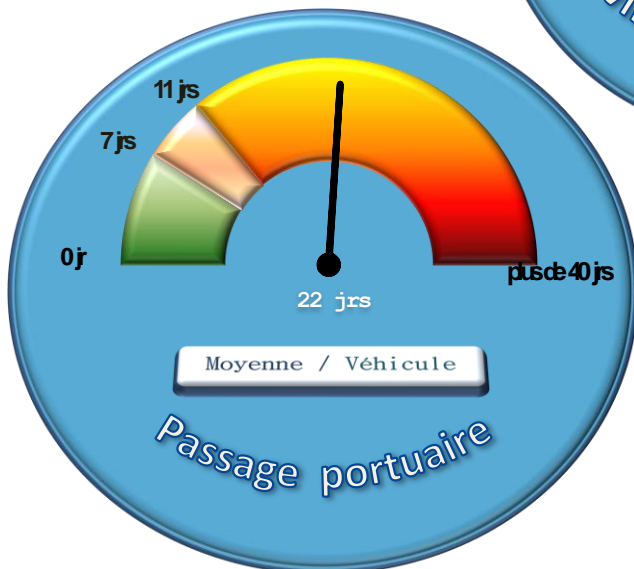
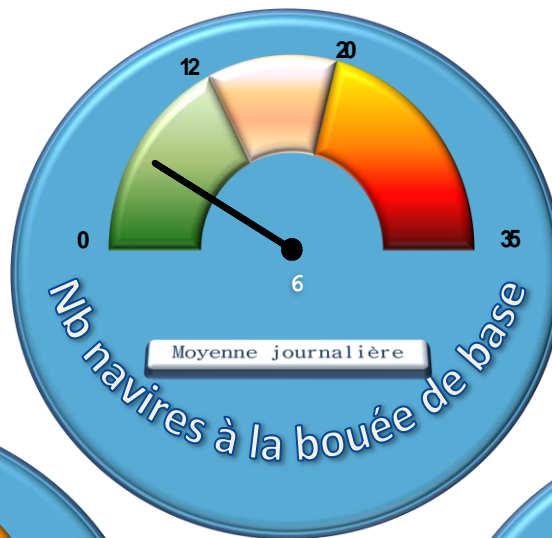




## THE ECONOMIC OUTLOOK | 3<sup>rd</sup> Quarter 2021



[0 - 7jrs] = 14% ; [7 - 11jrs] = 17% ; 11jrs et plus = 69 % du trafic

PARC TMFD



[0 - 7jrs] = 23% ; [7 - 11jrs] = 26% ; 11jrs et plus = 51% du trafic

PARC RTC

■ Good
 ■ Watch out
 ■ Bad

# TABLE OF CONTENTS

## FOREWORD → P2

## SHIPS → P3

**P3** – Average number of ships at anchorage per day

## SHIPPING COST → P4

**P4** –Containers

**P7** –Vehicles

## CARGO DWELL TIME AT THE PORT→ P9

**P9** –Containers

**P10** –Vehicles

## RAIL CARGO → P11

**P11**–Tonnage

**P13**–Transport cost

**P15**–Transit time

## AIR CARGO → P16

**P16**–Tonnage

**P18**–Air cargo dwell time

## FOREWORD



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, rail 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.

An analysis of the evolution of the main indicators for the transport of goods reveals that on each day of the 3<sup>rd</sup> quarter of 2021, an average of 6 ships were awaited at anchorage.

The average dwell time of imported used vehicles at the TMFD park which now stood at 22 days had increased by five days.

The dwell time for imported containerised goods at the port of Douala reduced by about 2 days to 16 days.

Rail freight remained almost the same (382,855 tonnes) and transit times for containerised goods went down from 5.5 to 5 days.

Air freight decreased by 6% and was valued at 4,346 tonnes. Imported cargoes spent an average of 5 days at airport warehouses in Q3.

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

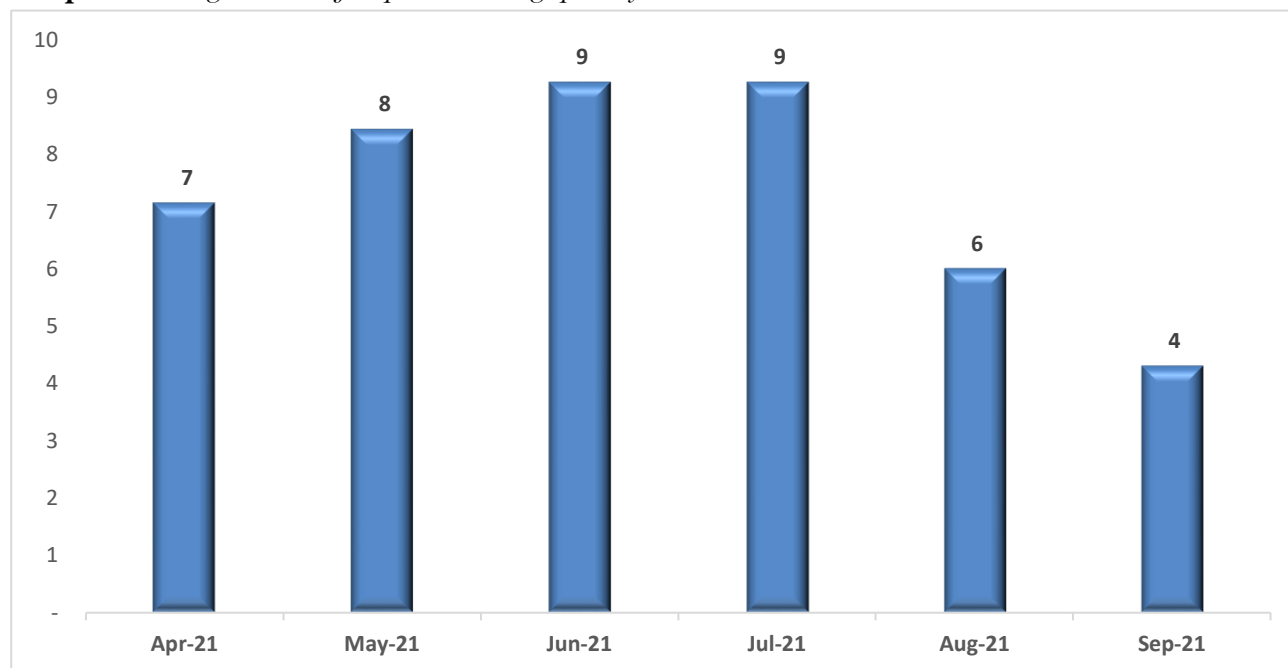
Have an enjoyable reading!

**Auguste Mbappe Penda**

## SHIPS | Average number of ships at anchorage / awaited per day

On average, 6 ships were awaited at anchorage per day in Q3 2021

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



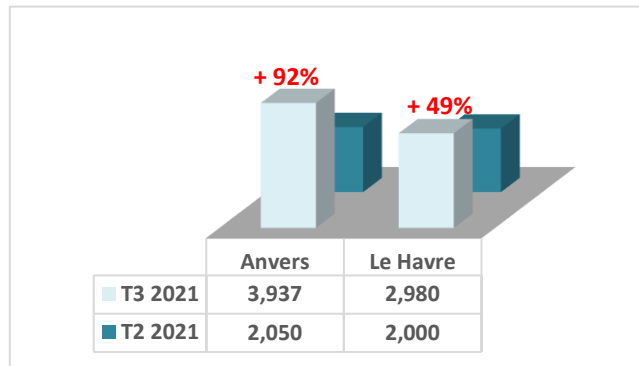
**Source:** CNSC

An average number of 6 ships awaited at anchorage per day in the 3<sup>rd</sup> quarter of 2021 as opposed to 8 in the previous quarter. A monthly analysis of the average number of ships at anchorage shows a downturn during the months of the Q3 2021. The average number of ships awaited at anchorage per day indeed decreased from 9 ships in July 2021 to 4 ships by September 2021.

## SHIPPING COSTS | Container 20'

9% increase in the average cost of shipping a 20' dry container at the ports of Antwerp and Valence

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



**Source:** CNSC

The average cost of transporting a 20 ft refrigerated container in Q3 2021 saw a marked increase at the two main ports of loading. At the port of Antwerp, it had almost doubled to an estimated €3,937 and one out of four shippers reported paying more than €5,000 to ship their container.

At the port of Le Havre, average shipping cost rose by 49% from €2,000 in the 2<sup>nd</sup> quarter of 2021 to €2,980 in the 3<sup>rd</sup> quarter.

**Table 1:** Average cost of shipping a 20' dry container (in €)

COUNTRY	PORTS	Q2 2021	Q3 2021	Variation
Côte d'Ivoire	Abidjan	979	1,186	21.1%
South Africa	Durban	2,373	1,960	-17.4%
Germany	Hamburg	2,013	1,985	-1.4%
Belgium	Antwerp	1,842	2,001	8.6%
Spain	Valence	1,659	1,812	9.2%
France	Le Havre	1,929	1,899	-1.6%

**Source:** CNSC

The average cost to ship a dry 20-foot container in the 3<sup>rd</sup> quarter of 2021 showed divergent trends in the main African ports of loading.

The average shipping cost at the ports of Hamburg (-1.4%) and Le Havre (-1.6%) fell slightly to €1,985 and €1,899 respectively. The prices charged at these ports varied by roughly €800 of the average and half of the shippers using these ports paid less than €1,600 to ship their container. The most significant increase in average shipping costs for the main European ports of loading was recorded in Valencia (+9.2%). An upward trend is also observed in the port of Antwerp where the average shipping cost was €2,001 after an increase of 8.6%. The prices charged deviated by more or less than €600 from the average cost. The Spanish port had 25% of shippers spending at least €2,120 compared to €2,465 in the port of Antwerp.

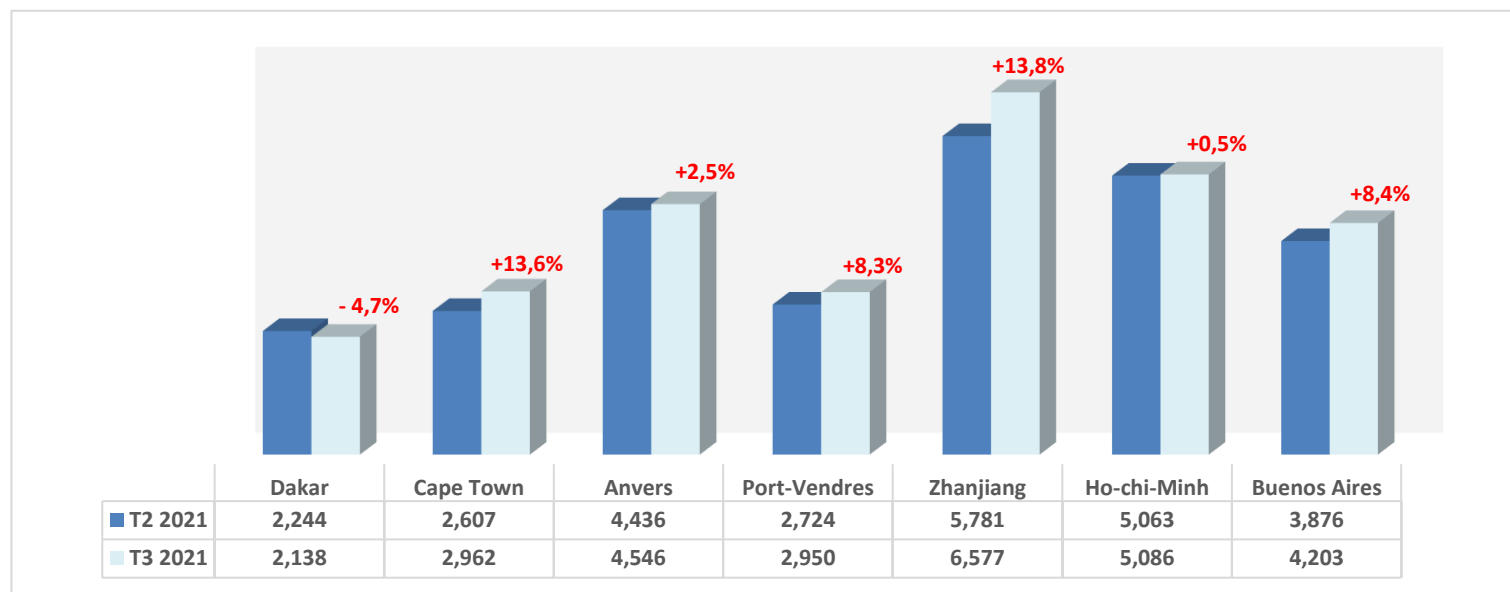
COUNTRY	PORTS	Q2 2021	Q3 2021	Variation
China	Qingdao	1,278	2,130	66.7%
	Shanghai	3,391	3,313	-2.3%
India	Nhava Sheva	2,756	1,413	-48.7%
UAE	Jebel Ali	2,427	2,435	0.3%
USA	Houston	2,841	2,621	-7.7%

Of the major Asian ports of loading, only the port of Qingdao showed a significant increase in the 3<sup>rd</sup> quarter of 2021. The average shipping cost at this port stood at €2,130, representing an increase of around 67%. Shipping costs at the port of Jebel Ali (€2,435) varied by less than 1% of the average. The port of Nhava Sheva recorded the most significant decrease as the average shipping cost there fell by 48.7% to €1,413. The rates charged in these different ports were more or less €1,000 of the average. The average shipping cost in the port of Houston which previously was €2,621 fell by about 15% in the 3<sup>rd</sup> quarter of 2021. The prices charged at this port deviated by €673 from the average cost. One in two shippers declared paying at most €2,350 to ship a container.

## SHIPPING COSTS | Container 40'

**Double-digit increase in the average shipping cost of 40' refrigerated containers in the ports of Cape Town and Zhanjiang**

**Graph 3:** Average cost of shipping a 40-foot refrigerated container (in €)



Source: CNSC

On the African continent, the two main ports of loading for 40-foot refrigerated containers bound for the port of Douala recorded divergent trends in their average shipping cost. At the port of Dakar, it decreased by 4.7% and stood at €2,138. One in two shippers paid at least €2,082 to ship a container. At the port of Cape Town, it decreased by 13.6% to stand at €2,962, and 25% of shippers spent at least €3,400 to ship their container. Prices charged in the ports of Dakar and Cape Town varied by roughly €607 and €773 of the average, respectively.

Over the period under study, the average shipping cost in the two main European ports of loading increased. At the Antwerp Port, it went from €4,436 to €4,546, representing a 2.5% increase. The prices charged deviated by about € 2,000 from the average cost. One in four shippers spent at least € 2,980 to ship a container. In Port-Vendres, after an increase of 8.3%, the average shipping cost stood at €2,950 for the third quarter of 2021. The prices charged in this port were much less volatile (roughly 1,500 of the

average). One out of two shippers reportedly paid less than € 2,500 to ship a container.

Of the main Asian ports of loading, the average shipping cost in Ho Chi Minh City (€5,086) was practically stable. At the port of Zhanjiang, however, it increased by about 14% to €6,577. The deviation of prices charged in the two ports is more or less €2,000 from the average and 50% of shippers using the Chinese port paid at least €7,500, compared with €4,791 for those using the port of Ho Chi Minh.

In the port of Buenos Aires (€4,203), the average shipping cost rose by 8.4%. The rates charged there were within €428 of the average and half of the shippers paid less than €4,145 to ship their container to the port of Douala in the third quarter of 2021.

## SHIPPING COSTS | Container 40'

**12.2% decrease in the average cost of shipping a 40' dry container at the port of Valence**

**Table 2:** Average cost of shipping a 40' dry container (in €)

COUNTRY	PORTS	Q2 2021	Q3 2021	Variation	COUNTRY	PORTS	Q2 2021	Q3 2021	Variation
<b>South Africa</b>	Durban	2,607	2,693	3.3%	<b>Germany</b>	Hamburg	2,872	3,234	12.6%
<b>China</b>	Ningbo	2,577	2,621	1.7%	<b>France</b>	Le Havre	3,142	3,230	2.8%
	Qingdao	4,114	4,043	-1.7%	<b>Spain</b>	Valence	2,518	2,211	-12.2%
<b>India</b>	Nhava Sheva	4,223	3,934	-6.8%	<b>United Kingdom</b>	Felixstowe		2,320	
<b>UAE</b>	Jebel Ali	3,016	2,929	-2.9%	<b>Belgium</b>	Antwerp	2,570	2,595	1.0%
<b>Canada</b>	Montreal	2,597	2,515	-3.2%	<b>Netherlands</b>	Rotterdam	2,322	2,401	3.4%
<b>USA</b>	Baltimore	2,606	2,629	0.9%	<b>Italy</b>	Genoa	2,330	2,776	19.1%

**Source:** CNSC

In the third quarter of 2021, the average cost of shipping a 40-foot dry container increased by 3.3% in the main African ports of loading. The prices charged over the study period were no more than €740 from the average. Half of the shippers reportedly shipped a container for roughly € 2,812.

In the main Asian ports of loading, only the port of Ningbo (+1.7%) recorded an increase in its average shipping cost as it fell from €2,577 to €2,621 in Q3 2021. The prices charged differed by € 952 from the average price of € 2,557. The average shipping cost at the port of Nhava Sheva in turn recorded a 7% decrease and stood at €3,934. For these ports, shipping costs were estimated at about €1,650. Two out of four shippers reportedly paid at least €4,171 as shipping costs. A downward trend is also observed at the ports of Jebel Ali (-2.9%) and Qingdao (-1.7%). The prices charged in the port of Jebel Ali were less volatile; approximately €1,148 of the average compared to €1,997 of the average in Qingdao.

At the port of Montreal, the average shipping cost fell by 3.2% to €2,515 in Q3 2021. The prices charged were within €603 from the average and half of the shippers paid at least € 2,557 to ship their container. At the port of Baltimore, it increased by about 1%. The prices charged therein were no more than € 491 from the average and with less than €2,727 half of the shippers were able to ship a container.

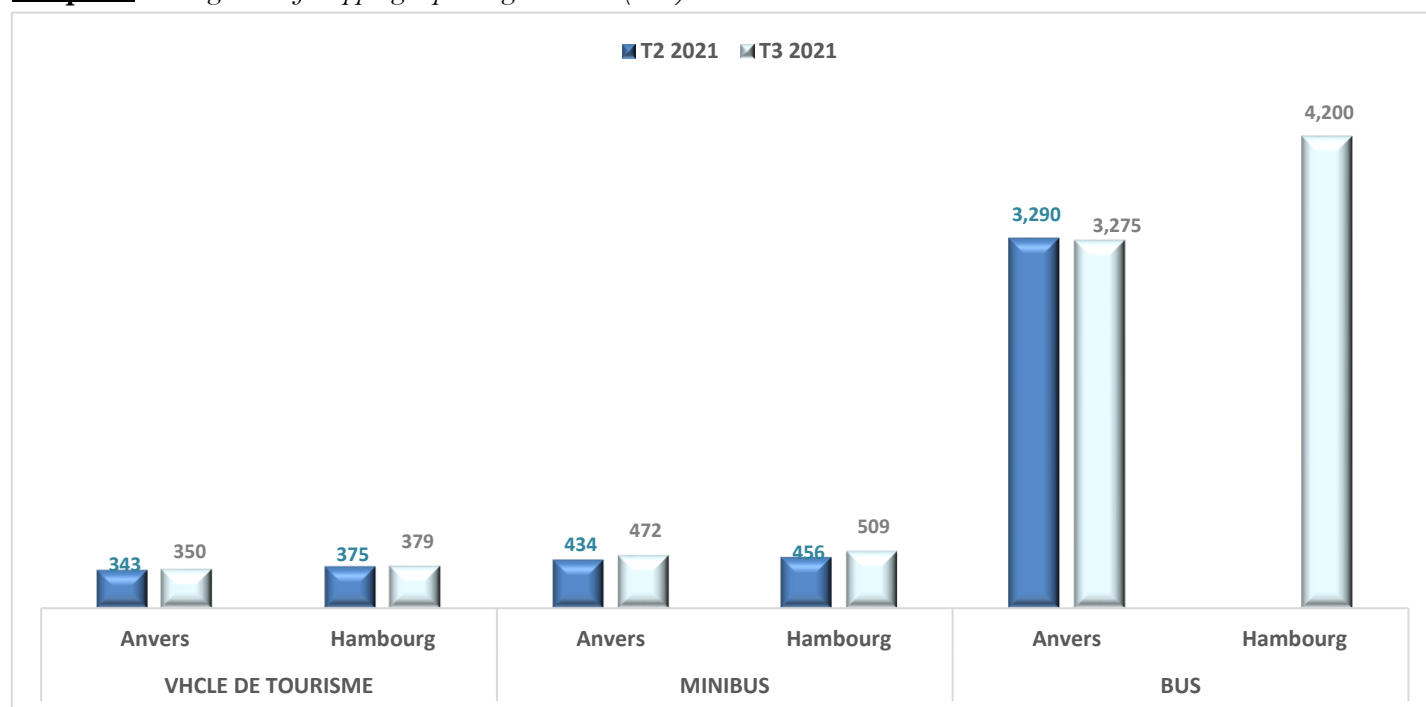
In Q3 2021, all the main European ports of shipment showed an increase in their average shipping cost, with the exception of the port of Valence where it stood at €2,211 after a -12.2% decline. The most significant increase is observed in the port of Genoa (+19.1%) followed by the port of Hamburg (+12.6%). The prices charged at these two ports deviated from the average cost by more or less €900. One in two shippers paid at least €2,850 at the Italian port against €3,510 at the German port. The increase in the ports of Le Havre and Rotterdam was about 3%. Prices were more volatile in the French port (more or less €2,000) compared to the port of Rotterdam (more or less €609). One in two shippers paid at least € 2,500 to ship their container. The variation at the port of Antwerp (€2,595) was 1%. However, no 40-foot dry container shipments destined for the port of Douala were recorded at the port of Felixstowe in Q3 2021.



## SHIPPING COSTS | Vehicles

**2% increase in the average cost of shipping a passenger vehicle at the port of Antwerp**

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



**Source:** CNSC

At the port of Antwerp, the average cost of shipping a passenger vehicle rose from €343 to €350 in Q3 2021; representing a 2% increase. The prices charged at this port varied by roughly €110 of the average. Similarly, at the port of Hamburg, the average shipping cost recorded a 1.1% increase to stand at €379. The prices charged there were slightly more volatile, deviating from the average by roughly €130. In these two ports, 75% of shippers reportedly paid less than €350 to ship a vehicle.

At the port of Hamburg, shippers spent an average of €509 to ship a Minibus in the 3<sup>rd</sup> quarter of 2021, making for an 11.6% increase. The difference from the average is more or less €187 and one in four shippers paid more than €490 as shipping cost. At the port of Antwerp, shippers spent an average of €472 to ship a Minibus to the port of Douala, representing a 9% increase compared to the previous quarter.

The prices charged were no more than €277 from the average and 25% of shippers reportedly paid more than €450 to ship a vehicle.

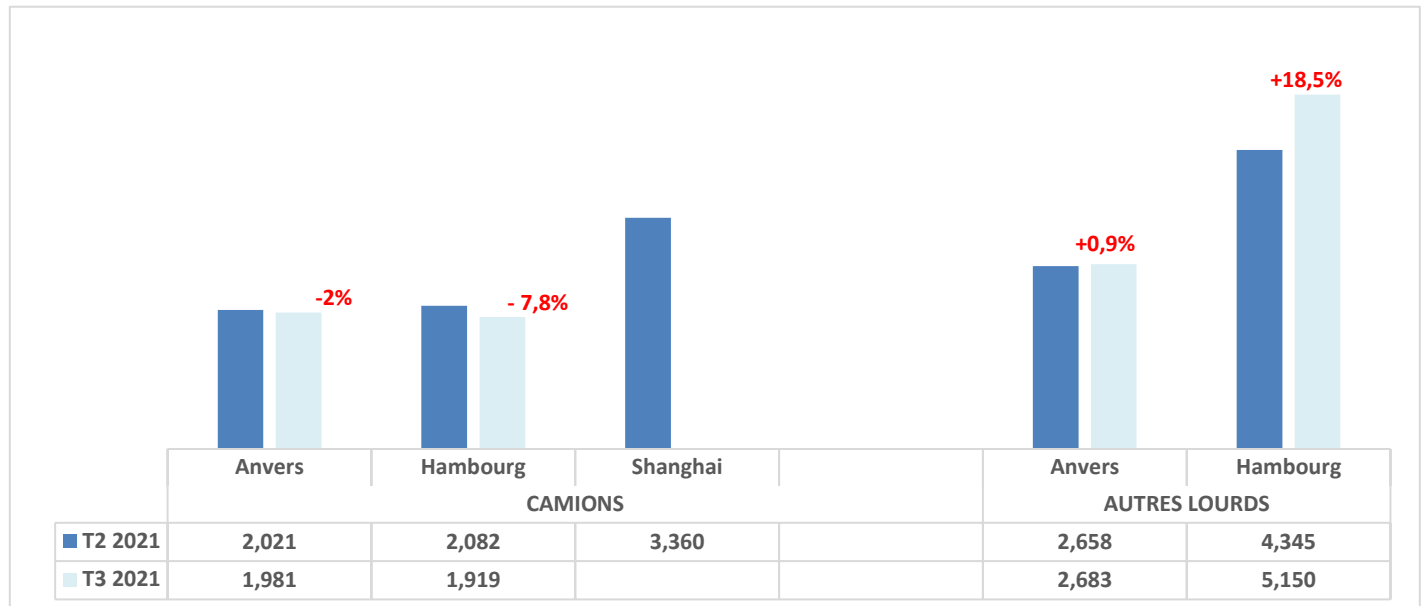
At the port of Antwerp, the average shipping cost of a bus over the period under study recorded a 0.5% drop going from € 3,290 to € 3,275 and 50% of shippers reportedly paid less than €275. Whereas no bus shipments had been recorded in the port of Hamburg in the second quarter of 2021, such shipments were once more registered in the third quarter of 2021. Shippers there paid an average of €4,200 to ship their vehicle.



## SHIPPING COSTS | Vehicles

About 8% decrease in the average cost of shipping a truck at the port of Hamburg

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



**Source:** CNSC

In the main European ports of loading, the average shipping cost for trucks actually decreased. At the port of Antwerp, the average shipping cost dropped by 2% moving from €2,021 in Q2 2021 to €1,981 in Q3 2021. The prices charged in this port roughly differed by €750 of the average and one in four shippers spent at least €2,400 to ship a truck or heavy equipment. At the port of Hamburg, the average shipping cost during the period under study dropped by about 8% and stood at €1,919. The prices charged therein were roughly €800 of the average and two out of four shippers reportedly paid at most €1,747 as shipping cost. No truck shipments to the port of Douala were recorded at the port of Shanghai in Q3 2021.

For Other heavy equipment, average shipping cost increased by about 1% at the port of Antwerp to stand at €2,683 in Q3 2021. The prices charged deviated by more or less €862 from the average cost.

One in four shippers spent at least €3,200 to ship a heavy equipment.

At the port of Hamburg, average shipping cost in Q3 2021 increased by 18.5% and stood at €5,150. The prices charged therein were less volatile (roughly €300 of the average) and three out of four shippers reportedly paid a shipping cost of roughly €5,175 for heavy equipment.

## PORT CARGO DWELL TIME | Containers

In Q3 2021, August witnessed the shortest import container clearance time

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

	April-21	May-21	June-21	Q2 2021	July-21	Aug-21	Sept-21	Q3 2021
<b>Average</b>	15.9	21.5	16	<b>17.7</b>	16.8	15.8	16	<b>16.2</b>
<b>Variation</b>	<b>0.0%</b>	<b>35.2%</b>	<b>-25.6%</b>	<b>7.9%</b>	<b>5.0%</b>	<b>-6%</b>	<b>1.3%</b>	<b>-8.5%</b>
<b>1<sup>st</sup> Quartile</b>	7	11	7	<b>8</b>	7	7	7	<b>7</b>
<b>2<sup>nd</sup> Quartile</b>	11	18	11	<b>12</b>	12	10	10	<b>11</b>
<b>3<sup>rd</sup> Quartile</b>	18	28	17	<b>22</b>	20	18	17	<b>18</b>
<b>Less than 11 days</b>	48%	24%	47%	<b>40%</b>	45%	51%	52%	<b>49%</b>

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

In the third quarter of 2021, the average dwell time for containerised import goods at the Douala Port was 16 days; that is 2 days less than in the previous quarter. The quartile analysis confirms the hypothesis that the third quarter of 2021 will show better performance. Indeed, during the study period, 25% of shipments spent 18 days or more at the terminal; however, in Q2 2021, approximately 34% of shipments had the same duration. In addition, 49% of containers were cleared in less than 11 days, an increase of 9 percentage points compared to Q2 2021.

The monthly analysis of import container clearance times shows that the average time for July 2021 was 17 days; 1 day longer than in June 21. The quartile values show that this month of the quarter had the worst scores; 50% of containers left the terminal after at least 12 days; 2 days longer than in the other 2 months of the quarter. Furthermore, 45% of containers left the yard in less than 11 days. For the month of August 2021, the average dwell time decreased by one day to 16 days. This statistic is identical to that

observed in August. The performance of the last two months of the quarter are fairly similar; 52% of the cargoes left the terminal within 11 days in September compared with 51% in August.

## CARGO DWELL TIME AT THE PORT | Vehicles

5 days increase in the average dwell time

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

Car Park	TMFD		SOCOMAR	
Period	Q2 2021	Q3 2021	Q1 2021	Q2 2021
Average	16.9	21.5	20.1	18.5
Variation	5.6%	27.2%	12.30%	-8.00%
1 <sup>st</sup> Quartile	10	10	9	8
2 <sup>nd</sup> Quartile	13	14	14	13
3 <sup>rd</sup> Quartile	20	27	25	22
Less than 11 days	31%	31%	31%	39%

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

In Q3 2021, the average dwell time for imported used vehicles offloaded at the port of Douala showed an upward trend at the TMFD park. It went up by 5 days moving from 17 days in Q2 2021 to 22 days in Q3 2021.

The quartile analysis shows that the difference in average dwell times is due to the fact that the proportion of long dwell times is much higher in Q3 2021. Indeed, 25% of the vehicles left the terminal after 27 days during the study period, whereas this same proportion had only spent 20 days during the previous quarter. In addition, over the two quarters studied, one of every four vehicles left the fleet within 10 days.

The proportion of vehicles that left in less than 11 days remained at 31%.

The monthly analysis shows that September had the worst records; the average dwell time was 24 days, compared with 21 days in July and August.

The average transit time for vehicles at the SOCOMAR park increased by 2 days and was estimated at 20 days in the first quarter of 2021.

A quartile analysis shows that the period under study had the longest dwell time for imported vehicles. Indeed, even if during the two quarters we observe that 25% of vehicles cleared spent at most 9 days at the port; it should be noted that half of the vehicles cleared during the 1st quarter of 2021 spent at least 14 days at the park, against 13 days for the same proportion during the 4th quarter of 2020.

31% of vehicles cleared in the first quarter of 2021 completed necessary formalities within 11 days, some 5 percentage points more than in the previous quarter.

The monthly analysis shows that February (20 days on average) recorded the longest vehicle dwell time of the quarter (with 23% of vehicles cleared within 11 days). January (19 days on average) on the other hand, was the month with the shortest dwell time with 39% of vehicles cleared within 11 days.

## RAIL CARGO | Tonnage

**2.3% increase in rail cargo transported from Douala to Ngaoundere**

Just as in Q2 2021, rail cargo transport did not register any major variations (-0.1%) with a total of 382,885 tonnes.

**Table 5:** Rail cargo transported from Douala to Ngaoundere per type of goods (in tonnes)

Douala -----> Ngaoundere	Q2 2021		Q3 2021		Variation
Type of goods	Tonnage	%	Tonnage	%	
Hydrocarbons	176,416	57.7	189,782	60.7	7.6%
Flours and cereals	30,451	10.0	29,324	9.4	-3.7%
Upward-bound containers	37,593	12.3	28,449	9.1	-24.3%
Local sugar	18,751	6.1	23,498	7.5	25.3%
Building materials	17,679	5.8	17,416	5.6	-1.5%
Oil & Gas	425	0.1	7,868	2.5	1751.3%
Fertilisers & insecticides	13,770	4.5	4,035	1.3	-70.7%
Alumina (Raw Mat.)	1,210	0.4	3,230	1.0	166.9%
Cement factory Raw mat.	0	0.0	2,752	0.9	
MAD PQ1	1,620	0.5	1,670	0.5	3.1%
Food aid	2,496	0.8	1,101	0.4	-55.9%
Other goods	5,099	1.7	3,361	1.1	-34.1%
<b>TOTAL</b>	<b>305,510</b>	<b>100</b>	<b>312,486</b>	<b>100</b>	<b>2.3%</b>

**Source:** Camrail

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

In Q3 2021, upbound freight (Douala to Ngaoundere) accounted for 82% of overall rail freight, 2 percentage points higher than in the previous quarter. Valued at 312,486 tonnes, it yielded an overall increase of 2.3% and mainly comprised hydrocarbons (60.7%), flour and cereals (9.4%), containerised goods (9.1%), local sugar (7.5%) and construction materials (5.6%). The other types of goods each accounted for less than 3%.

Over the study period, Oil and Gas (7,868 tonnes) and Alumina (3,230 tonnes) saw exponential growth. Hydrocarbons (+7.6%) experienced a more moderate evolution with

189,782 tonnes in Q3 2021. Cement factory raw materials, which were not transported by rail in Q2 2021, reappeared during the study period and accounted for 2,752 tonnes.

The most significant decline was observed for Fertilisers and insecticides, which dropped by 70.7% to 4,035 tonnes. The same applies to Food Aid (-55.9%), which was estimated at 1,101 tonnes. Building materials (17,416 tonnes) and Flour and cereals (29,324 tonnes) each dropped by about 5%.

## RAIL CARGO | Tonnage

9.4% decrease in rail cargo transported from Ngaoundere to Douala

**Table 6:** Rail cargo transported from Ngaoundere to Douala per type of goods (in tonnes)

Ngaoundere -----> Douala	Q2 2021		Q3 2021		Variation
Type of goods	Tonnage	%	Tonnage	%	
Wood logs	42,409	54.6	42,197	59.9	-0.5%
Milled wood (Sawn)	5,083	6.5	7,673	10.9	51.0%
Cotton fibre	11,360	14.6	7,510	10.7	-33.9%
Seeds and oil cake	5,628	7.2	6,913	9.8	22.8%
Wild wood	7,973	10.3	3,726	5.3	-53.3%
Live animals	985	1.3	1,330	1.9	35.0%
Downbound containers	4,247	5.5	1,050	1.5	-75.3%
<b>TOTAL</b>	<b>77,685</b>	<b>100</b>	<b>70,399</b>	<b>100</b>	<b>-9.4%</b>

**Source:** Camrail

Downbound rail freight (Ngaoundere to Douala) accounted for 18 percent of global rail freight in Q3 2021, 2 percentage points down compared to the previous quarter. The downward trend observed since the 3<sup>rd</sup> quarter of 2020 is still experienced in the study period. Downbound freight dropped by 9.4% to 70,399 tonnes in the third quarter of 2021.

Rail freight from Ngaoundere to Douala mainly consisted of wood logs which represented 60% of the total. These were followed by Milled wood with a share of 10.9%, Cotton fibre with a proportion of 10.7%, Seeds and oil cakes (9.8%) and Wild wood (5.3%). Containerised goods (1.5%) and Live animals (1.9%) closed the list.

In terms of tonnage, the most significant decline in the 3<sup>rd</sup> quarter was in Containerised goods with a 75.3% drop to 1,050 tonnes.

A similar trend was observed for Wild wood and Cotton fibre. The former fell by 53.3% to 3,726 tonnes. Cotton fibre stood at 7,510 tonnes after a 40% decrease while Wood logs recorded a very small decline (-0.5%) and registered a tonnage of 42,197 tonnes in Q3 2021.

The most significant increase in tonnage was for Milled wood which increased by 50% to 7,673 tonnes. Live animals (1,330 tonnes) increased by 35%. Seeds and oilcake were estimated at 6,913 tonnes in the third quarter of 2021, an increase of 22.8% compared to the previous quarter.

## RAIL CARGO | Transport cost

**Double-digit decrease in the cost of transporting Food aid and Oil and gas**

**Table 7:** *Transport cost per type of good from Douala –Ngaoundere (in CFAF/ tonne-km)*

Type of goods	Q2 2021	Q3 2021	Variation
Hydrocarbons	62.30	62.23	-0.1%
Alumina (Raw Mat.)	57.15	57.15	0.0%
MAD PQ1	42.81	42.81	0.0%
Food aid	50.09	42.09	-16.0%
Upward-bound containers	43.00	39.25	-8.7%
Fertilisers & insecticides	35.41	36.21	2.2%
Local sugar	35.45	35.57	0.3%
Building materials	31.79	34.16	7.5%
Oil & Gas	44.08	32.81	-25.6%
Cement factory Raw mat.		32.25	
Flours and cereals	27.17	29.03	6.9%

**Source:** Camrail

In the 3<sup>rd</sup> quarter of 2021, the cost of transporting goods from Douala to Ngaoundere varied depending on the type of goods.

Two (02) categories of goods showed variations over 10%. The cost of transporting Food aid (42.09 CFAF/tonne-kilometre) fell by 16%, as did the cost of oil and gas (32.81 CFAF/tonne-kilometre), which fell by 25.6%. A downward trend is also observed for Containerised goods as its transport cost fell from 43 CFAF/tonne-kilometre in Q2 2021 to 39.25 CFAF/tonne-kilometre in Q3 2021.

Transport costs for Local sugar (35.57 CFAF/tonne-kilometre), Alumina (57.15

CFAF/tonne-kilometre), Hydrocarbons (62.23 CFAF/tonne-kilometre) and MAD PAQ1 (42.81 CFAF/tonne-kilometre) remained virtually unchanged over the two quarters studied.

The most significant increases in transport costs were for Building materials (+7.5%) and Flours and cereals (+6.9%).

Fertilisers and insecticides were transported at 36.21 CFAF/tonne-kilometre, an increase of 2.2% compared with the second quarter of 2021.

## RAIL CARGO | Transport cost

**7.4% decrease in the cost of transporting Containerised goods**

**Table 8:** *Transport cost per type of goods from Ngaoundere to Douala (in CFAF/ tonne-km)*

Type of goods	Q2 2021	Q3 2021	Variation
Wild wood	48.90	51.04	4.4%
Milled wood (Sawn)	47.08	47.05	-0.1%
Wood logs	42.36	43.27	2.2%
Live animals	35.03	35.12	0.3%
Cotton fibre	31.47	31.13	-1.1%
Downbound containers	19.40	17.97	-7.4%
Seeds and oil cake	13.44	14.01	4.2%

**Source:** *Camrail*

Unlike upbound freight, the cost of transporting goods by rail from Ngaoundere to Douala showed moderate variations for most types of goods, with all variations being below 10%.

The most significant decrease was recorded for Containerised goods as its transport cost fell by 7.4% to 17.97 CFAF/tonne-kilometre. Transport cost for Cotton fibre showed a similar trend, falling by 1.1% to 31.12 CFAF/tonne-kilometre.

Wild wood (+4.4%) and seeds and oilcake (+4.2%) showed the most significant increases and their transport cost in Q3 2021 amounted to 51.04 CFAF/tonne-kilometre and 14.01 CFAF/tonne-kilometre, respectively.

The transport costs for Milled wood (47.05 CFAF/tonne-kilometre) and Live animals (35.12 CFAF/tonne-kilometre) were very similar to those of Q2 2021.



## RAIL CARGO | Transit time

Transit time for Conventional goods decreased by 3 days

**Table 9:** *Transit time (in days)*

	Container			Conventional		
	Q2 2021	Q3 2021	Var (in h)	Q2 2021	Q3 2021	Var (in h)
<b>Loading time:</b>	1.3	1.0	-8	1.1	1.1	-2
<b>Declaration period:</b>	0.5	0.4	-1	0.2	0.1	-1
<b>Departure wait-time</b>	0.1	0.1	0	0.1	0.2	1
<b>Haulage time:</b>	3.2	3.2	-1	4.8	4.2	-14
<b>Time for placing goods for off-loading</b>	0.1	0.1	0	1.8	0.6	-30
<b>Off-loading time:</b>	0.3	0.3	-1	1.1	0.5	-15
<b>Avg. Total Transit Time</b>	<b>5.5</b>	<b>5</b>	<b>-12</b>	<b>9.2</b>	<b>6.6</b>	<b>-62</b>

*Source:* Camrail

### Data lexicon

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

**Declaration period:** Period between when loading of a coach is completed and the issuance of a 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 the 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 5 days in Q3 2021, i.e., 12 hours less than in the previous quarter. On average, none of the sequences making up transit time recorded an increase in Q3 2021. The average waiting time for departure and the average time for placement for off-loading remained the same as in Q2 2021. The off-loading time dropped by 8 hours and the other sequences were completed on average with a one-hour time difference compared to the previous quarter.

Transit time for goods in transit with a conventional packaging mode reduced from 9.2 days to 6.6 days (down by 3 days). Except for the waiting for departure sequence which increased by an average of one hour, all the other sequences were completed faster than in the previous quarter. The time taken to place goods for off-loading was reduced by more than a day. The departure wait-time and the haulage time reduced by 14 hours and 15 hours, respectively.

## AIR CARGO | Tonnage

About 11% decrease in Air freight bound for Cameroon

Overall air freight increased by about 6% in Q3 2021 going from 4,612 tonnes in Q2 2021 to 4,346 tonnes in Q3 2021.

**Table 10:** Import air freight per type of goods (in tonnes)

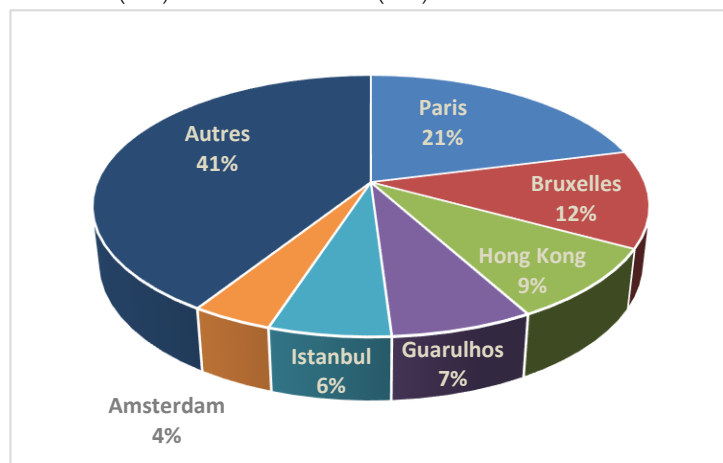
TYPES OF GOODS	Q2 2021		Q3 2021		Variation
	Tonnage	%	Tonnage	%	
OTHER PARCELS	1,600	68.3	1,327	63.6	-17.1%
DANGEROUS PRODUCTS	173	7.4	195	9.4	12.7%
CONSOLIDATIONS	164	7.0	154	7.4	-6.1%
FOOD	35	1.5	92	4.4	162.9%
PHARMACEUTICAL PRODUCTS	94	4.0	62	3.0	-34.0%
DIPLOMATIC PARCELS	26	1.1	57	2.7	119.2%
OTHERS	249	10.6	198	9.5	-20.5%
<b>TOTAL</b>	<b>2,341</b>	<b>100</b>	<b>2,085</b>	<b>100</b>	<b>-10.9%</b>

**Source:** ADC

In Q3 2021, import air freight accounted for 48% of the total; 3 percentage points less compared to Q2 2021. Import airfreight declined by 10.9%, going from 2,341 tonnes in the 2<sup>nd</sup> quarter of 2021 to 2,085 tonnes in the 3<sup>rd</sup> quarter of 2021. The ranking of the main goods making up import air freight basically remained unchanged. Miscellaneous Parcels (63.6%) still ranked first, followed by Dangerous Goods (9.4%). Consolidations still ranked 3<sup>rd</sup> with an estimated 7.4%. Foodstuffs, ranked 5<sup>th</sup> in the previous quarter, moved up by one place at the expense of Pharmaceutical Products (3%). Diplomatic parcels came in at 2.7% to close the list of the 6 most imported goods by air in the third quarter of 2021. Of these main types of goods imported by air, Foodstuffs and Diplomatic Parcels saw an exceptional increase in tonnage. They almost doubled to 92 tonnes and 57 tonnes respectively during the study period. Dangerous products grew by 12.7% to an estimated 195 tonnes in Q3 2021.

The most significant decrease is recorded by Pharmaceuticals (-34%), with just 62 tonnes recorded during the study period. Miscellaneous parcels (1,327 tonnes) and Consolidations (154 tonnes) fell by 17.1% and 6.1%, respectively.

In Q3 2021, import air freight mainly flew in from Paris (21%), Brussels (12%), Hong Kong (9%), Guarulhos (7%), Istanbul (6%) and Amsterdam (4%).



## AIR CARGO | Tonnage

*Relatively stable air freight from Cameroon (2,261 tonnes)*

**Table 11:** *Export air freight per type of goods (in tonnes)*

TYPES OF GOODS	Q2 2021		Q3 2021		Variation
	Tonnage	%	Tonnage	%	
FOOD	1,950	85.9	1,951	86.3	0.1%
OTHER PARCELS	212	9.3	215	9.5	1.4%
FLOWERS	21	0.9	24	1.1	14.3%
PHARMACEUTICAL PRODUCTS	9	0.4	9	0.4	0.0%
DANGEROUS PRODUCTS	1	0.0	7	0.3	600.0%
OTHERS	78	3.4	55	2.4	-29.5%
<b>TOTAL</b>	<b>2,271</b>	<b>100</b>	<b>2,261</b>	<b>100</b>	<b>-0.4%</b>

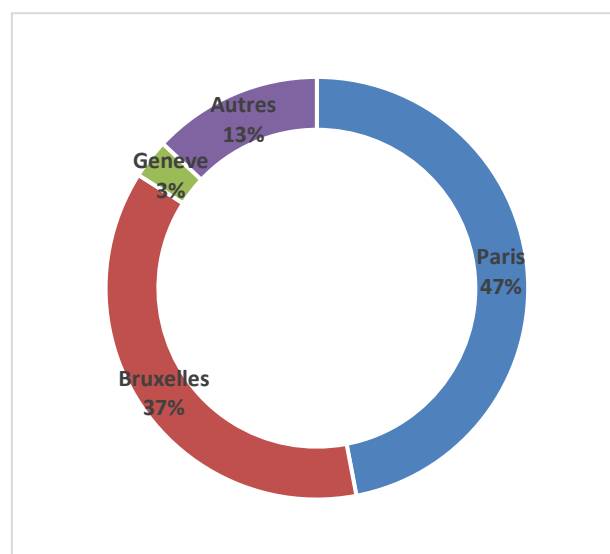
**Source:** ADC

Over the third quarter of 2021, Cameroon's exports by air accounted for 52% of total air freight, 3 percentage points higher than in the previous quarter. Over the study period, export air freight declined by some - 0.4% to an estimated 2,261 tonnes.

The ranking by weight of the main types of goods making up export air freight knew no changes in Q3 2021. Foodstuffs still ranked first accounting for 86.3% of air freight exports. Miscellaneous parcels representing 9.5% of export air freight still ranked second. Flowers (0.9%) remained in third place, followed by Pharmaceuticals (0.4%) and Dangerous products (0.3%).

None of the top five goods making-up export air freight experienced a decrease in tonnage in Q3 2021. Foodstuff (1,951 tonnes) and Pharmaceuticals (9 tonnes) knew no changes in their tonnage. Dangerous products which recorded the most significant increase went from 1 tonne in Q2 2021 to 7 tonnes in Q3 2021. Miscellaneous parcels increased by 1.4% from 212 to 215 tonnes. Flowers exported by air were estimated at 24 tonnes; reflecting an increase of 14.3%.

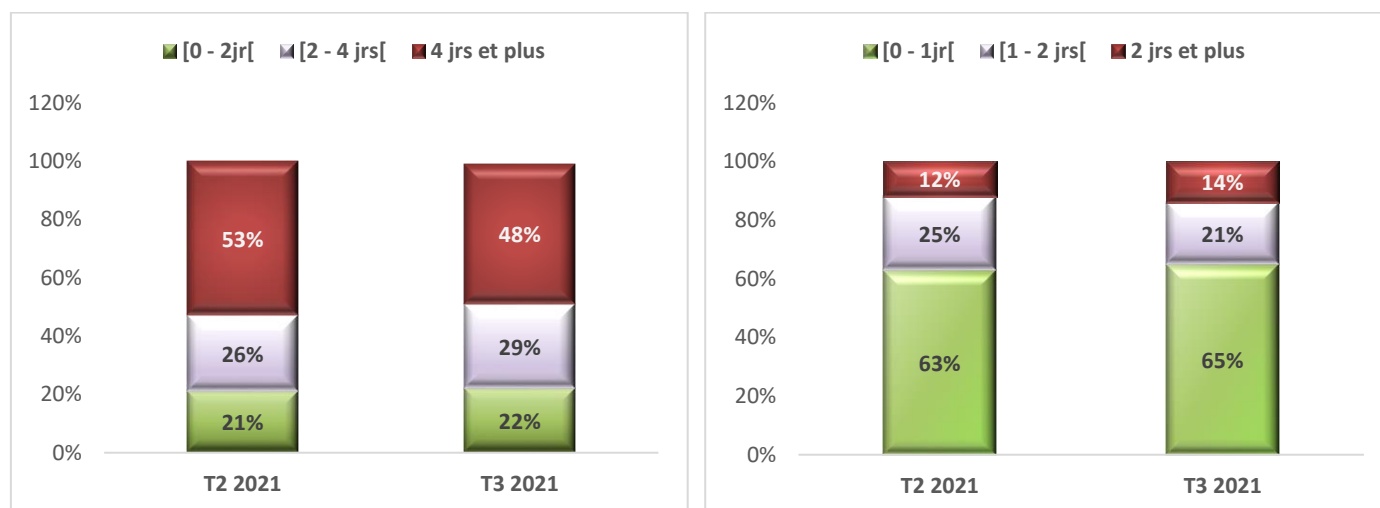
Export air freight during the 3<sup>rd</sup> quarter of 2021 was mainly bound for Paris (47%), Brussels (37%) and Geneva (3%).



## AIR CARGO | Air cargo dwell time

*Average dwell time for import (5 days) and export (1 day) remained the same*

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



### IMPORT

**Source:** ADC

During Q3 2021, the average time taken for import air freight to pass through airport warehouses was 5 days, just as in the previous quarter. The 2<sup>nd</sup> quarter of 2021 had the worst airport transit times. In fact, during this quarter, 53% of imported cargoes spent at most 2 days in airport stores; 5 points more than in Q3 2021. In addition, 25% of cargoes that left the port in Q3 2021 spent at least 5 days in airport stores, compared with 7 days during Q2 2021.

The monthly analysis revealed that for each month of Q3 2021, it took an average of 5 days to remove cargo from airport stores. Moreover, the month of September had the best records of the quarter with 25 % and 44 % of outbound cargo spending at most 2 and 4 days, respectively, in airport stores. The month of July had the worst record. Statistics show that 53% of cargo that left the port during this period had been there for at least 4 days and only 19% spent no more than 2 days.

### EXPORT

The average dwell time for exported goods in Q3 2021 was one day, just as in the previous quarter. In addition, 62% of exported cargoes were loaded on the same day as their arrival at the airport, 2 percentage points up compared to Q2 2021. On the other hand, 14% of cargoes exported in Q3 2021 spent at least 2 days at the airport store before loading, an increase of 2 percentage points compared to Q2 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 September had the best records, while the worst performance was recorded in August. Throughout the month of September, 70% of cargoes were shipped on the same day they arrived at the airport; compared to 63% for the month of August. In the month of September, 11% of parcels spent at least 2 days before being dispatched, 6 points less than in August.

The Cameroon National Shippers' Council (CNSC) sincerely thanks the various administrations that contributed in the elaboration of this document:

- 👍 (RTC)
- 👍 National Trade Facilitation Committee (CONAFE)
- 👍 Container Terminal Authority (RTC)
- 👍 Douala Mixed Fruit Terminal (TMFD)
- 👍 Aéroports Du Cameroun (ADC)
- 👍 Société Camerounaise d'Opérations Maritimes (SOCOMAR)

**Publisher:**

Auguste Mbappe Penda

**Editors in Chief:**

Alex Nkondje Ekenglo

**Collaborators in this edition:**

Hermann Ngassa Nkengne

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## THE ECONOMIC OUTLOOK | | 3<sup>rd</sup> Quarter 2021



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