



# THE ECONOMIC OUTLOOK || 4<sup>th</sup> quarter 2018



[0 - 7dys] = 13%; [7 - 11dys] = 13%; 11dys and more = 74% of traffic

**TMFD PARK**



[0 - 7dys] = 20%; [7 - 11dys] = 17%; 11dys and more = 63% of traffic

**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 a consultation meeting on Cameroon transit corridor issues organised by the Ministry of Transport on 16 April 2018.

The meeting, which held following a World Bank study that revealed that the costs of transport on these corridors were the highest in sub-Saharan Africa, aimed at identifying the problems encountered by the various actors in order to take consensual measures to improve the competitiveness of our cargo routes.

The analysis of the evolution of the main transport indicators reveals that an average of 12 ships waited at anchorage per day in the 4<sup>th</sup> quarter of 2018, that is to say 7 vessels lesser than in the previous quarter.

At the SOCOMAR and TMFD Car Parks, the average dwell time for imported second hand cars increased by about 1 day on average.

In the 4<sup>th</sup> quarter of 2018, air cargo stood at 4,848 tonnes, representing a 17.2% decrease. The average airport dwell time for imports was 4 days and 1 day for exports.

This issue contains detailed information on these different issues.

Have an enjoyable read!

**Auguste MBAPPE PENDA**

## DOSSIER | CNSC takes part in consultations on transit corridor operational problems

At the initiative of the Minister of Transport (MINT), a consultation meeting on the operational issues of the Cameroon transit corridors (Douala - N'djamena and Douala-Bangui) held in the Ministry of Transport on Tuesday, 16 April 2019. The meeting that was co-chaired by the Minister of Transport and the Minister of Forestry and Wildlife was attended by Cameroon road corridor players namely the General Delegation for National Security, Secretariat of State for Defence, transporters, Port Authorities, the Cameroon National Shippers' Council etc.

### Context

The consultation meeting held following a World Bank study on transport costs along sub-Saharan Africa corridors. The study showed that tariffs charged along road corridors in Central Africa, in general and Cameroonian transit corridors, in particular, are the highest in sub-Saharan Africa. The World Bank revealed that the cost of moving goods on the Douala - N'djamena and Douala - Bangui corridors averages 105 FCFA /tonne/km compared to 40 FCFA / tonne / km in West and East Africa and 25 FCFA / tonne / km in Southern Africa. According to the study, the discrepancy observed is mainly attributable to the many harassments and malpractices whose financial impact can be estimated at 175 billion FCFA per year.

Another study conducted in January 2019 by the Inter - State Transport Activities Coordination Committee (ITACC) outlined a number of difficulties encountered by transporters moving goods along the corridors. These include:

- harsh inspection of Chadian trucks in Cameroon;
- the problem of clamping truck wheels at the port of Douala;
- long waiting periods for installing GPS trackers on trucks by Customs at the Douala Port;

- multiple checkpoints (58 along the Douala-Bangui corridor).

These resulted in higher expenses and lengthy delivery times of shipments that make our corridors less competitive.

It was therefore expedient to hold a consultation meeting to assess the situation and take consensual measures to reverse the trend and improve the competitiveness of Cameroon's transit corridors.

### Problems faced by road transport

Participants from various transporters' unions pinpointed the following problems:

- Multiple checkpoints along the corridors, resulting in harassments and incidental expenses to pay at some of these checkpoints;
- After crossing the border, truckers can no longer intervene in the event of a problem involving their trucks or collaborators as only the Freight Management Bureaus have the authority to act therein;
- Fees paid for truck escorts along the Central African stretch of the Douala-Bangui corridor (25,000 FCFA per escort and per truck) and those who do not take escorts have a very high probability of being attacked by armed gangs;
- Problem of implementing NEXUS + (Lengthy times for installing GPS trackers by Customs at the Douala port, shortage of tags, unrealistic period of time between the port of Douala and the first checkpoint at Yassa);
- Problems of weighing stations (discrepancy between weighbridge and mobile weighing instruments, immobilisation of transit trucks even after payment of penalties given that load shedding procedures are more complex);



- High number of clandestine transporters within the profession;
- BGFT-related issues (low visibility on cargo sharing mechanism, non-existence of a tariff applicable to the BGFT).

At **MINREX**, some brainstorming is underway to ensure that Cameroonian truckers have better treatment once they cross into other countries.

The **MINT** has also provided all actors with a toll-free number (**8204**) that can be used to denounce illegal acts observed especially along the corridors.

### Contributions of the administration

In order to help reduce the harassment of timber carriers, **MINFOF** has slashed the number of checkpoints to six and the control time to an average of 20 minutes. Additionally, **MINFOF** has put in place a toll-free number that carriers can call to denounce any form of harassment observed in the field and regular controls are conducted to ensure that field staff are doing only their job.

The **SED** signed a decision prohibiting each Gendarmerie Unit from mounting two checkpoints simultaneously on the corridors. It has also provided carriers with a gendarmerie toll-free number (**1501**) that can be used to denounce cases of abuse.

As for the **DGSN**, disciplinary proceedings have been taken against all the officers involved in the harassment of transporters along the corridors. The **DGSN** also calls on transporters to be in good standing and to denounce such actions using the toll-free number of the police (**1500**). Finally, mixed controls are organised to detect cases of abuse.

For the **CNSC**, one of the problems of transporters is the lack of rest areas and secure truck parks both in towns and along the corridors.

In order to solve this problem, the **CNSC** has embarked on the construction of secure Trucker Accommodation Centres with amenities for truckers moving goods along Cameroonian corridors. To date, that of the Dibamba is already operational and will be commissioned in the coming weeks. The **CNSC** is constructing a second Trucker Accommodation Centre in Kousseri. Furthermore, the **CNSC** has a Transport Observatory which has conducted studies, particularly on the harassment of truckers and forwarded its report to the hierarchy (**CNSC** Board of Directors and **MINT**).

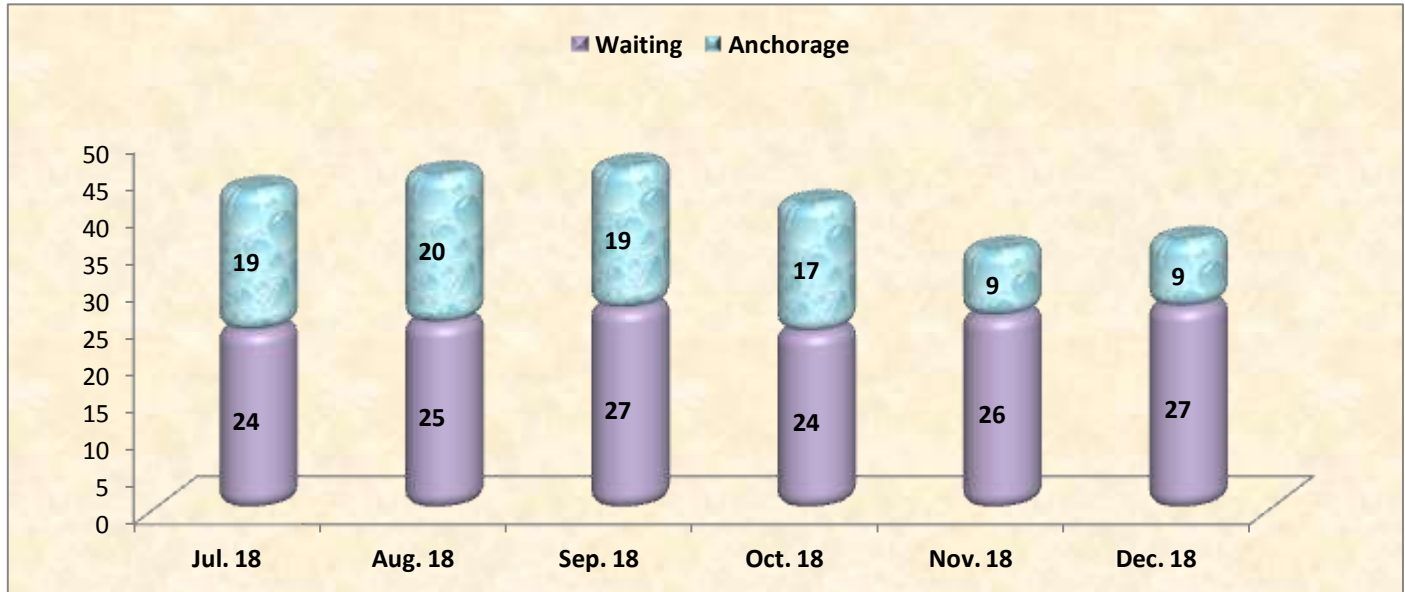
### Conclusion

Considering that some of the main actors (**BGFT**, Customs, etc.), were absent, it was recommended that a working group comprising all the stakeholders be set up to draft a document detailing all the difficulties encountered by transit corridor users as well as proposed appropriate corrective measures. The report of the working group shall be submitted no later than two months after its establishment.

## SHIPS | Number of ships at anchorage/ awaited per day

**Decrease in the number of vessels at anchorage in Q4 2018: on average 12 ships a day**

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



**Source :** PAD

During the fourth quarter of 2018, the number of ships announced at maritime conferences organised by the harbour master of the Douala port averaged 25 per day. This figure was similar to that recorded in the previous quarter. The monthly evolution of this statistic showed an increase in the various months of Q4 2018. On average, 24 ships were announced each day at conferences held in October 2018 against 26 and 27 for November and December respectively.

The number of vessels at anchorage in Q4 2018 dropped. In fact, during the study period, there was an average of 12 vessels at anchorage, 7 less than in the 3<sup>rd</sup> quarter of 2018.

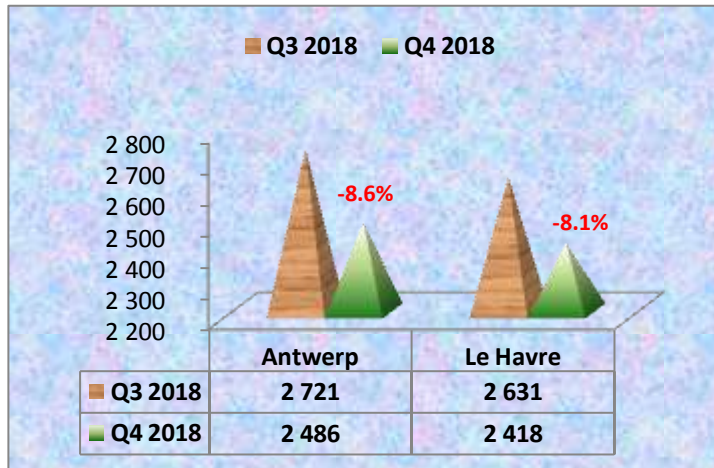
A monthly analysis of this indicator showed that October 2018 witnessed the highest number of vessels at anchorage. On average, 17 ships waited per day in October. In addition, every other day of this month, the number of ships at anchorage was greater than or equal to 20.

November and December were quite similar with daily averages of 9 vessels. However, it is noteworthy that in December, the number of vessels oscillated between 7 and 11, while in November it ranged between 4 and 13.

## SHIPPING COST | Container 20'

1% decrease in the average cost of shipping a 20' dry container at the ports of Hamburg and Valencia

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



Source : CNCC

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

COUNTRY	PORT	Q3 2018	Q4 2018	Variation
Cote d'Ivoire	Abidjan	1,211	1,219	0.7%
South Africa	Durban	1,314	1,365	3.9%
Germany	Hamburg	1,668	1,651	-1.0%
Belgium	Antwerp	1,584	1,585	0.1%
Spain	Valencia	1,708	1,689	1.1%
France	Le Havre	1,645	1,655	0.6%

Source : CNCC

The average cost of shipping a 20-foot dry container to the Douala Port increased by around 4% at the port of Durban (€1,365) during the fourth quarter of 2018. A similar trend (+ 0.7%) was observed at the port of Abidjan (€1,219).

Of the main European ports of loading, a similar evolution of the average cost of shipping a 20-foot container was observed in Valencia and Hamburg. Indeed, it decreased by 1% and amounted to €1,651 and €1,689 respectively. At the port of Le Havre, the average shipping cost rose by 0.6% in Q4 2018 (€1,655). In the port of Antwerp, shippers reportedly paid an average of €1,585, the same amount as in the previous quarter.

During the fourth quarter of 2018, the average cost of shipping a 20-foot refrigerated container decreased in the two main ports of shipment. In Antwerp, it dropped by 8.6%, registering €2,486. Half of the rates charged were less than €2,540.

At the port of Le Havre, it rose from €2,631 in the third quarter of 2018 to €2,418 in the fourth quarter of 2018, representing a 8.1% decline. One in two shippers who used this port spent at least €2,700 to ship a container.

COUNTRY	PORT	Q3 2018	Q4 2018	Variation
China	Qingdao	2,013	2,021	0.4%
	Shanghai	2,030	1,989	-2.0%
India	Nhava Sheva	1,948	1,927	-1.1%
UAE	Jebel Ali	2,003	1,984	-0.9%
USA	Houston	2,375	2,491	4.9%

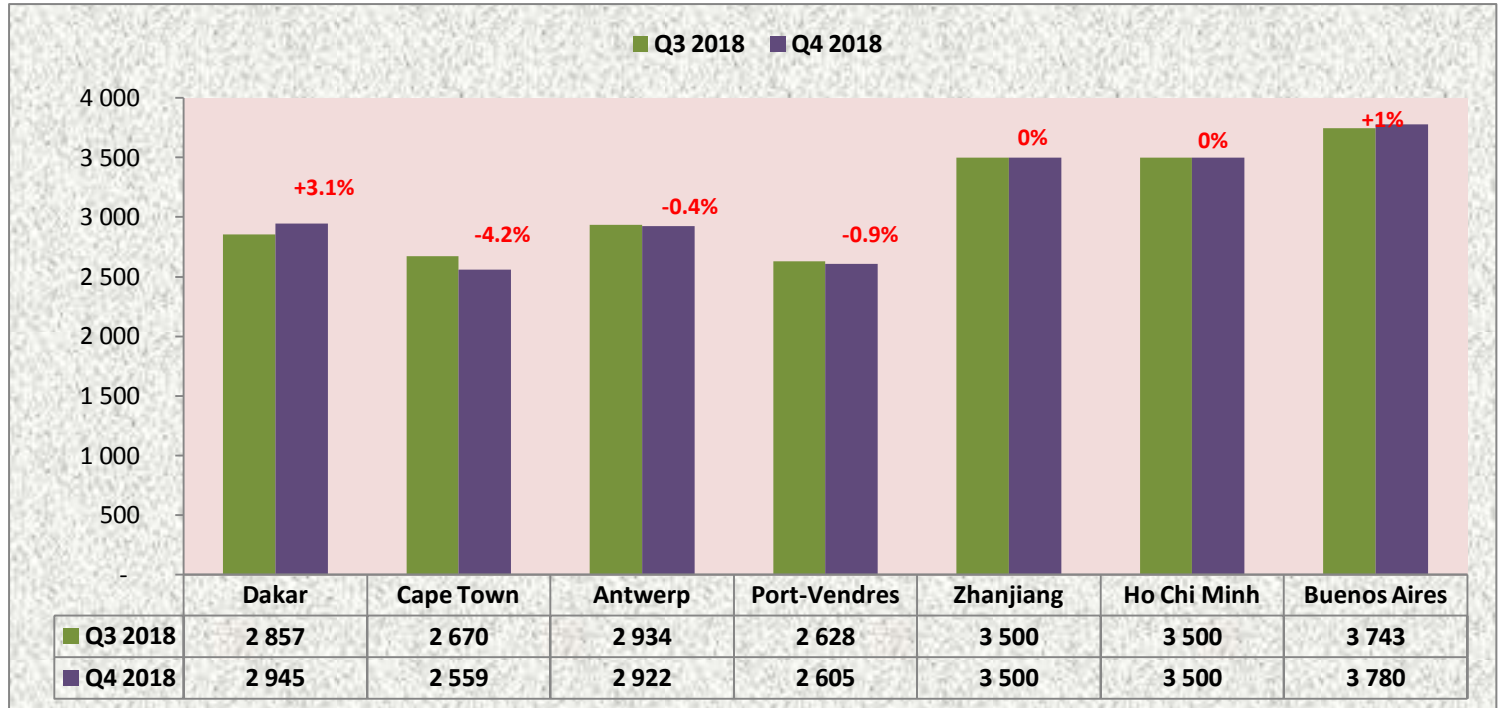
Out of the major Asian shipping ports, Qingdao was the only Port that witnessed an increase in average shipping cost. It rose from €2,013 to €2,021, representing a 0.4% increase. The most significant decrease was recorded at the port of Shanghai (-2%). At the port of Nhava Sheva, following a 1.1% decrease, the average shipping cost stood at €1,927. The port of Jebel Ali witnessed a drop of about 1% with an average shipping cost of €1,984.

With an approximately 5% increase, Houston (€2,491) was the only main port of embarkation of 20' dry containers bound for Douala that recorded the most significant increase.

## SHIPPING COST | Container 40'

Decrease in average cost of shipping a 40' refrigerated container to the main European ports of loading

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



*Source : CNSC*

In Q4 2018, the average cost of shipping a 40' refrigerated container from the port of Cape Town (€2,945) to the Port of Douala decreased by 4.2%. The trend was reversed in the port of Dakar with an average shipping cost of €2,945, representing an increase of 3.1% compared to Q3 2018. The prices charged in Dakar were closer. Indeed, the maximum difference with the average was €120 against €200 for the South African port.

In the main European ports of loading for 40' refrigerated containers, the average shipping cost dropped. In Port-Vendres, shippers paid on average €2,605 to ship one container, representing a 1% decrease compared to the previous quarter. The port of Antwerp recorded a 0.4% decrease with an average shipping cost of €2,922. The rates charged at these two ports deviated from the average by more or less €350. In addition, one out of four shippers paid more than €2,800 to ship a container.

The situation remained the same in the main Asian ports of loading namely Zhanjiang and Ho Chi Minh. On average, the cost of shipping a 40' refrigerated container stood at €3,500.

At the port of Buenos Aires, which is the main US port of loading for 40' refrigerated containers bound for the port of Douala, the average shipping cost rose from €3,743 to €3,780, representing a 1% increase. The rates charged deviated from the average by more or less than €130 and half of the shippers using this port paid less than €3,840 to ship a container.





## SHIPPING COST | Container 40'

About 1% decrease in the average cost of shipping a 40' dry container from the ports of Hamburg and Valencia

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

COUNTRY	PORTS	Q3 2018	Q4 2018	Variation	COUNTRY	PORTS	Q3 2018	Q4 2018	Variation
South Africa	Durban	2,039	2,054	0.7%	Germany	Hamburg	2,633	2,609	-0.9%
China	Ningbo	2,711	2,668	-1.6%	France	Le Havre	2,594	2,585	-0.3%
	Qingdao	2,871	2,848	-0.8%	Spain	Valence	2,563	2,539	-0.9%
India	Nhava Sheva	2,693	2,613	-3.0%	UK	Felixstowe	2,546	2,495	-2.0%
UAE	Jebel Ali	2,948	2,980	1.1%	Belgium	Antwerp	2,544	2,518	-1.0%
Canada	Montréal	3,023	3,044	0.7%	Holland	Rotterdam	2,611	2,595	-0.6%
USA	Baltimore	3,056	3,101	1.5%	Italy	Genoa	2,648	2,709	2.3%

*Source:* CNSC

During the fourth quarter of 2018, the average cost of shipping a 40' dry container from the port of Durban to the port of Douala was €2,054 representing a 0.7% increase.

Of the main Asian ports of loading, only Jebel Ali registered an increase (+1.1%) in average shipping cost. Shipping such a container from this port cost an average of €2,980, with price deviations of more or less €400 from the average. The port of Nhava Sheva registered the most significant decrease (-3%) with an average shipping cost of €2,613 for Q4 2018. The ports of Ningbo (-1.6%) and Qingdao (-0.8%) charged average shipping costs of €2,668 and €2,848 respectively. Rates at these ports fluctuated by around €300 and one in two shippers paid at least €2,800 for shipping costs.

The main US ports of loading witnessed increased costs. At the Port of Montreal (+0.7%) the average shipping cost stood at €3,044 while in Baltimore (+1.5%) it was €3,101. Half of the shippers reportedly paid at least €3,000 to ship a container to the port of Douala.

With an average shipping cost of €2,709, the port of Genoa (+2.3%) was the only European port of loading to witness an upward trend. The prices observed in this port had the highest volatility (about €400 of the average).

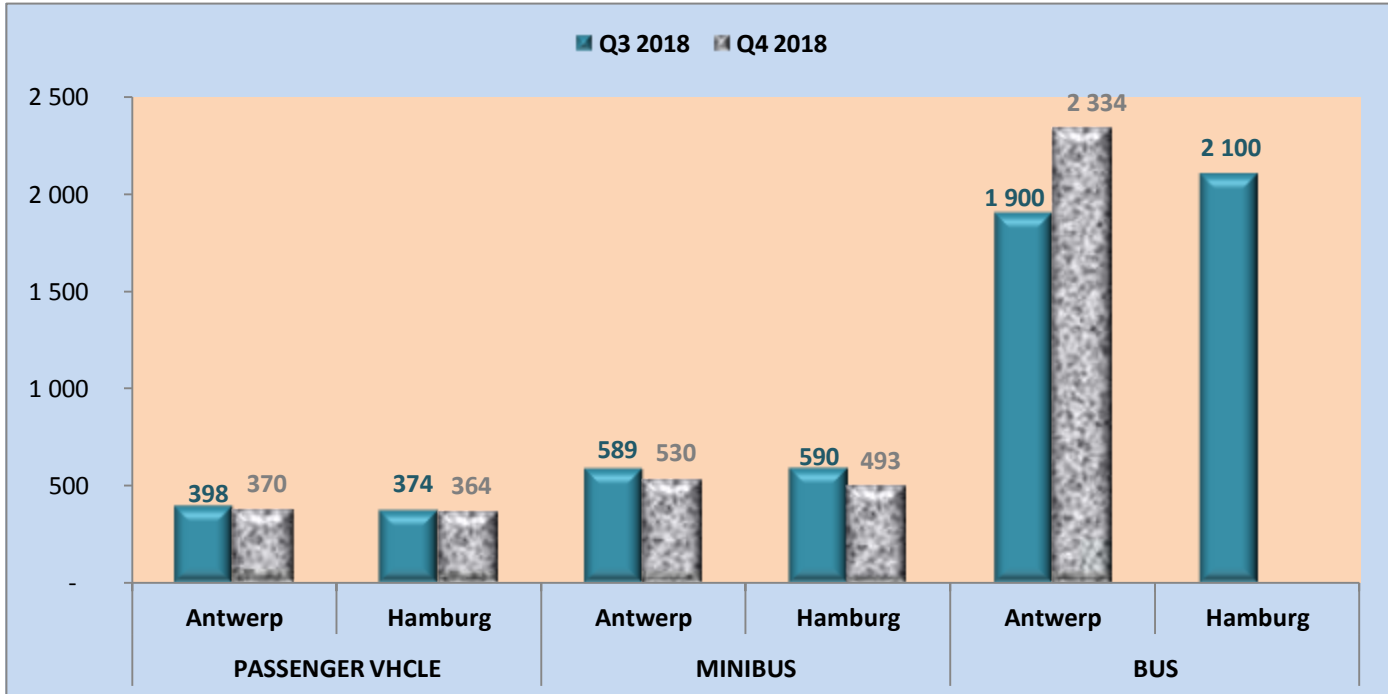
The port of Felixstowe (€2,495) witnessed a 2% decrease, representing the most significant decrease. Rate variations were about €310 of the average. The ports of Hamburg (€2,609), Valencia (€2,539) and Antwerp (€2,518) each experienced a decrease of 1% in their average shipping cost. The ports of Rotterdam (-0.6%) and Le Havre (-0.3%) showed a less significant variation, with average shipping costs of €2,595 and €2,585 respectively in Q4 2018. For the last four ports mentioned above, the volatility of the tariffs charged was the same, i.e. about €280 of the average.

In each of these main European ports of loading, half of the shippers reportedly paid less than €2,600 to ship a container to the port of Douala.

## SHIPPING COST | Vehicles

*Decrease in average shipping cost of a passenger vehicles at the ports of Antwerp and Hamburg*

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



Source : CNSC

In Q4 2018, the average cost of shipping a passenger vehicle at major ports of loading decreased.

At the port of Antwerp, it dropped from €398 to €370, representing a 7% decrease. Tariffs in this port stood at about €120 from the average and three quarters of shippers having shipped their vehicle from this port paid at most €350 as shipping cost.

At the port of Hamburg, it dropped by 2.7% registering €364 for Q4 2018. The volatility of the rates charged was slightly lower than that observed in Antwerp (about €90 of the average). Additionally, 75% of shippers who used this port reportedly paid about €360 as shipping costs.

As with passenger vehicles, the average cost of shipping Minibuses from the main ports of loading decreased.

At the port of Antwerp, it dropped by 10% and stood at €530 in Q4 2018. Tariffs charged witnessed a very high volatility (about €400 of the average) and 75% of shippers who have shipped their vehicle from this port paid less than €460.

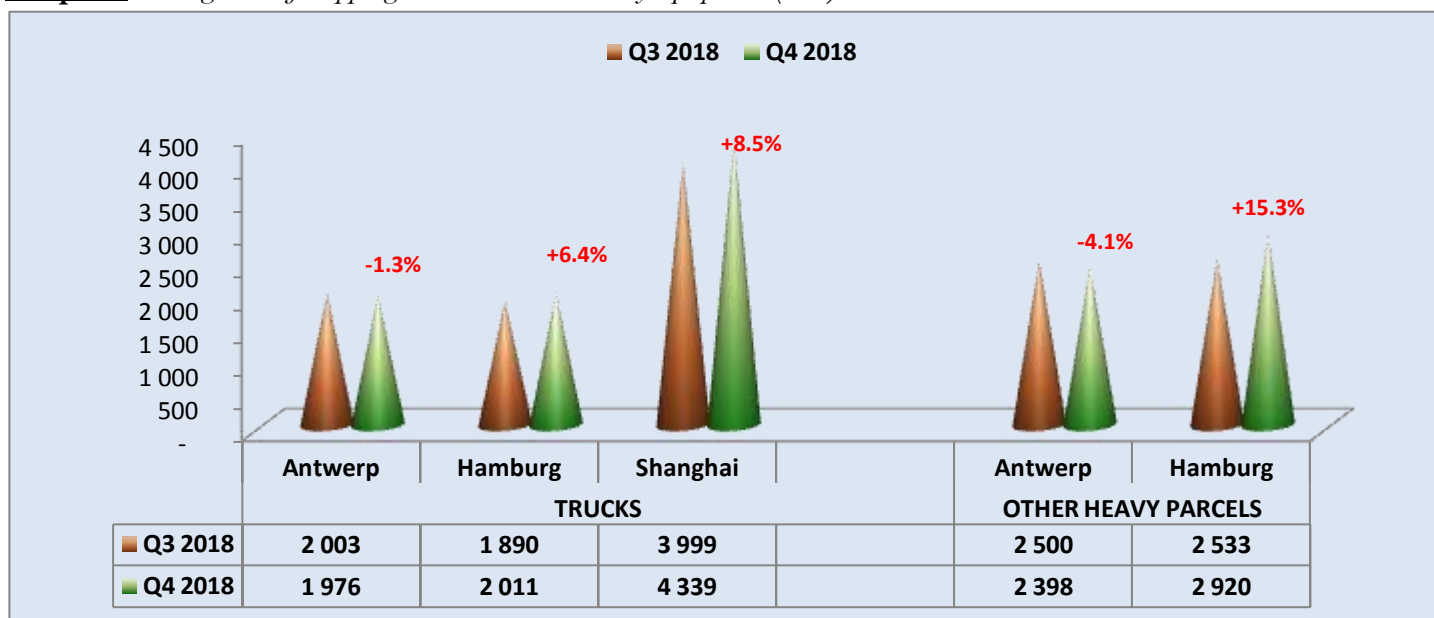
At the port of Hamburg it decreased from € 590 to € 493, representing a decrease of 16.4%. The prices charged therein were quite close, with deviation of about €60 from the average and three shippers out of four paid at most €500 to ship a vehicle.

Concerning the transport of buses, no bus was shipped from the port of Hamburg during the period of study. The port of Antwerp witnessed a 22.8% increase in the average shipping cost.

## SHIPPING COST | Vehicles

*Increase in the average cost of shipping a truck from the ports of Hamburg and Shanghai*

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



**Source :** CNCC

Of the main ports of loading trucks bound for the port of Douala, only the port of Antwerp witnessed a decrease (-1.3%) in average shipping cost. It dropped from €2,003 in the 3<sup>rd</sup> quarter of 2018 to €1,976 in the 4<sup>th</sup> quarter of 2018. The rates charged in this port differed by about €750 from the average and one out of four shippers paid at least €2,400 for shipping one truck. At the port of Shanghai (8.5%), which witnessed the highest increase in average shipping cost, shippers paid an average of €4,339 and half paid less than or equal to €4,127. This port witnessed tariffs that deviated from the average by about €1,100. At the port of Hamburg, the average shipping cost witnessed a 6.4% increase and stood at €2,011 in Q4 2018. One in four shippers using this port paid at least €2,217 for shipping a truck. Here, tariff volatility was not very far from that of the Belgian port (about €800 of the average).

As for other heavy duty equipment, especially building and public works equipment, the two main ports of loading witnessed an opposite trend.

At the port of Antwerp, the average cost rose from €2,500 in Q3 2018 to €2,398 in Q4 2018, representing a decrease of 4.1%. Here, the maximum average tariff deviation was €980 and three shippers out of four paid €3,100 or less for shipping one heavy duty truck.

At the port of Hamburg, the average shipping cost witnessed an upward trend. It rose from €2,533 to €2,920, representing a 15% increase. Here, tariff volatility was higher (about €1,100 of the average) and 75% of the shippers using this port paid shipping cost of at least €3,500.

## PORT CARGO DWELL | Containers

In Q4 2018, December witnessed the shortest port dwell time for import containers

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

	Jul-18	Aug-18	Sept-18	Q3 2018	Oct-18	Nov-18	Dec-18	Q4 2018
<b>Average</b>	16.2	17.6	18.4	<b>17.7</b>	18.8	20.7	18.3	<b>19.4</b>
<b>Variation</b>	<b>-12.0%</b>	<b>8.6%</b>	<b>4.5%</b>	<b>2.3%</b>	<b>2.2%</b>	<b>10.1%</b>	<b>-11.6%</b>	<b>9.6%</b>
<b>1<sup>er</sup> Quartile</b>	6	8	9	<b>8</b>	7	8	7	<b>8</b>
<b>2<sup>e</sup> Quartile</b>	12	14	15	<b>13</b>	14	16	13	<b>14</b>
<b>3<sup>e</sup> Quartile</b>	20	23	25	<b>23</b>	25	28	23	<b>25</b>
<b>Less than 11 days</b>	46%	38%	37%	<b>41%</b>	39%	34%	39%	<b>37%</b>

**Source :** National Trade Facilitation Committee (CONAFE)

Port dwell time for import containers at the Douala Port in Q4 2018 averaged 19 days i.e. about 2 more days compared to the previous quarter. Quartile analysis showed that of the two quarters studied, Q4 2018 witnessed the longest port dwell time for containers at the port of Douala. In fact, during the study period, half of the containers cleared had spent no more than two weeks in the port of Douala, whereas in the previous quarter, about 55% of such containers were cleared in less than two weeks. It was also observed that the proportion of containers with a port dwell time of at most 8 days remained the same (25%) over the two quarters.

In Q4 2018, 37% of the containers were cleared without being subject to extended parking penalties, representing a decrease of 4 points compared to Q3 2018.

The average port dwell time for import containers witnessed peaks and drops in the last three months of 2018. October 2018 recorded approximately 19 days port dwell time. In November 2018, the average port dwell time for containers increased by about 2 days (21 days) and then decreased in December 2018 by about 3 days (18 days). A quartile analysis showed that December

registered a shorter dwell time while November witnessed the worst dwell time. In November 2018, every other container spent at least 16 days at the port. In addition, 66% of shipments cleared this month were subject to extended parking penalties.

Half of import containers cleared at the port of Douala had spent about 13 days there. Some 61% of containers were subject to extended parking penalties.

## PORT CARGO DWELL | Vehicles

Increase in average dwell time in both parks (SOCOMAR and TMFD)

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

Car Park	TMFD		SOCOMAR	
	Q3 2018	Q4 2018	Q3 2018	Q4 2018
<b>Average</b>	<b>19.0</b>	<b>21.4</b>	<b>20.3</b>	<b>21.0</b>
<b>Variation</b>	<b>12.7%</b>	<b>12.7%</b>	<b>-9.3%</b>	<b>3.3%</b>
<b>1<sup>er</sup> Quartile</b>	11	11	11	11
<b>2<sup>e</sup> Quartile</b>	14	18	16	16
<b>3<sup>e</sup> Quartile</b>	23	27	25	27
<b>Less than 11 days</b>	<b>26%</b>	<b>26%</b>	<b>27%</b>	<b>29%</b>

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

In Q4 2018, the average dwell time for imported second-hand vehicles witnessed an increase at both parks of the Douala Port.

In the TMFD Park, vehicle dwell time rose from 19 days in Q3 2018 to 21 days in Q4 2018. Although the proportion of vehicles that were cleared early enough to avoid extended parking penalties were the same (26%) in both quarters, Q4 witnessed more frequent extended parking periods. In fact, during the study period, half of such vehicles spent at least 18 days at both parks against 14 days in Q3 2018.

A monthly analysis revealed a shorter dwell time in December 2018. During this period, the average dwell time was 20 days and 31% of the vehicles were not subject to extended parking penalties. October 2018 witnessed long dwell times with an average of 23 days and 22% of such vehicles were cleared in less than 11 days.

At the SOCOMAR Park, the average dwell time for imported second-hand vehicles stood at 21 days, showing an increase of one day in Q4 2018. The study period also witnessed the highest frequency for short dwell times than long transit times. In fact, in Q4 2018, 29% of such vehicles spent less than 11 days, i.e. 2 points more than the previous quarter. In addition, a quarter of vehicles cleared during the study period spent at least 27 days at the park, i.e. 2 more days compared to Q3 2018.

A monthly analysis showed a shorter dwell time in October 2018 and a longer dwell time in November 2018. In October, it took on average 19 days for the shipper to remove one vehicle from the SOCOMAR Park and during this month, 36% of the vehicles were not subject to extended parking penalties. In November, however, the average vehicle turnaround time was 24 days and only 13% of these were cleared in less than 11 days.

## AIR CARGO | Tonnage

**40, 1% decrease in Cameroon-bound air freight**

In Q4 2018, overall air freight dropped by 17.2%. It decreased from 5,854 to 4,848 tonnes.

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

TYPE OF GOODS	Q3 2018		Q4 2018		Variation
	Tonnage	%	Tonnage	%	
OTHERS PARCELS	1,980	61.2	1,301	67.1	-34.3%
CONSOLIDATIONS	350	10.8	338	17.4	-3.5%
DANGEROUS PRODUCTS	394	12.2	118	6.1	-70.0%
PHARMACEUTICAL PRODUCTS	123	3.8	61	3.1	-50.6%
PERISSABLES / FOOD	88	2.7	32	1.7	-63.3%
DIPLOMATIC PARCELS	60	1.9	26	1.3	-57.3%
OTHERS	241	7.4	64	3.3	-73.3%
<b>TOTAL</b>	<b>3,236</b>	<b>100</b>	<b>1,940</b>	<b>100</b>	<b>-40.1%</b>

*Source : ADC*

In Q4 2018, Cameroon-bound air freight accounted for 40% of the total, i.e. 15 points lower than the previous quarter. It dropped by 40.1% and stood at 1,940 tonnes.

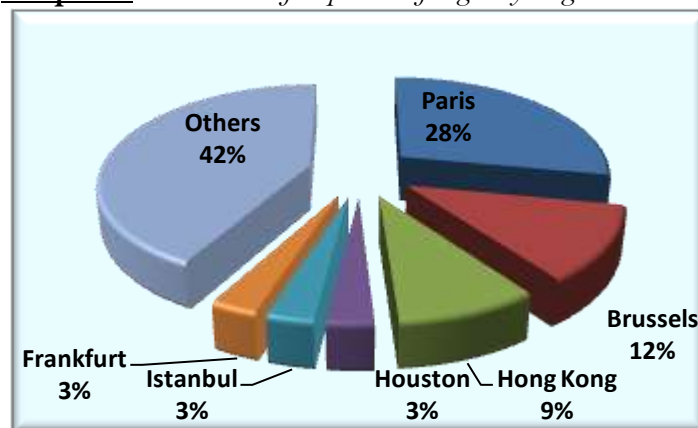
It ranked between 3<sup>rd</sup> and 4<sup>th</sup> in Q4 2018. Miscellaneous Parcels ranked 1<sup>st</sup>, after a 67.1% increase. Consolidations, which accounted for 17.4% of import air cargo, ranked 2<sup>nd</sup> followed by Hazardous Products (6.1%) and Pharmaceuticals (3.1%) respectively. Foodstuffs (1.7%) and Diplomatic Parcels (1.3%) occupied the last two positions according to the weight of the types of goods accounting for more than 1%.

During the period under review, main import air freight witnessed a drop in tonnage. Hazardous Products (-70%) witnessed the most significant decrease and amounted to 118 tonnes in Q4 2018. The tonnage of Pharmaceuticals dropped by half.

Miscellaneous Parcels dropped by one-third and recorded 1,301 tonnes in the fourth quarter of 2018. Consolidations witnessed the least significant decrease, dropping from 350 to 338 tonnes.

In Q4 2018, air cargo imports came mainly from Paris (28%), Brussels (12%), Hong Kong (9%), Houston (3%), Istanbul (3%) and Frankfurt (3%).

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



*Source : ADC*

## AIR CARGO | Tonnage

11,1% increase in air freight from Cameroon

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

TYPE OF GOODS	Q3 2018		Q4 2018		Variation
	Tonnage	%	Tonnage	Tonnage	
PERISSABLES / FOOD	2,197	83.9	2,494	85.8	13.5%
OTHER PARCELS	304	11.6	267	9.2	-12.3%
FLOWERS	30	1,1	38	1.3	27.9%
PHARMACEUTICAL PRODUCTS	16	0.6	16	0.6	2.9%
DANGEROUS PRODUCTS	4	0.1	14	0.5	288.4%
GROUPINGS	4	0.1	0.26	0.0	-93.1%
OTHERS	63	2.4	79	2.7	24.0%
<b>TOTAL</b>	<b>2,618</b>	<b>100</b>	<b>2,908</b>	<b>100</b>	<b>11.1%</b>

*Source : ADC*

In Q4 2018, air freight from Cameroon accounted for 60% of air cargo i.e. 15 points higher than in Q3 2018. These exports increased by 11.1% over the study period and stood at 2,908 tonnes in the Q4 2018.

Air freight from Cameroon ranked between 3<sup>rd</sup> and the 4<sup>th</sup> in Q4 2018. Foodstuffs maintained the first position with 85.8% of such freight. They were followed by miscellaneous parcels with 9.2%. Flowers still ranked third (1.3%). Each of the other types of goods accounted for less than 1% of the total.

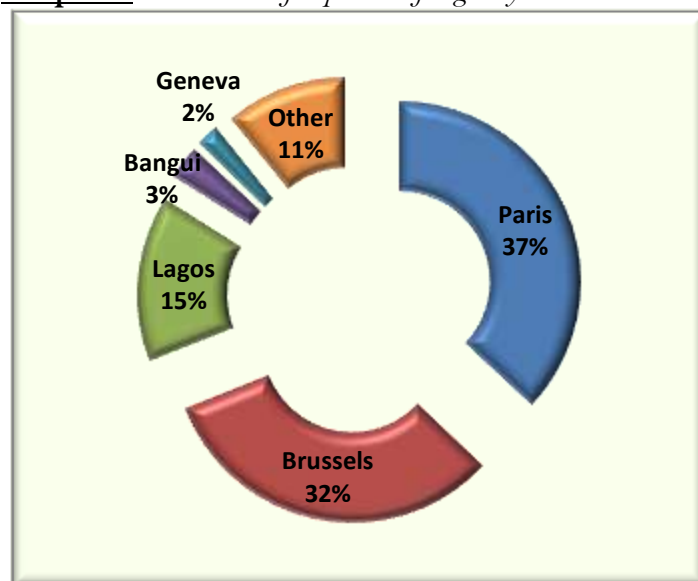
Of the main export air freight, only miscellaneous parcels and consolidations witnessed a decrease in tonnage. Estimated at 267 tonnes, the first category witnessed a decrease of 12.3% in the fourth quarter of 2018. Consolidations dropped from 4 tonnes to about 260kilogrammes, representing the most significant decline.

Foodstuffs, which stood at 2,197 tonnes in Q3 2018, registered an increase of 13.5% with 2,494 tonnes in Q4 2018. Flowers (+ 27.9%), which witnessed the same evolution, stood at 38 tonnes during the quarter under study. The most significant increase was recorded by Hazardous Products, which more than tripled recording 14

tonnes in Q4 2018.

The main destinations for air shipments namely Paris (37%), Brussels (32%), Lagos (15%), Bangui (3%) and Geneva (2%) remained the same between Q3 and Q4 2018 .

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

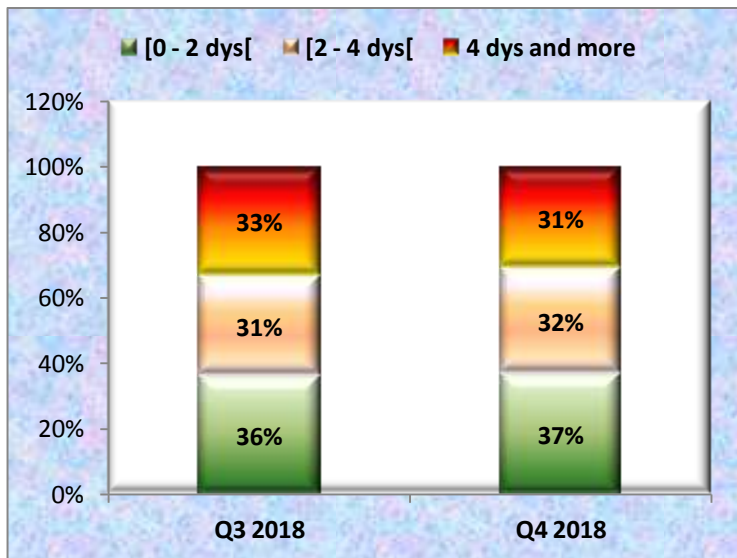


*Source : ADC*

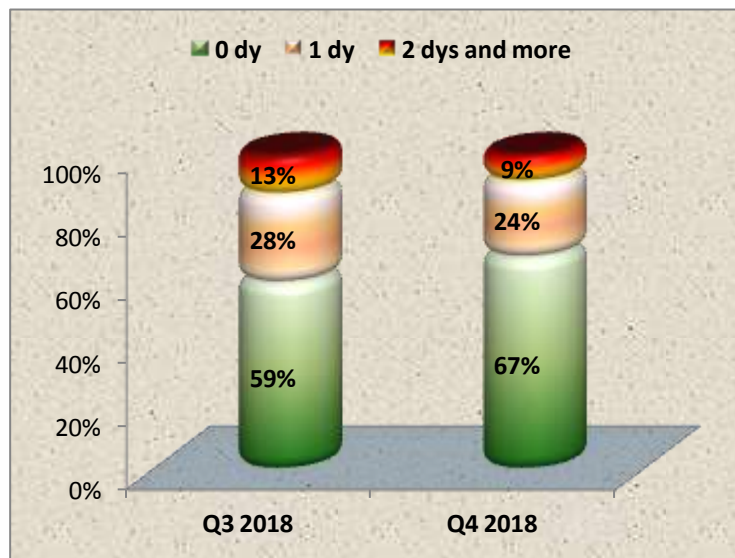
## AIR CARGO | Air cargo dwell time

**On the import (3 days) and export (1 day) sides, the average dwell time remained the same in Q4 2018**

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



**IMPORT**



**EXPORT**

Source : ADC

As in Q3 2018, Cameroon-bound air freight spent an average of 3 days at Cameroon international airports. Although the two quarters witnessed about the same average dwell time, Q4 2018 registered a shorter one. Indeed, 37% of such cargoes were removed in less than 2 days, i.e. one day earlier compared to Q3 2018. In addition, 31% of the freight spent about 4 days at the airport, representing 2 days earlier in Q3 2018.

A monthly analysis showed that November witnessed the shortest dwell time in Q4 2018. Indeed, the average dwell time was 3 days and 37% of shipments were removed in less than 2 days against 29% in 4 days and more. November witnessed the highest frequency of long dwell times with 33% of the goods removed from the airport terminal in at least 4 days. In addition, 36% of such goods were removed in less than two days.

In the fourth quarter of 2018, export air freight spent an average of one day at the airport, i.e. the same duration as in the previous quarter. However, Q4 2018 witnessed a shorter dwell time. Indeed, 67% of the air freight left on the same day of their arrival at the airport terminal, representing 8 points higher than in Q3 2018. In addition, the study period recorded a small proportion of long dwell times, with 9% of exports leaving more than a day after arrival at the terminal, i.e. 5 points lower than the previous quarter.

A monthly analysis showed that October 2018 witnessed the best performances in Q4 2018. Here, the average dwell time was half a day. Additionally, 7 out of 10 consignments were dispatched on the day of arrival at the airport terminal, while 7% spent more than a day before being dispatched.





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## THE ECONOMIC OUTLOOK || 4<sup>th</sup> Quarter 2018



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