



THE ECONOMIC OUTLOOK | | 1st Quarter 2017



[0 - 7 dys] = 22%; [7 - 11dys] = 22%; 11dys and more = 56 % of trafic

TMFD PARK



[0 - 7dys] = 7%; [7 - 11dys] = 13%; 11dys and more = 80 % of trafic

DIT PARK

■ Good
 ■ Watch out
 ■ Bad

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FOREWORD



« Trade information via Cameroon Trade Hub in a click »

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.

The 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 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 dossier on the launching of a web site dubbed «Cameroon Trade Hub» (www.cameroontradedhub.cm) by the CNSC. It contains useful information on foreign trade for users.

The analysis of the evolution of the main freight transport indicators shows that in terms of the number of vessels waiting at anchorage, the 4th quarter of 2016 and the 1st quarter of 2017 witnessed the same situation (13 vessels in average per day).

Imported used vehicles witnessed an increase of about 2 days in each of the parks (TMFD and SOCOMAR). Despite a 9% increase in export air cargo, air freight stood at 5,461 tonnes in Q1 2017, representing a 4.6% decrease.

This issue also contains details concerning these issues.

Have an enjoyable reading !

Auguste MBAPPE PENDA

DOSSIER | CNSC launches Cameroun Trade Hub

A trade information portal set up by the CNSC

On 20 November 2017, the Governor of Littoral Region chaired an official ceremony to launch Cameroon's first-ever electronic foreign trade procedure portal known as "**Cameroon Trade Hub**."

This foreign trade electronic tool put in place by the Cameroon National Shippers' Council (CNSC), meets the many demands of shippers with regard to difficulties of access to information, on the one hand, and is perfectly in line with the recommendations of the Trade Facilitation Agreement (TFA) adopted on **7 December 2013** in Bali, Indonesia by the World Trade Organisation (WTO) and ratified by the Government of Cameroon through **Decree No. 2016/210 of 25 April 2016** signed by the President of the Republic, on the other hand. The agreement entered into force on **22 February 2017**.



Objective

Available at www.cameroontradedhub.cm in English and French, this digital portal mainly seeks to provide users, investors and all interested parties with information relating to foreign trade and international transport in the Republic of Cameroon. Specifically, it contains the following information for business persons:

- a description of practical procedures for import, export and transit of goods by sea, air and land;
- a sample of the forms and documents required for import, export or transit;
- the contact details of the various supply chain stakeholders;
- laws and regulations governing international trade in Cameroon;

- statistics on the volume of goods traded and distributed by country of origin or destination, and the nature of the products.

Presentation of the portal



The **Cameroon Trade Hub** is designed for easy consultation and contains vital information on external trade and cargo transport in Cameroon. Such information is accessible through the following specialised headings:

- **Procedures:** This constitutes the backbone of the portal. It contains information on all the formalities to be completed when carrying out foreign trade transactions. The information contained in this heading enables shippers to know exactly the various stages in performing their operations (export, import or transit) from the beginning to the end. The user has the possibility of choosing the operation to be carried out, the country of origin / destination, the type of packaging, the mode of transport and the nature of goods. After validation, all the formalities to be completed are displayed. For each formality, the required documents are presented, the administration where it is carried out, the document issued as well as the cost. In addition, the portal contains a sample of each document (required documentation and documents issued) and the legal backing of each formality. This section equally contains a list of international trade actors with the possibility of directly accessing their respective website.



- **Documentation:** This contains a collection of laws and regulations governing the various import, export and transit procedures at the national level and for landlocked countries namely, Chad and the Central African Republic. It also lists titles of publications that users can consult free of charge at the CNSC's Resource Centre.
- **Tools:** This section provides information enabling users to track cargo, know vessel call programme and statistics. Tracking enables the user to use the references of Electronic Cargo Tracking Note (ECTN) and that of tax payer card to track their cargo in the sea. It also contains information on cargo position as well as the list of the different transshipments. The ship stopover programme provides information on the ships expected, those at anchorage, on the quayside and those that have just left the port of Douala. The statistics sub-menu enables the user to obtain a information on inbound / outbound traffic by country, by type of goods, etc.). Other indicators such as the average number of ships at anchorage and transit times are also available.
- **Opportunities: This menu presents the AGOA and the EPA.**
 - **AGOA:** The African Growth and Opportunity Act. It fosters economic development in sub-Saharan Africa by promoting a wide range of activities and providing benefits to entrepreneurs and farmers and facilitating trade and investment between the United States and sub-Saharan African countries.
 - **APE:** The Economic Partnership Agreements (EPAs) are trade agreements aimed at developing free trade between the European Union and the ACP countries (Africa Caribbean Pacific).
- **Transport Observatory:** This section presents CNSC's Transport Observatory, its missions and field actions as well as the various stakeholders that make up its Monitoring Committee. This menu also provides users with the various publications of the Transport Observatory, notably the Economic Outlook that are available online and downloadable.

- In addition, it contains a dashboard presenting the situation of key indicators for the transport of goods for better decision-making.
- **Update:** It provides information on transport and foreign trade sectors in Cameroon and at the international level. It also contains a list of upcoming events relating to this sector of activity.
- **Frequently Asked Questions (FAQ).** It contains frequently asked questions and answers regarding transport and international trade sectors.
- It also contains answers to frequently asked questions and users are welcome to ask questions to be answered subsequently by CNSC operators.

Updating the portal

Since foreign trade procedures evolve with time, the CNSC is working with focal points of Cameroon's foreign trade stakeholders cited here below to ensure that the information available is up-to-date. That way, the Cameroon Trade Hub will remain a reliable international trade information portal.

- the Ministry of transport;
- Ministry of Finance;
- the Ministry of Trade;
- the Ministry of Agriculture and Rural Development;
- Ministry of Livestock, Fisheries and Animal Husbandry;
- the Ministry of Forestry and Wildlife;
- the Minister of Public Health;
- the Ministry of Mines, Industry and Technological Development;
- the Ministry of the Economy, Planning and Territorial Development;
- the Ministry of Public Works;
- the Ministry of Small and Medium-sized Enterprises, Social Economy and Crafts;
- the General Directorate of Customs;
- the Cameroon Foreign Trade Operations Single Window;
- the Cameroon Foreign Trade Operations;
- the Port Authority of Douala;

- the Port Authority of Kribi;
- the Société Générale de Surveillance;
- the Standards and Quality Agency;
- the National of Cacao and Coffee Board;
- the Cocoa and Coffee Inter-professional Council;
- the Divisional Tax Centre;
- the Investment Promotion Agency;
- the Employers Association of Cameroon;
- the Chamber of Commerce, Industry, Mines and Crafts of Cameroon;
- the Chamber of Agriculture, Fisheries, Livestock and Forestry of Cameroon.

Contact

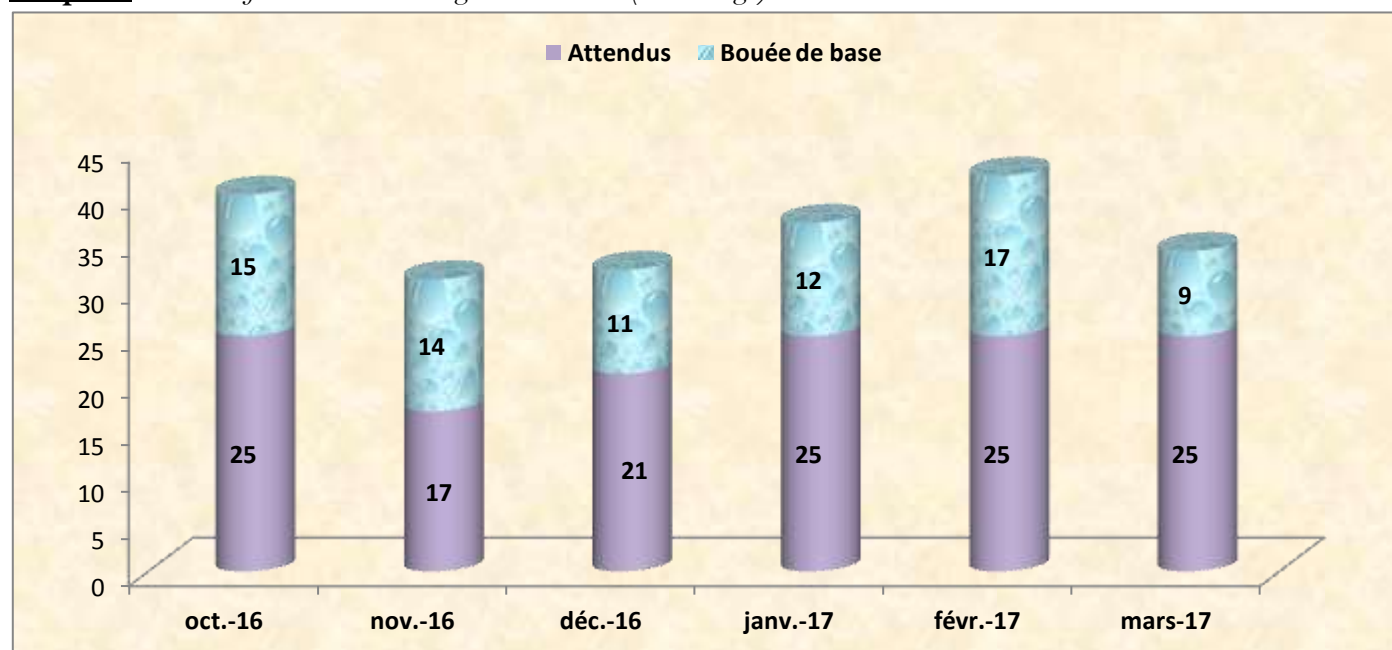
For any issues concerning the Cameroon Trade Hub, users are welcome to contact us through: info@cameroontradedhub.cm.

The *Cameroon trade hub*, can be consulted at www.cameroontradedhub.cm

SHIPS | Number of vessels at anchorage/ awaited

Less worrisome situation at anchorage in March after the influx recorded in February

Graph 1: Number of vessels at anchorage and awaited (on average)



Source : CNSC

The average number of vessels expected per day at the port of Douala remained stable during the first three months of 2017. Indeed, during meetings held at the harbour master's office, ships' agents and shipping agents announced the arrival of an average of 25 ships in the next days. This stability contrasts with the trend observed during the 4th quarter of 2016, where a seesaw variation was observed with between 25 and 17 ships expected on average per day.

As for the average the number of vessels waiting in anchorage per day, it was noted that the downward trend observed during the fourth quarter of 2016 was not maintained during the first three months of 2017. The month of February 2017 registered the largest number of ships at anchorage. On average 17 ships were stationed during each day of that month.

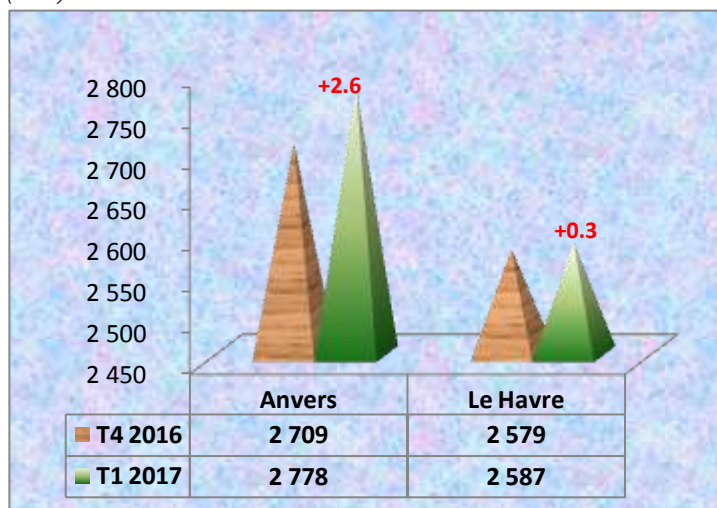
Quartile analysis confirms the hypothesis that February was the month when anchorage was the most saturated. In fact, this month recorded the highest daily value (27 vessels waiting). In addition, every other day, anchorage had at least 20 vessels.

In March, the situation was remarkably less worrying. On average, 9 ships waited daily. It should also be noted that in March 2017, the number of vessels on standby did not exceed 13 per day.

SHIPPING COST | Container 20'

Increase in the average cost of shipping a 20' dry container at the port of Antwerp (2.6%) and stability at the port of Le Havre

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



Source : CNSC

Table 1: Average cost of shipping a 40' dry container (in €)

| COUNTRIES | PORTS | Q4 2016 | Q1 2017 | Variation | COUNTRIES | PORTS | Q4 2016 | Q1 2017 | Variation |
|--------------|----------|---------|---------|-----------|-----------|-------------|---------|---------|-----------|
| Ivory coast | Abidjan | 1,224 | 1,211 | -1.1% | China | Qingdao | 1,964 | 1,967 | 0.2% |
| South Africa | Durban | 1,328 | 1,426 | 7.4% | | Shanghai | 2,029 | 2,046 | 0.8% |
| Germany | Hambourg | 1,673 | 1,673 | 0% | Inde | Nhava Sheva | 1,996 | 1,971 | -1.3% |
| Belgium | Anvers | 1,620 | 1,654 | 2.1% | EAU | Jebel Ali | 1,999 | 1,997 | -0.1% |
| Spain | Valence | 1,633 | 1,599 | -2.1% | USA | Houston | 2,355 | 2,405 | 2.1% |
| France | Le Havre | 1,650 | 1,671 | 1.3% | | | | | |

Source : CNSC

The average cost of shipping a 20-foot container from the port of Abidjan to the port of Douala dropped by 1.1%. However, the port of Durban, where shipping cost stood at 1,426€, witnessed an upward trend (+ 7.4%).

Of the main European ports of loading, only the port of Valencia (-2.1%) witnessed a decrease. At the port of Hamburg, fares in the first quarter of 2017 were similar to those of the previous quarter. In fact, shippers who used this port reportedly paid 1,673€ for shipping a container to the port of Douala. The most significant increase was registered at the port of Antwerp (+ 2.1%) where the average shipping cost was 1,654 € during the first quarter of 2017. In each of these main European ports of loading, 25% of the shippers paid more than 1,800 € for shipping a container.

The cost of shipping a 20' refrigerated container from the port of Le Havre to the port of Douala remained the same between the 4th quarter of 2016 and the 1st quarter of 2017. On average, shipping cost was around 2,580 €. The rates charged for shipping differed from the average by roughly 200€.

The port of Antwerp witnessed a 2.6% increase in the average cost of shipping a 20-foot container. During the fourth quarter of 2016, the rates charged for shipping were very close (around 2,700€). In Q1 2017 however, they were more dispersed (roughly 250€ of the average). However, three out of four shippers reportedly paid a shipping fee of 2,700€ during the quarter under study.

At the ports of Qingdao and Shanghai, which are the main ports of departure in China, shipping cost during the two quarters under study remained virtually unchanged. The variation was less than 1% and the maximum difference from the average was 200 €. The situation was the same at the port of Jebel Ali which witnessed no real change between the two referenced quarters.

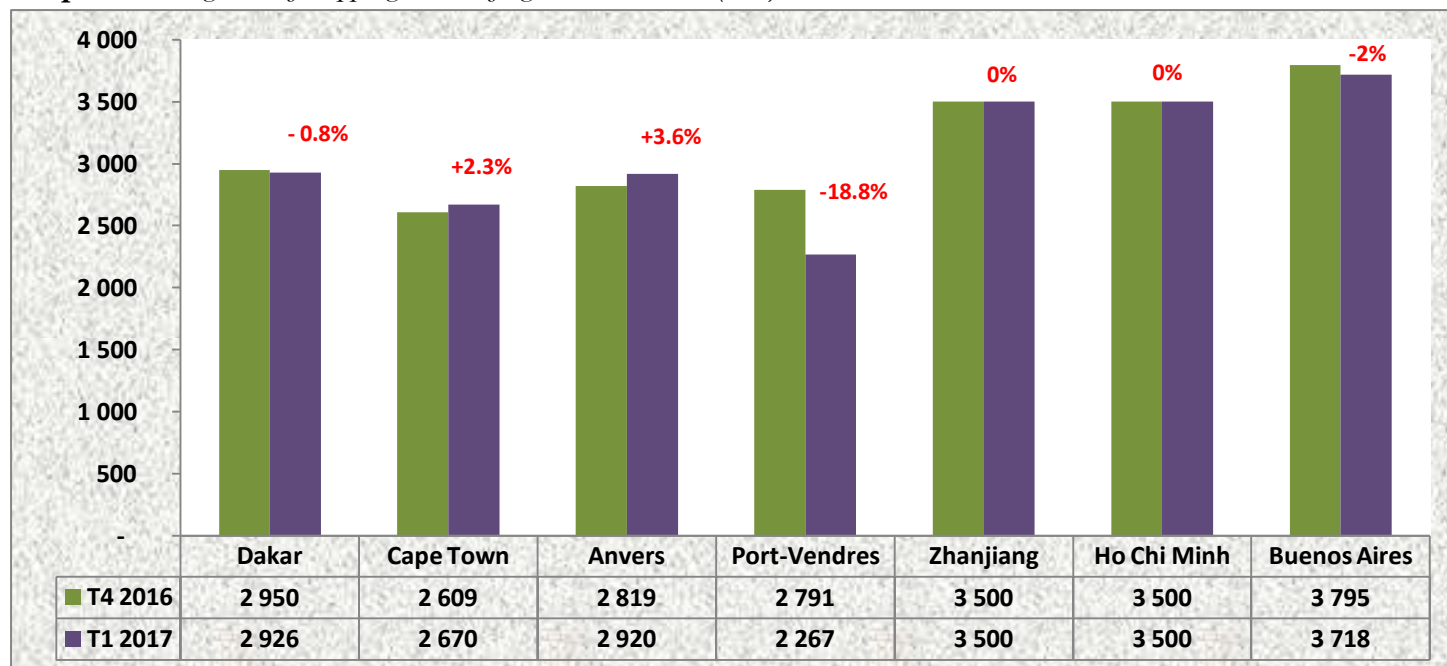
At the Port of Houston, the average shipping cost increased from 2,355€ to 2,405€, representing an increase of 2.1%. Prices in this port were more dispersed than elsewhere, (roughly 350 € from the average).

However, one shipper out of two paid € 2,500 for shipping a container to the port of Douala.

SHIPPING COST | Container 40'

18.8% drop in the average cost of shipping a 40' refrigerated container from Port-Vendres

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



Source : CNSC

During the first quarter of 2017, the average cost of shipping a 40-foot refrigerated container from the port of Cape Town to the port of Douala was 2,670€, representing an increase of 2.3%. The port of Dakar registered the opposite with a decrease of about 1%. Rates were less dispersed (roughly 120 € of the average) compared to the South African port (roughly 350 € of the average).

Port-Vendres registered an extraordinary drop with an average shipping cost dropping from € 2,791 to € 2,267, representing a decrease of 18.8%. Half of the shippers reportedly paid less than 2,000€ for shipping a container to the Douala Port. The average shipping cost increased (+ 3.6%) at the port of Antwerp. During the first quarter of 2017, one out of two shippers paid at least 2,800€ for shipping a container to the port of Douala.

The cost of shipping a 40-foot refrigerated container from the main Asian ports remained the same.

At the port of Buenos Aires, shipping cost sometimes witnessed a variation of 220€ from the average in the first quarter of 2017; that is 100 € less than the previous quarter. Three out of four shippers spent between 3,600€ and 3,700€ for shipping their cargo.

SHIPPING COST | Container 40'

Average cost of shipping a 40-foot dry container at the Port of Felixstowe

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

| COUNTRY | PORTS | Q4 2016 | Q1 2017 | Variation | COUNTRY | PORTS | T4 2016 | T1 2017 | Variation |
|--------------|-------------|---------|---------|-----------|---------|------------|---------|---------|-----------|
| South Africa | Durban | 2,038 | 1,999 | -1.9% | Germany | Hamburg | 2,658 | 2,614 | -1.7% |
| China | Ningbo | 2,706 | 2,675 | -1.1% | France | Le Havre | 2,571 | 2,575 | 0.1% |
| | Qingdao | 2,821 | 2,877 | 2% | Spain | Valence | 2,641 | 2,611 | -1.1% |
| India | Nhava Sheva | 2,940 | 2,803 | -4.7% | UK | Felixstowe | 2,640 | 2,748 | 4.1% |
| EAU | Jebel Ali | 2,940 | 2,913 | -0.9% | Belgium | Antwerp | 2,658 | 2,549 | -4.1% |
| Canada | Montreal | 3,117 | 3,055 | -2% | Holland | Rotterdam | 2,664 | 2,557 | -4.0% |
| USA | Baltimore | 3,136 | 3,112 | -0.8% | Italy | Genoa | 2,852 | 2,830 | -0.8% |

Source: CNCC

The average cost of shipping a 40-foot dry container at the main African ports of loading dropped from 2,038€ in the fourth quarter of 2016 to 1,999€ in the first quarter of 2017, representing a decrease of about 2%. Rates were quite close (more or less 80 €) and more than half of the shippers reportedly paid exactly 2,000€ as freight rate.

Of the main Asian port of loading, the port of Nhava Sheva (-4.7%) witnessed the most significant drop in average shipping cost. The rates charged in this port deviated by at most 400 € from the average. The most significant increase was registered at the port of Qingdao (+ 2%). The cost of shipping a 40' dry container from this port rose on average from 2,821€ to 2,877€. The ports of Jebel Ali and Ningbo registered a 1% drop in shipping costs. However, fares were more concentrated in the Chinese port (roughly 200 € of the average) compared to the port of Jebel Ali where the difference was sometimes close to 400 €.

In the Asian ports mentioned above, half of the shippers reportedly paid less than 2,800€ for shipping a container to the port of Douala.

At the ports of Montreal (-2%) and Baltimore (-0.8%) the average cost of shipping a 40' dry container witnessed a downward trend. At the port of Baltimore where fares were less dispersed (roughly 200 € of the average) nearly 60% of shippers paid between 3,000 and 3,125€ for shipping a container to the port of Douala. At the Port of Montreal, the same proportion paid between 2,800 and 3,050€.

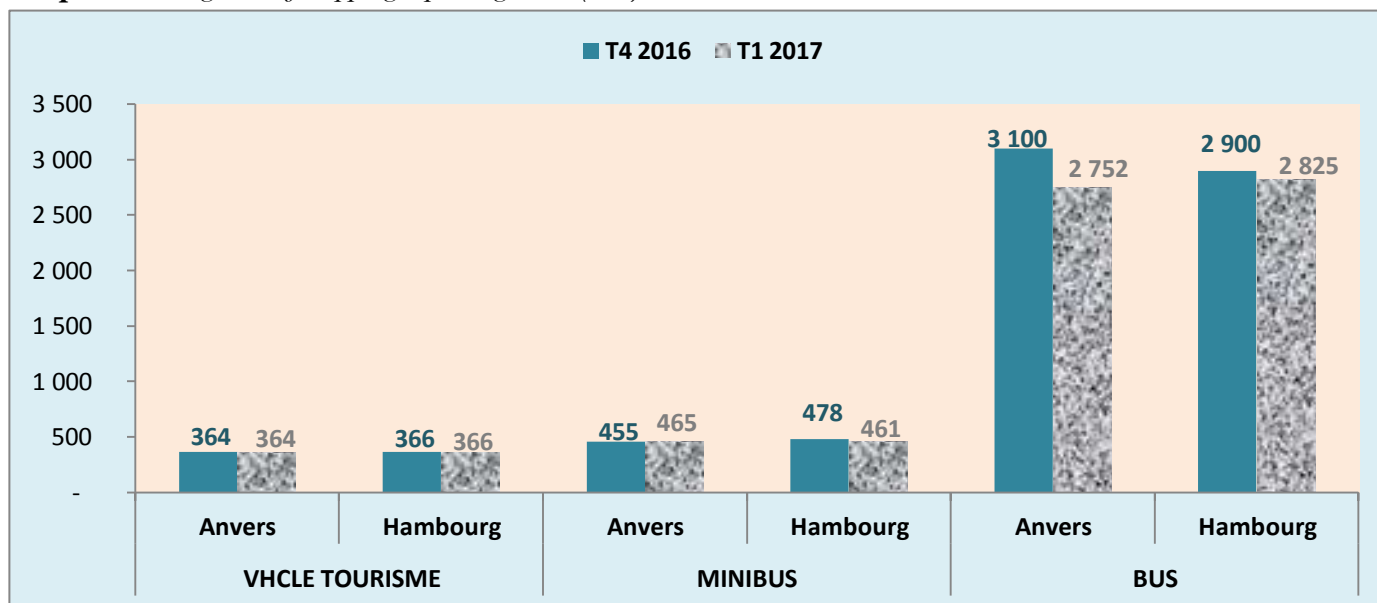
Apart from the ports of Le Havre (+ 0.1%) and Felixstowe (+ 4.1%), all the other main European ports of loading registered a decrease in their average shipping cost. The port of Le Havre witnessed stable shipping costs. On average, shippers paid 2,575€ for shipping a container. The difference from the average did not exceed 150 €. In Felixstowe, on the other hand, fares are more distant from each other (roughly 350 € of the average).

Half of the shippers who used one of the main European ports mentioned above paid at most 2,600€ for shipping a container to the port of Douala.

SHIPPING COST | Vehicles

Stability in the average cost of shipping a passenger car in Hamburg and Antwerp

Graph 4: Average cost of shipping a passenger car (in €)



Source : CNSC

Between the fourth quarter of 2016 and the first quarter of 2017, the cost of shipping passenger vehicles remained unchanged at the main ports of loading, namely Antwerp and Hamburg. At the Belgian port, shippers paid an average of 364€ for shipping a vehicle. The prices charged were at most 125 € from the average. At the port of Hamburg, shippers reportedly paid an average of 366€ for shipping one vehicle. The prices charged therein were quite close compared to those of the port of Antwerp (roughly 95 € of the average). In each of these ports, three shippers out of four were charged less than 350€ per vehicle shipped.

The average cost of shipping minibuses at the port of Antwerp rose from 455€ to 465€, representing an increase of 2.2% for the first quarter of 2017. The port of Hamburg registered a contrary situation with a decrease of 3.6% and the average cost of shipping this type of vehicle was 461€ in the first quarter of 2017.

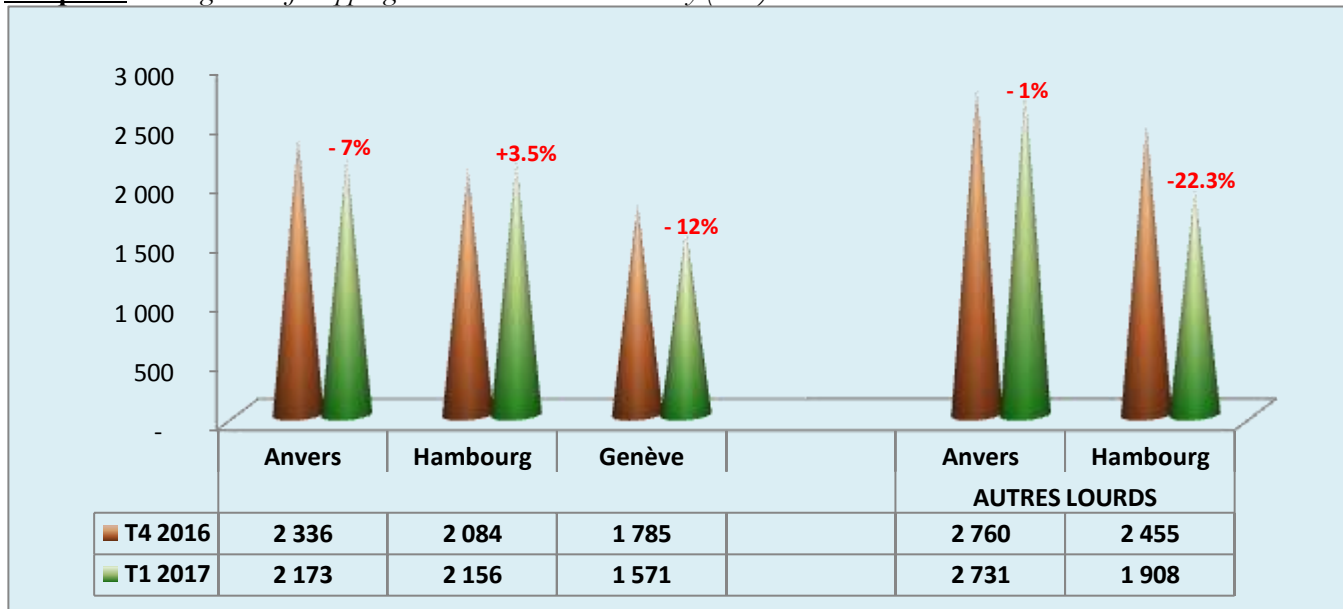
The rates at the port of Antwerp were less dispersed (roughly 200 € of the average) compared to the port of Hamburg (roughly 280 € of the average). However, it should be noted that in general, 25% of the minibuses imported via these ports were shipped for more than 450€.

With regard to the shipping of buses, it was observed that for the two main ports of loading, the shipping cost witnessed an average drop. At the port of Antwerp, it dropped from 3,100 € to 2 752€, representing a decrease of 11.2%. At the port of Hamburg, it dropped from 2,900€ to 2,825€, representing a decrease of 2.6%.

SHIPPING COST | Vehicles

Of the main ports of loading for trucks, only Hamburg (+ 3.5%) witnessed an increase in the average shipping cost

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



Source : CNSC

Of the main ports of loading trucks bound for the port of Douala, only the port of Hamburg witnessed an increase in the cost of shipping. Indeed, shippers paid an average of 2,156€ to ship a truck from this port to the port of Douala during the first quarter of 2017. This was 3.5% more than the previous quarter. Half of the shippers who used this port reported spent less than 2,100€ as shipping cost.

The most significant drop was recorded at the Port of Geneva, where the average shipping cost rose from 1,785€ to 1,571€ between the fourth quarter of 2016 and the first quarter of 2017. 40% of the trucks shipped at the port of Geneva cost exactly 1,500€ to be shipped to the port of Douala.

A downward trend was also observed in the port of Antwerp. Here, the average cost of shipping a truck during the first quarter of 2017 amounted to 2,173€, representing a decrease of 7% compared to the previous quarter.

The rates charged in this port were more dispersed than

elsewhere (900 € of the average against 800 € elsewhere).

Six out of ten shippers reported paying more than € 2,000 as freight rates for trucks.

During the first quarter of 2017, the average shipping cost of other heavy equipment decreased in the main ports of loading. In Hamburg, which witnessed the most significant decrease (-22.3%), shippers spent, on average, 1,908€ during the first quarter of 2017 for shipping a truck and other heavy machinery. The rates charged during this quarter were closer than during the previous quarter (roughly 500 € of the average against 1,100 €).

The port of Antwerp witnessed a less significant decrease (-1%). The average cost of shipping a heavy vehicle dropped from 2,760 € to 2,731 €. The difference in the average rates charged remained the same between the fourth quarter of 2016 and the first quarter of 2017 (about 1,200 €). One shipper out of two reportedly paid less than 2,600 € for shipping a truck to the port of Douala.



PORT DWELL TIME | Containers

In the first quarter of 2017, the month of March witnessed the shortest time for removing import containers

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

| | Oct.16 | Nov.16 | Dec.16 | Q4 2016 | Jan.17 | Feb.17 | Mar.17 | Q1 2017 |
|--------------------------------|--------|--------|--------|---------|--------|--------|--------|---------|
| Average | 17.7 | 14.1 | 18.8 | 16,8 | 18.2 | 16.5 | 16.2 | 17.4 |
| Variation | 2.8% | -20.3% | 33.3% | | -3.2% | -9.3% | -1.8% | 3.57% |
| 1st Quartile | 8 | 6 | 10 | 8 | 8 | 8 | 7 | 8 |
| 2nd Quartile | 13 | 12 | 16 | 14 | 15 | 13 | 12 | 14 |
| 3rd Quartile | 24 | 19 | 24 | 21 | 25 | 21 | 20 | 23 |

Source : The National Trade Facilitation Committee (CONAFE)

During the first quarter of 2017, an imported container spent an average of 17 days at the port of Douala, about a day longer than during the fourth quarter of 2016. Such data highlight the values observed during the month of January 2017. Indeed, this month recorded 50% of the containers removed from the port during the first quarter of 2017. Moreover, January 2017 witnessed the longest dwell time. On average, one container spent 18 days at the port as was the case in the month of December 2016.

During the month of February 2017, the average dwell time for import containers decreased by about 10%. It stood at 16.5 days. The same trend was observed during the month of March 2017, but with lower amplitude (-1.8%). During this month, it took 16 days on average to remove an imported container. This was the best monthly record registered in the first quarter of 2017.

Quartile analysis revealed that the month of March recorded the best performance and January had the worse. Half of the shipments were removed during the month of March in at most 12 days as against more than three days in January.

Generally, it can be noted that for the two quarters under study, half of shippers took at most two days to remove an import container from the port of Douala. However, for the first quarter of 2017, it was observed that 25% of containers spent more than 23 days, which was 5 points higher than the previous quarter.

PORT DWELL TIME | Vehicles

In Q1 2017, dwell time for used vehicles was longer in both parks compared to the previous quarter

Table 4: Port dwell for import used vehicles at the port of Douala (in days)

| Car park | TMFD | | SOCOMAR | |
|--------------------------------|---------|---------|---------|---------|
| | Q4 2016 | Q1 2017 | Q4 2016 | Q1 2017 |
| Average | 15.0 | 16.3 | 22.1 | 24.2 |
| Variation | | 8.9% | | 9.6% |
| 1st quartile | 5 | 7 | 13 | 14 |
| 2nd Quartile | 10 | 12 | 17 | 20 |
| 3rd Quartile | 18 | 21 | 27 | 29 |

Source : Douala Mixed Fruit Terminal (TMFD)/ Cameroon Maritime Operations Company (SOCOMAR)

In the first quarter of 2017, imported used vehicles spent an average of 16 days at TMFD as against 15 days in the fourth quarter of 2016. The first quarter of 2017 therefore, registered the worst records. The analysis of the different quartiles also confirms this hypothesis. Indeed, it took at least a week to complete all customs formalities for 25% of used vehicles against at most 5 days in the 4th quarter of 2016. In addition, one-quarter of the shippers who removed their used vehicle from the TMFD in the first quarter of 2017 took at least three weeks to complete all the procedures. In the previous quarter, less than 20% of shippers took so long to remove a vehicle from this terminal.

At SOCOMAR, the change in the dwell time of imported used vehicles witnessed a similar trend at the TMFD. On average, vehicles spent 24 days therein in the first quarter of 2017, which is two days longer than in the fourth quarter of 2016. The quartile values show that it took a shorter time to remove vehicles from this park in the fourth quarter of 2016 compared to the first quarter of 2017. Half of the shipments removed in the first quarter of 2017 spent at least 20 days at SOCOMAR, whereas in the previous quarter, the same proportion spent at most 17 days in this terminal.

AIR FREIGHT | Tonnage

21.4% drop in Cameroon-bound air freight

Airfreight, which stood at 5,723 tonnes in Q4 2016 decreased by 4.6% in the 1st quarter 2017, stood at 5461 tonnes.

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

| Type of goods | Q4 2016 | | Q1 2017 | | Variation |
|-------------------------|--------------|------------|--------------|------------|---------------|
| | Tonnage | % | Tonnage | % | |
| OTHERS PARCELS | 1,515 | 58.8 | 1,231 | 60.8 | -18.7% |
| CONSOLIDATION | 559 | 21.7 | 394 | 19.5 | -29.5% |
| DANGEROUS PRODUCTS | 226 | 8.8 | 162 | 8.0 | -28.4% |
| PHARMACEUTICAL PRODUCTS | 87 | 3.4 | 143 | 7.1 | 65.1% |
| PERISSABLES | 35 | 1.4 | 21 | 1.0 | -22.7% |
| DIPLOMATIC PARCELS | 27 | 1.1 | 16 | 0.8 | -54.7% |
| OTHERS | 126 | 4.9 | 57 | 2.8 | -54.9% |
| TOTAL | 2,575 | 100 | 2,024 | 100 | -21.4% |

Source : ADC

During the first quarter of 2017, the volume of import air cargo accounted for 37% of total air freight. Import air cargo dropped from 2, 575 tonnes to 2,024 tonnes, representing a decrease of 21.4%.

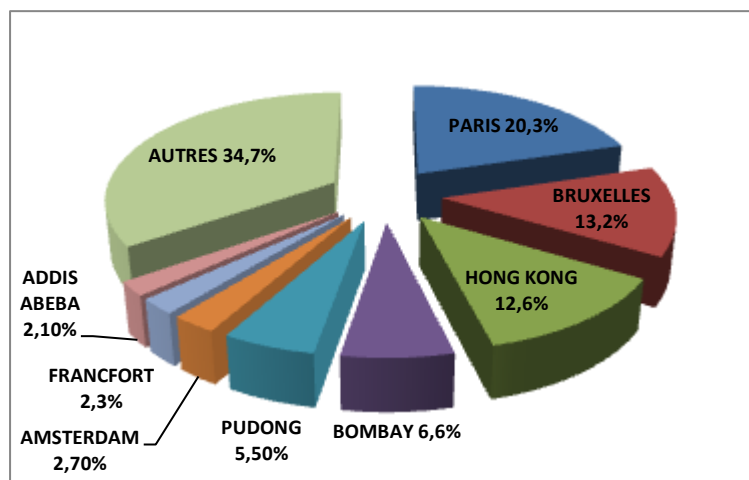
The composition of import air freight remained the same during the two quarters under study. Miscellaneous parcels ranked first with 60.8%, followed by consolidations (19.5%), dangerous goods (8%) and pharmaceuticals (7.1%) respectively. Each of the other types of cargo accounted for less than 1%.

Apart from Pharmaceuticals (+ 65.1%), which witnessed an increase in volume, all other types of merchandise recorded a negative variation.

Miscellaneous parcels dropped from 1,515 tonnes to 1,231 tonnes, representing a decrease of 18.7%. Consolidations and hazardous products witnessed a decrease of around 29% and their volume during the first quarter of 2017 stood at 394 tonnes and 162 tonnes respectively.

The most significant drop was observed for the perishables. They dropped by half and stood at 16 tonnes for the 1st quarter of 2017.

The import air cargo in Cameroon came mainly from Paris (20.3%), Brussels (13.2%) and Hong Kong (12.6%).



AIR FRIEGHT | Tonnage

9% increase in air freight from Cameroon

Table 6: Export airfreight per type of cargo (in tonnes)

| Type of goods | Q4 2016 | | Q1 2017 | | Variation |
|-------------------------|--------------|------------|--------------|------------|-----------|
| | % | Tonnage | % | Tonnage | |
| FOOD | 1,617 | 51.4 | 1,744 | 50,7 | 90% |
| PERISSABLES | 919 | 29.2 | 1,207 | 35.1 | -25% |
| OTHERS PARCELS | 392 | 12.5 | 292 | 8.5 | -26% |
| FLOWERS | 69 | 2.2 | 38 | 1.1 | -45% |
| CONSOLIDATIONS | 27 | 0.9 | 24 | 0.7 | 11% |
| PHARMACEUTICAL PRODUCTS | 22 | 0.7 | 20 | 0.6 | -26% |
| DANGEROUS PRODUCTS | 8 | 0.3 | 5 | 0.1 | -41% |
| OTHERS | 94 | 3.0 | 107 | 3.1 | 14% |
| TOTAL | 3,148 | 100 | 3,148 | 100 | 9% |

Source : ADC

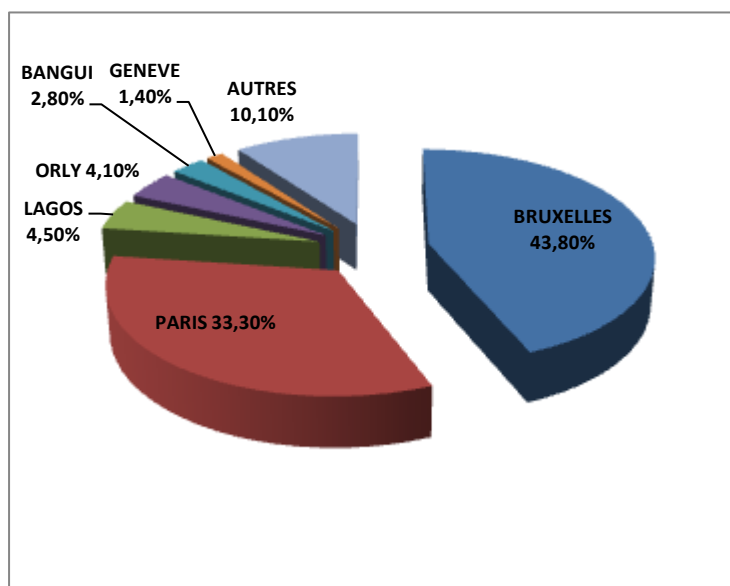
In the first quarter of 2017, export airfreight from Cameroon dominated total airfreight (67% of global freight). Export airfreight stood at 3,437 tonnes, representing an increase of 9% in Q1 2017.

Perishables, which constituted the 3rd most exported merchandise in the fourth quarter of 2016, ranked first in the 1st quarter of 2017. In fact, during the two quarters under study, they rose from 919 to 1,744 tonnes, representing about double the volume.

Foodstuff, which ranked first in the fourth quarter, occupied the second position. In the first quarter of 2017, they accounted for 35.1% of the total export air freight. Their tonnage dropped from 1,617 to 1,207, representing a decrease of 25%. A similar drop was recorded for miscellaneous parcels and consolidations (-26%).

Pharmaceutical products increased from 22 to 24 tonnes, representing an increase of 11%. The most significant drop was observed for flowers, which fell by almost half. Their volume dropped from 69 to 38 tonnes between the fourth quarter of 2016 and the first quarter of 2017.

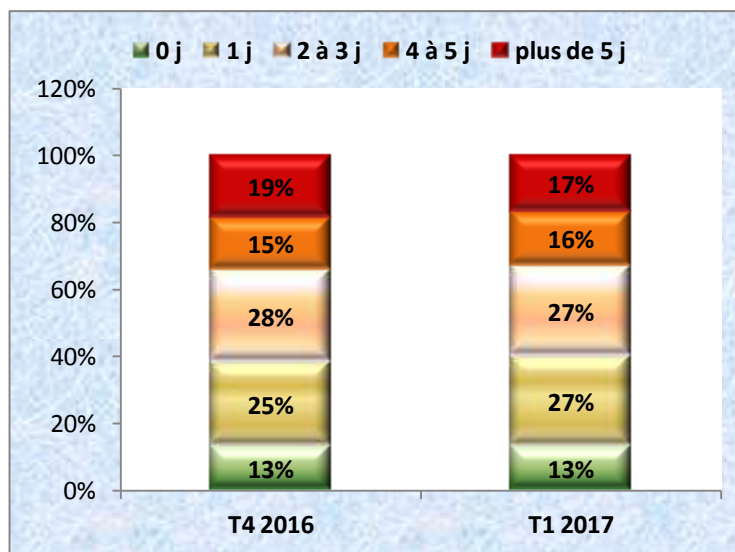
Goods exported by air went mainly to Brussels (43.8%), Paris (33.3%), Lagos (4.5%) and Orly (4.1%).



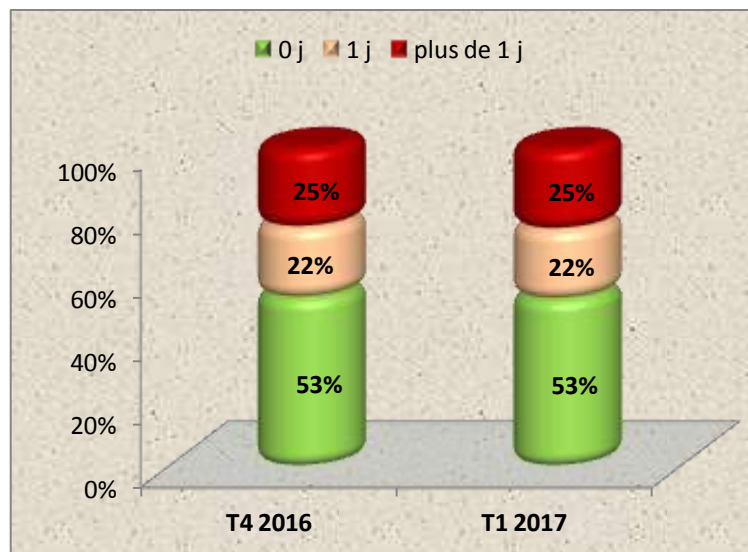
AIR CARGO | Airport dwell time

On the import side, there was a slight improvement in cargo removal time during the first quarter of 2017. Concerning exports, the two quarters under study witnessed the same situation.

Graph 6: Cargo distribution according to airport dwell time



IMPORT



EXPORT

Source : ADC

Between the fourth quarter of 2016 and the first quarter of 2017, airport dwell time for import cargo was the same on average (3 days). In the first quarter of 2017, however, the proportion of long staying cargo was lower than in the previous quarter.

In fact, the proportion of goods that stayed more than 5 days at the terminal dropped from 19% to 17% between the fourth quarter of 2016 and the first quarter of 2017, showing two points down from the previous. Shipments that took 2 to 3 days to be removed from the airport accounted for 27% in the first quarter of 2017, representing 1 point down from the previous quarter.

Merchandise that spent a single day at the terminal accounted for 27% of import air cargo in Q1 2017, representing 2 points more than at the end of 2016.

It was observed that cargo removed the day of their arrival, as in the fourth quarter of 2016, accounted for 13% of total import air cargo.

Airport dwell time for export air cargo also remained the same, both in terms of average (2 days) and at the level of the different quartiles.

Like in the fourth quarter of 2016, during the first quarter of 2017, 53% of export air freight was dispatched on the day of their arrival at the airport. Some 22% stayed one day before being dispatched and a quarter had to wait more than a day before heading to its final destination.

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1st Quarter 2017



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