendarmerie in order to have a common approach to the difficulties encountered on a daily basis;

DGSN

- Initiate discussions for the dematerialisation of checks at the Port;

DGD

- Extend customs facilitation actions initiated at the port to the Yassa checkpoint

AUTHORITIES CONDUCTING CHECKS WITHIN THE PORT

- Organise a meeting with the administrations conducting checks to define the competences of each one;
- Disseminate legal instruments governing truck inspections at the port of Douala;
- Strengthen checkpoint staff by assigning staff from all administrations thereto.

TECHNICAL ADMINISTRATIONS

- Accelerate the dematerialisation of the procedures carried out at the level Technical Administrations;
- Mitigate, or even eliminate redundancies in the interventions of technical administrations at the port in order to reduce the time spent at port gates;

TRANSPORTERS' GROUPS AND UNIONS

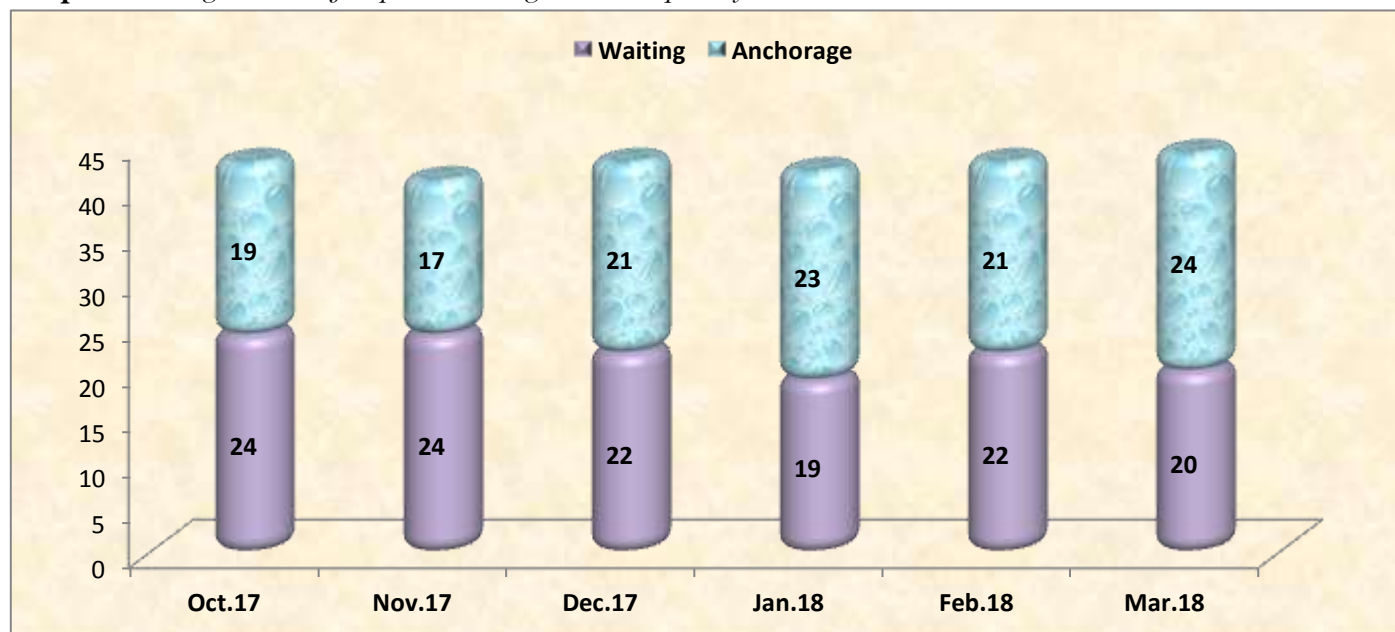
- List professional transporters for better checking of trucks and check against amateurism;
- Raise the awareness of the members regularly in order to instil more professionalism among them, in particular by always having and keeping copies of required documentation and by scrupulously observing the traffic plan in the port;
- Adopt responsible behaviour by:
 - o avoiding abusive parking, speeding etc .;
 - o being in possession of access tickets;
 - o meeting mandatory technical standards for the movement of vehicles;

- Systematically denounce all forms of harassment and corruption to the competent bodies and authorities;
- Compile a list of difficulties to be forwarded to the competent administrations.

SHIPS | Number of ships at anchorage/ awaited per day

Many ships at anchorage in March 2018; on average 24 ships a day

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



Source : PAD

Vessels reported at Harbour Master's Conferences as having to berth at the port of Douala over the next few days averaged 20 per day for the 1st quarter of 2018; 3 months less than in the last quarter of 2017. The month of February is the period of highest number of awaited ships with an average of 22 vessels per day against 19 and 20 for the months of January and March respectively.

With regard to ships waiting at anchorage, the first quarter of 2018 (23 vessels per day) recorded on average a higher influx than that observed in Q4 2017 (19 vessels per day).

During the various months of the referenced period, this indicator fluctuated. In January 2018, on average, 23 ships were at anchorage each day. For the first month of the year, every other day more than 22 ships (with a maximum of 30 ships) were recorded.

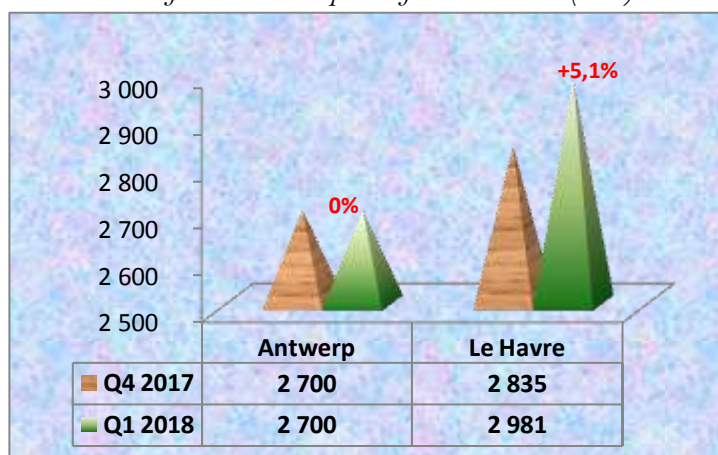
In February, which was the period with the lowest number of ships at anchorage, there was an average of 21 ships per day. In addition, every other day, at least 17 ships waited at anchorage (with a maximum of 35 vessels).

The month of March, which witnessed a high number of ships in the quarter, had an average of 24 ships per day waiting at anchorage. Over this period, the number of vessels at anchorage oscillated between 13 and 32.

SHIPPING COST | Container 20'

3.9% drop in the average cost of shipping a 20 'dry container from the Port of Hamburg by and near stability at Qingdao port

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



Source : CNCC

The port of Antwerp maintained the cost of shipping 20 refrigerated containers between the 4th quarter of 2017 and the 1st quarter of 2018. Shipping a container from Antwerp cost an average of €2,700.

At the port of Le Havre, on the other hand, shipping cost went up. On average, the cost of shipping a refrigerated container rose from €2,835 in the fourth quarter of 2017 to € 2,981 in the first quarter of 2018, representing an increase of 5.1%.

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

COUNTRY	PORT	Q4 2017	Q1 2018	Variation
Cote d'Ivoire	Abidjan	1,201	1,208	0.6%
South Africa	Durban	1,358	1,371	1.0%
Germany	Hamburg	1,754	1,686	-3.9%
Belgium	Antwerp	1,607	1,588	-1.2%
Spain	Valencia	1,572	1,622	3.2%
France	Le Havre	1,646	1,686	2.4%

Source : CNCC

COUNTRY	PORT	Q4 2017	Q1 2018	Variation
China	Qingdao	1,967	1,970	0.2%
	Shanghai	2,023	1,997	-1.3%
India	Nhava Sheva	1,938	1,982	2.3%
UAE	Jebel Ali	1,970	1,977	0.4%
USA	Houston	2,555	2,309	-9.6%

In Africa, the main ports of loading for 20-foot dry containers witnessed a slight increase (most 1%) in their average shipping cost.

In Europe, the port of Hamburg recorded the most significant decrease (-3.9%). It dropped from €1,754 in the fourth quarter of 2017 to €1,686 in the first quarter of 2018.

At the port of Antwerp, the trend is similar. After a 1.2% decrease, the average cost of shipping a 20-foot dry container stood at €1,588 in the first quarter of 2018.

The Port of Valencia, which recorded a growth rate of 3.2%, witnessed the highest average shipping cost. Here, a shipper had to pay €1,622 on average for shipping a container.

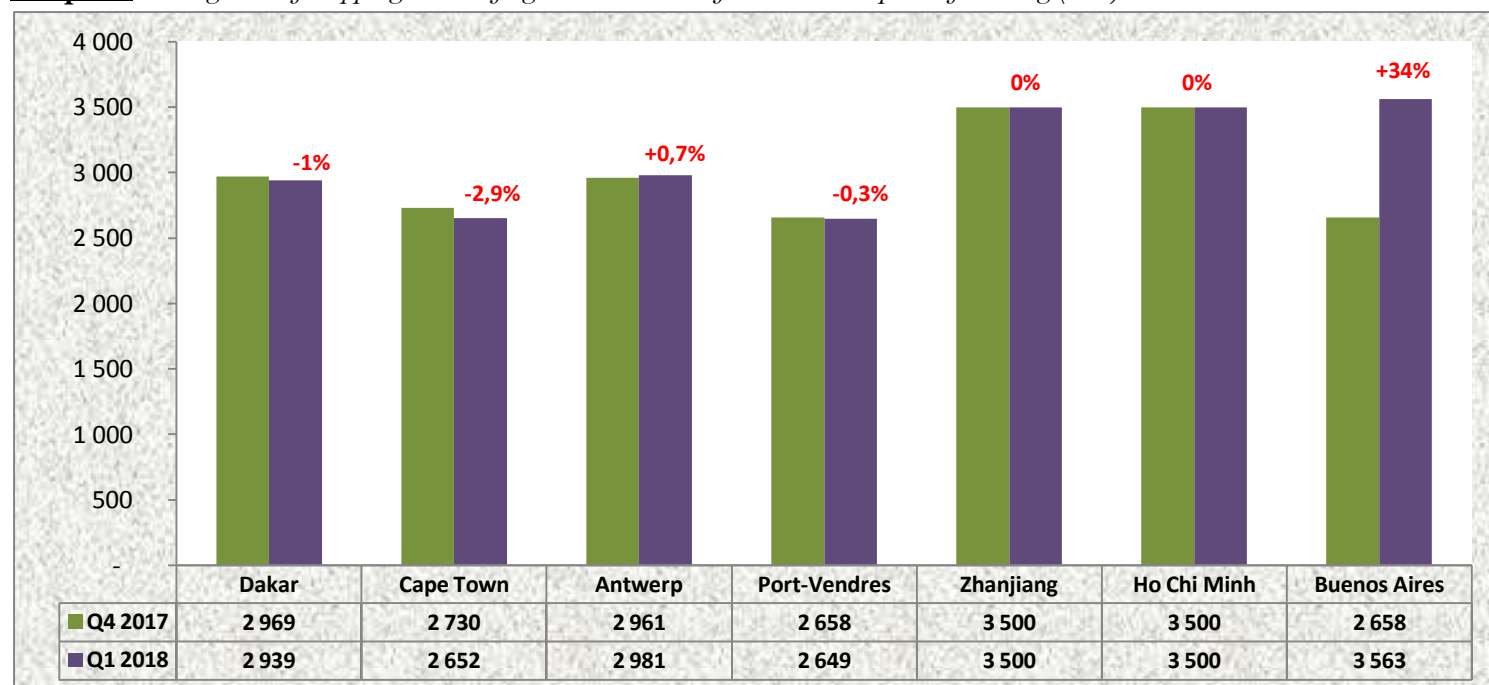
The port of Le Havre, like that of Valencia, registered higher fares in the first quarter of 2018 than in the fourth quarter of 2017. On average, shipping cost rose from €1,646 to €1,686; representing an increase of 2.4%.

In Asia, the ports of Qingdao and Jebel Ali registered slight variations (less than 0.5%). The port of Shanghai saw a 1.3% decline in the average shipping cost in the first quarter of 2018. At the port of Nhava Sheva, the average cost rose from € 1,938 to €1,982; representing an increase of 2.3%. It was noted that 25% of the shippers who used these Asian ports spent more than € 2,000 to ship a container to the port of Douala.

SHIPPING COST | Container 40'

Less than 1% variation in the average cost of shipping a 40 'refrigerated container at the main European shipping ports

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



Source : CNSC

In the first quarter of 2018, the main African shipping ports for 40-foot refrigerated containers recorded lower average shipping costs than in the fourth quarter of 2017. At the port of Dakar, it dropped from €2,969 to €2,939, representing a 1% decrease. Following a decline of about 3% at the port of Cape Town, the average shipping cost was €2,652 in the first quarter of 2018. It should be noted that the Senegalese port had far less dispersed fares than Cape Town (roughly €100 of the average against €300).

At the port of Antwerp, the average shipping cost rose from €2,961 to €2,981, representing a slight increase of 0.7%. The tariffs charged in this port moved away from the maximum average by €450. In Port-Vendres, following a 0.3% drop, the average shipping cost was €2,649 in the first quarter of 2018. Here, fares were less dispersed than in the Belgian port (roughly €300 of the average).

Shippers using one of these two European ports spent less than €2,800 to ship one 40 foot refrigerated container to the port of Douala.

At the main US boarding port for 40-foot refrigerated containers, the average shipping cost rose from €2,658 to €3,563, representing an increase of 34%. The tariffs charged in this port showed a less pronounced dispersion during the first quarter of 2018, roughly €200 of the average against roughly €300 of the average for the 4th quarter of 2017. The main Asian ports of loading for 40-foot refrigerated containers witnessed no change in shipping costs.

SHIPPING COST | Container 40'

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

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

COUNTRY	PORTS	Q4 2017	Q1 2018	Variation	COUNTRY	PORTS	Q4 2017	Q1 2018	Variation
South Africa	Durban	2,116	2,066	-2.4%	Germany	Hamburg	2,633	2,663	1.1%
China	Ningbo	2,660	2,659	0.0%	France	Le Havre	2,580	2,608	1.1%
	Qingdao	2,822	2,790	-1.1%	Spain	Valence	2,589	2,569	-0.8%
India	Nhava Sheva	2,660	2,677	0.6%	UK	Felixstowe	2,606	2,634	1.1%
UAE	Jebel Ali	3,022	2,948	-2.4%	Belgium	Antwerp	2,572	2,569	-0.1%
Canada	Montréal	3,043	3,257	7.0%	Holland	Rotterdam	2,602	2,658	2.2%
USA	Baltimore	3,046	2,990	-1.8%	Italy	Genoa	2,660	2,505	-5.8%

Source : CNSC

During the first quarter of 2018, the average cost of shipping a 40-foot dry container to the port of Durban was €2,066, representing a decrease of 2.4% compared to Q4 2017.

Of the main Asian 40-feet dry container shipping ports, the Port of Jebel Ali witnessed the most significant variation in the average shipping cost. It dropped from €3,022 to €2,948, representing a decrease of 2.4%. However, fares were much more volatile in this port, roughly € 425 of the average. At Qingdao port, the fares were on a downward trend. The average shipping cost dropped from €2,822 in the fourth quarter of 2017 to €2,790 in the first quarter of 2018, representing a 1.1% decrease. The port of Nhava Shava witnessed a 0.6% increase while in Ningbo the average shipping cost during the study period remained the same, i.e. €2,660. Tariff dispersions in the abovementioned ports were the same, roughly € 250 of the average. Half of the shippers using these Asian ports spent less than €2,800 to ship one 40-foot dry container.

In Europe, the highest decrease in the average shipping cost was recorded at the port of Genoa where it dropped from €2,660 to €2,505, representing a decline of about 6%.

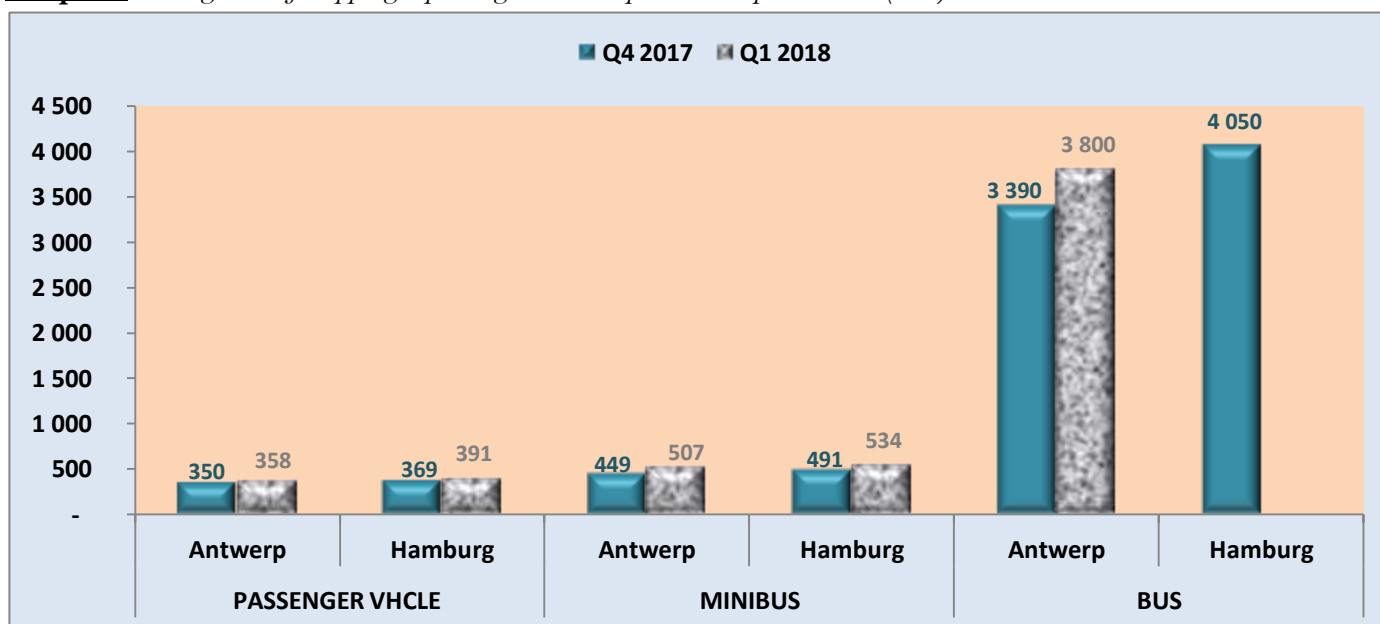
A similar trend was observed at the Port of Valencia, where the average cost fell by 0.8% recording a value equals to €2,569 for the 1st quarter of 2018. The rates charged at the port of Antwerp during the 4th quarter of 2017 remained the same as in the first quarter of 2018. On average, a shipper paid €2,570 to shipper a container.

The most significant increase was observed at the port of Rotterdam. In the first quarter of 2018, shippers using this port paid an average of €2,658 as shipping costs, representing an increase of 2.2% compared to the fourth quarter of 2017. The ports of Hamburg, Felixstowe and Le Havre both witnessed an increase of 1.1% in their average shipping cost. Regardless of the European port referred to above, half of the importers reportedly spent less than €2,600 to ship a container to the port of Douala.

SHIPPING COST | Vehicles

Increase in average cost of shipping a passenger vehicle at major ports of loading

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



Source : CNSC

At the major passenger boarding ports, the average shipping cost increased in the first quarter of 2018.

At the port of Hamburg, the average shipping cost rose from €369 to €391; representing an increase of 6%. During the study period, it was observed that tariffs moved away from the average by roughly €100 against roughly €50 for the fourth quarter of 2017. Three shippers out of four having shipped their vehicle from this port reportedly paid less than €360.

At the port of Antwerp, the average shipping cost rose by 2.3% and the value in the first quarter of 2018 was €358. As in the port of Hamburg, it was noted that the rates charged in the first quarter of 2018 were much more dispersed compared to those Q4 2017 (roughly €150 of the average against roughly € 90 of the average). Of the importers who used the Belgian port, 25% claimed to have paid more than €350 for shipping.

During the first quarter of 2018, the cost of shipping public transport vehicles increased in the main ports of embarkation.

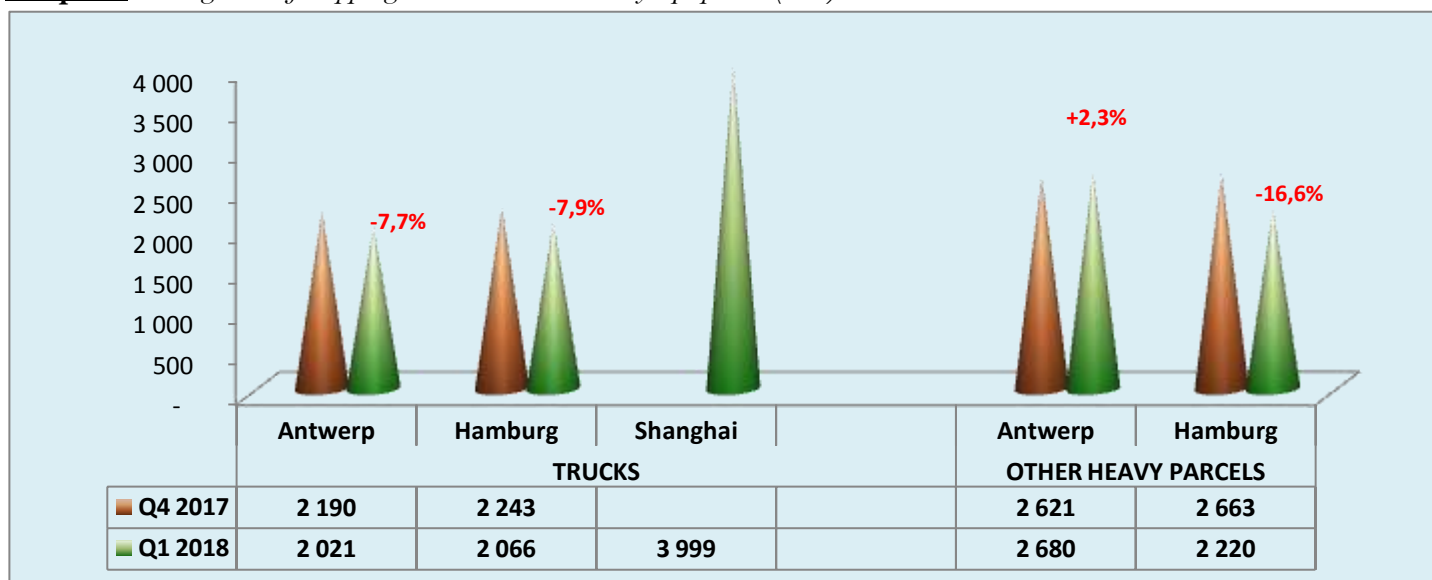
With regard to Minibuses, the increase at the port of Antwerp was about 13% and at the port of Hamburg, it was 8.8%, the amounts paid on average by shippers in the Q1 2018 were €534 and €507 respectively.

The average cost of shipping a minibus from the port of Antwerp increased from €3,390 to €3,800, representing an increase of 12.1%. During the study period, no bus was shipped from a German Port to the port of Douala. However, in Q1 shippers paid an average of €4,050 to ship a bus.

SHIPPING COST | Vehicles

About 8% decrease in the average cost of shipping a truck from the ports of Antwerp and Hamburg

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



Source : CNCC

In the first quarter of 2018, shippers using the main truck loading ports paid less than in the fourth quarter of 2017 for shipping a truck.

At the port of Antwerp, the average cost of shipping a truck dropped from €2,190 during the fourth quarter of 2017 to €2,021 in the first quarter of 2018, representing a decrease of 7.7%. The dispersion of tariffs in this port remained the same during the two quarters under study; roughly €750 of the average. Three out of four shippers using the Belgian port claimed to have paid less than €2,400 for shipping a truck.

At the port of Hamburg, shippers paid an average of €2,066 to ship a truck to the port of Douala in the first quarter of 2018, representing a decrease of 7.9% compared to Q4 2017. Prices in the first quarter of 2018 were slightly more dispersed. They deviated from the average by a maximum of €760; €40 more than in the fourth quarter of 2017. One-quarter of the shippers who shipped their trucks from the port of Hamburg paid more than €2,600 to ship them to the port of Douala.

The port of Shanghai, which shipped no truck to the port of Douala during the fourth quarter of 2017, shipped some in Q1 2018. Shippers who used this Port Said they spent on average €3,999 per truck shipped.

As for other heavy duty vehicles, the port of Hamburg witnessed a decrease of 16.6% while the port of Antwerp registered an increase of 2.3% in average transport costs. At the German port, it dropped from €2,663 to €2,220. The maximum difference from the average rate was €870 i.e. 30 euros more than in the fourth quarter of 2017. At the Belgian port, after the increase observed, shippers paid an average of € 2,680 during the first quarter of 2018. The prices charged were much more dispersed during the first period under study, roughly €820 of the average against roughly €600 for the 4th quarter 2017.

PORT CARGO DWELL | Containers

In Q1 2018, January the shortest dwell time concerning the clearing of import containers

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

	Oct-17	Nov-17	Dec-17	Q4 2017	Jan-18	Feb-18	Mars-18	Q1 2018
Average	16.9	16.8	15.9	16.6	13.2	14.6	14.4	14.3
Variation	-2.9%	-0.6%	-5.4%	7.1%	-17%	10.6%	-1.4%	-13.9%
1^{er} Quartile	7	7	6	7	5	6	5	5
2^e Quartile	12	13	11	12	9	10	10	10
3^e Quartile	21	21	21	21	18	18	18	18
Less than 11 days	42%	42%	47%	43%	54%	51%	52%	52%

Source : National Trade Facilitation Committee (CONAFE)

During the first quarter of 2018, dwell time observed for containerised import cargo dropped after the increase recorded during the last quarter of 2017. On average, containers removed in the first quarter of 2018 spent 14 days at the port after arrival, 2 days less than in the previous quarter. A quartile analysis confirms the predicted result by averages; the first quarter registered a better performance than in Q1 2017. Half of the containers that were released in the first quarter of 2018 had spent no more than 10 days in the port compared to 12 days in the previous quarter.

In addition, the proportion of containers that did not pay penalties for staying beyond the grace period was 52%; 9 points higher than in Q4 2017.

For the first three months of 2018, the month of January witnessed the shortest dwell time. Here, it took on average of 13 days for a container to leave the DIT Park after landing; against 15 days for the month of February and 14 days for the month of March. Otherwise; 9 days after landing, it was found that 25% of the containers had already left the port during the month of January; against approximately 22% for the other two months.

We also noted that irrespective the month (in the 1st quarter of 2018), more than half of the containers left the DIT Park without being slammed penalties related to a long stay.

PORT CARGO DWELL | Vehicles

Decrease in average dwell time for second hand vehicles in both parks (0, 5 day at SOCOMAR; 4 days at TMFD)

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

Car Park	TMFD		SOCOMAR	
	Q4 2017	Q1 2018	Q4 2017	Q1 2018
Average	19.8	16.1	21.9	21.4
Variation	0.0%	-18.7%	36.0%	-2.3%
1^{er} Quartile	10	6	10	11
2^e Quartile	14	12	16	15
3^e Quartile	24	20	26	28
Less than 11 days	35%	45%	30%	26%

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

During the first quarter of 2018, the average dwell time for vehicles at the TMFD Park was 16 days i.e. 4 days less than during the fourth quarter of 2017. During this period, half of the vehicles cleared had spent no more than 12 days at the port of Douala as opposed to 14 days in Q4 2017. In Q1 2018, 45% of vehicles were removed before the expiry of the 11-day grace period. This shows 10 points higher than in Q4 2017. These results show that the dwell time in the 1st quarter of 2018 was shorter than that of the 4th quarter of 2017.

A monthly analysis shows that the results obtained in the first quarter of 2018 were driven by the performances recorded during the month of March. Here, it took an average of 13 days for shippers to remove a car from the TMFD Park against 18 days in January and February. In addition, 60% of vehicles removed in March were not subject to parking penalties; about double the proportion observed in January (36%) and February (33%).

At the SOCOMAR Park, the average dwell time of used vehicles dropped from 22 days to 21 days between the Q4 2017 and Q1 2018. An analysis of the quartiles suggests longer dwell times observed in Q1 2018. In fact, 25% of the vehicles removed had stayed more than 28 days compared to 26 days in Q4 2017. Moreover, it can be seen that 26% of the vehicles that used this Park did not pay parking penalties; i.e. 4 points less than in Q4 2017.

An analysis of trends for each month of Q1 shows that, on average, it took 21 days for a shipper to clear a vehicle during the month of January, against 25 and 19 days respectively for February and March. The month of February seems to be the one with the worst dwell time. During this month, it took 21 days to remove half of the vehicles at the SOCOMAR Park against 13 and 14 days respectively for January and March. In addition, in February only 18% of vehicles spent less than 11 days at the Park against 26% and 31% in January and March.

AIR CARGO | Tonnage

Slight decrease (0, 6%) in air cargo to Cameroon

In the first three months of 2018, global air freight stood at 5,327 tonnes, representing a decrease of about 4% compared to the fourth quarter of 2017, when it was estimated at 5,542 tonnes.

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

TYPE OF GOODS	Q4 2017		Q1 2018		Variation
	Tonnage	%	Tonnage	%	
OTHERS PARCELS	1,584	65.0	1,348	55.6	-14.9%
DANGEROUS PRODUCTS	277	11.4	303	12.5	9.4%
CONSOLIDATIONS	240	9.8	297	12.3	23.8%
PERISSABLES / FOOD	45	1.8	124	5.1	175.6%
PHARMACEUTICAL PRODUCTS	99	4.1	82	3.4	-17.2%
DIPLOMATIC PARCELS	27	1.1	25	1.0	-7.4%
OTHERS	166	6.8	244	10.1	47.0%
TOTAL	2,438	100	2,423	100	-0.6%

Source : ADC

Cargo imported into Cameroon by air during the first quarter of 2018 accounted for 45% of the overall airfreight .i.e. one point higher than in the previous quarter. These imports fell slightly. They dropped from 2,438 tonnes in Q4 2017 to 2,423 tonnes in Q1 2018, representing a decrease of 0.6%.

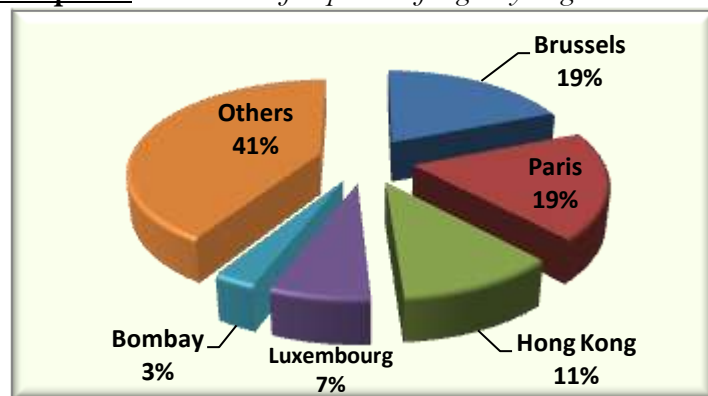
The configuration of air cargo remained almost the same. Miscellaneous parcels ranked first a proportion of around 57% followed by Hazardous Products, which accounted for 12.5% of the import air cargo. Consolidations ranked third with 12.3% followed by food, which represented 5.1% of import air traffic. The other imported products each accounted for less than 1%.

Of the main imported products, only miscellaneous parcels witnessed a negative growth rate. They dropped from 1,584 tonnes in Q4 2017 to 1,348 tonnes in Q1 2018, representing a decline of about 15%. Hazardous products witnessed a 9.4% growth rate with a tonnage of 303 for the 1st quarter of 2018. Consolidations also witnessed an increase, leaping from 240 to 297 tonnes. Foodstuffs recorded the most significant variation. Their tonnage in the first quarter of 2018 almost tripled (124 tonnes).

Pharmaceuticals witnessed the sharpest decline, dropping from 99 tonnes in the fourth quarter of 2017 to 82 tonnes in the first quarter of 2018, representing a reduction of 17.2%. Diplomatic packages also had a downward trend (-7.4%) with 25 tonnes for the first three months of 2018.

During the study period, cargo imported into Cameroon by air came from Brussels (19%), Paris (19%), Hong Kong (11%), Luxembourg (7%) and Bombay (3%). Each of the other cities in the world contributed for less than or equal to 2%.

Graph 6 : Breakdown of import air freight by origin



Source : ADC

AIR CARGO | Tonnage

6% decrease in air cargo from Cameroon

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

TYPE OF GOODS	Q4 2017		Q1 2018		Variation
	Tonnage	%	Tonnage	Tonnage	
PERISSABLES / FOOD	2,566	82.7	2,512	86.5	-2%
OTHER PARCELS	366	11.8	282	9.7	-23%
FLOWERS	44	1.4	25	0.9	-43%
PHARMACEUTICAL PRODUCTS	16	0.5	15	0.5	-6%
DANGEROUS PRODUCTS	21	0.7	8	0.3	-62%
GROUPINGS	18	0.6	7	0.2	-61%
OTHERS	73	2.4	55	1.9	-25%
TOTAL	3,104	100	2,904	100	-6%

Source : ADC

In the first three months of 2018, export air cargo accounted for 55% of overall air cargo, representing one point drop compared to the fourth quarter of 2017. Cargo exported by air to Cameroon dropped from 3,104 to 2,904 tonnes, representing a 6% drop.

The classification of types of goods according to their weight shows that the structure of export air freight was almost the same. Foodstuff ranked first with 86.5% of the total. Miscellaneous parcels ranked second with 9.7% of the total. Flowers ranked third with about 1% of the total. All other types of goods each accounted for not more than 0.5%. In terms of variation, it was noted that all products exported during the first quarter of 2018 decreased in volume.

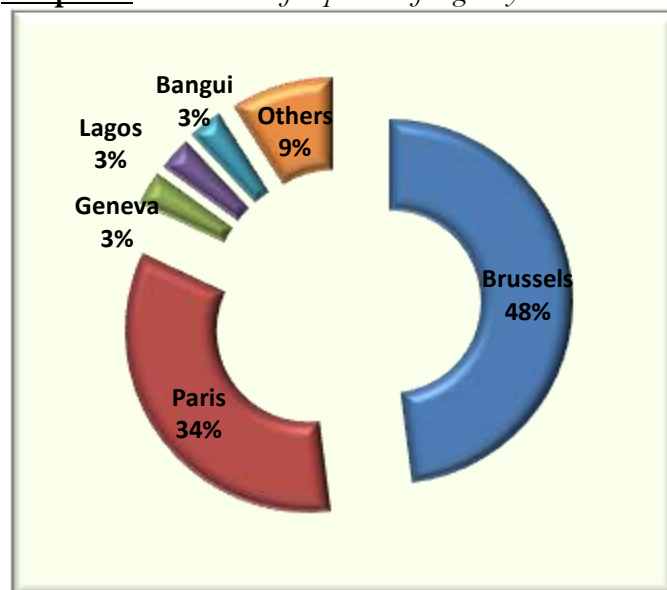
Hazardous goods (-62%) and consolidations (-61%) registered the most significant decreases. They stood at 8 and 7 tonnes respectively for the 1st quarter of 2018. Flowers dropped by almost half, plummeting from 44 tonnes in the fourth quarter of 2017 to 25 tonnes in the first quarter of 2018.

Miscellaneous parcels dropped by 23% with a tonnage of 282 for the first three months of 2018.

Pharmaceuticals (-6%) and foodstuff (-2%) witnessed lowest declines. They were respectively 15 and 2,512 tonnes in the first quarter of 2018.

Cargoes exported from one of Cameroon's international airports went to the following cities: Brussels (48%), Paris (34%), Geneva (3%), Bangui (3%) and Lagos (3%). Each of the other cities that received these exports over the study period had a share of less than 1%.

Graph 7 : Breakdown of export air freight by destination

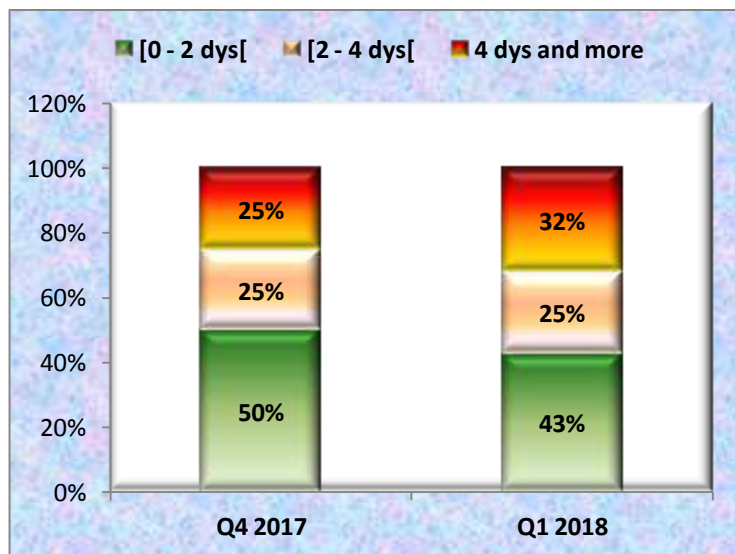


Source : ADC

AIR CARGO | Air cargo dwell time

Increase in import cargo dwell time in Q1 2018 (one-day increase), similar situation for exports during the two quarters under study (1 day average dwell time)

Graph 8 : Freight distribution according to airport dwell time



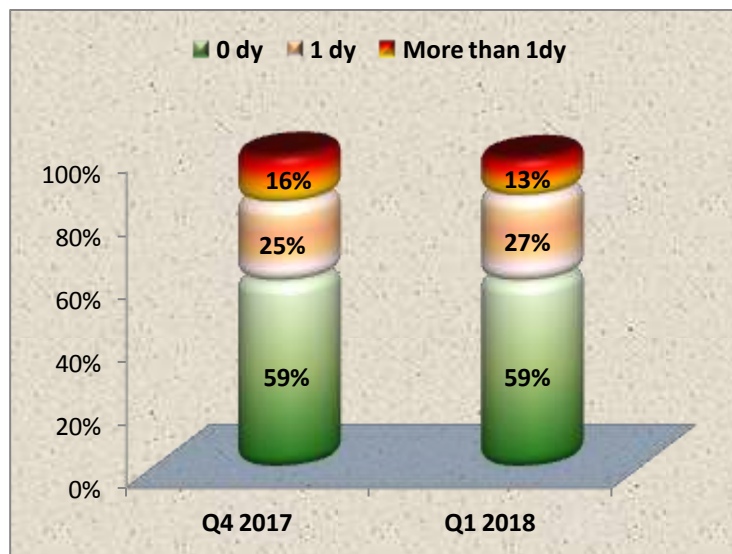
IMPORT

Source : ADC

Cargoes imported into Cameroon by air in Q1 2018 spent, on average, 4 days at the airport; i.e. one day more than in the fourth quarter of 2017.

The difference between the averages observed over the two periods studied suggests that more time was needed in the first three months of 2018. An in-depth analysis confirms this assumption. In fact, 43% of air freight was removed in less than two days i.e. 7 points less than in the fourth quarter of 2017. In addition, the proportion of packages that stayed at least four days before leaving the airport was 32% in the first quarter of 2018; that is to say 7 points more than during the 4th quarter of 2017.

A monthly analysis of airport dwell time during the first quarter of 2018 shows that the month of March witnessed the shortest clearing time. The proportion of cargo that spent less than two days was 45% against 41% for the other two months.



EXPORT

As in the fourth quarter of 2017, cargo forwarded by air during the first quarter of 2018 spent an average of 1 day at the airport before leaving for their destination.

As in the fourth quarter of 2017, 59% of airfreight left the same day they arrived at the airport. The packages that spent more than one day before leaving the airport accounted for 14% in the first quarter of 2017 i.e. 2 points less than in the fourth quarter of 2017.

Consequently, although the two quarters had the same average transit time, the first quarter of 2018 recorded shorter dwell times than those of the fourth quarter of 2017.

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1st Quarter 2018



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