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## **Chapter 7.**



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## Chapter 7

# REVIEW OF REGIONAL DEVELOPMENTS: SUB-SAHARAN AFRICA

*This chapter reviews and analyses the global and intraregional maritime trades in Africa since the late 1990s, with the focus on sub-Saharan countries. It also covers developments in transport and related services, in particular for landlocked countries.*

### A. ECONOMIC BACKGROUND

There are 53 countries in the 30.3 million square km of Africa, with an estimated population of 820 million in 2001. These countries could broadly be grouped into three geographic regions: the five countries (Algeria, Egypt, Libyan Arab Jamahiriya, Morocco and Tunisia, which correspond to Code 8.1 of annex I) located along the north coast of the continent make up the first group; South Africa (Code 5 of annex I), embracing a large portion of the southern tip of the continent, is often regarded as a single group; and the remaining 47 countries located in between, which are collectively referred to as sub-Saharan African countries (corresponding closely to Codes 8.2 and 8.3 of annex I), make up the third group.

Sub-Saharan African countries are a diverse group with widely differing needs on account of their geographic situation. There are 24 coastal countries, 16 landlocked countries and 7 insular countries located in the Atlantic and Indian Oceans. In economic terms, however, many of these countries share common features. Thirty-four of the sub-Saharan African countries are classified as least developed countries (LDCs) that have low economic and social welfare indicators. In fact, these countries make up the majority of the 49 LDCs of the world.

Table 47 presents the geographic and economic denomination of sub-Saharan African countries, together with their average annual increase in GDP for the period 1990-1999, the annual increase from 1999 to 2001 and the estimates for 2002 and 2003. The same

economic data are included for other African countries, for all developing countries and for market-economy countries.

The economic performance of all African countries was below the average recorded for all developing countries. During the last decade, the average annual GDP increases were 3.1 and 4.7 per cent respectively. The same trend has continued up to 2003. The economic performance of countries, however, fluctuates widely from year to year for several reasons such as natural disasters, domestic or international political instability, displacement of populations due to instability in neighbouring countries, armed conflict with neighbouring countries, fluctuations in the prices of the main export commodities, and fluctuations in levels of foreign investment.

Six countries in West Africa (Benin, Burkina Faso, Cape Verde, Ghana, Mauritania and Senegal) have managed to achieve steady positive growth. Other countries have had poor or negative growth in some years. Domestic political turmoil is behind the 2000 and 2001 results for Côte d'Ivoire, and with the renewed crisis since September 2002, the forecast outputs will probably be missed. Civil war has kept the economy of Sierra Leone contracting for a decade and required United Nations peacekeeping missions and United Kingdom armed intervention. In Liberia, instability precludes even the collection of data. In Nigeria, the largest economy in sub-Saharan Africa, regional civil disturbances and floods in the north of the country resulted in poor results for 1999 and 2002, but prospects for 2003 are good.

Table 47

## Real GDP of developing countries of sub-Saharan Africa

Type of country			Real GDP		Annual percentage change			
Geographic	Economic		1990-99	1999	2000	2001	2002	2003
<b>Sub-Saharan African countries</b>								
<b>(a) West Africa</b>								
Benin	C	LDC	4.6	4.7	5.8	5.0	5.3	6.0
Burkina Faso	LLC	LDC	3.8	6.3	2.2	5.7	5.7	5.4
Cape Verde	I	LDC	5.4	8.6	6.8	2.9	3.0	3.5
Côte d'Ivoire	C		1.6	-2.3	0.1	3.0	4.5	..
Gambia	C	LDC	2.8	6.4	5.6	5.5	6.0	6.0
Ghana	C		..	4.4	3.7	4.2	4.5	5.0
Guinea	C	LDC	4.2	4.6	2.1	3.6	4.2	4.9
Guinea-Bissau	C	LDC	0.3	8.0	9.5	0.2	3.9	4.4
Liberia	C	LDC	-	-	-	-	-	-
Mauritania	C	LDC	4.2	4.1	5.0	4.6	5.1	5.5
Mali	LLC	LDC	3.5	6.7	3.7	1.5	9.3	5.3
Niger	LLC	LDC	2.4	-0.6	-1.4	7.6	2.7	3.9
Nigeria	C		..	1.0	4.3	2.8	-2.3	3.7
Senegal	C	LDC	3.3	5.1	5.6	5.6	5.0	5.1
Sierra Leone	C	LDC	-4.7	-8.1	3.8	5.4	6.6	7.0
Togo	C	LDC	2.4	2.9	-1.9	2.7	3.0	4.0
<b>(b) Central Africa</b>								
Angola	C	LDC	0.4	3.3	3.0	3.2	17.1	4.8
Burundi	LLC	LDC	-2.9	-1.0	-0.1	2.4	3.4	5.0
Cameroon	C		..	4.4	4.2	5.3	4.4	4.7
Central African Republic	LLC	LDC	1.8	3.6	1.8	1.0	4.5	4.3
Chad	LLC	LDC	1.7	2.3	1.0	8.5	11.2	9.2
Congo	C		..	-3.0	8.2	2.9	3.9	-1.0
Democratic Republic of Congo	LLC	LDC	-5.2	-4.3	-6.2	-4.4	3.0	5.5
Equatorial Guinea	I	LDC	1.3	41.4	16.1	45.5	30.4	16.4
Gabon	C		..	-8.9	-1.9	2.4	1.0	-0.5
Rwanda	LLC	LDC	-1.5	7.6	6.0	6.7	6.5	6.2
Sao Tome and Principe	I	LDC	1.7	2.5	3.0	4.0	5.0	5.0
<b>(c) Southern Africa</b>								
Botswana	LLC		..	6.3	8.6	4.9	2.6	3.7
Lesotho	LLC	LDC	4.3	2.4	3.5	4.0	4.0	4.3
Malawi	LLC	LDC	4.0	4.0	1.7	-1.5	1.8	4.5
Mozambique	C	LDC	6.2	7.5	1.6	13.9	9.0	5.6
Namibia	C		..	3.6	3.4	2.5	3.1	3.8
Swaziland	LLC		..	3.5	2.2	1.6	1.8	2.3
Zambia	LLC	LDC	0.2	2.2	3.6	4.9	3.7	4.0
Zimbabwe	LLC		..	-0.7	-5.1	-8.5	-10.6	-2.8

Table 47 (continued)

Type of country			Real GDP 1990-99	Annual percentage change				
Geographic	Economic	1999		2000	2001	2002	2003	
<b>(d) Horn and East Africa</b>								
Djibouti	C	LDC	..	2.2	0.7	1.9	2.6	3.5
Eritrea	C	LDC	5.0	0.6	-12.1	9.7	8.8	7.1
Ethiopia	LLC	LDC	4.6	6.0	5.4	7.7	5.0	6.0
Kenya	C		..	1.3	-0.1	1.2	1.4	2.8
Somalia	C	LDC	..	-	-	-	-	-
Sudan	C	LDC	8.2	7.7	9.7	5.3	5.2	6.3
Uganda	LLC	LDC	7.2	7.6	5.0	5.6	5.7	6.5
United Rep. of Tanzania	C	LDC	2.0	3.5	5.1	5.6	5.8	6.0
<b>(e) African countries of the Indian Ocean</b>								
Comoros	I	LDC	-0.6	1.9	-1.1	1.9	3.5	3.0
Madagascar	I	LDC	1.7	4.7	4.8	6.7	-10.0	10.0
Mauritius	I		..	5.3	2.6	7.2	5.3	4.9
Seychelles	I		..	-2.8	-5.4	-8.1	-2.4	-0.6
<b>Northern Africa</b>								
Algeria	C		..	3.2	2.5	2.8	2.1	2.9
Egypt	C		..	6.0	5.1	3.3	2.0	3.7
Libyan Arab Jamahiriya	C		..	0.7	4.4	0.6	-0.6	2.5
Morocco	C		..	-0.1	1.0	6.5	4.4	4.1
Tunisia	C		..	6.1	4.7	5.0	3.8	6.4
<b>South Africa</b>	C		..	2.1	3.4	2.2	2.5	3.0
<b>All African countries</b>			3.1	2.8	3.0	3.5	3.1	4.2
<b>Developing countries</b>			4.7	4.0	5.7	3.9	4.2	5.2
<b>Developed market-economy countries</b>			2.3	3.4	3.8	0.8	1.7	2.5

Source: IMF, World Economic Outlook Database, September 2002; and UNCTAD (2002), *Least Developed Countries Report 2002*, United Nations publication, Sales No. E.02.II.D.13, Geneva.

Notes: C = coastal country  
 I = island country  
 LDC = least developed country  
 LLC = landlocked country

In Central Africa, the war afflicting Burundi, the Democratic Republic of Congo and Rwanda is behind the negative results for the last decade, which are continuing. A refugee problem in Chad and the traumatic change of regime that required a UN peacekeeping force in Central African Republic are behind the poor results for these countries in 2000 and 2001 respectively. Political instability in Gabon resulted in negative growth for 1999 and 2000. The outstanding economic performance of Equatorial Guinea is due to the discovery and production of offshore oil that reached a rate of 0.2 mbpd in 2001. Oil discoveries and a future pipeline are the reasons behind the growth forecast for Chad and Cameroon.

In southern Africa, the poor results for 2000 for Mozambique resulted from two cyclones and floods that displaced almost 200,000 people and left 1 million homeless; however, the country quickly resumed its growth. The slowing down and eventual ending of the Angolan war in 2002 considerably raised the country's annual economic growth, which has averaged only 0.4 per cent during the past decade. In Zimbabwe, land reform, participation in the war in Congo, contested elections and economic sanctions resulted in several years of economic contraction. Other countries such as Botswana, Lesotho, Malawi, Namibia and Swaziland continued their steady economic growth.

In East Africa and the Horn of Africa region, good performers were the United Republic of Tanzania, Uganda and Kenya, although the latter did not perform as well in 2000 and recorded a negative result that year, a year of heavily contested elections. In the same year these countries re-established the East Africa Community. The good performance of Sudan for 2000 was achieved in spite of the continuing civil war, drought in the south of the country and overproduction of sugar. The war between Eritrea and Ethiopia was responsible for the bad results for Eritrea in 1999 and 2000, and performance improved when peace was agreed and a UN peacekeeping force was deployed. In spite of the war, drought in the north-east and low coffee prices, Ethiopia's growth declined only slightly in 2000.

## B. TRADE STRUCTURE

During the period 1990-2001, the value of exports from Africa increased by 33.8 per cent to reach \$141.2 billion, and in the same period the value of imports rose by 37.1 per cent to \$136 billion. Annual merchandise trade values for Africa are indicated in table 48. The increases

during the period mask spells of predominant trade contraction, such as that of 1991-1993, of predominant trade expansion like that of 1994-1997, and of uneven behaviour of exports and imports as from 1998 onwards. Annual fluctuations were also significant: exports contracted by 17.2 per cent in 1998 but expanded by 10.6 per cent the following year; imports expanded by 19.2 per cent in 1995 and contracted by 1.1 per cent in 1996. Overall the share of Africa in world trade is modest and has decreased, falling to about 3 per cent of the value of exports and imports in 1990 and around 2.4 per cent in 2001. Preliminary figures for 2002 seem to indicate a further contraction of trade.

The breakdown of trade for the three regional groupings is indicated in table 49. In 2001, sub-Saharan African countries accounted for 44 per cent of African exports and 41 per cent of its imports. For North African countries, the share of exports was 35 per cent and of imports 38 per cent. South Africa accounted for an equal share, 21 per cent, of exports and imports. These shares have been fairly stable since 1999. Since 2000, Africa has had a positive balance of trade, with only northern Africa having a negative balance of \$2.2 billion in 2001.

The main trading partners for African exports by value are indicated in table 50. Europe, notably the European Union, is the destination for about half of African exports. The North American market takes a little less than a fifth, which is slightly more than the share for Japan and other Asian countries. The Middle East, Latin America and intra-Africa markets account for the balance of African exports – between 10 and 15 per cent.

About half of the value of African exports to Europe is accounted for by crude oil, gas and petroleum products, about a quarter by textiles, a little less than a fifth by agricultural products and the remainder of about 10 per cent by minerals. African imports from Europe are 80 per cent manufactured goods, with about half of this machinery and transport equipment. Agricultural products and other edible items make up about a tenth of imports. The importance of the European Union for African trade is highlighted by the Everything but Arms (EBA) initiative approved in February 2001 by the European Commission whereby quotas and duties for exports from LDC countries, hence many sub-Saharan African exports, with the exception of arms, will be eliminated in phases. This will provide access for more agricultural products, subject to the availability of efficient supply chains.

Table 48

## Merchandise trade of Africa

Year	Billions of dollars		Annual growth, percentage		World share, percentage	
	Exports	Imports	Exports	Imports	Exports	Imports
1990	105.5	99.2	..	..	3.1	2.8
1991	99.8	94.7	-5.4	-4.5	2.9	2.7
1992	96.9	100.6	-2.9	6.2	2.6	2.7
1993	93.0	98.4	-4.0	-2.2	2.5	2.6
1994	96.8	106.1	4.1	7.8	2.3	2.5
1995	111.5	126.5	15.2	19.2	2.2	2.5
1996	125.0	125.1	12.1	-1.1	2.4	2.3
1997	127.3	132.3	1.8	5.8	2.4	2.4
1998	105.4	132.5	-17.2	0.2	2.0	2.4
1999	116.6	128.1	10.6	-3.3	2.1	2.2
2000	148.5	133.1	27.4	3.9	2.4	2.0
2001	141.2	136.0	-4.9	2.2	2.4	2.2

Source: UNCTAD secretariat from WTO, *International Trade Statistics 2002*, Appendix Tables A4 and A5.

Table 49

## Composition of African trade by blocks

		Billions of dollars				Percentages of African trade		
		All Africa	S/S Africa	Northern Africa	South Africa	S/S Africa	Northern Africa	South Africa
1999	Exports	116.6	52.6	37.3	26.7	45	32	23
	Imports	128.1	53.5	47.9	26.7	42	37	21
2000	Exports	148.5	65.1	53.4	30.0	44	36	20
	Imports	133.0	52.4	51.0	29.7	39	38	22
2001	Exports	141.2	62.3	49.6	29.3	44	35	21
	Imports	136.0	55.8	51.8	28.4	41	38	21

Source: UNCTAD secretariat from WTO, *International Trade Statistics 2002*, Appendix Trade by Region – Africa, Tables III.55 to III.60 and Charts III.13 and III.14.

Table 50

## African exports in terms of value

	Billions of dollars			Percentages		
	1999	2000	2001	1999	2000	2001
<b>World</b>	116.6	148.5	141.2	100.0	100.0	100.0
<b>Western Europe</b>	59.7	75.3	73.0	51.2	50.7	51.7
<b>North America</b>	17.6	27.2	24.8	15.1	18.3	17.6
<b>Japan</b>	3.1	3.8	3.5	2.7	2.6	2.5
<b>Other Asian countries</b>	16.1	20.0	17.2	13.8	13.5	12.2
<b>Latin America</b>	3.6	4.6	5.1	3.1	3.1	3.6
<b>Middle East</b>	2.3	3.0	2.9	2.0	2.0	2.1
<b>Intra-Africa</b>	11.1	12.1	11.4	9.5	8.1	8.1
<b>Others</b>	3.1	2.5	3.3	2.7	1.7	2.3

Source: UNCTAD secretariat from WTO, *International Trade Statistics, 2002*, Appendix Trade by Region – Africa, Tables III.55 to III.60 and Charts III.13 and III.14.

The EBA initiative was followed by the African Growth and Opportunity Act (AGOA) approved by the United States, the second trading partner for African countries, on May 2000, which is specifically focused in sub-Saharan African countries and South Africa.

A number of organizations have been established by African countries over a number of years to promote intra-African trade. Table 51 provides a breakdown of their membership and table 52 shows the distribution of trade for these organizations to the world, to Africa and amongst the organizations.

In 2000, the largest shares of exports to Africa of total exports by various organizations were those of SADC and ECOWAS with \$5.5 billion and \$4.4 billion respectively. Membership of sub-Saharan countries is stronger in ECOWAS and COMESA, which in the same year exported \$30.8 billion and \$24.6 billion respectively; the shares of Africa in these exports were 14.2 and 10.2 per cent. The highest shares of exports to sub-Saharan African countries were those of WAEMU to ECOWAS, 25.1 per cent, and to FRANC ZONE, 17.6 per cent. The largest shares of imports from Africa were attributable to WAEMU, with 27.5 per cent, and

FRANC ZONE, with 23.5 per cent. Again WAEMU recorded the highest share of imports from another sub-Saharan group of countries, COMESA, with 24.7 per cent. Overall, intra-Africa trade fluctuates around 9 to 10 per cent of total trade.

In July 2000 the treaty signed by Kenya, Uganda and Tanzania to revive the East Africa Community entered into force. The starting point is a Customs Union to reinforce trade and economic links, with political federation envisaged in the long term.

### C. MARITIME TRANSPORT

In 2002, the African merchant fleet, including the Liberian open register, reached 82,422 thousand dwt, i.e. 9.8 per cent of the world fleet. The African fleet without the open register reached 5,406 thousand dwt, equivalent to 3.2 per cent of the fleet of developing countries and 0.6 per cent of the world fleet. As indicated in table 53, there has been a continual decrease in the African fleet's share of the world fleet. The share, including open registers, decreased from 24.3 to 10.7 per cent between 1980 and 2000, while the share without open registers decreased from 1.1 to 0.8 per cent during the same period.





Table 51 (continued)

	AMU	CAEMC	ECCAS	ECOWAS	FRANCZ	WAEMU	COMESA	SADC	IGAD
Burkina Faso				X	X	X			
Malawi							X	X	
Mozambique									X
Namibia							X	X	
Swaziland							X	X	
Zambia							X	X	
Zimbabwe							X	X	
<b>(e) Horn and East Africa</b>									
Djibouti							X		X
Eritrea							X		X
Ethiopia							X		X
Kenya							X		X
Somalia							X		X
Sudan							X		
Uganda							X		X
United Republic of Tanzania							X	X	
<b>(f) African countries of the Indian Ocean</b>									
Comoros					X		X		
Madagascar							X		
Mauritius							X	X	
Seychelles							X	X	

Source: *Africa 2003*, published by Business Books International, United States, ISBN 0-916673-11-1 and ISSN 1536-1454.

Note: AMU = Arab Magreb Union; CAEMC = Central Africa Economic and Monetary Community; ECCAS = Economic Community of Central Africa States; ECOWAS = Economic Community of West Africa States; FRANC ZONE = Financial African Community; WAEMU = West African Economic and Monetary Union; COMESA = Common Market for Eastern and Southern Africa; SADC = Southern Africa Development Community; IGAD = Intergovernmental Authority for Development.

About two-thirds of the African merchant fleet without open registers is registered in countries of northern Africa (Algeria, Egypt, Libyan Arab Jamahiriya, Morocco and Tunisia) and in South Africa, with the remaining third in sub-Saharan African countries. Since 2000 there has been a modest increase of 7.8 per cent in the size of the latter, from 1,644 to 1,773 thousand dwt, but this is still lower than the 1,985 thousand dwt of 1980. About half of the sub-Saharan fleet in 2002 belonged to countries in West Africa; countries in Southern Africa and on the Indian Ocean accounted for about a quarter; and the remaining tonnage was shared by equally East and Central African countries.

The average age of the sub-Saharan African fleet, excluding open registers, is 22.1 years, considerably more than the average age for the world fleet –

12.6 years (see table 54). The average age for all categories of vessels was above 20 years, with containerships and tankers being the oldest.

Since 2000 the total of goods loaded and unloaded in African ports has fluctuated around 750 million tons per year, with the share of sub-Saharan countries being about a third, namely 250 million tons. The continent accounted for 6.2 per cent of global cargo loaded and unloaded, while sub-Saharan Africa reached almost 2.1 per cent of total world cargo.

There is a considerable imbalance in the total cargo moved by sub-Saharan countries. Loaded goods averaged 190 million tons per year, while unloaded ones reached 60 million tons, less than one-third of the total loaded. The bulk of loaded cargo, estimated at almost

Table 52

## Distribution of intra-African trade in goods in value, 2000

Exports from	To world	To Africa		To different African groups of countries (percentages)							
	(\$ billion)	(\$ billion)	(per cent)	AMU	CAEMC	ECCAS	ECOWAS	FRANC Z.	WAEMU	COMESA	SADC
AMU	47.8	1.48	3.1	2.3	0.1	0.1	0.5	0.5	0.2	0.2	0.0
CAEMC	10.6	0.26	2.5	0.5	1.2	1.5	0.4	1.4	0.3	0.4	0.4
ECCAS	19.3	0.35	1.8	0.2	0.7	0.9	0.3	0.8	0.2	0.3	0.5
ECOWAS	30.8	4.37	14.2	0.6	1.3	1.8	10.8	8.2	6.9	0.6	1.5
FRANC ZONE	16.0	1.90	12.0	0.9	1.5	2.1	8.8	6.9	5.4	0.7	0.9
WAEMU	5.4	1.64	30.4	1.8	2.1	3.1	25.1	17.6	15.6	1.4	1.8
COMESA	24.6	2.51	10.2	0.6	0.1	0.7	0.2	0.2	0.1	5.2	5.2
SADC	36.1	5.52	15.3	0.2	0.2	1.6	1.0	0.6	0.3	9.2	12.2
Africa	136.3	12.94	9.5	1.1	0.5	1.0	2.9	2.2	1.7	3.3	3.8
Imports into	From world	From Africa		From different African groups of countries (percentages)							
	(\$ billion)	(\$ billion)	(per cent)	AMU	CAEMC	ECCAS	ECOWAS	FRANC Z.	WAEMU	COMESA	SADC
AMU	35.8	1.7	4.8	3.3	0.2	0.2	0.6	0.5	0.3	0.5	0.2
CAEMC	4.4	0.7	15.2	0.6	3.1	3.4	9.5	5.9	2.7	0.6	2.2
ECCAS	7.8	1.6	19.9	0.3	2.3	2.6	7.5	4.7	2.4	2.3	8.4
ECOWAS	28.7	4.3	14.8	0.9	0.2	0.2	12.3	4.8	4.6	0.2	1.4
FRANC ZONE	13.6	3.2	23.5	0.9	1.3	1.4	19.6	7.8	6.5	0.4	1.8
WAEMU	9.1	2.5	27.5	1.1	0.4	0.5	24.7	8.8	8.4	0.2	1.5
COMESA	39.9	5.0	12.5	0.4	0.1	0.2	0.5	0.3	0.2	3.5	9.2
SADC	39.8	5.3	13.2	0.0	0.1	0.3	1.2	0.4	0.3	3.4	10.9
Africa	139.6	13.7	9.8	1.1	0.2	0.3	3.3	1.4	1.2	1.9	4.0

Source: UNCTAD secretariat on the basis of balance-of-payment data from the African Development Bank, see [afdb.org/knowledge/statistics/statistics\\_indicators\\_selected/external/pdf/table28.pdf](http://afdb.org/knowledge/statistics/statistics_indicators_selected/external/pdf/table28.pdf).

Table 53

## Sub-Saharan African fleet

*(in thousand dwt)*

	Years	Total	Tanker	Dry bulk	General cargo	Container	Others
<b>World Total</b>	1980	682 768	339 324	185 652	115 824	11 243	30 725
	1990	658 377	245 936	234 659	102 676	25 955	49 151
	2000	808 377	285 442	281 655	102 653	69 216	69 412
	2001	825 652	285 519	294 589	99 872	77 095	68 577
	2002	844 234	304 396	300 131	97 185	82 793	59 730
<b>African fleet with open registers</b>	1980	165 622	108 085	45 295	7 540	798	3 903
	1990	106 494	57 877	31 677	7 515	2 230	7 195
	2000	86 383	38 189	23 432	6 356	8 011	10 395
	2001	84 532	36 082	22 350	5 959	10 408	9 733
	2002	82 422	38 634	20 769	5 421	11 569	6 030
<b>African fleet without open registers</b>	1980	7 644	3 615	549	2 573	241	667
	1990	7 268	2 406	1 040	2 095	226	1 501
	2000	6 321	1 572	1 257	1 735	428	1 329
	2001	6 048	1 302	1 420	1 568	424	1 334
	2002	5 406	1 215	1 337	1 447	139	1 269
<b>Liberia</b>	1980	157 978	104 470	44 746	4 967	557	3 236
	1990	99 226	55 471	30 637	5 420	2 004	5 694
	2000	80 062	36 617	22 175	4 621	7 583	9 066
	2001	78 484	34 780	20 930	4 391	9 984	8 399
	2002	77 016	37 419	19 432	3 974	11 430	4 761
<b>North Africa</b>	1980	4 820	3 093	262	967	1	498
	1990	5 415	1 952	1 040	1 276	10	1 137
	2000	4 309	981	1 236	1 062	92	938
	2001	3 967	602	1 310	1 016	92	947
	2002	3 575	490	1 186	896	108	895
<b>South Africa</b>	1980	839	63	287	190	240	59
	1990	299	1	0	0	216	82
	2000	368	5	0	0	262	101
	2001	359	5	0	0	262	92
	2002	59	4	0	0	30	25
<b>Sub-Saharan African fleet</b>	1980	1 985	459	0	1 416	0	110
	1990	1 554	453	0	819	0	282
	2000	1 644	586	21	673	74	290
	2001	1 722	695	110	552	70	295
	2002	1 773	721	151	551	2	349
<b>West Africa</b>	1980	1 309	277	0	966	0	66
	1990	1 102	439	0	451	0	212
	2000	877	529	0	164	0	184
	2001	842	566	0	93	0	183
	2002	871	594	0	99	0	178

Table 53 (continued)

	Years	Total	Tanker	Dry bulk	General cargo	Container	Others
<b>Central Africa</b>	1980	362	141	0	191	0	30
	1990	155	0	0	121	0	34
	2000	305	17	16	222	5	45
	2001	354	22	105	183	1	43
	2002	214	23	29	101	2	60
<b>East Africa</b>	1980	181	26	0	148	0	7
	1990	146	10	0	120	0	16
	2000	232	23	0	195	0	14
	2001	220	23	0	182	0	15
	2002	235	31	0	185	0	19
<b>Southern Africa and Indian Ocean</b>	1980	133	15	0	111	0	7
	1990	151	4	0	127	0	20
	2000	230	17	5	92	69	47
	2001	306	84	5	94	69	54
	2002	452	73	122	165	0	93

Source: Compiled by the UNCTAD secretariat on the basis of data supplied by Lloyd's Register – Fairplay.

170 million tons, was crude oil from the oil-exporting countries of West Africa, notably Nigeria, Gabon, Angola and recently Equatorial Guinea. Most of the balance was dry bulk cargo, bauxite from Guinea and iron ore from Mauritania, which fluctuates around 15 million tons per year. The remaining tonnage of loaded cargo and fourth-fifths of the total unloaded cargo was general cargo, which is increasingly carried in containers. The remaining one-fifth of unloaded cargo was refined petroleum products such as gasoline.

Liner cargo is to a large extent carried in containers, although there are break-bulk general cargo services and other specialized traffics such as logs and timber. In 2000, containers loaded and unloaded in African ports reached almost 7.3 million TEU, including 2.5 million TEU in sub-Saharan countries. Similar container throughputs were recorded in South Africa and in countries along the north coast – 2.1 and 2.7 million TEU respectively. Data for 14 African countries indicate a container throughput of 6.1 million TEU for 2001. The trade imbalance of sub-Saharan countries was reflected in the throughput of empties – around a third of the total, as indicated in table 55.

Table 56 indicates the traffic flow in the largest containerized route of sub-Saharan Africa, namely between the West Coast of Africa and Europe. Actual figures are given for 2000 and 2001 and forecast figures are given up to 2005. Again, trade imbalance is also reflected in these traffic flows, with the southbound flow being around 60 per cent of the total traffic. The forecasts show very limited growth.

Two carriers, Delmas and Maersk, dominate the international transport of goods for West Africa. Delmas provides weekly direct services with lo-lo and ro-ro self-sustaining vessels ranging from 1,500 to 2,200 TEU from West African ports to a number of European ports in the Atlantic and the Mediterranean. Maersk serves West Africa, with feeders from its European transshipments hubs, notably Algeciras. Both carriers relay containers reaching Europe to the US markets. The West Africa traffic accounts for 55 per cent of Delmas services, which include log and timber carriers. In 2001 Delmas started services to East Africa and islands in the Indian Ocean. Direct services from the West Coast of Africa via the Cape to South-East Asia and China are provided by PIL China Shipping and Gold Star Line, with vessels in the

Table 54

**Age distribution of sub-Saharan African fleet**  
(percentage of total dwt)

Country or grouping	Types of vessel	0-4 years	5-9 years	10-14 years	15-19 years	20 years and over	age end 2002
<b>World total</b>	All ships	22.0	20.9	15.6	13.2	28.1	12.6
	Tankers	26.9	18.5	21.1	9.5	24.0	11.6
	Bulk carriers	19.7	23.9	12.8	17.8	25.8	12.7
	General cargo	9.4	13.6	9.8	16.7	50.6	17.0
	Container ships	31.1	33.9	13.1	10.0	11.9	9.1
	All others	14.9	13.1	13.4	9.4	49.2	16.0
<b>Sub-Saharan Africa (including open-registry countries)</b>							
	All ships	24.1	25.6	21.3	13.1	15.9	10.8
	Tankers	24.5	23.0	26.3	9.6	16.5	10.8
	Bulk carriers	16.1	29.2	16.9	20.9	16.9	11.9
	General cargo	10.8	22.0	15.7	26.3	25.2	14.0
	Container ships	45.3	30.2	14.5	5.7	4.3	6.7
	All others	16.8	24.7	20.9	14.8	22.8	12.4
<b>Sub-Saharan Africa (excluding open-registry countries)</b>							
	All ships	2.7	1.3	2.4	5.5	88.1	22.1
	Tankers	2.6	0.0	0.6	0.0	96.8	22.9
	Bulk carriers	5.3	3.5	0.0	0.0	91.2	21.8
	General cargo	1.0	1.4	5.5	17.9	74.3	21.3
	Container ships	0.0	0.0	0.0	0.0	100.0	23.5
	All others	4.7	5.2	5.2	7.8	77.0	20.5
<b>Angola</b>	All ships	3.5	0.8	0.0	14.1	81.7	21.7
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	0.0	0.0	0.0	8.3	91.7	23.0
	All others	9.7	2.2	0.0	26.7	61.4	19.3
<b>Benin</b>	All ships	0.0	0.0	0.0	0.0	100.0	23.5
	All others	0.0	0.0	0.0	0.0	100.0	23.5
<b>Cameroon</b>	All ships	0.0	8.4	8.5	2.2	80.8	21.0
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5
	All others	0.0	9.6	9.7	2.5	78.1	20.6
<b>Cape Verde</b>	All ships	3.4	0.0	3.4	3.5	89.6	22.1
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	4.8	0.0	4.7	0.4	90.2	21.9
	All others	0.0	0.0	0.0	37.3	62.7	21.1
<b>Comoros</b>	All ships	0.0	0.0	0.5	0.5	99.0	23.4
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	Bulk carriers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	0.0	0.0	4.2	1.4	94.4	22.9
	All others	0.0	0.0	0.0	23.9	76.1	21.9

Table 54 (continued)

Country or grouping	Types of vessel	0-4 years	5-9 years	10-14 years	15-19 years	20 years and over	age end 2002
<b>Congo</b>	All ships	0.0	0.0	0.0	0.0	100.0	23.5
	All others	0.0	0.0	0.0	0.0	100.0	23.5
<b>Democratic Republic of Congo</b>	All ships	0.0	0.0	3.3	0.0	96.7	23.1
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5
	All others	0.0	0.0	3.5	0.0	96.5	23.1
<b>Côte d'Ivoire</b>	All ships	0.0	0.0	0.0	0.0	100.0	23.5
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	All others	0.0	0.0	0.0	0.0	100.0	23.5
<b>Djibouti</b>	All ships	8.6	0.0	0.0	0.0	91.4	21.6
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5
	All others	22.2	0.0	0.0	0.0	77.8	18.7
<b>Equatorial Guinea</b>	All ships	0.0	0.0	12.2	0.0	87.8	22.1
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5
	All others	0.0	0.0	17.0	0.0	83.0	21.6
<b>Eritrea</b>	All ships	1.5	0.5	0.0	0.0	98.0	23.1
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5
	All others	12.8	4.8	0.0	0.0	82.5	20.0
<b>Ethiopia</b>	All ships	0.0	0.0	21.5	72.7	5.9	16.3
	Tankers	0.0	0.0	100.0	0.0	0.0	12.0
	General cargo	0.0	0.0	18.6	75.4	6.1	16.5
<b>Gabon</b>	All ships	8.8	0.0	6.8	20.4	63.9	19.5
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	14.1	0.0	0.0	27.3	58.5	18.7
	All others	4.3	0.0	16.9	16.7	62.1	19.5
<b>Gambia</b>	All ships	0.0	30.7	0.0	2.9	66.4	18.2
	All others	0.0	30.7	0.0	2.9	66.4	18.2
<b>Ghana</b>	All ships	0.0	0.5	1.8	3.2	94.4	23.0
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	Bulk carriers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	0.0	0.0	0.0	10.1	89.9	22.8
	All others	0.0	0.8	2.9	1.1	95.2	23.0
<b>Guinea</b>	All ships	1.2	0.0	0.0	0.0	98.8	23.2
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5
	All others	1.3	0.0	0.0	0.0	98.7	23.2
<b>Guinea-Bissau</b>	All ships	0.0	0.0	0.0	6.9	93.1	23.1
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5
	All others	0.0	0.0	0.0	7.7	92.3	23.0

Table 54 (continued)

Country or grouping	Types of vessel	0-4 years	5-9 years	10-14 years	15-19 years	20 years and over	age end 2002
<b>Kenya</b>	All ships	0.0	1.6	19.1	5.7	73.6	20.7
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	0.0	0.0	76.9	0.0	23.1	14.7
	All others	0.0	3.5	22.9	12.4	61.1	19.5
<b>Madagascar</b>	All ships	0.0	1.6	3.8	7.6	86.9	22.3
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	0.0	0.0	0.0	7.4	92.6	23.0
	All others	0.0	7.7	18.0	15.8	58.5	19.1
<b>Mauritania</b>	All ships	5.5	0.9	1.4	20.7	71.5	20.7
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5
	All others	5.7	0.9	1.5	21.4	70.5	20.6
<b>Mauritius</b>	All ships	20.9	19.3	11.0	3.0	45.9	14.4
	Bulk carriers	60.3	39.7	0.0	0.0	0.0	4.0
	General cargo	23.0	0.0	31.8	0.0	45.2	14.9
	All others	0.6	20.1	4.6	6.1	68.5	19.1
<b>Mozambique</b>	All ships	30.6	2.8	8.7	3.0	54.9	15.3
	General cargo	0.0	0.0	7.5	0.0	92.5	22.6
	All others	49.3	4.5	9.5	4.9	31.9	10.8
<b>Nigeria</b>	All ships	0.4	1.6	0.1	0.4	97.4	23.1
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	0.0	12.8	0.0	0.0	87.2	21.4
	All others	6.4	8.4	2.0	5.5	77.8	20.2
<b>Saint Helena</b>	All ships	0.0	0.0	0.0	0.0	100.0	23.5
	All others	0.0	0.0	0.0	0.0	100.0	23.5
<b>Sao Tome and Principe</b>	All ships	0.0	0.0	3.4	0.2	96.5	23.1
	Tankers	0.0	0.0	21.5	0.0	78.5	21.0
	Bulk carriers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	0.0	0.0	0.0	0.3	99.7	23.5
	Container ships	0.0	0.0	0.0	0.0	100.0	23.5
	All others	0.0	0.0	0.0	0.0	100.0	23.5
<b>Senegal</b>	All ships	1.2	0.0	2.5	12.2	84.2	22.2
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	0.0	0.0	0.0	64.5	35.5	19.3
	All others	1.2	0.0	2.7	8.6	87.5	22.4
<b>Seychelles</b>	All ships	45.4	5.8	5.3	19.2	24.3	10.9
	Tankers	100.0	0.0	0.0	0.0	0.0	2.0
	General cargo	2.6	1.8	0.0	53.9	41.7	19.1
	All others	0.0	24.8	25.4	2.2	47.6	16.3
<b>Sierra Leone</b>	All ships	0.0	0.0	2.4	4.4	93.2	22.9
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5
	All others	0.0	0.0	12.0	21.8	66.2	20.7



Table 54 (continued)

Country or grouping	Types of vessel	0-4 years	5-9 years	10-14 years	15-19 years	20 years and over	age end 2002
<b>Somalia</b>	All ships	0.0	0.0	0.0	0.0	100.0	23.5
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5
	All others	0.0	0.0	0.0	0.0	100.0	23.5
<b>Sudan</b>	All ships	0.0	0.0	0.0	0.1	99.9	23.5
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5
	All others	0.0	0.0	0.0	6.3	93.7	23.1
<b>Togo</b>	All ships	0.0	0.0	0.0	0.8	99.2	23.4
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5
	All others	0.0	0.0	0.0	1.2	98.8	23.4
<b>United Republic of Tanzania</b>	All ships	0.0	0.6	0.1	2.8	96.5	23.2
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5
	All others	0.0	4.0	0.5	19.4	76.1	21.5

Source: Compiled by the UNCTAD secretariat on the basis of data supplied by Lloyd's Register – Fairplay Ltd.

Table 55

**Container throughput in sub-Saharan African ports in  
thousands of TEU in 2000**

Sub-Saharan Africa	West Coast	East Coast
<b>Loaded</b>		
Laden	283	156
Empty	186	212
<b>Total Loaded</b>	<b>469</b>	<b>368</b>
<b>Unloaded</b>		
Laden	379	323
Empty	131	36
<b>Total Unloaded</b>	<b>510</b>	<b>359</b>
<b>Total Loaded Unloaded</b>	<b>979</b>	<b>727</b>
<b>Percentage of empties</b>	<b>32.4</b>	<b>34.1</b>

Source: UNCTAD secretariat for a sample of the largest ports.

Table 56

**Container traffic between the West Coast of Africa  
and Europe**  
(thousands of TEU)

Year	Southbound flow	Northbound flow
2000	465	253
2001	447	267
2002	440	267
2003	437	270
2004	439	273
2005	446	277

Source: *Containerisation International*, several issues.

1,500-2,000 TEU range. Feeder vessels also link West Africa to the services running from South Africa to the Far East and the East Coast of South America.

Concentration is a feature of sea transport services in West Africa, where carriers have been reduced from 37 in the mid-1980s to nine. Furthermore, some of these carriers belong to the same owner: Delmas and Otal belong to the Bolloré group (France) and Maersk and Safmarine to AP Moller (Denmark).

The low freight rates prevailing during the previous years on many routes forced some carriers (Maersk, Safmarine, Nile Dutch Africa Line, P&O Nedlloyds and WAL) to set up the Europe West Africa Trade Agreement (EWATA) in late 1999 in accordance with EU Regulation 4056/86. In early 2002, freight rates between Tema and Rotterdam for a 20' container were \$878 northbound and \$1,208 southbound. Like any other conference, EWATA has implemented rate restoration plans (since 1 April 2003, an increase of 350 euros for a 20 foot container) and BAF (14 euros per TEU southbound, 6 euros per TEU northbound) and CAF (currently nil) surcharges. Other surcharges have also applied, for instance congestion surcharges (to Nigerian ports in 2001, 2002 and 2003; to Cotonou in 2001; to San Pedro and Malabo in 2000) and emergency surcharges due to civil unrest (Sierra Leone in 2000, Liberia in 2001 and 2002, and Côte d'Ivoire in 2003). As a result there are wide differences in sea transport costs between ports.

Shipping services in East Africa are articulated, at the north end, with east-west mainline routes at several ports in the Middle East Gulf (i.e. Salalah in Oman for Maersk,

Aden for MSC) and, at the south end, at South African ports, notably Durban, in spite of its poor productivity. Direct services to Europe are run by Delmas, which also serves Indian Ocean islands and the Far East jointly with Mitsui. In early 2003, Ellerman, a long-established carrier, stopped services, probably due to continuing depressed freight rates. Carriers were also concerned with the Tanzanian Shipping Agency Act of 2002, which stated that all agencies should have a minimum of 51 per cent local ownership, with minimum capital of \$100,000 for international agencies and \$10,000 for local ones, which would increase their costs.

Operational efficiency of sub-Saharan African ports has improved with the introduction of private sector operators for container handling.<sup>14</sup> This has been the case in Djibouti, Dar es Salaam and Maputo, where contracts were signed with Dubai Ports International (United Arab Emirates), ITCSI (Philippines), with a local partner Vertex, and MPDC (made up of three international partners from Portugal, Sweden and the United Kingdom) and the local partner Mozambican Railways, respectively. Subsequently, ITCSI sold its share to HPH (China). At the end of 2002, the small port of Mustamudu in Comoros was leased to the private operator Spanfreight Shipping for a period of 10 years. In other ports, productivity is lagging behind. In Mombasa, this is due to obsolete equipment and poor maintenance practices. In Luanda, years of under-investment due to the civil war has led to congestion.

Investments are also benefiting from private sector involvement. Benin's second seaport, to be built about 20 kilometres from Cotonou, which has now reached its saturation level, requires an investment of \$160 million, and its planning, construction, operation and maintenance have been awarded under concession for 30 years to Bouygues Group (France). Similar schemes are under consideration in Nigeria, where two carriers have submitted proposals to build the Snake and Ogororo terminals, which would complement the existing facilities of Apapa and Tin Can Island.

#### D. INLAND TRANSPORT

There are a number of transport corridors that are essential for inland transport for landlocked sub-Saharan African countries. Moreover, in spite of the distance between ports and inland destinations, road transport is predominant. Table 57 lists some of these corridors and their road length. In practice, other corridors are also used. For instance, traffic to Ethiopia is also carried

through the Somaliland corridor, although it is difficult to assess its quantity. In 1998, Lusaka received 1.4 million tons through the Beira corridor, only 0.1 million tons through the Dar corridor, and 2.4 million tons through the Durban corridor, but recent and comparable data are not available.

The Port Management Association of Eastern and Southern Africa (PMAESA) have provided recent figures on transit traffic through the ports of Djibouti, Mombasa, Dar es Salaam, Nacala, Beira and Muputo that totalled 10.3 million tons in 2002. The Association also provided 2002 figures on container flows via Mombasa and Dar es Salaam to Uganda, Democratic Republic of Congo, Rwanda and Burundi. Volumes moved to and from these four countries were 39,000 TEU, 9,500 TEU, 4,600 TEU and 3,500 TEU respectively with Mombasa handling 90 per cent, 33 per cent, 35 per cent and 3 per cent of the transit cargo for each country respectively. Import containers dominated the trade making up around 70 per cent, 95 per cent, 78 per cent and 72 per cent of the total traffic for the respective countries.

The total cost per container and the average cost per container per kilometer are also indicated in table 57. The high cost of inland transport along the various sub-Saharan corridors becomes evident when compared with those of South Africa. It is even more striking when compared to the average cost of \$1.10 per kilometre in the United States and \$1.65 per kilometre in EU countries. There are several reasons for these high costs, including substandard and badly maintained roads and lorries, cumbersome procedures, excessive controls and poor management information systems. Transport costs are often split into distance-related and non-distance-related items. Most components, such as haulage, tolls, transit and Customs escort fees and insurance, are distance-related. Border post charges, however, are non-distance-related and could be about 5 per cent of the total cost. When port costs, which are not distance-related, are added, the non-distance-related cost could range between 12 and 40 per cent of the total inland transport costs. Thus, a significant portion of transport costs are not related to distance.

The limited cargo traffic in some corridors precludes the use of rail services, while in other cases (i.e. Djibouti–Addis Ababa and Mombasa–Nairobi–Kampala) the limited rail traffic is due to lack of investment and maintenance. The private sector is also involved in some of the existing rail networks, notably

the Abidjan–Ouagadougou line and the Cameroonian railways that are operated by Delmas. On the former, average inland transport costs are 15.4 per cent lower than the road alternative. Recent figures from PMAESA indicate that for the Mombasa–Kampala corridor, rail freight charges are slightly higher than road freight rates while transit times by rail were 12 days versus 6 days by road. Delmas is also promoting the “B/L Direct” as multimodal transport to African inland destinations. In October 2002, bidding started for the privatization of the Tanzanian Railway Corporation, with privatized operations scheduled to start in 2004. During 2003, similar procedures are expected for the Kenyan and Ugandan railways, which are to a large extent complementary.

The challenges posed by existing rail networks in sub-Saharan African countries can be illustrated by the case of the intra-regional export of 40,000 tons of Ugandan maize to Zambia from late 2001 until February 2002. After being concentrated in Kampala (Uganda), the maize was railed to Portobell on the shores of Lake Victoria, from where it was ferried to Mwanza (United Republic of Tanzania). From this point, three different networks, namely Tanzanian Railways, Tazara and Zambian Railways, were used to reach the final destination in Zambia.

Unforeseen events have led to mismatches of traffic volumes with existing infrastructure, administrative procedures and management capability along transport corridors for extended periods. The 1998 war between Eritrea and Ethiopia substantially increased road traffic carrying Ethiopian cargoes along the Djibouti–Addis Ababa corridor and also along the Somaliland corridor. By late 2002, exports from Mali and Burkina Faso, notably of cotton, which had been shipped through Abidjan, were starting to seek alternative road corridors as instability in Côte d’Ivoire was making the use of the existing route too risky. The performance of the Bamako–Dakar corridor is hampered by insufficient rail capacity, derailments and poor maintenance of rolling stock, while current road rehabilitation is scheduled to end in late 2003.

Two technical assistance programmes of UNCTAD, namely ASYCUDA and ACIS, contribute to improving management information systems and thus lowering inland transport costs. In particular, inland carriers appreciate the ACIS package (see Box 5) for managing assets and tracking vehicles and cargoes along a route.

Table 57

## Estimated unit road transport cost for container (maximum 28 tons in 40')

Description	Distance (km.)	Total cost (\$)	Cost (\$ per km.)
<b>Corridors within sub-Saharan Africa</b>			
Djibouti-Dire Dawa – Addis Ababa	844	n.a.	n.a.
Mombasa – Kampala	1 440	3 250	2.26
Dar-es-Salaam – Kigali	1 650	4 980	3.02
Dar-es-Salaam – Bujumbura	1 750	5 180	2.96
Dar-es-Salaam – Lusaka	2 000	4 230	2.11
Dar-es-Salaam – Harare (via Lusaka)	2 490	4 013	1.61
Dar-es-Salaam – Blantyre (via Lilongwe)	2 030	3 573	1.76
Nacala – Lusaka (via Lilongwe)	1 774	2 735	1.54
Beira – Lubumbashi (via Harare, Lusaka)	1 581	2 554	1.61
Walvis Bay – Harare (via Maun)	2 409	3 585	1.49
Douala – Bangui	1 600	7 900	4.94
Douala – D’Jamena	1 900	8 000	4.21
Cotonou – Niamey	1 056	2 200	2.08
Lomé – Niamey	1 234	3 160	2.56
Lomé – Ouagadougou	1 000	2 550	2.55
Abidjan – Bamako	1 230	2 192	1.78
Dakar – Bamako	1 200	3 400	2.83
<b>Other corridors</b>			
Maputo – Johannesburg	561	775	1.38
Durban – Lusaka (via Plumtree)	2 524	3 873	1.53
Walvis Bay – Johannesburg	1 885	2 593	1.38

Source: UNCTAD secretariat on the basis of SATN Comparative Transit Transport Cost Analysis, September 2001 – USAID; MSC presentation in Geneva, February 2003; *Marchés Tropicaux*, 18 April 2003, page 792.

## E. TRANSPORT COSTS AND THEIR IMPACT ON THE IMPORT BILL

### Cost factor for import trades

Table 58 provides estimates of total freight payments for imports and freight costs as a percentage of total import value for various country groups. In 2001, the total freight costs of African developing countries as a proportion of import value was 12.65 per cent, which is considerably higher than the average of 8.70 per cent for developing countries. It is more than double the percentage for market-economy countries and the world average.

The African average masks differences amongst the subregions. The transport cost factor for import trades for countries in Northern Africa is the lowest at 11.21 per cent, and for countries in the Indian Ocean it is 12.23 per cent. Countries on the east coast of Africa also recorded a cost factor slightly below the average at 12.35 per cent. The cost factor was higher in western and southern Africa, which recorded 13.90 and 16.42 respectively. The average for sub-Saharan African countries was 13.84 per cent, and the highest cost factor was found in landlocked countries at 20.69 per cent.

## Box 5

## ACIS

ACIS stands for **Advance Cargo Information System**. It is a computer-based network information system that tracks cargo on railways, lakes, rivers and roads and in port. It is developed and installed by UNCTAD, according to the needs and requirements of the operator.

ACIS provides real-time information “live” and a detailed history of the whereabouts of any container or consignment in which the user has a pre-advised legitimate interest. It functions in more than 20 countries in Africa and Asia and can follow cargo across national frontiers. All it requires is a PC with a modem to access Internet and of course the system installed on the different railways, roads or in the ports.

The system facilitates trade relations and reinforces subregional integration, as it enables all operators to communicate through modes and interfaces, and over borders, the information required to improve trade efficiency. By making full use of existing infrastructure and equipment capacity, transport costs are significantly reduced.

ACIS automatically produces statistics and performance indicators and thus helps remedy deficiencies and reduce fraudulent practices. On railways, the system monitors traffic, distributes empty wagons, manages terminals, monitors locomotive fuel consumption and rolling stock maintenance and provides billing for all services rendered.

An independent evaluation commissioned by the European Union to measure the impact and usefulness of the system on five interconnected railways of Eastern/Southern Africa reported that, in addition to reduced average turnaround, dwell and transit times and increased wagon and locomotive utilization, total estimated savings on rail hire charges for the five railways were \$6.4 million per annum and realistic additional revenues due to increased carrying capacity equalled \$20.5 million per annum.

For further information contact the ACIS Coordinator at +41 22 907 4480 or [acis@unctad.org](mailto:acis@unctad.org).

### *Cost factor for import trades of selected landlocked countries*

Landlocked developing countries in Africa continued to suffer from excessive transport costs, as table 59 indicates. High import transport costs inflated the consumer prices of imported goods, and high transport costs for exports undermined their competitiveness in foreign markets. Transport costs are made up of direct and indirect costs, which are incurred during the

transportation of goods from their point of loading to their destinations. A large portion of the indirect costs is attributable to the capital cost of infrastructure and equipment. The major elements accounting for the high freight costs of landlocked developing countries include inefficient management of transport facilities, poorly maintained infrastructure and equipment, imbalanced trades, inadequate overall infrastructure and cumbersome government regulations.

Table 58

**Estimates of total freight costs on imports of African countries (excluding South Africa) for 2001**  
(millions of dollars)

Year	Country group	Estimate of freight cost of imports	Value of imports (c.i.f.)	Freight costs as percentage of import value
2001	World total	364 008	5 960 595	6.11
	Developed market-economy countries	221 248	4 320 511	5.12
	Developing countries - total	142 760	1 640 084	8.70
	<i>of which:</i>			
	Africa	13 806	109 125	12.65
	<i>of which:</i>			
	Northern Africa	5 512	49 183	11.21
	Southern Africa	1 346	8 197	16.42
	Western Africa	5 057	36 394	13.90
	Eastern Africa	1 389	11 244	12.35
	Indian Ocean <sup>a</sup>	502	4 107 <sup>a</sup>	12.23
Sub-Saharan Africa	8 294	59 942	13.84	
African landlocked countries	1 900	9 180	20.69	

Source: UNCTAD secretariat on the basis of data supplied by IMF.

<sup>a</sup> No data for Reunion.

Table 59

**Estimates of total freight costs of imports for selected African landlocked countries for 2001**  
(millions of dollars)

Year	Country group	Estimate of freight cost of imports	Value of imports (c.i.f.)	Freight costs as percentage of import value
2001	<b>Southern Africa</b>			
	Malawi	115	505	22.72
	Zambia	149	1 123	13.29
	Zimbabwe	343	1 739	19.74
	<b>Western Africa</b>			
	Burkina Faso	120	530	22.73
	Mali	461	1 404	32.83
	Niger	63	324	19.34
	<b>Eastern Africa</b>			
	Burundi	21	139	15.24
	Rwanda	58	291	20.02
Uganda	93	964	9.61	

Source: Estimated by the UNCTAD secretariat on the basis of data supplied by IMF.