

Chapter 7

REVIEW OF REGIONAL DEVELOPMENTS: SUB SAHARAN AFRICA

This chapter reviews and analyses the global and intraregional maritime trades in Africa since 2003 with a 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 885 million at mid-2004. These countries could broadly be grouped into three, along the following geographical lines: the 5 countries (Algeria, Egypt, Libyan Arab Jamahiriya, Morocco and Tunisia that correspond to Code 8.1 of Annex I) located along the north coast of the continent make up the first group; the second is South Africa (Code 5 of Annex I), embracing a large portion of the southern tip of the continent, which 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 (closely corresponding 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 geographical situation. There are 24 coastal countries (C), 16 landlocked countries (LLC) and 7 insular countries (I) 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 is, they have low economic and social

welfare indicators. In fact, these countries make up the majority of the forty-nine LDCs in the world.

Table 46 presents the geographical and economic denomination of sub-Saharan African countries, together with their average increase in GDP for the period 1995–2004 and the corresponding average annual increases in GDP from 2001 to 2004 and the GDP estimate for 2005. The same economic data are included for other developing economies of Africa, developing economies and developed economies.

The economic performance for developing economies in Africa remains below that recorded by developing economies as a whole. During the period 2000–2004, only in 2001 was the average annual GDP increase for African countries above the corresponding increase for developing economies. For the other years and the expectations for 2005 the disparities are significant and in favour of developing economies. Awareness that the situation needs to be corrected was evident in larger forums such as the G8 and the African Union.

A number of steps were taken towards reducing the gap in future years. The New Partnership for Africa's Development (NEPAD), which has identified

Table 46

Real GDP of developing countries of sub-Saharan Africa
(Annual percentage change)

Country/regional grouping	Type of country		Annual percentage change					
	Geographical	Economic	1995–2004	2001	2002	2003	2004	2005
Sub-Saharan African countries								
(a) West Africa								
Benin	C	LDC	5.2	5.0	6.4	5.5	2.7	3.9
Burkina Faso	LLC	LDC	5.3	5.7	4.6	8.0	4.8	3.5
Cape Verde	I	DC	7.1	4.7	4.9	5.3	5.5	6.3
Côte d'Ivoire	C		1.5	0.0	0.0	0.0	1.7	1.0
Gambia	C	LDC	4.8	5.8	-3.2	6.7	7.1	4.7
Ghana	C		4.4	4.2	4.5	5.2	5.2	5.8
Guinea	C	LDC	3.7	3.8	4.2	1.2	2.6	3.0
Guinea-Bissau	C	LDC	-1.9	0.2	-7.2	0.6	1.0	2.3
Liberia	C	LDC	-	-	-	-	-	-
Mauritania	C	LDC	4.4	4.3	3.3	4.9	4.6	5.4
Mali	LLC	LDC	5.0	12.1	4.3	6.0	4.5	6.4
Niger	LLC	LDC	3.3	7.1	3.0	5.3	0.9	4.2
Nigeria	C		3.9	3.1	1.5	10.7	4.0	3.9
Senegal	C	LDC	5.0	5.6	1.1	6.3	6.1	5.7
Sierra Leone	C	LDC	0.2	5.4	6.3	6.5	6.8	7.5
Togo	C	LDC	1.6	0.2	4.3	2.0	3.8	3.0
(b) Central Africa								
Angola	C	LDC	6.5	5.2	13.0	5.3	11.2	14.7
Burundi	LLC	LDC	1.0	2.2	4.5	-0.5	5.4	5.0
Cameroon	C		5.0	5.3	6.5	4.5	4.8	2.8
Central African Republic	LLC	LDC	1.1	0.3	-0.6	-7.5	2.3	2.2
Chad	LLC	LDC	6.4	8.7	9.7	11.9	31.0	5.9
Congo	C		2.8	2.9	5.4	0.8	4.0	9.2
Democratic Republic of the Congo	LLC	LDC	-1.4	-1.1	3.1	5.6	6.3	6.6
Equatorial Guinea	I	LDC	30.5	65.6	20.9	10.2	13.6	0.2
Gabon	C		-0.4	1.9	-0.1	1.0	1.5	2.2
Rwanda	LLC	LDC	7.6	6.7	9.3	0.7	3.8	4.0
Sao Tome and Principe	I	LDC	3.2	4.0	4.1	4.5	6.5	3.2
(c) Southern Africa								
Botswana	LLC		5.9	8.5	2.2	6.7	4.5	3.8
Lesotho	LLC	LDC	2.3	3.2	3.5	3.3	3.0	0.8
Malawi	LLC	LDC	2.6	-4.1	1.8	4.4	4.9	2.1
Mozambique	C	LDC	8.6	13.1	8.7	7.9	8.4	7.7
Namibia	C		3.2	0.6	2.5	3.7	3.5	3.6
Swaziland	LLC		2.8	1.8	3.6	2.2	1.5	2.0
Zambia	LLC	LDC	3.0	4.9	3.3	4.3	3.5	5.0
Zimbabwe	LLC		-3.3	-2.7	-4.4	-10.4	-5.0	-7.1

Table 46 (continued)

Country/regional grouping	Type of country		Annual percentage change					
	Geographical	Economic	1995–2004	2001	2002	2003	2004	2005
(d) Greater Horn and East Africa								
Djibouti	C	LDC	1.7	1.9	2.6	3.5	4.1	3.2
Eritrea	C	LDC	1.1	9.2	0.7	3.0	1.8	0.8
Ethiopia	LLC	LDC	4.2	7.7	1.6	-3.9	11.6	7.3
Kenya	C		1.4	1.1	1.1	1.7	2.3	4.7
Somalia	C	LDC	-	-	-	-	-	-
Sudan	C	LDC	5.2	6.4	6.5	6.1	7.3	8.0
Uganda	LLC	LDC	6.2	6.4	4.7	6.3	5.9	5.9
United Republic of Tanzania	C	LDC	6.7	6.2	7.2	7.1	6.3	6.9
(e) African countries of the Indian Ocean								
Comoros	I	LDC	0.9	2.3	2.3	2.1	1.8	2.8
Madagascar	I	LDC	2.7	6.0	-12.7	9.6	6.0	6.3
Mauritius	I		5.1	5.3	1.7	4.2	4.5	3.6
Seychelles	I		2.2	-1.9	0.3	-5.4	-2.0	-2.8
Countries along the northern coast of Africa								
Algeria	C		3.5	2.1	4.0	6.9	4.5	4.8
Egypt	C		4.3	3.2	3.1	4.1	4.8	4.8
Libyan Arab Jamahiriya	C		2.0	3.3	-0.2	5.6	2.8	4.3
Morocco	C		3.5	6.3	3.2	5.2	3.5	1.0
Tunisia	C		4.9	4.9	1.7	5.6	5.8	5.0
South Africa	C		2.8	2.7	3.6	2.8	3.7	4.3
Sub-Saharan Africa			3.5	3.8	3.5	4.0	4.7	4.1
Developing economies of Africa			3.6	3.7	3.3	4.6	4.6	4.5
Developing economies			4.1	2.8	3.9	5.0	6.4	6.4
Developed economies			2.5	1.2	1.2	2.0	3.1	2.5

Source: UNCTAD *Handbook of Statistics 2005*, table 7.2. Data for 2005 are from the IMF Weo database.

infrastructure as one of the major parameters for economic growth and poverty reduction, established the NEPAD Infrastructure Project Preparation Facility (NEPAD-IPPF) and nominated the African Development Bank as the lead agency for technical support. By 2004, two power-interconnection projects, one oil pipeline and one telecommunication project were thus approved. Then, in mid-2005, agile funding mechanisms were put in place with the conversion of NEPAD-IPPF into a untied multi-donor facility for

supporting local governments and bodies in formulating viable infrastructure projects and attracting public-private investment partnerships. Also in mid-2005, but in a separate development, the debt of 18 countries to multilateral funding institutions was written off. About \$40 billion was involved in this decision, with the majority of beneficiaries being African countries, namely Benin, Burkina Faso, Ethiopia, Ghana, Madagascar, Mali, Mauritania, Mozambique, Niger, Rwanda, Senegal, Uganda, the United Republic of Tanzania and Zambia.

The economic performance of individual countries, however, might fluctuate from year to year for a number of reasons, such as natural disasters, domestic or international political instability (7 of the 16 peacekeeping missions of the United Nations are located in sub-Saharan African countries), displacement of populations due to this instability, the sequel to armed conflict in or with neighbouring countries, price fluctuations for the main export commodities and annual levels of foreign investment, notably for oil exploration and extraction. Over the last few years, crisis control measures, improved domestic governance and a favourable international environment seem to have smoothed out previous wild fluctuation of annual growth output in most countries.

Several of these factors affected economic performance of countries in West Africa, whose overall performance for the period 2001–2004 was encouraging (12 out of 15 countries recorded a positive annual percentage output change), despite the effect of the appreciation of the euro that adversely affected Franc-Zone countries. In particular, the results for Ghana seem to indicate an accelerating trend. The \$590 million offshore West Africa gas pipeline, linking the Delta region in Nigeria to Takoradi in Ghana, started to be built in 2005 to provide enough energy for Ghana and its neighbours, and follows the harsh fuel price increases of 90 per cent in 2003. The locust plague that destroyed large tracts of cultivated land in the region and destroyed up to one third of Mali's grain production of 2004 was partially responsible for the meagre positive result for Niger during that year and caused localized pockets of severe malnutrition in the country. The lowest 2004 growth for Benin occurred against a background of rising inflation and border closures by Nigeria. The high output increases for Sierra Leone from 2002 onwards were indicative of a recovery from the severely deteriorated economy of the previous years. After the dismal result for 2002, Nigeria, the largest economy in sub-Saharan Africa, managed to record good growth increases in spite of violence in the north and south of the country and strikes in the vital oil industry. Single-year contraction of output was recorded in two countries. The least encouraging was that of Guinea-Bissau for 2002, which seems to indicate that crisis bottomed in that year; the weak growth the following year coincided with elections to restore civilian rule and was followed by a more encouraging result for 2004. Domestic political turmoil was responsible for the 2000, 2002 and 2003 negative results for Côte d'Ivoire. Despite clashes with foreign peacekeeping forces, there

was a recovery in 2004 and the forecast for 2005 is also positive. Normalization was still a prospect in Liberia, where even data have not been collected for many years.

In Central Africa 7 of the 11 countries recorded positive annual output increases for all years during the period 2001–2005. The ending of the war in Angola and increases in oil production explain the double-digit result for 2004 and the forecast for 2005. In the latter year, that country signed nine cooperation agreements with China, including for the development of a refinery and telecommunications networks as well as for long-term oil and gas supply to China. The impressive annual percentage output growth for Chad and Equatorial Guinea are due to oil and oil-related activities. In 2004 the oil pipeline for exporting Chad's oil from the Doba Basin through Cameroon's port was fully operating, and the oil bonanza in Equatorial Guinea was felt in the plans to build a new airport and capital for the country, as well as a gas-powered energy plant. The 2003 peace arrangements to end the war in Congo and set up a two-year transitional Government did not prevent sporadic clashes in eastern regions during the following years and even upset neighbouring Rwanda and Burundi, but have allowed positive growth since 2004. The stability achieved in the Congo since May 2003, when the fighting in the Pool region ended, made possible the 2004 agreements for mining magnesium using environmentally friendly brine well technology and building magnesium and aluminium smelters in Kouilou along the Atlantic coast. The project was subsequently delayed when plans to build a dam were added to provide energy originally scheduled to be supplied from a neighbouring country. The relatively modest annual percentage output growth for Sao Tome and Principe is set to increase with offshore oil production. This country agreed with Nigeria on an offshore joint development zone and the transparent splitting of the proceeds in accordance with an agreed proportion.

In Southern Africa, good harvests and increased investment in many countries explain the almost positive annual output growth until 2004 and the positive forecast for 2005. Most countries continued their steady economic growth, despite inflation in Malawi in 2004, with landlocked Botswana ranking first among African countries in terms of governance for that year. The exception to this favourable outlook is Zimbabwe, whose economy has contracted over the last five years and is now a net grain importer.

In East Africa and the Greater Horn, good performers were the Sudan, Uganda and the United Republic of Tanzania.

The demand for power for the expanding economy of the United Republic of Tanzania was responsible for the commissioning in late 2004 of the Songas power project. This provides natural gas power to the capital through a processing plant on Songo island and a 225 km pipeline to Dar-es-Salaam. Also, the country prepared plans for economic development around Lake Victoria, notably for using waters for irrigation, but this was deemed to threaten the livelihood of countries along the Nile river. After negotiations it was agreed to update the 1903 treaty before undertaking any action. In Sudan prospects for increased oil production were increased with the agreement to end the armed conflict in the south of the country in May 2004. Although unrest was reported in the western provinces during the following months, joint-venture plans with Indian partners were under way for expanding refineries in Khartoum and Port Sudan, and for the construction of a pipeline for export of oil products and a new port. Civil unrest is still affecting northern regions of Uganda, whose southern provinces benefit from substantial donor disbursements. In that region single-year negative results were recorded for Eritrea in 2000 and Ethiopia in 2003. Those countries maintained the truce despite Ethiopia's rejection of the ruling by the International Court of Justice, which in 2004 assigned to Eritrea a hotly contested town. The drought

that affected 15 million people was responsible for the contraction of the Ethiopian economy during 2003. The bumper crop of the following year did not reach all the country, with populations living close to the northern Somali border being badly affected by a local drought, which led to the decision to resettle them to better areas of the country. Also in 2004, Eritrea had to resort to food aid because of a plague of locusts, while an attempt was being made to develop recently discovered gold and copper mines. Somalia was still unsettled, even though it had agreed to a transitional Government based in Kenya, and like Liberia was basically an informal economy. In Kenya the Government elected in 2003 was engaged mostly in improving transparency in the economy.

The economic performance of island countries in the Indian Ocean was affected by cyclones, as was the case twice in Madagascar in 2004, and by structural problems in Seychelles.

Relying on the overall positive annual GDP growth rate for African countries could be misleading, especially in the light of the UN Millennium Development Goal of halving poverty by 2015. As shown in table 47, in the figures for 2004 and the estimates for 2005, the majority of countries have annual growth rates of less than 7 per cent — the growth target deemed necessary for meeting that goal.

Table 47

Number of countries with positive annual GDP rates in 2004 and 2005

Range of GDP annual growth rate	2004	2005
From 0.0 to 3.9 per cent	20	22
From 4.0 to 6.9 per cent	23	21
More than 7 per cent	8	6
Total	51	49

B. TRADE STRUCTURE

During the period 1990–1999 the value of exports from Africa increased by 10.5 per cent to reach \$116.6 billion, and the value of imports rose by 29.1 per cent to \$128.1 billion. Over the last five years exports increased by 56.0 per cent to \$231.7 billion, while imports rose by 58.6 per cent to \$204.8 billion. The figures are shown in table 48. This difference is mainly due to the increases in prices for export commodities, notably crude oil. Overall, the share of Africa in world trade is modest and seems to be stable. In 1994 it stood at 2.2 per cent of the value of exports and 2.4 per cent for imports. Ten years later, in 2004, the corresponding values are 2.5 per cent for exports and 2.2 per cent for imports. Preliminary figures for 2005 seem to indicate a continuation of this trend.

The breakdown of the trade of the three major groups of countries on the continent is shown in table 49. In 2004, sub-Saharan African countries accounted for 45.5 per cent of African exports and 41.4 per cent of imports; for countries in North Africa the share of

exports, 34.6 per cent, was higher than that of imports, 31.7 per cent; and South Africa accounted for 19.9 per cent of exports and 27.0 per cent of imports. These shares have been broadly stable over the period.

The destination of African exports by value is indicated in table 50. For 2004, Europe, notably the European Union, was the market for about 40 per cent of African exports, while North America was the destination for about 18 per cent. The share for Japan, China and other Asian countries was about 15 per cent, which is roughly the same share for exports to the Middle East, Latin America and other countries. Intra-Africa markets account for the balance of African exports — about 10 per cent.

The breakdown of African exports to the European Union for 2004 is as follows: crude oil, gas and petroleum products accounted for 43.7 per cent of total exports, with 32.1 per cent corresponding to manufactures and 16.2 per cent to agricultural products. The corresponding percentages for African exports to North America are 76.0, 14.3 and 3.1 per cent respectively. Also in 2004,

Table 48

Merchandise trade of Africa

Year	Billion of \$		Percentage annual growth		World share in % for	
	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	129.1	27.4	0.8	2.4	2
2001	137.9	134.0	-7.1	3.8	2.4	2.2
2002	140.1	136.6	1.6	1.9	2.2	2.2
2003	175.1	162.8	25.0	19.2	2.4	2.2
2004	231.7	204.8	32.3	25.8	2.6	2.3

Source: UNCTAD secretariat from WTO *International Trade Statistics 2002*, Appendix Tables A4 and A5, and WTO *International Trade Statistics 2005*, Appendix Table A2.

Table 49

Composition of African trade by blocs

Year		Billions of dollars				Percentage			
		All Africa	Sub-Saharan Africa	Northern Africa	South Africa	Sub-Saharan Africa	Northern Africa	South Africa	
2002	Exports	140.1	62.3	48.1	29.7	44.4	34.3	21.2	100.0
	Imports	136.8	56.8	50.7	29.3	41.5	37.1	21.4	100.0
2003	Exports	175.2	76.5	62.2	36.5	43.7	35.5	20.8	100.0
	Imports	162.8	70.0	52.7	40.1	43.0	32.4	24.7	100.0
2004	Exports	231.7	105.4	80.2	46.0	45.5	34.6	19.9	100.0
	Imports	204.8	84.8	64.8	55.2	41.4	31.7	27.0	100.0

Source: UNCTAD secretariat from WTO *International Trade Statistics 2005*, Appendix — Trade by Region and Selected Countries, Tables A6 and A7.

Table 50

Destination of African exports in term of value

Destination markets for exports	Billion of dollars			Percentages		
	2002	2003	2004	2002	2003	2004
Exports to world	140.1	175.1	231.7	100.0	100.0	100.0
European Union	65.9	78.3	90.7	47.0	44.7	39.1
North America	20.9	31	43.2	14.9	17.7	18.6
Japan	4.2	4.8	7.0	3.0	2.7	3.0
China	4.5	7.2	13.5	3.2	4.1	5.8
Other Asian countries	12.5	14	18.2	9.0	8.0	7.9
Latin America	2.9	3.7	6.8	2.0	2.1	2.9
Middle East	2.6	2.9	3.3	1.9	1.7	1.4
Intra-Africa	15.5	18.9	23.1	11.1	10.8	10.0
Others	11.0	14.3	25.9	7.9	8.2	11.2

Source: UNCTAD secretariat from WTO *International Trade Statistics 2005*, Appendix Table A2.

the share of fuels in African exports to China was 64.7 per cent while the share of manufactures and agricultural products was 16.3 per cent each. For the same year the share of fuels in exports to Japan was much lower, 43.7 per cent, while the shares for manufactures and agricultural products were 16.3 per cent each.

Exports from sub-Saharan Africa to the United States increased from \$13.9 billion in 2002 to \$29.9 billion in 2004. Oil-exporting countries accounted for most of the

increase between these years: Nigerian exports almost trebled to \$16.2 billion in 2004, while those of Equatorial Guinea more than doubled to \$1.2 billion and Angolan ones increased by a third to \$4.5 billion. Small oil producers recorded more impressive increases — Chad from \$5.7 million to \$756 million and the Congo from \$182.1 million to \$857.6 million. Diversification of sub-Saharan African exports to the US market is being actively promoted as a result of the African Growth and Opportunity Act (AGOA) of 2000, whereby African consumption products are procured by major US

retailers. The potential for increased agricultural exports, however, seems to be also contingent on WTO rulings. In early 2005 that organization ruled against US subsidies to domestic cotton producers and, in welcoming the ruling, four West African cotton-producing countries reiterated their call for the total elimination of these subsidies. Overall, the share of sub-Saharan Africa exports to the United States accounted for 28.4 per cent of the total and dwarfed the share of imports from that country — only 6.4 per cent of the total \$5.4 billion recorded for 2004.

Table 51 shows the main African trading groups and their shares of export and import within the group and with the rest of Africa. Overall, trading within the group and with the rest of Africa remains low and undiversified. UEMOA ranks first in terms of intra-group exports (14.2 per cent), followed by ECOWAS (9.4 per cent) and SADC (9.3 per cent). Trade with the rest of Africa remains modest, with UEMOA ranking first in terms of exports (16.1 per cent), followed by CEPGL (12.5 per cent) and MRU (6.2 per cent). The share of imports of these groups with the rest of Africa amounted to 38.1 per cent for CEPGL, 16.2 per cent for ECCAS, 14.1 per cent for CEMAC and 13.4 per cent for UEMOA. In 2004, the trade of those groups with the rest of the world was more substantial — on average, over 85 per cent of the trade is destined for or originates outside Africa.

C. MARITIME TRANSPORT

In 2005 the African merchant fleet, including open registers (i.e. Liberia), totalled 98,563 thousand dwt, that is 10.3 per cent of the world fleet (see table 52). The African fleet without open registers totalled 5,537 thousand dwt; this is equivalent to 2.1 per cent of the fleet of developing countries and 0.6 per cent of the world fleet. There is a long-term decrease in shares of African fleets in the world fleets: the one including open registers decreased from 24.3 to 10.7 per cent between 1980 and 2000, while the one without open registers decreased from 1.1 to 0.8 per cent during the same period.

In 2005, the merchant fleet of countries in North Africa (Algeria, Egypt, Libyan Arab Jamahiriya, Morocco and Tunisia) and South Africa totalled 3.229 million dwt, which is equivalent to 58.3 per cent of the African merchant fleet without major open registry. The balance corresponded to the merchant fleet of sub-Saharan African countries. These countries, however, have

increased their tonnage from 1.773 million to 2.308 million dwt in the last three years and their share in the African merchant fleet, without major open registry, increased from 33 per cent in 2002 to 41.7 per cent in 2005. The largest increase has been in countries of the Indian Ocean, which more than doubled their tonnage during the period.

The African merchant fleet without major open registry is evenly spread between different types of vessels, the exception being the very low level of containerized cellular tonnage that accounts only for only 3.4 per cent of the total.

By the end of 2005 the average age of the merchant fleet of African developing countries, including major open registry, was 11.8 years and was therefore lower than the average age of the world merchant fleet, which was 12.2 years (see table 53). However, the average age of this fleet without taking into account major open registry was much older — 20.5 years. In both cases containerships were the youngest, recording 6.9 and 12.3 years respectively, while general cargo ships were the oldest with 17.3 and 22.1 years respectively. Comparison of the 2005 average age with the ages indicated in the same table for 2002 is not possible, since for that year the average age corresponds to that of the African sub-Saharan fleet only. For individual countries, however, fleet age comparisons between 2005 and 2002 are indeed possible.

The most recent estimates for the total of goods loaded and unloaded in African ports fluctuates around 860 million tons per year, with the share of sub-Saharan countries being above a third, namely 300 million tons. Hence the continent accounts for 6.1 per cent of the worldwide loaded and unloaded cargo, while sub-Saharan Africa accounts for almost 2.1 per cent of that total.

There is a considerable imbalance in the total cargo moved by sub-Saharan countries since loaded goods average 230 million tons per year, while the figure for unloaded ones, being less than a third of that total, is 70 million tons. The bulk of loaded cargo estimated at almost 200 million tons is crude oil from oil-exporting countries of West Africa, notably Nigeria, Gabon, Angola and recently Equatorial Guinea. Most of the balance is dry bulk cargo, bauxite from Guinea and iron ore from Mauritania, which fluctuates at around 15 million tons per year. The remaining tonnage of loaded cargo and

Table 51

Africa trade of main African trading groups in 2004

	Share of exports (percentage)		Share of imports (percentage)	
	Intra- group	Rest of Africa	Intra- group	Rest of Africa
Economic Community of the Great Lakes Countries (CEPGL): Burundi, Democratic Republic of the Congo, Rwanda	1.2	12.5	1.0	38.1
Common Market for Eastern and Southern Africa (COMESA): Angola, Burundi, Comoros, Democratic Republic of the Congo, Egypt, Ethiopia, Eritrea, Djibouti, Kenya, Madagascar, Malawi, Mauritius, Rwanda, Seychelles, Sudan, Swaziland, Uganda, Zambia, Zimbabwe	6.2	5.3	4.3	8.5
Economic Community of Central African States (ECCAS): Angola, Burundi, Cameroon, Central African Republic, Chad, Congo, Democratic Republic of the Congo, Equatorial Guinea, Gabon, Rwanda, Sao Tome and Principe	1.0	2.8	2.4	16.2
Economic Community of West African States (ECOWAS): Benin, Burkina Faso, Cape Verde, Côte d'Ivoire, Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Niger, Nigeria, Senegal, Sierra Leone, Togo	8.2	4.3	9.4	3.6
Mano River Union (MRU): Guinea, Liberia, Sierra Leone	0.4	6.2	0.1	5.0
Southern African Development Community (SADC): Angola, Botswana, Democratic Republic of the Congo, Lesotho, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, United Republic of Tanzania, Zambia, Zimbabwe	8.8	3.4	9.3	2.4
Economic and Monetary Community of Central Africa (CEMAC): Cameroon, Central African Republic, Chad, Congo, Equatorial Guinea, Gabon	1.2	2.5	3.3	14.1
West African Economic and Monetary Union (UEMOA): Benin, Burkina Faso, Côte d'Ivoire, Guinea-Bissau, Mali, Niger, Senegal, Togo	14.2	16.1	9.5	13.4
Arab Maghreb Union (UMA): Algeria, Libyan Arab Jamahiriya, Mauritania, Morocco, Tunisia	2.4	1.3	3.1	1.4

Source: UNCTAD secretariat estimates based on data from the International Monetary Fund and UN DESA; UNCTAD *Handbook of Statistics 2005*, table 1.4 (“Intra-trade of regional or trade groups”).

Table 52

African fleet
(In thousand dwt)

	Year	Total	Tanker	Dry bulk	General cargo	Container ships	Other
World total	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
	2002	844 234	304 396	300 131	97 185	82 793	59 730
	2005	959 964	354 219	345 924	96 218	111 095	52 508
African fleet with open registers	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
	2002	82 422	38 634	20 769	5 421	11 569	6 030
	2005	98 563	51 219	20 913	4 298	16 710	5 423
African fleet without open registers	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
	2002	5 406	1 215	1 337	1 447	139	1 269
	2005	5 537	1 527	1 275	1 270	189	1 275
Liberia	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
	2002	77 016	37 419	19 432	3 974	11 430	4 761
	2005	93 026	49 692	19 637	3 028	16 521	4 148
North Africa	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
	2002	3 575	490	1 186	896	108	895
	2005	3 115	588	1 054	570	154	749
South Africa	1980	839	63	287	190	240	59
	1990	299	1	0	0	216	82
	2000	368	5	0	0	262	101
	2002	59	4	0	0	30	25
	2005	114	10	0	0	30	74
Sub-Saharan Africa	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
	2002	1 773	721	151	551	2	349
	2005	2 308	929	221	701	5	452
West Africa	1980	1 309	277	0	966	0	66
	1990	1 102	439	0	451	0	212
	2000	877	529	0	164	0	184
	2002	871	594	0	99	0	178
	2005	825	487	13	82	0	242

Table 52 (continued)

	Year	Total	Tanker	Dry bulk	General cargo	Container ships	Other
Central Africa	1980	362	141	0	191	0	30
	1990	155		0	121	0	34
	2000	305	17	16	222	5	45
	2002	214	23	29	101	2	60
	2005	225	75	29	61	0	60
East Africa	1980	181	26	0	148	0	7
	1990	146	10	0	120	0	16
	2000	232	23	0	195	0	14
	2002	235	31	0	185	0	19
	2005	207	24	0	153	0	30
Indian Ocean	1980	133	15	0	111	0	7
	1990	151	4	0	127	0	20
	2000	230	17	5	92	69	47
	2002	452	73	122	165	0	93
	2005	1 051	342	179	405	5	120

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

about 90 per cent of total unloaded cargo are general cargo, which is increasingly carried in containers. About one tenth of unloaded cargo is refined petroleum products such as gasoline.

General cargo is carried to a large extent by containerized shipping services. Also, there are general cargo back-up services to many ports as well as services for specific port ranges. For instance, dhow traffic is found in the Horn and East Africa, while other specialized traffics such as those of logs and timber are prevalent in West Africa.

Container traffic flow between Africa and Europe is the largest for the continent and in 2004 reached 3.3 million TEUs; the corresponding flow between Africa and North America was only one tenth of that amount. Moreover, the largest traffic flow is heavily imbalanced, with the northbound container flow being only one third of the total. Container traffic flows with Asia are expanding fast, in particular with sub-Saharan Africa. International transport for this subregion is dominated by two sea carriers, namely Delmas, a subsidiary of Bolloré, and Maersk, with estimated shares of 30 and 25 per cent respectively. The balance is carried by a number of other, lesser sea carriers, including Gold Start

Line from Hong Kong (China), which specializes in intra-Asia trade and is rapidly expanding into both coasts of sub-Saharan Africa. In late 2005 this line launched direct services from Chennai (India) to West African destinations via Réunion. However, the absorption of sub-Saharan Africa trade volumes by the world's top sea container carriers continued in 2005 with the purchase of all of Bolloré's liner businesses by CMA-CGM for \$600 million. Top sea carriers often make use of large hubs — for example, Maersk uses Algeciras (Spain) and Salalah (Oman), and MSC uses Las Palmas (Spain) — to cover this traffic. At the south end, in spite of Durban's congestion and sluggish productivity, this port is used by other carriers.

Table 54 indicates the traffic flow in the containerized route linking the West Coast of Africa and Europe. Actual figures are given for 2003 and 2004, while those for 2005 are forecasts only. Trade imbalance is a major feature of this route, with the southbound flow accounting for around 66 per cent of total traffic.

Along the East Coast and in the Indian Ocean the emergence of trans-shipment and the resulting measures to palliate the build-up of congestion were the main feature of recent years (see table 55). Trans-shipment

Table 53

Age distribution of 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	Average age at end 2005	Average age at end 2002
World total	All ships	24.2	21.2	16.8	10.6	27.1	12.2	12.6
	Tankers	31.6	22.0	19.7	12.4	14.3	10.0	11.6
	Bulk carriers	19.7	21.6	16.6	10.2	32.0	13.1	12.7
	General cargo	8.6	13.9	10.6	9.6	57.4	17.5	17.0
	Containerships	32.1	28.3	17.3	8.2	14.0	9.4	9.1
	Others	18.2	14.5	11.2	8.8	47.3	15.3	16.0
Merchant fleet of African developing countries, including major open-registry (see note)	All ships	23.5	21.0	20.8	12.5	22.3	11.8	10.8
	Tankers	25.6	17.9	23.8	16.7	16.0	11.2	10.8
	Bulk carriers	9.7	25.8	21.9	10.5	32.2	14.0	11.9
	General cargo	1.9	23.4	10.0	12.6	52.1	17.3	14.0
	Containerships	46.1	27.7	15.6	4.5	6.2	6.9	6.7
	Others	9.6	12.3	14.7	7.1	56.2	17.2	12.4
Merchant fleet of African developing countries without major open-registry (see note)	All ships	2.9	8.5	5.6	5.4	77.6	20.5	22.1
	Tankers	7.7	1.5	1.4	0.0	89.4	21.4	22.9
	Bulk carriers	0.6	22.1	15.1	0.0	62.2	18.0	21.8
	General cargo	0.8	1.8	1.9	10.7	84.7	22.1	21.3
	Containerships	0.0	54.8	8.8	17.7	18.7	12.3	23.5
	Others	2.6	3.8	4.1	9.4	80.1	21.2	20.5
Algeria	All ships	0.9	0.0	1.4	0.0	97.7	23.2	n.a.
	Tankers	0.0	0.0	14.6	0.0	85.4	21.8	n.a.
	Bulk carriers	0.0	0.0	0.0	0.0	100.0	23.5	n.a.
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	n.a.
	Containerships	-	-	-	-	-	-	n.a.
	Others	1.7	0.1	1.2	0.0	97.0	23.0	n.a.
Angola	All ships	0.0	5.0	0.0	6.6	88.5	22.3	21.7
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	13.4	86.6	22.6	23.0
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	8.1	0.0	4.3	87.6	21.9	19.3
Benin	All ships	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Tankers	-	-	-	-	-	-	0.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	-	-	-	-	-	-	0.0
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	0.0	0.0	0.0	100.0	23.5	23.5
Cameroon	All ships	0.0	2.0	0.0	0.9	97.2	23.1	21.0
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	0.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	24.8	0.0	10.6	64.6	18.7	20.6

Table 53 (continued)

Country or grouping	Types of vessel	0-4	5-9	10-14	15-19	20 years	Average age at	
		years	years	years	years	and over	end 2005	end 2002
Cape Verde	All ships	0.0	2.9	2.9	3.0	91.2	22.5	22.1
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	4.9	4.8	0.4	90.0	22.1	21.9
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	0.0	0.0	11.6	88.4	22.7	21.1
Comoros	All ships	0.0	0.0	0.0	2.3	97.7	23.3	23.4
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Bulk carriers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	General cargo	0.0	0.0	0.0	4.8	95.2	23.2	22.9
	Containerships	0.0	0.0	0.0	0.0	100.0	23.5	0.0
	Others	0.2	0.0	0.9	1.1	97.8	23.3	21.9
Congo	All ships	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Tankers	-	-	-	-	-	-	0.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	-	-	-	-	-	-	0.0
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	0.0	0.0	0.0	100.0	23.5	23.5
Congo, Democratic Republic of the	All ships	0.0	0.0	3.0	0.0	97.0	23.2	23.1
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	0.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	0.0	3.5	0.0	96.5	23.1	23.1
Côte d'Ivoire	All ships	0.0	0.0	0.0	1.1	98.9	23.4	23.5
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	-	-	-	-	-	-	0.0
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	0.0	0.0	1.5	98.5	23.4	23.5
Djibouti	All ships	0.0	2.7	0.0	0.0	97.3	23.1	21.6
	Tankers	-	-	-	-	-	-	0.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	14.5	0.0	0.0	85.5	21.1	18.7
Egypt	All ships	1.6	22.2	13.6	4.8	57.9	17.6	n.a.
	Tankers	0.2	0.0	0.2	0.0	99.6	23.4	n.a.
	Bulk carriers	0.0	38.1	26.0	0.0	35.9	14.2	n.a.
	General cargo	1.8	4.6	4.7	19.4	69.5	20.6	n.a.
	Containerships	0.0	100.0	0.0	0.0	0.0	7.0	n.a.
	Others	15.1	1.8	7.1	8.1	67.9	18.6	n.a.

Table 53 (continued)

Country or grouping	Types of vessel	0-4	5-9	10-14	15-19	20 years	Average age at	
		years	years	years	years	and over	end 2005	end 2002
Equatorial Guinea	All ships	0.0	5.9	0.0	29.7	64.3	20.6	22.1
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	0.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	24.2	0.0	0.0	75.8	19.5	23.5
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	0.0	0.0	40.5	59.5	20.9	21.6
Eritrea	All ships	0.0	1.4	0.5	0.0	98.0	23.2	23.1
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	12.8	4.8	0.0	82.5	20.8	20.0
Ethiopia	All ships	0.0	0.0	0.0	18.6	81.4	22.3	16.3
	Tankers	-	-	-	-	-	-	12.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	18.6	81.4	22.3	16.5
	Containerships	-	-	-	-	-	-	0.0
	Others	-	-	-	-	-	-	0.0
Gabon	All ships	0.0	9.5	0.0	18.9	71.6	20.7	19.5
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	14.1	0.0	12.9	73.0	20.3	18.7
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	6.3	0.0	29.5	64.1	20.5	19.5
Gambia	All ships	40.1	4.7	0.0	0.0	55.2	14.1	18.2
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	0.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	100.0	0.0	0.0	0.0	0.0	2.0	0.0
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	30.7	0.0	0.0	69.3	18.4	18.2
Ghana	All ships	0.0	0.2	0.6	10.4	88.7	22.7	23.0
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Bulk carriers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	22.8
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	0.3	0.8	13.5	85.4	22.5	23.0
Guinea	All ships	0.0	0.9	0.0	2.1	97.1	23.2	23.2
	Tankers	-	-	-	-	-	-	0.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	0.9	0.0	2.2	96.9	23.2	23.2

Table 53 (continued)

Country or grouping	Types of vessel	0-4	5-9	10-14	15-19	20 years	Average age at	
		years	years	years	years	and over	end 2005	end 2002
Guinea-Bissau	All ships	0.0	0.0	0.0	6.9	93.1	23.1	23.1
	Tankers	-	-	-	-	-	-	0.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	0.0	0.0	7.7	92.3	23.0	23.0
Kenya	All ships	5.0	0.9	10.1	11.3	72.7	20.4	20.7
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	76.9	0.0	23.1	14.7	14.7
	Containerships	-	-	-	-	-	-	0.0
	Others	12.0	2.1	2.1	27.1	56.8	18.6	19.5
Libyan Arab Jamahiriya	All ships	0.1	8.7	9.8	24.9	56.6	19.3	n.a.
	Tankers	0.0	67.6	0.0	0.0	32.4	12.3	n.a.
	Bulk carriers	-	-	-	-	-	-	n.a.
	General cargo	0.0	0.0	0.0	30.5	69.5	21.5	n.a.
	Containerships	-	-	-	-	-	-	n.a.
	Others	0.2	0.2	36.8	24.0	38.8	17.6	n.a.
Madagascar	All ships	0.0	0.6	6.2	2.5	90.7	22.5	22.3
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	5.4	0.0	94.6	22.9	23.0
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	3.1	15.5	12.2	69.3	20.4	19.1
Mauritania	All ships	0.0	5.1	0.2	15.2	79.4	21.6	20.7
	Tankers	-	-	-	-	-	-	0.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	5.2	0.3	15.7	78.8	21.6	20.6
Mauritius	All ships	11.0	5.1	30.9	8.7	44.3	16.2	14.4
	Tankers	-	-	-	-	-	-	0.0
	Bulk carriers	100.0	0.0	0.0	0.0	0.0	2.0	4.0
	General cargo	0.0	23.0	0.0	31.8	45.2	17.6	14.9
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	0.3	45.5	2.9	51.2	18.0	19.1
Morocco	All ships	0.4	10.6	7.5	26.2	55.3	19.1	n.a.
	Tankers	0.0	51.5	48.5	0.0	0.0	9.4	n.a.
	Bulk carriers	-	-	-	-	-	-	n.a.
	General cargo	0.0	2.1	9.8	8.6	79.6	21.5	n.a.
	Containerships	0.0	30.5	14.6	29.2	25.7	14.9	n.a.
	Others	0.7	1.7	1.4	30.8	65.4	20.9	n.a.

Table 53 (continued)

Country or grouping	Types of vessel	0-4 years	5-9 years	10-14 years	15-19 years	20 years and over	Average age at end 2005	Average age at end 2002
Mozambique	All ships	0.0	32.4	1.9	10.1	55.6	17.3	15.3
	Tankers	-	-	-	-	-	-	0.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	7.5	92.5	23.0	22.6
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	52.7	3.2	11.8	32.4	13.7	10.8
Nigeria	All ships	0.7	1.7	1.1	0.1	96.4	22.9	23.1
	Tankers	0.0	1.3	1.3	0.0	97.4	23.1	23.5
	Bulk carriers	0.0	0.0	0.0	0.0	100.0	23.5	0.0
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	21.4
	Containerships	-	-	-	-	-	-	0.0
	Others	3.6	3.9	0.9	0.3	91.3	22.0	20.2
Sao Tomé and Príncipe	All ships	0.0	0.0	0.0	0.0	100.0	23.5	23.1
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	21.0
	Bulk carriers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Containerships	-	-	-	-	-	-	23.5
	Others	0.0	0.0	0.0	0.0	100.0	23.5	23.5
Senegal	All ships	1.4	1.5	0.0	8.3	88.8	22.4	22.2
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	19.3
	Containerships	-	-	-	-	-	-	0.0
	Others	1.6	1.7	0.0	9.3	87.5	22.3	22.4
Seychelles	All ships	78.8	6.0	0.3	2.6	12.2	5.4	10.9
	Tankers	100.0	0.0	0.0	0.0	0.0	2.0	2.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	16.3	11.6	0.0	72.1	19.5	19.1
	Containerships	-	-	-	-	-	-	0.0
	Others	1.8	29.7	0.0	14.2	54.4	17.3	16.3
Sierra Leone	All ships	0.0	0.0	0.1	7.2	92.7	23.0	22.9
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	27.2	72.8	21.7	23.5
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	0.0	1.0	25.9	73.2	21.7	20.7
Somalia	All ships	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	0.0	0.0	0.0	100.0	23.5	23.5

Table 53 (continued)

Country or grouping	Types of vessel	0-4	5-9	10-14	15-19	20 years	Average age at	
		years	years	years	years	and over	end 2005	end 2002
Saint Helena	All ships	0.0	51.6	0.0	0.0	48.4	15.0	23.5
	Tankers	-	-	-	-	-	-	0.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	-	-	-	-	-	-	0.0
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	51.6	0.0	0.0	48.4	15.0	23.5
Sudan	All ships	3.3	0.0	0.0	0.0	96.7	22.8	23.5
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Containerships	-	-	-	-	-	-	0.0
	Others	40.0	0.0	0.0	0.0	60.0	14.9	23.1
Togo	All ships	0.0	0.0	0.0	4.2	95.8	23.2	23.4
	Tankers	-	-	-	-	-	-	0.0
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	0.0	0.0	5.9	94.1	23.1	23.4
Tunisia	All ships	0.1	12.7	0.2	0.4	86.6	21.3	n.a.
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	n.a.
	Bulk carriers	0.0	0.0	0.0	0.0	100.0	23.5	n.a.
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	n.a.
	Containerships	-	-	-	-	-	-	n.a.
	Others	0.2	36.3	0.7	1.2	61.6	17.3	n.a.
United Republic of Tanzania	All ships	0.0	0.7	0.0	0.1	99.2	23.4	23.2
	Tankers	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Bulk carriers	-	-	-	-	-	-	0.0
	General cargo	0.0	0.0	0.0	0.0	100.0	23.5	23.5
	Containerships	-	-	-	-	-	-	0.0
	Others	0.0	16.2	0.0	2.0	81.8	20.7	21.5

Note: The fleet age at the end of 2002 is for sub-Saharan African countries only.

Table 54

Container traffic between the West Coast of Africa and Europe
(In thousands of TEUs)

Year	Southbound flow	Northbound flow
2003	534	278
2004	532	281
2005	556	286

Source: *Containerisation International*, September 2005, p. 5.

Table 55

Total and trans-shipment throughput in selected ports and years
(In thousands of TEUs)

Description	Dar-es-Salaam	Port Louis	Djibouti
2002 throughput	167	176	177
Trans-shipment	25	20	67
Trans-shipment percentage	15	11	38
2003 throughput	204	319	241
Trans-shipment	37	146	105
Trans-shipment percentage	18	46	44
2004 throughput	256	410	157
Trans-shipment	56	221	5
Trans-shipment percentage	22	54	3

Source: UNCTAD secretariat from PMAESA presentation to the World Bank Transport Forum, March 2005, Washington, DC.

featured prominently in Port Louis when several lines made agreements to use it as a hub, and as a result the share in the total throughput increased from 11 to 54 per cent in just two years. By 2004 berthing delays had shot up to 20 hours per ship and berth occupancy was above 80 per cent. This congestion made it necessary to take remedial measures, such as procuring additional handling equipment, revamping terminal operations and adopting the “berth window scheme”. Although in the case of Djibouti the trans-shipment share was only 44 per cent, this was deemed unacceptable to the main customer, PIL, which moved back to Aden, so that by 2004 the trans-shipment share had gone down to only 3 per cent. A substantial share of the throughput of this port is transit cargo for landlocked Ethiopia. Trans-shipment traffic increased in Dar-es-Salaam from 15 per cent of the 2002 throughput to 22 per cent two years later, without adversely affecting the quality of service.

The development of trans-shipment cannot be seen in isolation from the involvement of specialized container terminal operators in cargo-handling activities. In Mauritius, there was a public-sector cargo-handling company, while HPH was operating in Dar and DPI in Djibouti.

Table 56 shows the top 20 African container ports for 2004 and their throughputs for that year and the previous one. These ports make up three quarters of the total container throughput for African ports. Sixteen of the 31 coastal and island countries are listed, with South Africa and Egypt having more than one entry — four and two ports respectively. Although many of the African ports recorded significant throughput increases in recent years, their total throughput in relation to the world’s total remains modest at about 3.3 per cent.

Table 56

Top African container ports for 2004

2004 Rank	Port	Country	TEUs		Percentage change
			2004	2003	
1	Durban	South Africa	1 717	1 511	13.6
2	Damietta	Egypt	1 263	955	32.2
3	Abidjan	Côte d'Ivoire	670	613	9.4
4	Cape Town	South Africa	570	533	6.9
5	Casablanca	Morocco	492	448	9.8
6	Lagos	Nigeria	444	486	-8.7
7	Mombasa	Kenya	404	331	22.3
8	Tema	Ghana	340	350	-2.9
9	Dakar	Senegal	331	281	17.7
10	Port Elizabeth	South Africa	323	274	17.6
11	Port Louis	Mauritius	290	381	-23.9
12	Dar-Es-Salaam	United Republic of Tanzania	260	204	27.5
13	Luanda	Angola	235	210	12.1
14	Port Sudan	Sudan	206	157	31.2
15	Port Reunion	Reunion	193	170	13.5
16	Lome	Togo	185	166	11.1
17	Djibouti	Djibouti	159	244	-34.8
18	Sokhna	Egypt	155	122	27.2
19	Toamasina	Madagascar	105	95	10.8
20	East London	South Africa	60	56	7.3
Total top 20			8 402	7 587	10.7
Total all African ports			11 239	9 661	16.3
Top twenty share in African ports			74.8	78.5	

Source: *Containerisation International Yearbook, 2006*.

The largest share of Africa's container throughput is handled in terminals under the control of the public sector — 88.2 per cent and 83.9 per cent in 2003 and 2004 respectively. The share of global container terminal operators in the remaining share has continued to increase — from 5.4 per cent in 2003 to 11 per cent in 2004. For the latter year a breakdown by operator reveals the following shares — SSA Marine 2.3 per cent, DPI 2 per cent, APM Terminals 1.4 per cent, HPH 0.5 per cent and P&O Ports 0.2 per cent.

Further improved operational efficiency and investments continued to be sought by Governments through the landlord port model. This was apparent in West Africa with the concession, in March 2004, of the Vridi Container Terminal in Abidjan to SEDV (a subsidiary of Bolloré) and, in 2005, of two container terminals in Lagos — in

April the Apapa Terminal was awarded to Maersk and in September the Tin Can Island Terminal was awarded to Bolloré associated with Gold Star Lines. Bolloré's land-based transport businesses, such as port terminals, freight forwarding, ship agencies, and road and rail companies, were not divested to CMA-CGM and are important players in several ports of the region such as Douala (Cameroon), Cotonou (Benin) and Tema (Ghana).

The alternative approach was followed by South Africa during 2005. Ports in that country were adversely affected by lack of investment and militant labour opposition to changing the current institutional set-up. Transnet, the holding encompassing transport businesses at the national level, including ports, was authorized to invest up to \$8.8 billion to rehabilitate railways and ports

over the next five years using reserves and loans from the capital markets.

An indication of freight rate evolution 2003–2005 is provided by the rate restorations announced by the Europe West Africa Trade Agreement (EWATA) during that period. The latter was established for sea carriers in late 1999 in accordance with EU Regulation 4056/86 and is responsible for a large share of the international traffic of sub-Saharan Africa. During 2003 there were rate restorations in April and October for southbound 20' containers of 350 euro each. In 2004 the rate restorations were for March and October for southbound 20' containers. The one in March fluctuated between 100 and 300 euros according to the port of destination, while the one in October was 200 euros for all ports. In October there were northbound rate restorations for conventional cargo of 7.50 euros per freight ton. During 2005, rate restorations were announced for January and July for southbound 20' containers of 150 and 250 euros respectively. Rate restorations for northbound conventional cargo were also made in those months for 5 and 12 euros per freight ton.

D. LINER SHIPPING CONNECTIVITY INDEX FOR AFRICAN COUNTRIES

Access to regular and frequent shipping services is an important trade enabler and a determining factor of nations' competitiveness. In 2004, the UNCTAD secretariat developed a measure specific to maritime containerized liner trade — the *Liner Shipping Connectivity Index* (LSCI) — to quantify this factor of countries' competitiveness. The LSCI is built up by taking nine elements into consideration and ranges from 100 to zero. Countries with a high index benefit from regular and frequent shipping services that place them at the centre of international trading activity, while those with a lower index are on the periphery of such activity. Therefore, the index measures the connectivity of a country to international trade. Box 4 describes the LSCI and the way in which it is elaborated.

Table 57 displays African countries 2004 and 2005 LSCI levels. The top three, and best connected countries, were Egypt, South Africa and Côte d'Ivoire, while Sao Tome and Principe, Eritrea and Somalia were the least connected African countries.

A number of countries, among them the top two, increased their index between 2004 and 2005. The LSCI

for Egypt and South Africa moved up from 41 to 47 and from 27 to 29 respectively. Egypt benefits from the Suez Canal and, because of the recent commissioning of trans-shipment port facilities, also from additional port calls of vessels deployed on the booming Asia–Europe route. South Africa enjoys a broad cargo base from national and neighbouring countries' economies. Fourteen other African countries also improved their LSCI in 2005 (Angola, Cape Verde, Djibouti, Ghana, Guinea, Guinea-Bissau, Kenya, Mauritania, Seychelles, Sudan, Sao Tome and Principe, United Republic of Tanzania, Gambia and Tunisia), with Djibouti, Guinea-Bissau, Kenya and Mauritania recording the best performance. The LSCI growth of these countries is due to recent global trade growth and to improved shipping services brought about by port reform and private sector involvement in cargo handling. Concessions granted to global terminal operators, including operators affiliated to liner shipping companies, helped to improve performance and attracted not only parent liner shipping companies, but also other shipping lines as well. In other cases there were other factors at work. In Ghana, the index improvement was partly due to increased capacity deployed by shipping lines to cope with traffic diverted from neighbouring Côte d'Ivoire, while in Djibouti the index went up as a reflection of increased ship calls to cater for increased trade from landlocked Ethiopia.

Other countries witnessed a drop in the index. Côte d'Ivoire's LSCI dropped from 25 to 20 as a result of businesses lost to ports of neighbouring countries. Nevertheless, this country continued to rank high thanks to resilient local traffic and trans-shipment activity. Nine other countries saw their LSCI position deteriorate in 2005 (Comoros, Congo, Equatorial Guinea, Eritrea, Madagascar, Mauritius, Senegal, Somalia and Togo), with the sharpest declines recorded by Comoros, Eritrea, Madagascar and Somalia. The drastic decline of Mauritius's LSCI is due to the 2004 congestion that led some shipping companies, such as MOL and P&O Nedlloyd, to modify their schedules — the latter replaced the trans-shipment in Port Louis with a direct service from Singapore to Indian Ocean islands. Finally, 12 countries maintained their 2004 LSCI (Algeria, Benin, Cameroon, Democratic Republic of the Congo, Gabon, Liberia, Libyan Arab Jamahiriya, Morocco, Mozambique, Namibia, Nigeria and Sierra Leone).

The gap between the index recorded by countries at the top and at the bottom of table 57 should be put in perspective as it only refers to containerized shipping

Box 4

Liner Shipping Connectivity Index

The *Liner Shipping Connectivity Index* (LSCI) focuses on containerized traffic and is generated from data available from *Containerisation International Online* (www.ci-online.co.uk). It was calculated for the first time in July 2004 for 162 countries, and was updated in July 2005 to reflect annual changes in liner shipping services.

Nine factors, or variables, are considered in the LSCI calculation. Each pertains to ports of a given country: (1) the number of containerships deployed on the liner services from/to a country's ports; (2) the container carrying capacity deployed, measured in TEUs; (3) the per capita number of ships deployed; (4) the per capita container carrying capacity deployed; (5) the number of liner shipping companies servicing a country's ports; (6) the number of liner services provided by shipping lines; (7) the maximum size of vessels deployed; (8) the average size of vessels deployed; and (9) the average number of vessels operated per liner shipping company.

Each variable has been standardized to ensure all variables have the same maximum value of 100 and minimum value of 0. Obviously, LSCI is zero for landlocked countries. As a second step, the average value of each variable is calculated for each country and the highest average value is set to equal 100 in 2004, which is the base year.

A large number of ships and a large amount of carrying capacity deployed indicate that shippers of a given country have more opportunities to load their containerized exports and are better connected to foreign markets. By taking into account a country's population, it is possible to distinguish the special case of countries that are sparsely populated and have a weak national cargo base, but enjoy high liner shipping connectivity levels because of their position as trans-shipment centres. The larger the number of shipping companies serving the ports of a given country and the greater the number of liner services provided, the more connected to international markets is the country. The relevance of the size of vessels deployed by shipping lines relates to the economies of scale that could be reaped — the larger the size of vessels deployed, the more likely it is that traders of a given country would benefit from lower freight rates generated through economies of scale that accrue to shipping lines.

services. Nevertheless, on account of the predominance of extraregional trade in the total trade of the African countries and the high value implied by goods moving in containers, the index gives a good assessment of the ability of African countries to participate in the most rewarding segments of international trade.

E. INLAND TRANSPORT

The inland transport network in Africa is about 2.06 million km: the road network is paramount, while the rail network has a share of only 4 per cent. This share is slightly higher than that found in Latin America and in the United States, which are around 3.5 per cent. The density of the African road and rail transport networks, however, is considerably lower and accounts for only 65.0 and 2.7 km per sq. km of territory

respectively, or about a tenth of the corresponding densities found in the United States. Moreover, only about a quarter of the road network is paved, the quality of the roads varying substantially from one country to another.

Transport corridors are an important feature of the international trade of sub-Saharan African countries since they connect landlocked countries with ports of coastal transit countries (see map). In West Africa seaports are linked to landlocked countries through several corridors. There are corridors linking Dakar (Senegal) to Bamako (1,250 km); Abidjan (Côte d'Ivoire) to Ouagadougou (1,176 km) and onwards to Bamako (74 km); Tema (Ghana) to Ouagadougou (990 km); Lomé (Togo) to Ouagadougou (990 km) and onwards to Bamako (1,081 km); Lomé (Togo) to Niamey (1,240 km)

Table 57

Africa's Liner Shipping Connectivity Index, 2004–2005

Country	Index 2005	Index 2004
Egypt	47	41
South Africa	29	27
Côte d'Ivoire	20	25
Ghana	19	18
Mauritius	19	25
Nigeria	18	18
Gabon	18	18
Togo	18	19
Senegal	18	19
Djibouti	18	15
Benin	17	17
Angola	16	15
Cameroon	16	16
Congo	16	18
Mauritania	15	10
Guinea	14	11
Namibia	14	14
Kenya	12	9
Seychelles	12	11
United Republic of Tanzania	12	11
Gambia	12	10
Liberia	11	11
Sierra Leone	11	11
Morocco	11	11
Algeria	11	11
Equatorial Guinea	11	12
Comoros	11	14
Sudan	10	9
Mozambique	10	10
Madagascar	10	12
Guinea-Bissau	9	4
Tunisia	9	8
Libyan Arab Jamahiriya	8	8
Cape Verde	6	4
Democratic Republic of the Congo	5	5
Sao Tome and Principe	4	3
Somalia	3	6
Eritrea	3	6

Source: UNCTAD Transport Newsletter No. 27, first quarter 2005, p. 4; UNCTAD Transport Newsletter No. 29, third quarter 2005, p. 7.

and Cotonou (Benin) to Niamey (1,060 km); the latter could be combined with rail transport. Rail links are found in two corridors, namely Dakar–Bamako (1,250 km) and Abidjan–Ouagadougou (1,249 km).

Traffic flows in these corridors fluctuate with events in coastal transit countries. Since the beginning of the decade domestic political turmoil has substantially reduced Abidjan's share in this transit traffic. In 2003 it stood at only 6 per cent (see table 58), and the difficulties in using land routes through Côte d'Ivoire have forced traffic to move through neighbouring Tema, which in 2003 recorded a 22 per cent share of this transit traffic. It also led to the \$250 million plan to expand the small port of Takoradi to prevent congestion from reaching unmanageable levels in Ghana's ports.

In Central Africa, however, the Central African Republic and Chad rely on a single transit country — Cameroon. About 80 per cent of the road traffic to those two countries takes place on just two road corridors: the Douala–Ngaoundere–Bangui corridor (1,500 km) and the Douala–Ngaoundere–Ndjamena corridor (2,100 km). As the condition of the road on these corridors is poor, long delays affect the movement of goods — cargo travelling from Douala to Bangui takes five days in the dry season and up to 10 days in the rainy season. Other routes using other coastal countries such as Congo, Gabon and Nigeria are of lesser importance.

Further south, corridors are in the making since substantial railways upgrading is being planned and will be available in the medium term. The \$2 billion loan

made by China to Angola for developing infrastructure includes the rehabilitation of the Benguela railway, which goes across the country to link mineral-rich Congolese southern provinces with the port of Lobito. In a separate development Zambia signed a MOU with a private company to build a railway link to connect the new mines of Kansanshi and Lumwana in its north-western province to the Benguela line.

In East Africa road transport corridors are also dominant. It was estimated that only 25 per cent of containerized cargo uses the railway between Mombasa (Kenya) and the three landlocked countries of Uganda, Rwanda and Burundi, while for the Tanzanian corridor from Dar that share is 43 per cent. Nevertheless, efforts have been made to boost railway productivity in this region. During 2003 and 2004 tariffs for carrying a 20' container between Mombasa and Embakasi (the dry port close to Nairobi) were reduced by \$60 to \$390 and plans to run three block trains to Kampala (Uganda) in less than 54 hours were made. The share of railways is set to increase in the future as a result of investments to be made by private sector railway operators.

The concession process to engage these railway operators has been a protracted one in many countries owing to a number of factors, including the enactment of laws. In late 2003 it was decided that the three railways in East Africa (Kenya, Uganda and United Republic of Tanzania) would be privatized separately, although a joint process was under consideration. A retrenchment programme for the labour force was one of the problems to be solved ahead of the

Table 58

Transit traffic going through West African ports in 2003
(In thousands of metric tons)

Landlocked country	International trade	International trade going through different ports					
		Dakar	Abidjan	Tema	Takoradi	Lomé	Cotonou
Burkina Faso	1 126	Nil	28	330	29	703	37
Niger	1 083	Nil	Nil	78	30	175	800
Mali	1 584	653	177	423	97	221	14
Total	3 793	653	204	831	156	244	851
Percentage taken per port		17	6	22	4	29	22

Source: UNCTAD secretariat from Summary of Port Statistics — Michael Luguje, WMU dissertation entitled “A comparative study of import transit corridors of landlocked countries in West Africa”, 2004.

Figure 10

Sub-Saharan Africa: selected inland transport corridors



process. With regard to the United Republic of Tanzania, about 9,100 workers were involved and it was estimated that the retrenchment would cost \$41 million. In Kenya, it was necessary to amend the Railways Act. In mid-2004 a memorandum of understanding was signed by Kenya and Uganda on the modalities for the concession, having in view a single concessionaire for the line Mombasa (Kenya) to Kampala (Uganda) for 25 years. The total length involved was 1,920 km, out of the 2,064 km of the Kenya network, plus three sections in Uganda — 270 km on the Malaba–Kampala mainline, the Port Bell branch line and the 161 km line linking Tororo to Soroti. The duration of the concession was 25 years for freight and 7 for passenger trains. A large amount of time was allocated for attracting enough bidders and shareholding structure including local interests. In mid-2005 pre-qualified bidders submitted their offers, with two consortiums from India and South Africa being involved in the Tanzanian and the joint Kenya–Uganda tenders. The winner of the concession in Kenya and Uganda is expected to take over the line during the first half of 2006, while with regard to the United Republic of Tanzania the declared winner is waiting for the objection raised by another bidder to be resolved.

Further south, in Mozambique and Malawi there were other factors at work. The rehabilitation work on the line from Maputo (Mozambique) to the South African border was contingent on certification that the line was landmine-free, and this was received by the end of 2003. Then in 2005 there were negotiations with Spoornet, the South African rail operator, for contracting out the line. For the northern line from Nacala (Mozambique) to the Malawi border a joint venture was established in the late 1990s between CFM (the national railway company) and CDN, a consortium of other public and private local interests with a US railroad investor, and negotiations went on for a number of years, with the search for finance being the most difficult.

In the meantime, the railways of Malawi went on concession in 2000 and the winner was CEAR, an operator whose shareholders included those of the Mozambican joint venture. CEAR was set to run for 20 years the 707 km Malawi railway network, on which passengers and freight (i.e. fuels, maize, cement, etc.) move to the main markets of Lilongwe and Blantyre. Investors realized, however, that the potential of this network was large as it can work as a connector for the neighbouring countries of Mozambique and Zambia. Thus the ports of Nacala and Beira in Mozambique could

serve Zambia through Malawi, provided that the 26 km rail link from Mchinji (Malawi) to Chipata (Zambia) is available.

In 2004, CDN obtained \$29.6 million from a US federal funding institution to refurbish 77 km of line between Cuamba (Mozambique) and Entrelagos (Malawi) that will link the CEAR and CDN networks and give Malawi access to the sea at Nacala. This effectively launched the 15-year CDN concession in early 2005. In a separate development USAID awarded, in 2004, a grant to conduct a feasibility study for the line from Mchinji to Chipata, which is estimated to cost \$30 million. Later in the same year the World Bank made a \$110 million loan to CFM to refurbish 900 km of line connecting the port of Beira with the Malawi border.

Rehabilitation and upgrading, including divestiture, of other railways were at different stages of consideration during the period 2003–2005. In 2004, a study to divest the TAZARA railways running from Dar to landlocked Zambia was being conducted with a World Bank loan. In the same year, South African interests conducted a technical study of the line from Khartoum to Port Sudan as a prerequisite for procuring rolling stock. Also, the concession of the line from the port of Djibouti to Addis Ababa (Ethiopia) attracted half a dozen interested parties. In Swaziland, the legal framework for allowing leasing of the railways was approved in mid-2005 after commissioning of the upgraded 111 km line with Italian funding.

Moreover, improvement of the institutional framework and documentary procedures contributes to reaping the potential of existing corridors, as shown by the pilot technical assistance project undertaken by UNCTAD in the TransCaprivi Corridor linking Walvis Bay (Namibia) with Lusaka (Zambia).

F. AIR TRANSPORT

Air freight plays an important role in the competitiveness of African goods in world markets. In 2004, the 84 African cargo airports handled about 1.4 million tonnes of cargo, and this resulted in a 2 per cent share of cargo handled by world airports.

Table 59 lists the top 20 African airports for 2004 and the growth rate in cargo handled as compared with the previous year. Double-digit traffic growth was recorded for twelve airports, an indication of the dynamism of this traffic. Johannesburg airport was placed in the top

position with 262,523 tonnes of cargo, but traffic increased only by a modest 2.6 per cent. Europe is Africa's largest trade partner, representing about 70 per cent of total flows into and out of the region, and is still poised to expand following the enlargement of the EU.

G. TRANSPORT COSTS AND THEIR IMPACT ON THE IMPORT BILL

Cost factor for import trades

Table 60 provides estimates of total freight payments for imports, as well as freight costs as a percentage of total import value for various country groups. In 2004, the total freight costs of African developing countries as proportion of import value was 9.9 per cent, which is considerably higher than the average of 5.9 per cent for developing economies and almost treble the world average.

The regional average masks differences among trading areas. The cost factor for import trades for countries in North Africa is the lowest, reaching 8.8 per cent, and is followed by the freight factor for countries in Southern Africa and Central Africa, which recorded 9.0 and 9.5 per cent respectively. Countries in West Africa and in the Horn and East Africa reached 10.9 and 12.6 per cent respectively. The average freight factor for import trades for countries in sub-Saharan Africa reached 10.3 per cent.

Cost factor for import trades of selected landlocked countries

Landlocked developing countries in Africa continued to suffer from excessive transport costs, as table 61 indicates. High import transport costs inflated the consumer prices of imported goods and high transport costs for exports undermined their competitiveness in

Table 59

Top African cargo airports

Rank	Airport	Freight in tonnes	% increase from previous year
1	Johannesburg	262 523	2.6
2	Cairo	218 606	24.6
3	Nairobi	183 470	10.2
4	Kinshasa	70 861	37.3
5	Lagos	66 042	19.0
6	Entebbe	48 585	32.7
7	Casablanca	48 193	7.5
8	Accra	46 918	1.6
9	Brazzaville	43 994	100.9
10	St. Denis	32 305	8.8
11	Addis Ababa	26 033	24.6
12	Algiers	23 947	8.3
13	Tunis	21 516	3.0
14	Dakar	20 165	22.4
15	Lusaka	18 465	12.1
16	Mwanza	17 863	30.4
17	Luanda	17 158	3.1
18	Antananarivo	16 326	10.6
19	Libreville	14 400	8.7
20	Dar es Salaam	14 376	16.5

Source: Airports Council International 2004 (www.airports.org).

foreign markets. Transport costs are defined as the direct and indirect costs which are incidental to the transportation of goods from their point of loading to their destinations. The major elements accounting for the high freight costs for landlocked developing countries included

inefficient transport facilities and their management, imbalanced trades, inadequate overall infrastructure and inefficient or cumbersome government regulations.

Table 60

Estimates of total freight costs on imports of African countries, 2004
(In billions of dollars)

Year	Country group	Estimate of freight cost of imports	Value of imports (c.i.f.)	Freight costs as percentage of import value
2004	World total	270.8	9 244.7	3.6
	Developed economies	157.7	5 928.4	3.1
	Developing economies	75.8	1 945.2	5.9
	<i>of which in:</i>			
	Africa	9.9	151.5	9.9
	<i>of which:</i>			
	North Africa	4.0	68.7	8.8
	Southern Africa	0.8	13.5	9.0
	West Africa	2.3	32.1	10.9
	Horn & East Africa	1.9	22.9	12.6
Central Africa	0.9	14.3	9.5	
Sub-Saharan Africa	5.9	82.8	10.3	

Source: Imports based on merchandise imports data from the *UNCTAD Handbook of Statistics 2005* (table 1.1); freight and insurance data from the *IMF Balance of Payments Statistics on CD-ROM* (January 2006); freight ratio estimated as weighted average based on size of economies. This table is not comparable with those found in previous issues of the *Review of Maritime Transport* owing to changes in sources and methodology.

Table 61

Estimates of freight costs on imports for selected African landlocked countries in selected years
(In millions of dollars)

Year	Country group	Estimate of freight cost of imports	Value of Imports (CIF)	Freight costs as percentage of import value
	Southern Africa			
2002	Malawi	101.0	695	14.5
2000	Zambia	108.6	993	10.9
	Western Africa			
2001	Burkina Faso	92.5	656	14.1
2003	Mali	275.8	1 130	24.4
2003	Niger	117.3	490	23.9
	Eastern Africa			
2003	Burundi	20.9	157	13.3
2004	Rwanda	61.0	284	24.1
2004	Uganda	288.3	1 657	17.4

Source: Imports based on merchandise imports data from the UNCTAD *Handbook of Statistics 2005* (table 1.1); freight and insurance data from the IMF *Balance of Payments Statistics on CD-ROM* (January 2006). This table is not comparable with those found in previous issues of the *Review of Maritime Transport* owing to changes in sources and methodology.

Notes

¹ The totals reported by BP Statistical Review of World Energy, June 2005, include crude oil, shale oil, oil sands and natural gas liquids (NGL) – the liquid content of natural gas when this is recovered separately.

² Measured at 15 degrees C and 1013 mbar.

³ See website www.vhss.de/englisch/hax.html.

⁴ The text and its Annexes are available on the WTO web site via www.wto.org/english/tratop_e/dda_e/draft_text_gc_dg_31july04_e.htm. For more detailed information and links to proposals, see the related topic in the Global Facilitation Partnership, www.gfptt.org/topics/wto.

⁵ TN/TF/W/45.

⁶ TN/TF/W/46.

⁷ TN/TF/W/92.

⁸ TN/TF/W/45.

⁹ TN/TF/W/30.

¹⁰ TN/TF/W/32.

¹¹ TN/TF/W/89.

¹² TN/TF/W/30.

¹³ TN/TF/W/36.

¹⁴ TN/TF/W/70.

¹⁵ TN/TF/W/100.

¹⁶ TN/TF/W/39.

¹⁷ See http://www.wto.org/english/thewto_e/minist_e/min05_e/final_text_e.htm#tradfa for the Ministerial Declaration.

¹⁸ See, in particular, proposals TN/TF/W/81, TN/TF/W/82 and TN/TF/W/95.

¹⁹ TN/TF/W/81, available on the WTO website at <http://docsonline.wto.org/DDFDocuments/t/tn/TF/W81.doc>.

²⁰ See also the agenda of seminars and other events under www.gfptt.org.

²¹ The Conference was held in Tokyo on 12 and 13 January 2006. The objective was to exchange views and information on international transport security in the aviation, land and maritime sectors, and to discuss the issues that should be addressed in an internationally coordinated and cooperative manner. For further information, see <http://www.mlit.go.jp/english/>.

²² For further details, see *Ministerial Statement on Security in International Maritime Transport*.

²³ The reference relates to amendments to the *Safety of Life at Sea Convention (SOLAS)*, 1974, which was adopted in 2002. For information on this, see the IMO website at www.imo.org. See also UNCTAD, *Review of Maritime Transport 2005*, p. 84.

²⁴ For more information see www.wcoomd.org.

²⁵ At that time, the WCO was composed of 166 member States. At the time of writing, that number had risen to 169.

²⁶ *International Convention on the Simplification and Harmonization of Customs Procedures (as amended)*, June 1999.

²⁷ See the Speech by the Deputy Secretary General of the WCO at the 11th WCO Asia Pacific Regional Heads of Administration Conference, 4 April 2006, Beijing China (www.wcoomd.org).

²⁸ Communication from the Commission to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions on enhancing supply chain security, *Proposal for a Regulation of the European Parliament and of the Council on enhancing supply chain security*, COM(2006), 79, 27 February 2006.

²⁹ See *Enhancement of security in cooperation with the WCO*, doc. MSC/81/5/4, 9 February 2006. See also *Measures to Enhance Maritime Security*, Report of the Working Group on Maritime Security (Part I), MSC 81/WP.5, of 17 May 2006. The Maritime Safety Committee (MSC), at its 81st session, in May 2006, discussed the carriage of closed transport units and of freight containers transported by ships and referred the matter to the Ship/Port Interface (SPI) Working Group of the Facilitation Committee for further consideration, including the development of draft amendments to the SOLAS Convention.

³⁰ For an overview over the responsibilities of Governments, port facilities and ship-owning and ship-operating companies under the ISPS Code, see UNCTAD, *Container Security: Major Initiatives and Related International Developments*, UNCTAD/SDTE/TLB/2004/1, paras. 80–86. See also *UNCTAD Review of Maritime Transport 2005*, p. 84.

³¹ The MSC circulars are available on the IMO website (www.imo.org). See also UNCTAD, *Review of Maritime Transport 2005*, p. 87.

³² Other circulars adopted include MSC.1/Circ.1188, *Guidelines on training and certification for port facility security officers*; MSC.1/Circ.1189, *Guidance on the provision of information for identifying ships when transmitting ship security alerts*; MSC.1/Circ.1190, *Interim scheme for the compliance of special purpose ships with the special measures to enhance maritime security*; and MSC.1/Circ.1191, *Further reminder of the obligation to notify flag States when exercising control and compliance measure*. A full list of all relevant circulars is included in MSC.1/Circ.1194.

³³ The Guidance circular is a revised version of MSC/Circ.1131.

³⁴ Information on results of another survey conducted by the International Transport Workers' Federation (ICFTU), bringing to the attention of the MSC, inter alia, problems experienced by seafarers in obtaining shore leave following the implementation of the ISPS Code, can be found in IMO document MSC 81/5/8, submitted for consideration at the 81st session of the MSC (10–19 May 2006).

³⁵ SOLAS chapter V/19.

³⁶ The issue of LRIT has been considered by the Maritime Safety Committee (MSC) and by the Sub-Committee on Radiocommunications and Search and Rescue (COMSAR). For further information, see most recently the COMSAR Report to the Maritime Safety Committee (COMSAR 10/16, section 10, also published as an extract in document MSC 81/5/Add.1, and Annexes 17 and 18) and *Measures to Enhance Maritime Security*, Report of the Working Group on Maritime Security (Part II), MSC 81/WP.5/Add.1. See also the IMO website (www.imo.org).

³⁷ Resolutions MSC.202(81), MSC.210(81) and MSC.211(81).

³⁸ Note that it has been emphasized that the regulation “was not creating or affirming any new rights of States over ships beyond what was existing in international law, particularly UNCLOS, nor altering existing rights, jurisdictions, duties and obligations of States in connection with the law of the sea”; see the note by the Secretary-General for consideration by the Council at its 96th session, document C 96/7/Add.1 of 30 May 2006.

³⁹ While the costs arising for States seeking to receive LRIT information are, at this stage, not yet clear, some reference to various likely charges is provided in COMSAR 10/16 (MSC 81/5/Add 1), at para. 10.50.

⁴⁰ For an overview of other amendments to SOLAS and mandatory codes and guidelines adopted by the MSC at its 81st session in May 2006, see the IMO website (www.imo.org).

- ⁴¹ *Convention for the Suppression of Unlawful Acts Against the Safety of Maritime Navigation*, 1988 (SUA Convention).
- ⁴² *Protocol for the Suppression of Unlawful Acts Against the Safety of Fixed Platforms Located on the Continental Shelf*, 1988 (SUA Protocol).
- ⁴³ 2005 Protocol to the Convention for the Suppression of Unlawful Acts Against the Safety of Maritime Navigation, 1988 (SUA Convention); and 2005 Protocol to the Protocol for the Suppression of Unlawful Acts Against the Safety of Fixed Platforms Located on the Continental Shelf, 1988 (SUA Protocol).
- ⁴⁴ For further information, see the IMO website, www.imo.org
- ⁴⁵ The 2005 Protocol amending the SUA Convention requires adoption by 12 member States to enter into force. The 2005 Protocol to the SUA Protocol requires adoption by only 3 State Members, but its entry into force is contingent on the entry into force of the amendments to the SUA Convention.
- ⁴⁶ It is also worth noting that a Joint IMO/ILO Ad Hoc Expert Working Group on Fair Treatment of Seafarers (which met from 13 to 17 March 2006) has adopted a draft resolution with guidelines on the fair treatment of seafarers to be observed in the event of a maritime accident. They were adopted by the IMO Legal Committee at its 91st session in May 2006, and were transmitted to the ILO Governing Body for consideration and approval later this year. The objective of these guidelines is to ensure that seafarers are treated fairly following a maritime accident and during an investigation and detention by public authorities, and that detention is no longer necessary. For the text of the guidelines see IMO document LEG 91/12 of 9 May 2006.
- ⁴⁷ For definitions and scope of application, see Article II of the Convention. The Convention will apply to all ships engaged in commercial activities with the exception of fishing vessels and traditional ships (such as dhows and junks). The definition of ships also excludes ships “which navigate exclusively in inland waters or waters within, or closely adjacent to sheltered waters or areas where port regulations apply “. The Convention applies to all seafarers; these are defined as “any person who is employed or engaged or works in any capacity on board a ship” covered by the Convention.
- ⁴⁸ See International Labour Conference, 94th (Maritime) Session, 2006, Report II, Report of the Director-General on developments in the maritime sector, p. 8.
- ⁴⁹ International Labour Conference, 94th (Maritime) Session, 2006, Report I(1B) *Proposed Consolidated Maritime Labour Convention*, p.12.
- ⁵⁰ Article IV (5) of the Convention.
- ⁵¹ There are, however, two main areas for flexibility in the implementation; see Articles VI (3) and (4) which allow effect to be given to detailed requirements of Part A of the Code through “*substantial equivalence*“, as defined. See also the Explanatory Note to the Regulations and Code, International Labour Conference, 94th (Maritime) Session, 2006, Report I(1B), *Proposed Consolidated Maritime Labour Convention*, p. 12.
- ⁵² Article V (2) of the Convention. See also Regulation 5.1.4 (Inspection and enforcement).
- ⁵³ Article V (3) of the Convention.
- ⁵⁴ See ILO Press Release ILO/06/07 of 23 February 2006.

