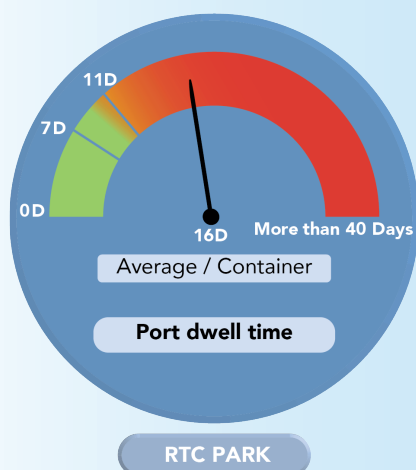
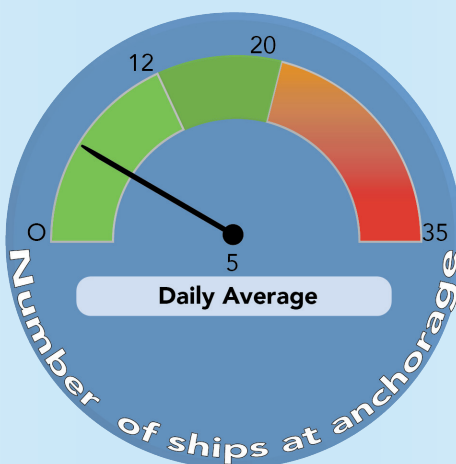




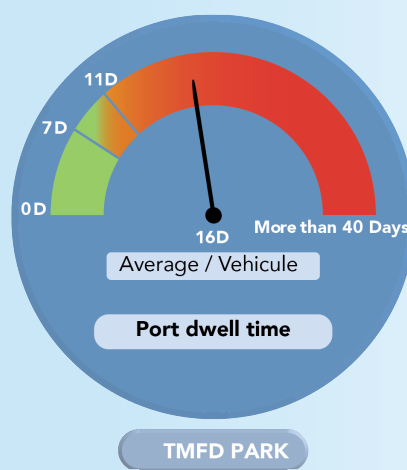
No. 029 January 2029

# THE ECONOMIC OUTLOOK

4<sup>TH</sup> Quarter 2021



[0-7 Days] = 12%;  
[7-11 Days] = 22%;  
11 Days and more = 66%  
of traffic



[0-7Days] = 18%;  
[7-11Days] = 21%;  
11Days and more = 61%  
of traffic

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## Foreword

### *“ Evolution of freight rates for containerised goods between ”*



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 help to identify trends and evolutions in Cameroon's transport and foreign trade. All modes of transport, including maritime and air transport, are taken into account. The upcoming issues of this publication will also cover land transport.

CNSC's "**The Economic Outlook**" analyses the latest transport and trade news quarterly by monitoring the evolution of key indicators of the entire transport chain. It is therefore an important decision-making tool for both private actors and public authorities.

This issue's special report focuses on *"the evolution of freight rates for containerised goods from 2019 to 2021"*. The report reveals that the cost of transporting a TEU (**Twenty-tonne Equivalent Unit**) has increased since 2019 in the ports of Shanghai, Antwerp and Durban. However, the port of De Mundra has witnessed a decline in the average freight rate since 2019.

Furthermore, the analysis of the evolution of the

main cargo transport indicators revealed that containerised cargo spent an average of 16 days at the Douala port container terminal in the 4th quarter of 2021, the same as in the previous quarter. The average dwell time of imported used vehicles decreased by six days at the TMFD Park (16 days).

Rail freight fell by 9.3% to 347,252 tonnes. Transit time for conventional goods still stood at 6.5 days while that for Containerised goods (4.5 days) dropped by half a day.

Air freight, estimated at 5,028 tonnes, witnessed a 16% increase compared to Q3 2021. It took an average of one (1) day to process export consignments through the airport while import air freight took an average of 4 days to leave airport warehouses, one day less than in the previous quarter.

This publication contains detailed information on these different aspects of cargo transport.

Have an enjoyable read!

**Auguste Mbappe Penda**

General Manager

## DOSSIER | Evolution of freight rates for containerised goods between 2019 and 2021

Studies carried out by the United Nations Conference on Trade and Development (UNCTAD) indicate that there was a significant shortage of empty containers as from the second half of 2020. This, amongst other reasons, was caused by a shortage of port labour due to sanitary restrictions and long queues at North America's West Coast ports for offloading goods. Container scarcity combined with the new measures taken by the International Maritime Organisation (IMO) in 2020 for the decarbonisation of maritime transport have had an impact on maritime freight rates since the second half of 2020. Added to this, the grounding of the massive Ever Given container ship in the Suez Canal in March 2021 led to the diversion of ships and consequently to longer dwell times for containers and low container turnover. This contributed to a spike in container freight rates not only on routes through the Suez Canal but on almost every other route.

UNCTAD forecasts an increase in world import price levels of 11% and consumer price levels of 1.5% by 2023, should this surge in maritime freight rates persist.

Faced with the increase in maritime freight rates, shippers in Cameroon have seen their production costs rise from 15 to 50%. Confronted with this situation, they approached the Ministry of Trade to make known their concerns and obliged the government to take a number of measures.

This dossier specifically examines the evolution of freight rates over the period 2019 - 2021. Given that over 60% of overall traffic is containerised, the freight rates monitored here are those for Twenty-Foot Equivalent Units (TEU) containers which mainly come from Asia (47%), Europe (36%) and Africa (10%). The ports selected for this analysis handle at least 60% of the TEUs of their respective continents.

### Evolution in Asia

The average freight rate for a dry TEU did not have similar trends in the main Asian ports of loading. A surge in the rate was recorded in the port of Shanghai where the average freight rate for dry TEUs rose from €1,787 in 2019 to €1,889 in 2021 after successive annual increases of 4.7% and 1%. A similar pattern was observed in the port of Qingdao. The reverse was true for the port of Mundra where the average freight rate for a dry TEU dropped by 2.3% from €1,788 in 2019 to €1,746 in 2020, and by a further 0.4% to €1,739 in 2021. The port of Ningbo, which is the main port loading TEU shipments in Asia, recorded a 0.3% decrease in 2020 and a 1.4% increase in 2021 in the average freight rate for a dry TEU. A similar trend is observed in the ports of Jebel Ali, Nhava Sheva and Nansha.

As regards refrigerated containers, the average freight rate has not been uniform in the main Asian ports of loading. A sharp increase of 10.9% was recorded at the port of Nhava Sheva, where the average freight rate for a dry TEU rose from €2,427 in 2019 to €2,692 in 2020, and further to €2,725 in 2021; an additional increase of 1.2%. In contrast, the port of Ho Chi Minh City saw a sharp double-digit drop (37.9%) in the average freight rate of a refrigerated TEU in 2020 and a double-digit rebound (66.2%) in 2021, with a 3.28% increase as it went from in €2,436 in 2019 to €2,516 in 2021.

**Table 1:** Evolution of the maritime freight rate per TEU in Asia from 2019 to 2021 (in €)

Dry TEU					Refrigerated TEU				
Country	Ports	2019	2020	2021	Country	Ports	2019	2020	2021
		Average	Average	Average			Average	Average	Average
		(a)	(b)	(c)			(a)	(b)	(c)
			Variation ((a)->(b))	Variation ((b)->(c))				Variation ((a)->(b))	Variation ((b)->(c))
United Arab Emirates	Jebel Ali	1,632	1,526 -6.5%	1,538 +0.8%	Vietnam	Ho Chi Minh City	2,436	1,514 -37.9%	2,516 +66.2%
India	Mundra	1,788	1,746 -2.3%	1,739 -0.4%	India	Nhava Sheva	2,427	2,692 +10.9%	2,725 +1.2%
	Nhava Sheva	1,765	1,649 -6.6%	1,771 +7.4%	China	Qingdao	1,551	1,731 +11.7%	1,572 -9.2%
China	Nansha	1,308	1,298 -0.8%	1,310 +0.9%		Yantian	1,834	1,883 +2.7%	1,873 -0.5%
	Ningbo	1,163	1,159 -0.3%	1,176 +1.4%					
	Qingdao	1,602	1,624 +1.4%	1,667 +2.6%					
	Shanghai	1,787	1,870 +4.7%	1,889 +1.0%					

Source: CNSC

## Evolution in Europe

**Table 2:** Evolution of the average freight rate per TEU in Europe from 2019 to 2021 (in €)

Dry TEU					Refrigerated TEU				
Country	Ports	2019	2020	2021	Country	Ports	2019	2020	2021
		Average	Average	Average			Average	Average	Average
		(a)	(b)	(c)			(a)	(b)	(c)
			Variation ((a)->(b))	Variation ((b)->(c))				Variation ((a)->(b))	Variation ((b)->(c))
Belgium	Antwerp	1,195	1,206 +1.0%	1,252 +3.8%	Belgium	Antwerp	2,062	1,994 -3.3%	2,226 +11.6%
Italy	Genoa	1,417	1,463 +3.2%	1,401 -4.2%	France	Le Havre	2,948	3,049 +3.4%	2,908 -4.6%
Germany	Hamburg	1,395	1,437 +3.0%	1,524 +6.0%		Port Vendres	1,510	1,019 -32.5%	991 -2.8%
France	Le Havre	1,298	1,294 -0.4%	1,421 +9.8%					
Turkey	Mersin	1,447	1,408 -2.7%	1,489 +5.8%					
Spain	Valence	1,198	1,236 +3.2%	1,338 +8.3%					

Source: CNSC

In Q4 2021, the average freight rate for a refrigerated TEU in the port of Antwerp, the main European port of loading, increased by 1% and 3.8% on an annual basis, reaching €1,252 in 2021. A similar trend was observed in the ports of Hamburg and Valencia. The port of Le Havre recorded a slight decrease of 0.4% in 2020 and a marked increase of 9.8% in 2021 and its level in 2021 (€1,421) was higher than that of 2019 (€1,298) by 9.5%. A similar evolution was recorded in the port of Mersin.

For refrigerated TEUs, divergent trends in the average freight rate were observed in the main ports of Europe. A steady decline of 32.5% was recorded at Port Vendres where the average freight rate fell from €1,510 in 2019 to €1,019 in 2020, and stood at €991 in 2021 after a further 2.8% drop. Elsewhere, the port of Antwerp recorded a decrease of 3.3% in 2020 and a

substantial increase of 11.6% in 2021. The reverse was experienced in the port of Le Havre where freight rates increased by 3.4% in 2020 and later dropped by 4.6% in 2021.

### Evolution in Africa

**Table 3:** Evolution of the average freight rate per TEU in Africa from 2019 to 2021 (in €)

Dry TEU					Refrigerated TEU				
Country	Ports	2019 Average (a)	2020	2021	Country	Ports	2019 Average (a)	2020	2021
			Average	Average				Average	Average
			(b)	(c)				(b)	(c)
			Variation ((a)->(b))	Variation ((b)->(c))				Variation ((a)->(b))	Variation ((b)->(c))
Côte d'Ivoire	Abidjan	850	961 <i>+13.1%</i>	909 <i>-5.4%</i>	South Africa	Cape Town	1,206	1,174 <i>-2.6%</i>	1,250 <i>+6.4%</i>
Egypt	Alexandria	1,326	1,346 <i>+1.5%</i>	1,292 <i>-4.0%</i>	Senegal	Dakar	1,038	1,087 <i>+4.7%</i>	1,022 <i>-6.0%</i>
Morocco	Casablanca	1,258	1,368 <i>+8.8%</i>	1,340 <i>-2.1%</i>	Mauritania	Nouadhibou	1,601	1,602 <i>+0.01%</i>	1,631 <i>+1.9%</i>
South Africa	Durban	1,515	1,942 <i>+28.2%</i>	1,995 <i>+2.7%</i>					
Tunisia	Sfax	1,171	1,187 <i>+1.4%</i>	1,260 <i>+6.2%</i>					

*Source: CNSC*

The evolution of the average freight rate of a dry TEU in the main African ports of loading was not consistent. In the port of Casablanca, the main port of loading for TEUs, after an increase in the average freight rate per TEU of 8.8% in 2020, a decrease of 2.1% was recorded in 2021, but its level in 2021 (€1,340) was still above that of 2019 (€1,258) by 6.5%. A similar trend was observed in the ports of Abidjan and Alexandria. On the other hand, the average freight rate for a dry TEU at the port of Durban has evolved continuously over the study period. Its average freight rate increased from €1,515 in 2019 to €1,942 in 2020, i.e., a very strong increase of 28.2%, and later stood at €1,995 after a further increase of 2.7%. A similar evolution has been observed in the port of Sfax.

The evolution of the average freight rate for refrigerated TEUs in the main African ports of loading was not uniform. In the port of Dakar, the main port of shipment of refrigerated TEUs, the average freight rate for a TEU increased by 4.7% in 2020 and decreased by 6% in 2021. The reverse was true for the port of Cape Town, where the average freight rate fell by 2.6% in 2020 and then rebounded by 6.4%. In contrast, a steady increase in the average freight rate was recorded at the port of Nouadhibou.

### Conclusion

Looking at the period 2019-2021, the average freight rates for dry TEUs successively increased after each year at the ports of Qingdao, Shanghai, Antwerp, Hamburg, Valencia, Durban and Sfax. This situation was also observed in the ports of Nhava Sheva and Nouadhibou for refrigerated containers.

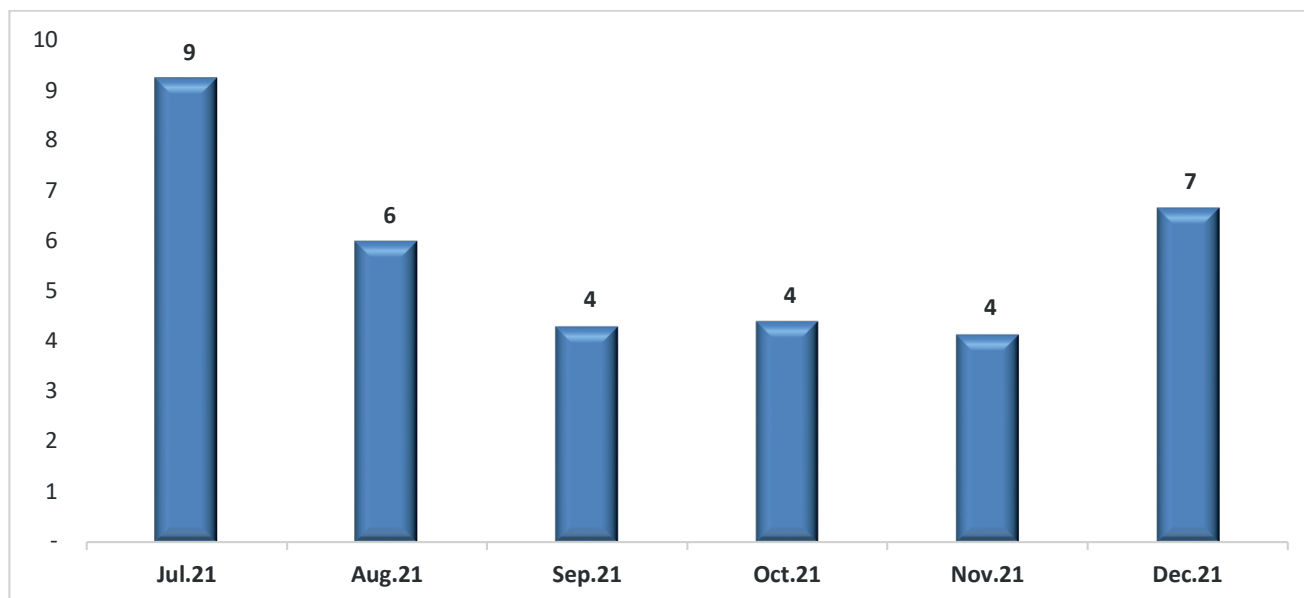
However, over the same period, a continuous decrease in the average freight rate for dry and refrigerated containers was recorded at the port of Mundra and Port Vendres respectively.



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

**On average, 5 ships were awaited at anchorage per day in Q4 2021**

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



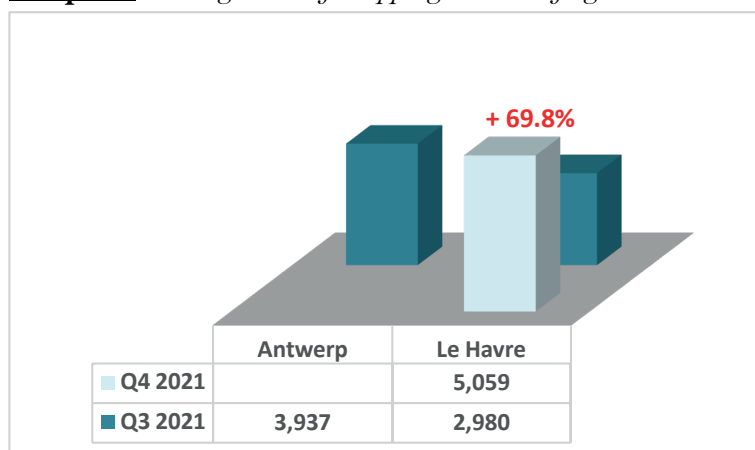
**Source:** CNSC

In the 4th quarter of 2021, an average of 5 ships were awaited at anchorage per day. This value is down by one ship compared to Q3 2021. The monthly analysis shows that the months of October and November 2021 recorded similar performances with 4 ships awaited at anchorage on each day of these months. Throughout December 2021, an average of 7 ships were awaited at anchorage per day.

**SHIPPING COST | Container 20'**

**Increase in the average transport cost of a 20' dry container at the ports of Shanghai (+7.8%) and Le Havre (+10.6%)**

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



**Source:** CNSC

The average cost of transporting a 20-foot refrigerated container increased significantly during the 4<sup>th</sup> quarter of 2021 at the port of Le Havre. Transport cost at this port increased from € 2,980 in Q3 2021 to € 5,059 in Q4 2021; representing a 70% hike.

No shipments of refrigerated 20-foot containers bound for the port of Douala were recorded in the port of Antwerp during the study period.

**Table 4:** Average cost of shipping a 20' dry container from the main ports of loading (in €)

COUNTRY	PORTS	Q3 2021	Q4 2021	Variation
<b>Ivory Coast</b>	Abidjan	1,186	1,212	2.2%
<b>South Africa</b>	Durban	1,960	2,311	17.9%
<b>Germany</b>	Hamburg	1,985	2,233	12.5%
<b>Belgium</b>	Antwerp	2,001	2,012	0.5%
<b>Spain</b>	Valencia	1,812	1,893	4.5%
<b>France</b>	Le Havre	1,899	2,100	10.6%

*Source:* CNSC

COUNTRY	PORTS	Q3 2021	Q4 2021	Variation
<b>China</b>	Qingdao	2,130		
	Shanghai	3,313	3,902	17.8%
<b>India</b>	Nhava Sheva	1,413	4,513	219.4%
<b>UAE</b>	Jebel Ali	2,435	2,135	-12.3%
<b>USA</b>	Houston	2,621	3,048	16.3%

The average shipping cost of a dry 20-foot container steadily increased in the main African ports of loading. It went up by about 18% in the port of Durban, where half of the shippers paid at least €2,300 for transport costs. In Abidjan, it rose by 2.2% to stand at €1,212.

The average transport cost in all the main European ports of loading showed an upward trend during the study period. Similarly, the port of Hamburg charged €2,233 after an increase of 12.5% while the port of Le Havre (€2,100) showed an increase of 10.6%. In these two ports, a quarter of the shippers paid at least €2,850 to ship their container. The average transport cost at the port of Valencia in turn recorded a 4.5% increase and stood at €1,893. The scale of the increase was much smaller in the port of Antwerp (€2,012). In these two ports, 25% of shippers reportedly paid less than €2,400 to ship a container.

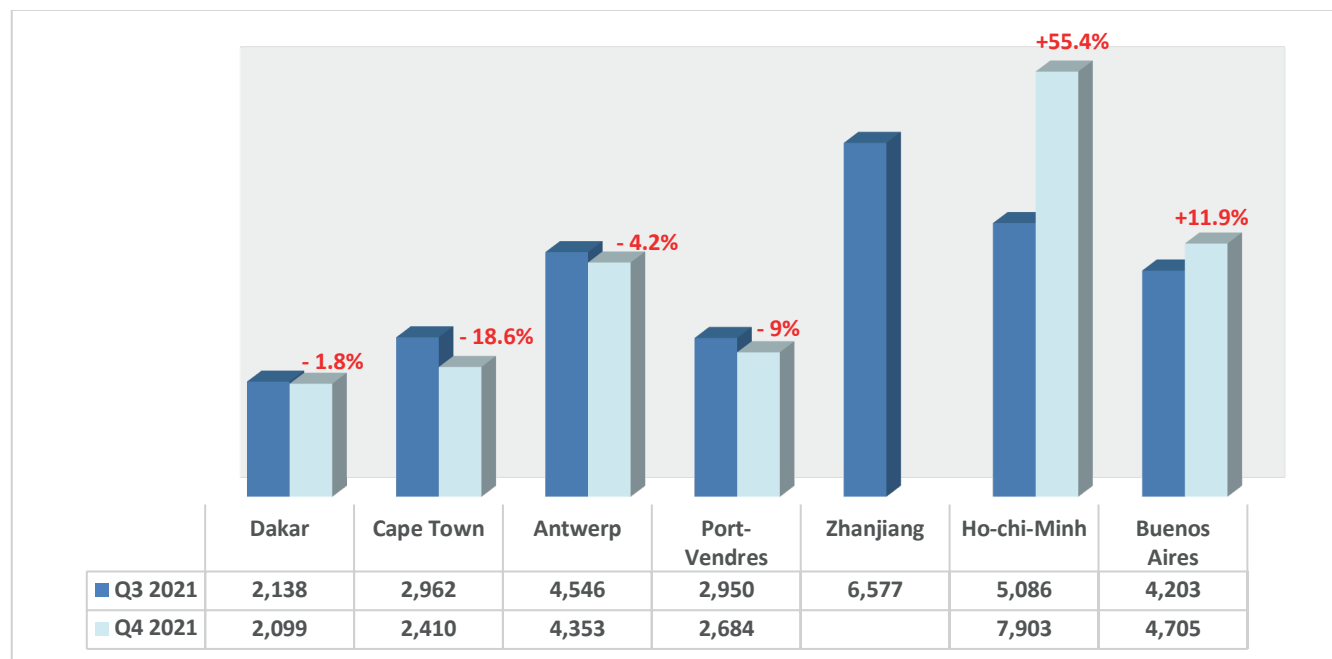
Of the main Asian ports of loading, the port of Nhava Sheva (+219.4%) showed the most significant increase in the 4<sup>th</sup> quarter of 2021 as the average transport cost rose from €1,413 to €4,513. One out of two shippers declared having paid at least € 5,260 to ship their cargo. In Shanghai (+17.8%), the increase was less significant and half of the shippers were able to ship their containers for no more than €3,597. At the port of Jebel Ali, the average transport cost fell by 12.3% to €2,135 in Q4 2021. The rates deviated by at most €925 and one of every four shippers reportedly paid at least €2,705 to ship their cargo.

The average transport cost in the port of Houston (€3,048) went up by about 16.3% in the 4<sup>th</sup> quarter of 2021 and the prices charged there deviated by more or less than € 1,466 from the average cost.

## SHIPPING COST | Container 40'

**Decrease in the average shipping cost of 40' refrigerated containers in the main African and European ports of loading**

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



**Source:** CNSC

On the African continent, the two main ports of loading for 40-foot refrigerated containers bound for the port of Douala showed downward trends in their average shipping cost. In the port of Cape Town, where the drop was more vivid, the average cost went down by 18.6% and stood at €2,410. One in two shippers paid at least €2,130 to ship a container. At the port of Dakar, average shipping cost increased by 2% and stood at € 2,099 in the fourth quarter of 2021. One out of four shippers spent less than €1,970 to ship a container. Prices charged in the ports of Dakar and Cape Town varied by roughly €500 and €650 of the average, respectively.

The main European ports of loading also recorded a downward trend in the average container transport cost. At the Antwerp Port, it went from € 4,546 to € 4,353, representing a 4.2% decrease. The rates charged vary by more or less €1,500 from the average, the same variation as in the previous quarter. One in four shippers spent at least € 2,900 to ship a container. The average transport cost in Port Vendres for the 4<sup>th</sup> quarter of 2021 stood at €2,684, after losing 9 percentage points. The prices charged in this port were much less volatile (roughly € 1,000 of the average cost). One out of two shippers reportedly paid less than € 2,000 to ship a container.

The port of Zhanjiang had no dry 40-foot container shipments to the port of Douala in the 4<sup>th</sup> quarter of 2021.

In the port of Ho Chi Minh, the average transport cost increased by 50% to €7,903 in Q4 2021. More than half of the containers that passed through this port were transported at a cost of €8,200.

At the port of Buenos Aires (€ 4,705), the variation in the average shipping cost increased by 12%. The prices charged at this port were roughly €900 from the average and 50% of shippers paid less than €4,260 to ship their container to the port of Douala.

## SHIPPING COST | Container 40'

### Increase in the average cost of shipping a 40' dry container in most of the main Asian ports of loading

**Table 5:** Average cost of shipping a 40' dry container from the main ports of loading (in €)

COUNTRY	PORTS	Q3 2021	Q4 2021	Variation	COUNTRY	PORTS	Q3 2021	Q4 2021	Variation
South Africa	Durban	2,693	2,874	6.7%	Germany	Hamburg	3,234	3,326	2.8%
China	Ningbo	2,621	2,612	-0.3%	France	Le Havre	3,230	3,177	-1.6%
	Qingdao	4,043	4,126	2.1%	Spain	Valencia	2,211	2,633	19.1%
India	Nhava Sheva	3,934	4,223	7.3%	UK	Felixstowe	2,320	2,245	-3.2%
UAE	Jebel Ali	2,929	3,172	8.3%	Belgium	Antwerp	2,595	2,593	-0.1%
Canada	Montreal	2,515	2,597	3.3%	Holland	Rotterdam	2,401	2,398	-0.1%
USA	Baltimore	2,629	2,838	7.9%	Italy	Genoa	2,776	3,103	11.8%

*Source:* CNSC

In the fourth quarter of 2021, the average cost of shipping a 40-foot dry container rose by 6.7% in the main African ports of loading. The prices charged over the study period were no more than € 500 from the average and half of the shippers reportedly shipped a container for roughly € 2,875.

In the main Asian ports of loading, only the port of Ningbo failed to record an increase in its average shipping cost which remained almost the same (€2,612). The most significant increase was recorded at the port of Jebel Ali (+8.3%) where the average cost reached €3,172 in the 4<sup>th</sup> quarter of 2021. The rates charged here sometimes deviated by up to €1,400 from the average and half of the shippers reportedly paid at least €2,985 to ship their container. The average cost in the Nhava Sheva port was €4,223 after an increase of 7.3%. The prices charged therein were more volatile (roughly € 2,100 of the average). Showing very slight variations, transport rates in the port of Qingdao (+2.1%) deviated by roughly €2,500 from the average and 50% of the containers were shipped at a cost of at least €3,000.

At the port of Montreal, average shipping cost increased by 3.3% and stood at € 2,597 in the fourth quarter of 2021. The prices charged were € 600 from the average and half of the shippers paid at least € 2,560 to ship their container. At the port of Baltimore, it increased by 8%. The prices charged therein in Q4 2021 were no more than € 600 from the average and with less than €2,730 half of the shippers were able to ship a container.

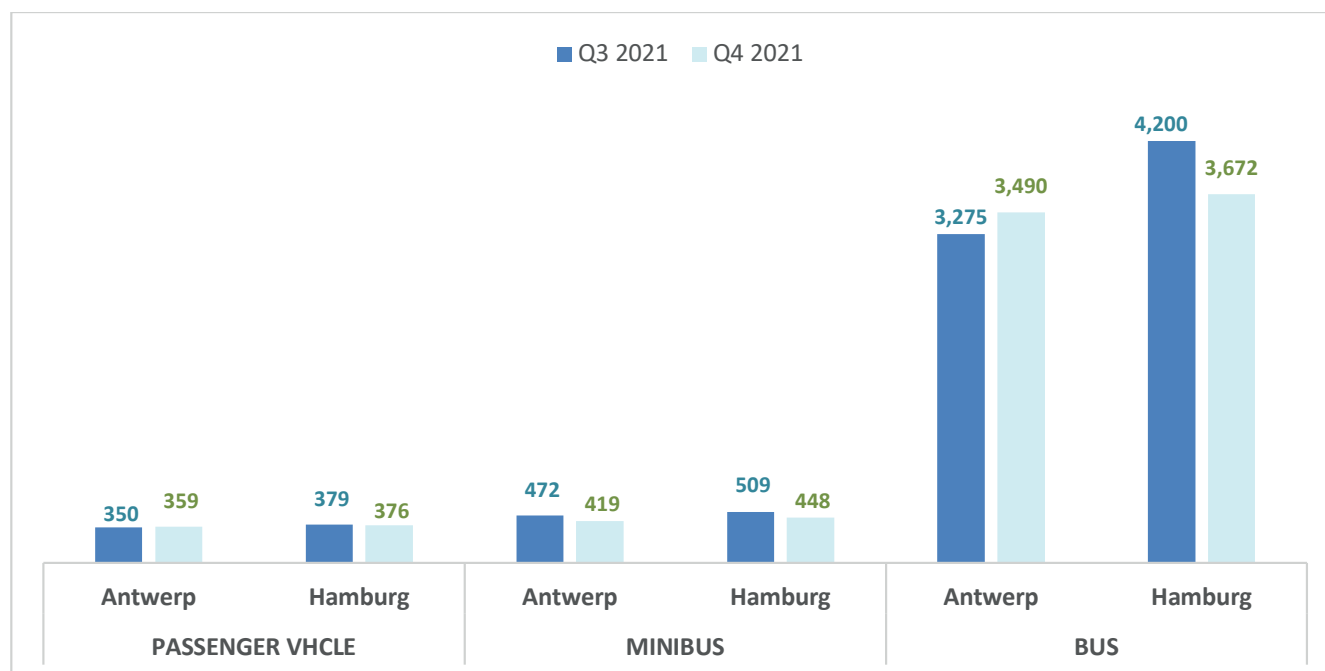
The average transport cost at the ports of Antwerp (€2,593) and Rotterdam (€2,398) remained virtually the same over the two quarters under study. Nevertheless, there is a lesser variation in the rates charged at the Belgian port (more or less €1,100 of the average compared to €600 in Rotterdam). Shipping costs at the port of Felixstowe decreased by 3.2% to €2,245. One third of the containers shipped from this port were shipped at a cost of exactly €2,000. The most significant increase was seen in the port of Valencia where the average transport cost stood at €2,633 after a 19.1% increase. One out of two shippers reportedly paid less than € 2,850 to ship a container. At the port of

Genoa, shipping cost increased by about 12% to €3,103. One out of three shippers who used this port paid less than €2,665 to ship their container.

## SHIPPING COST | Vehicles

**2.6% decrease in the average cost of shipping a passenger vehicle at the port of Antwerp**

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



**Source:** CNSC

The average shipping cost for a passenger vehicle at the port of Antwerp over the period under study recorded a 2.6% decrease going from €350 to €359. The prices charged at this port were roughly €140 of the average. The average transport cost at the port of Hamburg in turn recorded a 0.8% decrease and stood at €376. The prices charged there were slightly less volatile, deviating from the average by roughly €90. In these two ports, 75% of shippers reportedly paid less than €350 to ship a vehicle.

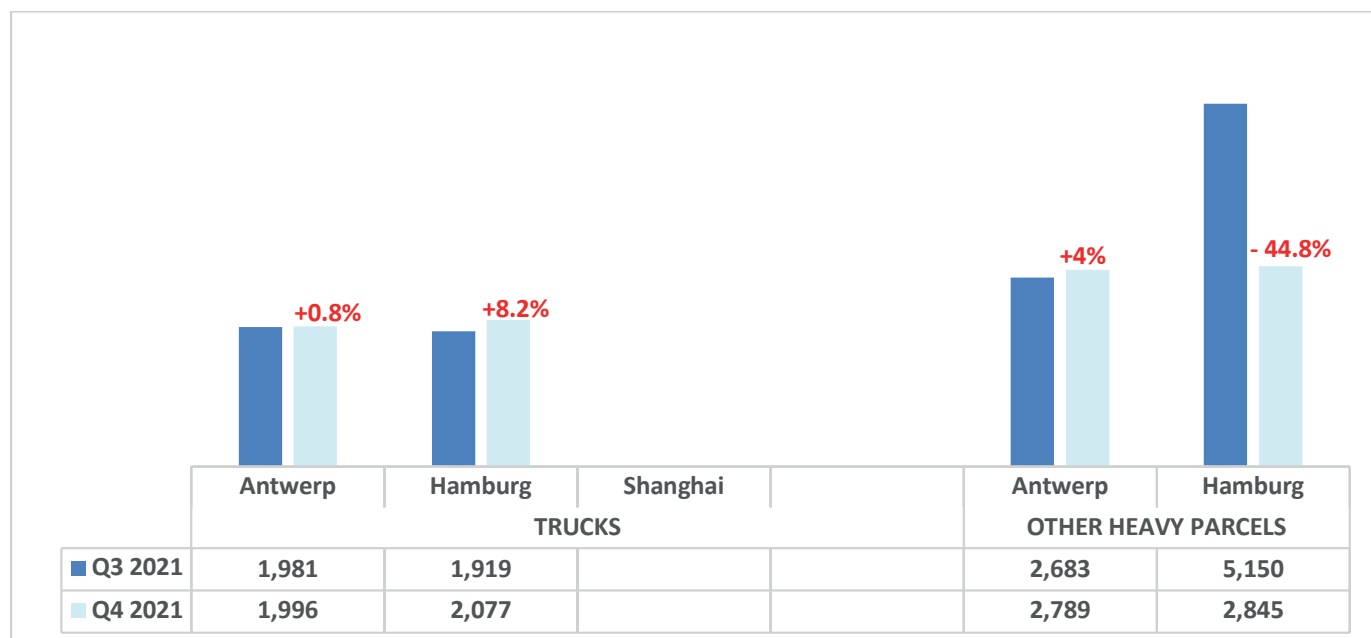
On average, the cost of transporting a Minibus in the main ports of loading was down by two digits. The average transport cost at the port of Hamburg dropped by 12% and stood at €448. The difference from the average was more or less €60 and one in four shippers paid more than €490 as shipping cost. At the port of Antwerp, shippers spent an average of €419 to ship a Minibus to the port of Douala, representing a 11.2% decline for the 4<sup>th</sup> quarter of 2021. The prices charged were no more than €110 from the average and 25% of shippers reportedly paid more than €450 to ship their Minibus.

The average shipping cost of a bus over the period under study recorded a 6.6% increase going from €3,275 to €3,490. One out of two shippers declared having paid at least € 3,700 as freight costs. The reverse was true for the port of Hamburg. The average transportation cost went from €4,200 in the 3<sup>rd</sup> quarter of 2021 to €3,672 in the 4<sup>th</sup> quarter of 2021; a decrease of about 12.6%. One in two shippers paid at least €3,800 to ship their bus.

## SHIPPING COST | Vehicles

**8.2% increase in the average cost of shipping a truck at the port of Hamburg**

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



**Source:** CNSC

In the main European ports of loading, the average shipping cost for trucks actually increased. At the port of Antwerp, average shipping cost increased by 1% moving from €1,981 in Q3 2021 to €1,996 in Q4 2021. The prices charged in this port roughly differed by €970 of the average. One in four shippers spent at least €1,352 to ship a truck or heavy equipment from the port of Antwerp. At the port of Hamburg, the average shipping cost rose by 8.2% and stood at €2,077 for the fourth quarter of 2021. The prices charged in this port show a similar variation to those in Antwerp (roughly €830 from the average). Two out of four shippers reportedly paid at least €1,975 as shipping costs. Same as in the previous quarter, no truck shipments to the port of Douala were recorded at the port of Shanghai in Q4 2020.

For Other heavy equipment, average shipping cost rose by about 4% at the port of Antwerp to stand at €2,789 in Q4 2021. The prices charged deviated by more or less than € 850 from the average cost. One in four shippers spent at least € 3,440 to ship a heavy equipment. At the port of Hamburg, average shipping cost dropped by 45% and stood at €2,845 for the fourth quarter of 2021. The prices charged therein were more volatile (roughly € 1,400 of the average) and 50% of shippers reported paying €2,400 for shipping cost.

**PORT CARGO DWELL TIME | Containers****In Q4 2021, October witnessed the shortest import container clearance time****Table 6:** Port dwell time for cargo bound for Cameroon (in days)

	Jul.21	Aug.21	Sep.21	Q3 2021	Oct.21	Nov.21	Dec.21	Q4 2021
<b>Average</b>	16.8	15.8	16	<b>16.2</b>	14.9	15.1	16.8	<b>15.6</b>
<b>Variation</b>	<b>5.0%</b>	<b>-6%</b>	<b>1.3%</b>	<b>-8.5%</b>	<b>-6.9%</b>	<b>1.3%</b>	<b>11.3%</b>	<b>-3.7%</b>
<b>1<sup>st</sup> Quartile</b>	7	7	7	<b>7</b>	7	7	7	<b>7</b>
<b>2<sup>nd</sup> Quartile</b>	12	10	10	<b>11</b>	11	11	11	<b>11</b>
<b>3<sup>rd</sup> Quartile</b>	20	18	17	<b>18</b>	17	18	20	<b>19</b>
<b>Less than 11 days</b>	45%	51%	52%	<b>49%</b>	48%	47%	46%	<b>47%</b>

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

In the fourth quarter of 2021, the average dwell time for containerised import goods at the Douala Port was 16 days; the same as in the previous quarter. The quartile analysis shows a slight advantage for Q3 2021 in terms of performance. In fact, 47% of shipments spent at least 11 days at the terminal during the study period, compared with 49% in Q3 2021. The quartile analysis was also very similar as half of the containers spent at least 11 days at the park in both quarters.

The monthly analysis of import container turnaround times indicates that shippers took an average of 15 days to move their containers out during the months of October and November. The quartile analysis for these two months showed some similarities as 48% of containers left the terminal in less than 11 days in October compared with 47% in November.

On average, it took 17 days for a container to leave the terminal in December, 2 days longer than in previous months, and 46% of containers spent less than 11 days at the container terminal. For each of the three months of Q4 2021, 25% of the containers left the terminal within a week of arrival at the park.

**PORT CARGO DWELL TIME | Vehicles****6 days decrease in the average dwell time for vehicles at the TMFD Park (16 days)****Table 7:** *Dwell time for imported second-hand vehicles at the Douala Port (in days)*

Car Park	TMFD		SOCOMAR	
Period	Q3 2021	Q4 2021	Q2 2021	Q3 2021
Average	21.5	15.5	20.1	18.5
Variation	27.2%	-27.9%	12.30%	-8.00%
1 <sup>st</sup> Quartile	10	9	9	8
2 <sup>nd</sup> Quartile	14	12	14	13
3 <sup>rd</sup> Quartile	27	18	25	22
Less than 11 days	31%	39%	31%	39%

*Source: Douala Mixed Fruit Terminal (TMFD)*

The average dwell time for used vehicles imported and offloaded at the Port of Douala was reversed at the TMFD park in Q4 2021 as it decreased by 6 days to about 16 days.

The quartile analysis shows that the difference in average dwell times is due to the fact that the proportion of short dwell times is much higher in Q4 2021. Over 25% of vehicles were cleared within 9 days during the study period; one day less than in the previous quarter. In addition, about 25% of vehicles were cleared after 18 days in Q4 2021 compared to 35% in Q3 2021, and 39% of the vehicles cleared in Q4 2021 left the park within 11 days; some 8 percentage points less than in Q3 2021.

The monthly analysis shows that December 2021 recorded the best performance, with an average dwell time of 15 days and with 42% of vehicles released from the fleet within 11 days of their arrival.



## RAIL CARGO | Tonnage

4,7% decrease in rail cargo transported from Douala and Ngaoundere

Overall rail freight in Q4 2021 remained on the downturn as it further dropped by 9.3% to 347,252 tonnes.

**Table 8:** Rail cargo transported from Douala to Ngaoundere per type of goods (in tonnes)

Douala -----> Ngaoundere	Q3 2021		Q4 2021		Variation
Type of goods	Tonnage	%	Tonnage	%	
Hydrocarbons	189,782	60.7	179,893	60.4	-5.2%
Flour and Cereals	29,324	9.4	36,727	12.3	25.2%
Containers transported to Ngdere	28,449	9.1	30,150	10.1	6.0%
Home-made sugar	23,498	7.5	17,869	6.0	-24.0%
Building materials	17,416	5.6	13,323	4.5	-23.5%
Oil & Gas	7,868	2.5	6,364	2.1	-19.1%
Alumina (Raw mat.)	3,230	1.0	4,945	1.7	53.1%
Food aid	1,101	0.4	3,857	1.3	250.3%
Fertilizers and insecticides	4,035	1.3	1,928	0.6	-52.2%
Cement factory Raw mat.	2,752	0.9	448	0.2	-83.7%
MAD PQ1	1,670	0.5	210	0.1	-87.4%
Other goods	3,361	1.1	1,961	0.7	-41.7%
<b>TOTAL</b>	<b>312,486</b>	<b>100</b>	<b>297,675</b>	<b>100</b>	<b>-4.7%</b>

**Source:** Camrail

**MAD PQ1:** Materials used in the Rail Track Renewal Programme (Ballast, rail, tie, etc.)

In the fourth quarter of 2021, rail freight transported from Douala to Ngaoundere accounted for 86% of overall rail freight; up by 4 points compared to the previous quarter. After a drop of 4.7%, it was estimated at 297,675 tonnes and mainly comprised of hydrocarbons (60.4%), flour and cereals (12.3%), containerised goods (10.1%), local sugar (6%) and construction materials (4.5%). The other types of goods each accounted for less than 3%.

The bulk of the commodities showed a double-digit variation. The most significant increase was in Food Aid (3,857 tonnes) which more than tripled. Alumina increased by 50% to 4,945 tonnes in Q4 2021. Flour and cereals increased by 25.2% while Containerized goods registered a tonnage of 30,150; an increase of 6%.

Local sugar (17,869 tonnes) and construction materials (13,323 tonnes) dropped by 24%. Fertilizers and insecticides were down by half to 1,928 tonnes during the study period. Oil and gases went from 7,868 tonnes in Q3 2021 to 6,364 tonnes in Q4 2021, showing a decrease of 19.1%. Hydrocarbons declined the least in Q4 2021, falling by 5.2% to 179,893 tonnes.

**RAIL CARGO | Tonnage****29,6% decrease in rail cargo transported from Ngaoundere to Douala****Table 9:** Rail cargo transported from Ngaoundere to Douala per type of goods (in tonnes)

Ngaoundere -----> Douala	Q3 2021		Q4 2021		Variation
Type of goods	Tonnage	%	Tonnage	%	
Wood logs	42,197	59.9	19,571	39.5	-53.6%
Seeds and cakes	6,913	9.8	9,461	19.1	36.9%
Finished lumber (sawn wood)	7,673	10.9	8,072	16.3	5.2%
Cotton fibre	7,510	10.7	5,460	11.0	-27.3%
Wild Wood	3,726	5.3	4,186	8.4	12.4%
Downward-bound Containers	1,050	1.5	1,540	3.1	46.7%
Livestock	1,330	1.9	1,287	2.6	-3.2%
<b>TOTAL</b>	<b>70,399</b>	<b>100</b>	<b>49,577</b>	<b>100</b>	<b>-29.6%</b>

*Source: Camrail*

Downbound rail freight (Ngaoundere to Douala) accounted for 14 percent of total rail freight in Q4 2021, 4 percentage points lower than in the previous quarter. The downward trend observed since the 3<sup>rd</sup> quarter of 2020 is still experienced in the study period. Downbound rail freight decreased by 29.6% to 49,577 tonnes in the fourth quarter of 2021.

Rail freight from Ngaoundere to Douala mainly consisted of wood logs which represented 39.5% of the total. Seeds and oilcakes (19.1%), previously in fourth place in Q3 2021, moved up to second place at the expense of Milled wood (16.3%), which occupied third place during the period under review. The 4<sup>th</sup> position was occupied by Cotton fibre with a share of 11%, followed by Wild wood (8.4%), Containerised goods (3.1%) and Live animals (2.6%).

In terms of tonnage, the most significant decline in the 4<sup>th</sup> quarter was in Wood logs which dropped by 50% to 19,571 tonnes. A similar trend was observed for cotton fibre (5,460 tonnes), which fell by 27.3%, and for Live animals (1,287 tonnes) down by 3.2%.

The most significant increase was in Containerised goods, which increased by 46.7% to an estimated 1,540 tonnes in Q4 2021. Seeds and oilcakes went from 6,913 tonnes in Q3 2021 to 9,461 tonnes in Q4 2021, showing an increase of 37%. Wild wood (+12.4%) and Milled wood (+5.2%) also increased in volume and reached 4,186 tonnes and 8,072 tonnes respectively.

**RAIL CARGO | Transport cost****14.3% increase in the cost of transporting Oil and Gas****Table 10:** *Transport cost per type of goods from Douala –Ngaoundere (in CFAF/ tonne-km)*

Type of goods	Q3 2021	Q4 2021	Variation
Hydrocarbons	62.23	62.44	0.3%
Alumina (Raw mat.)	57.15	57.15	0.0%
MAD PQ1	42.81	42.82	0.0%
Containers transported to Ngdere	39.25	42.52	8.3%
Food aid	42.09	42.09	0.0%
Oil & Gas	32.81	37.50	14.3%
Fertilizers and insecticides	36.21	36.61	1.1%
Home-made sugar	35.57	34.86	-2.0%
Building materials	34.16	32.70	-4.3%
Cement factory Raw mat.	32.25	30.48	-5.5%
Flour and Cereals	29.03	28.41	-2.1%

**Source:** *Camrail*

In the 4<sup>th</sup> quarter of 2021, the cost of transporting goods from Douala to Ngaoundere varied based on the type of goods.

The cost of transporting Oil and gas increased from 32.81 CFAF/tonne-kilometre in the third quarter of 2021 to 37.50 CFAF/tonne-kilometre in the fourth quarter of 2021, an increase of 14.3%. A similar trend was observed for Containerised goods. while transportation cost increased by 8.3% to 42.52 CFAF /tonne-kilometre. Fertilizers and insecticides (+1.1%) experienced a much more moderate increase in their transport cost.

Four (04) categories of goods showed transport costs almost identical to those of the third quarter of 2021. These are Hydrocarbons (62.44 CFAF/tonne-kilometre), Alumina (57.15 CFAF/tonne-kilometre), MAD PQ1 (42.82 CFAF/tonne-kilometre) and Food aid (CFAF/tonne-kilometre).

The most significant decrease was recorded for Cement raw materials as their transport costs fell by 5.5% to an estimated 30.48 CFAF/tonne-kilometre during the study period. The same is true for Construction materials (32.70 CFAF/tonne-kilometre), down by 4.3 %. Local sugar transported at 34.86 CFAF/tonne-kilometre and Flour and cereals at 28.41 CFAF/tonne-kilometre saw a 2% decrease in transport costs.

**RAIL CARGO | Transport cost****13.3% decrease in the cost of transporting Wild wood****Table 11:** *Transport cost per type of goods from Ngaoundere to Douala (in CFAF/ tonne-km)*

Type of goods	Q3 2021	Q4 2021	Variation
Finished lumber (sawn wood)	47.05	51.42	9.3%
Wild wood	51.04	44.26	-13.3%
Wood logs	43.27	43.46	0.4%
Livestock	35.12	35.11	0.0%
Cotton fibre	31.13	31.70	1.8%
Containers transported from Ngdere to Douala	17.97	18.60	3.5%
Seeds and oilcakes	14.01	15.68	11.9%

**Source:** *Camrail*

Unlike the previous quarter where variations of less than 10% were recorded, the cost of transporting certain categories of goods in the fourth quarter of 2021 saw double-digit variations.

Wild wood was the only category where transport cost decreased in the fourth quarter of 2021. It fell by 13.3% to 44.26 CFAF/tonne-kilometre.

The most significant increase recorded was for Seeds and oilcakes which increased by about 12% to an estimated 15.68 CFAF/tonne-kilometre. The cost of transporting Milled wood was 51.42 CFAF/tonne-kilometre, after an increase of 9.3%. Containerised goods (+3.5%) and Cotton fibre (+1.8%) had more moderate increases and their transport cost in Q4 2021 was 18.60 CFAF/tonne-kilometre and 31.70 CFAF/tonne-kilometre, respectively.

The transport costs for Wood logs (43.46 CFAF/tonne-kilometre) and Live animals (35.11 CFAF/tonne-kilometre) quite similar to those of Q3 2021.

## RAIL CARGO | Transit time

Transit time for Conventional goods still stood at 6.5 days

**Table 12:** Transport cost per type of goods from Ngaoundere to Douala (in CFAF/ tonne-km)

	Containers			Conventional		
	Q3 2021	Q4 2021	Var (in hrs)	Q3 2021	Q4 2021	Var (in hrs)
Loading time	1.0	1.1	4	1.1	1.5	10
Declaration period	0.4	0.1	-8	0.1	0.0	-1
Departure wait-time	0.1	0.1	0	0.2	0.1	-1
Haulage time	3.2	2.9	-8	4.2	3.2	-23
Time for placing goods for offloading	0.1	0.1	0	0.6	1.0	11
Off-loading time	0.3	0.3	2	0.5	0.5	0
Average Total Transit Time	5	4.6	-10	6.6	6.4	-5

**Source:** Camrail

### Data lexicon

**Loading time:** Time between when the coach is put at the disposal of a shipper and when loading completes.

**Declaration period:** Period between when loading of a coach completes and the issuance of transit declaration

**Departure wait time:** Period between when goods are declared and when a train wagon leaves.

**Haulage time:** Duration between the date a wagon leaves a departure station and the date it arrives at the destination station.

**Time for placing goods for off-loading:** Time between the arrival of a wagon and its effective availability for off-loading by shipper

**Off-loading time:** Time between when a wagon is made available for off-loading by a shipper and its effective off-loading.

The average transit time for Containerised goods bound for Ngaoundere from Douala was 4.6 days in Q4 2021, i.e., 10 hours less than in the previous quarter. On average, the declaration and haulage sequences have each seen a time reduction of 8 hours. The loading and offloading sequences saw their time increase on average by 4 hours and 2 hours respectively. Waiting for departure and Placement for offloading averagely took the same time as in the previous quarter.

Transit time for goods in transit with a conventional packaging mode fell from 6.6 days to 6.4 days (down by 5 hours). The sequences for loading and placement of goods for offloading showed an increase in their average time of 10 hours and 11 hours respectively. The haulage sequence showed the most remarkable decrease, down by about one day. The declaration and awaiting departure sequences decreased on average by one hour each. It still took 12 hours to offload, as in the previous quarter.

**AIR CARGO | Tonnage****28.1% increase in air freight to Cameroon**

Overall air freight increased by around 16% in Q4 2021, going from 4,346 tonnes in Q3 2021 to 5,028 tonnes in Q4 2021.

**Table 13:** *Import air cargo per type of cargo (in tonnes)*

TYPE OF GOODS	Q3 2021		Q4 2021		Variation
	Tonnage	%	Tonnage	%	
OTHER PARCELS	1,327	63.6	1,705	63.9	28.5%
CONSOLIDATIONS	154	7.4	205	7.7	33.1%
DANGEROUS PRODUCTS	195	9.4	150	5.6	-23.1%
FOOD	92	4.4	58	2.2	-37.0%
PHARMACEUTICAL PRODUCTS	62	3.0	55	2.1	-11.3%
DIPLOMATIC PARCELS	57	2.7	31	1.2	-45.6%
OTHERS	198	9.5	466	17.5	135.4%
<b>TOTAL</b>	<b>2,085</b>	<b>100</b>	<b>2,670</b>	<b>100</b>	<b>28.1%</b>

**Source:** ADC

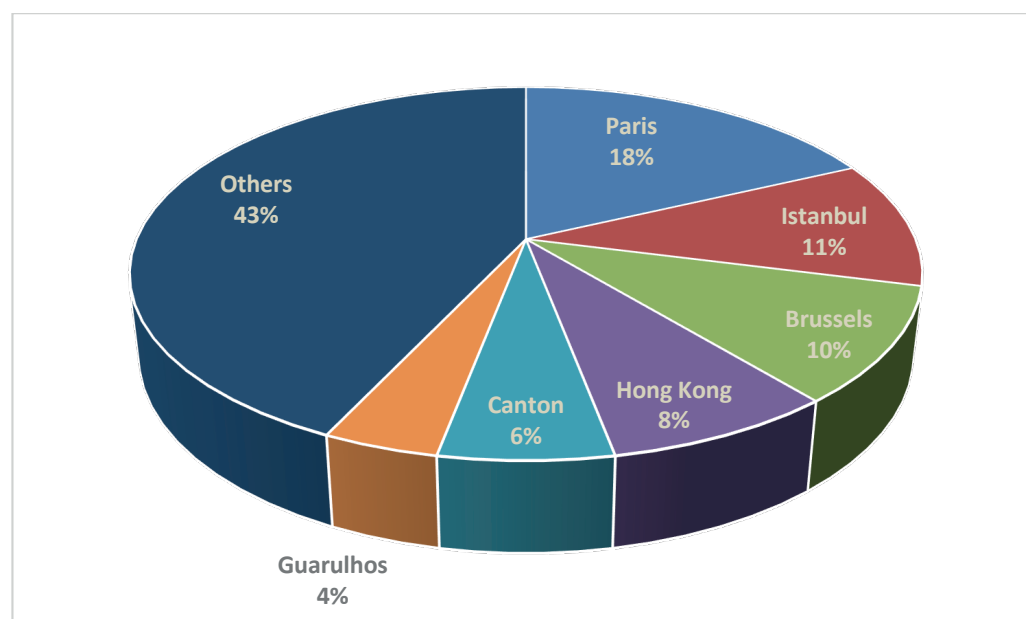
In Q4 2021, import air freight accounted for 53% of the total and was up by 5 percentage points over Q3 2021. Import air freight registered an increase of 28.1%, going from 2,085 tonnes in the 3<sup>rd</sup> quarter of 2021 to 2,670 tonnes in the 4<sup>th</sup> quarter of 2021.

The ranking of the main goods making up import air freight basically remained unchanged. Miscellaneous parcels (63.9%) still topped the list. Dangerous goods (5.6%) left its second position to Consolidations (7.7%) and moved up to third place. Foodstuffs (2.2%) remained in 4<sup>th</sup> place, followed by Pharmaceuticals (2.1%) and Diplomatic Packages (1.2%).

Of the main types of goods imported by air, only Miscellaneous parcels and Consolidations witnessed an increase in tonnage. Miscellaneous Parcels rose by 28.5% moving from 1,327 tonnes to 1,705 tonnes. After a 33.1% increase, Consolidations totalled 205 tonnes in Q4 2021.

The most significant decrease was recorded for Diplomatic Packages, which dropped by 45.6% to 31 tonnes. Foodstuffs (58 tonnes) fell by 37% and Dangerous Goods (150 tonnes) by 23.1%. Pharmaceutical products fell by 11.3% to 55 tonnes in Q4 2021.

In Q4 2021, import air freight mainly flew in from Paris (18%), Istanbul (11%), Brussels (10%), Hong Kong (8%), Canton (6%) and Guarulhos (4%).

**Graph 6:** Breakdown of import air freight by origin**Source:** ADC**AIR CARGO | Tonnage****4.3% increase in air freight from Cameroon****Table 14:** Export air freight by type of goods (in tonnes)

TYPE OF GOODS	Q3 2021		Q4 2021		Variation
	Tonnage	%	Tonnage	%	
FOOD	1,951	86.3	2,089	88.6	7.1%
OTHER PARCELS	215	9.5	164	7.0	-23.7%
FLOWERS	24	1.1	32	1.4	33.3%
PHARMACEUTICAL PRODUCTS	9	0.4	12	0.5	33.3%
DANGEROUS PRODUCTS	7	0.3	1	0.0	-85.7%
OTHERS	55	2.4	60	2.5	9.1%
<b>TOTAL</b>	<b>2,261</b>	<b>100</b>	<b>2,358</b>	<b>100</b>	<b>4.3%</b>

**Source:** ADC

In the fourth quarter of 2021, Cameroon's exports by air accounted for 47% of total air freight; 5 percentage points less than in the previous quarter. Over the period under study, export air freight increased by 4.3% and reached 2,358 tonnes.

The ranking by weight of the main types of goods making up export air freight knew no changes in Q4 2021. Foodstuffs still ranked first accounting for 88.6% of air freight exports. Miscellaneous parcels representing 7% of export air freight still ranked second. Flowers (1.4%) remained in third place, followed by Pharmaceuticals (0.5%) and Dangerous Goods (0.04%).

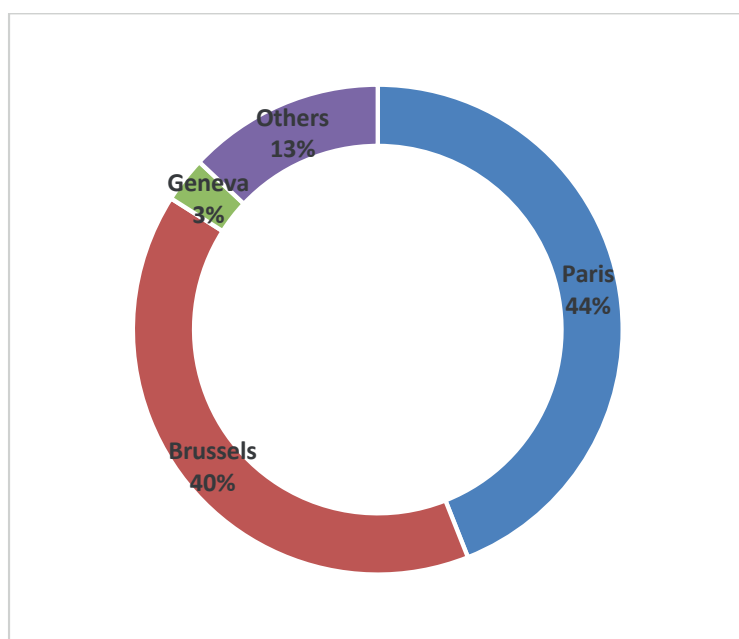
Over the course of the fourth quarter of 2021, only Miscellaneous parcels and Dangerous goods saw a decrease in tonnage. The most significant decrease was recorded for Dangerous goods, which went

from 7 tonnes in Q3 2021 to 1 tonne in Q4 2021. Miscellaneous parcels decreased by approximately 24% to 164 tonnes over the study period.

Flowers (32 tonnes) and Pharmaceuticals (12 tonnes) each increased by a third. Foodstuffs increased by 7.1% with a total of 2,089 tonnes exported in the 4<sup>th</sup> quarter of 2021.

Export air freight during the 4<sup>th</sup> quarter of 2021 was mainly bound for Paris (44%), Brussels (40%) and Geneva (3%).

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



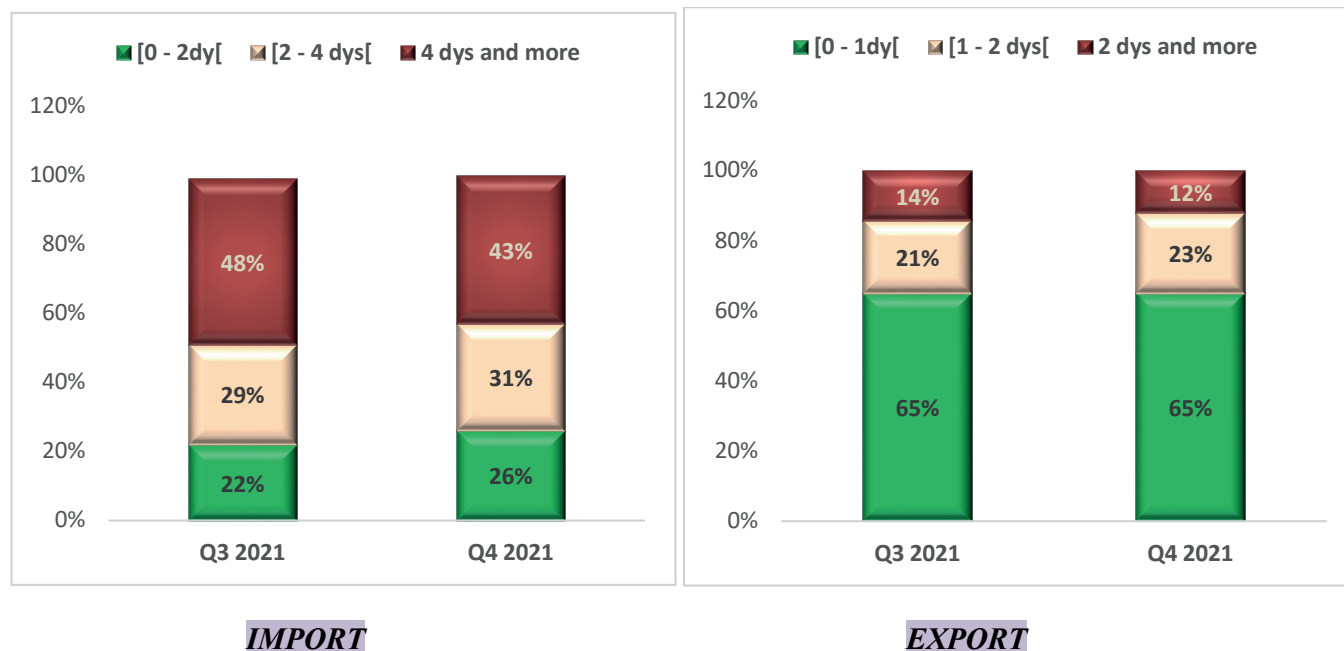
**Source:** ADC



## AIR CARGO | Air cargo dwell time

**Average transit time for imports (4 days) decreased by one day // and exports remained at 1 day**

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



**Source:** ADC

Over the study period, the average transit time for imported cargoes was 4 days as opposed to 5 days in Q3 2021. The analysis of these times shows that the 4<sup>th</sup> quarter of 2021 had a better performance. In fact, during Q4 2021, 43% of imported goods spent at most 2 days in airport stores, some 5 percentage points less than in the previous quarter. Moreover, 26% of outbound cargoes spent less than 2 days compared with 22% in Q3 2021.

Monthly analyses reveal that it took an average of 3 days to move cargo out of airport warehouses in December 2021 compared with 5 days in October and November. Detailed analysis however showed that December had the best records of the quarter with 29 % and 39 % of outbound cargo spending at most 2 and 4 days in airport stores, respectively. The month of November had the worst record. In fact, 45% of the cargo that left the port during this month had been there for at least 4 days and only 24% spent no more than 2 days.

For exported goods, the average time spent at the airport remained equal to one day. Furthermore, 65% of cargoes exported in Q4 2021 were loaded on the same day as their arrival at the airport; a performance that matches that of Q3 2021. On the other hand, 12% of cargo exports in Q4 2021 spent at least 2 days at the airport store before loading, a decrease of 2 percentage points compared to Q3 2021.

A monthly analysis of airport dwell time for exports shows that the average shipment for each month of the quarter was shipped one day after arrival at the airport. However, detailed analysis show that December had the best records, while the worst performance was recorded in November. Indeed, in the month of October, 70% of export cargoes were dispatched the same day they arrived at the terminal; compared to 61% for the month of November. In addition, 10% of parcels spent at least 2 days before being dispatched, 2 points less than in November.

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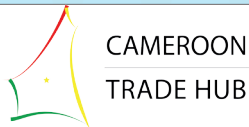
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### Les actions d'assistance aux Chargeurs

- Assistance par la formation
- Assistance par l'information
- Réhabilitation des structures d'assistance de proximité
- Assistance par la promotion du commerce extérieur
- Mise en Place du Cyber des Chargeurs

### Shippers' Assistance

- Assistance through training
- Assistance through information
- Rehabilitation of local support structures
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- Setting up of a shippers' cyber



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### Le développement des équipements de facilitation des transports et du commerce

- Réhabilitation du Musée Maritime de Douala
- Construction des magasins
- Construction des Centres de vie pour le séjour des transporteurs

### Development of trade and transport facilitation infrastructure

- Rehabilitation of CNSC Maritime Museum
- Construction of cargo warehouses
- Construction of Trucker accommodation centres



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