

CENTRAL CORRIDOR TRANSPORT OBSERVATORY QUARTERLY REPORT

JULY – SEPTEMBER 2021







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1.0. INTRODUCTION

The Central Corridor Transport Observatory quarterly report is a report that analyzes the performance of freight transport and logistics along the corridor for the period of three months. Central Corridor consists of member states that are trade-linked with the Dar-es-Salaam Port. These are United Republic of Tanzania, Uganda, Rwanda, Burundi and Democratic Republic of Congo.

The assessment of performance is portrayed through analysis of changes in a series of selected indicators developed for the corridor. Comparisons are made on changes in corridor indicators for the reporting period of July-September 2021 with similar period of year 2020. In some indicators, performance is also compared with agreed performance targets to assess progress towards attaining expectations.

It is worth noting that despite the shock of COVID19 in the first half of year 2020; its impact began to subside from June 2020 and consequently the performance of trade and transport began to take a turn from the comparative period of July-September 2020. There are however, sporadic curfews in some countries to-date, restricting and thereby delaying truckers on the road. However, a positive record along the Corridor has been the streamlining of procedures by the Governments to ease transit transport and trade.

Some of the developments are such as instituting and easing procedures for crossborder testing facilities, reduction and harmonization of testing fees among drivers and initiation of COVID-19 vaccines to reduce further fatalities.

The report has five Sections. Section One introduces the report while Section Two provides a summary of the report. Analysis of performance indicators is presented in Section Three while Conclusion is presented in Section Four. Lastly, there is an Annexure presented with detailed tables in Section five.

2.0. SUMMARY OF THE PERFORMANCE

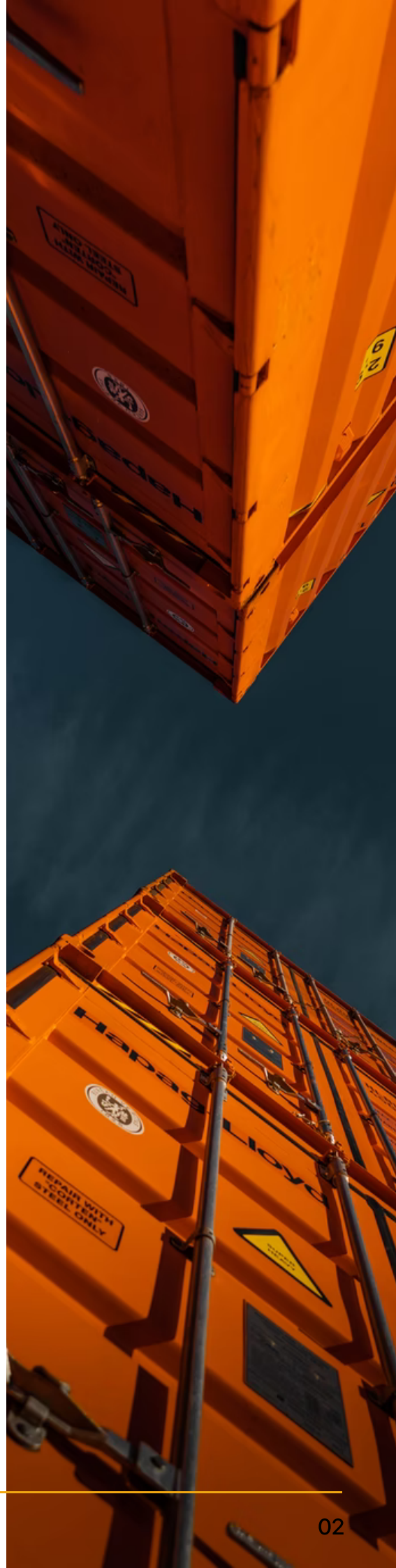
During the period of July to September 2021; performance of the Central Corridor was observed to have returned to its normal state after the COVID-19 hit operations in first half of 2020 and its correspondent period of 2021. Corridor member states have continued to implement preventive measures for COVID-19 including digitization of operations, transit truck driver testing, voluntary vaccinations and so on.

In the period of July –September 2021, improvements were observed in the volume of cargo transactions that grew by 16% compared to previous similar period of 2020. Largest share of imports were recorded by Tanzania (57%) and DRC (12%). Also, DRC had grown the largest change (58%) of its previous import cargo, followed by Rwanda (34%). Further improvements were observed in local container dwell-time at TICTS of below five days, Port clearance efficiency improvement of 34% by reduction of dwell time from 9.3 in July-September of 2020 to 8.8 days in July-September of 2021. There were also reductions in road transit times to all corridor destinations of between one day and six days; in the order of Kigali (6 days reduction), Bukavu (6 days reduction), Goma (5 days reduction), Bujumbura (2 days reduction) and Kampala (1 day reduction).

Furthermore, the cost rate of moving a container through a kilometer along the corridor routes declined by 1.3%, from \$2.2033 to \$2.1712 between July-September of 2020 and 2021 respectively; with minimum cost rates from Dar Port to Bujumbura and maximum rates to Bukavu. Transit cost rate per kilometre to Bukavu has remained the highest in the two periods. It could be explained by speedy increase in cargo (58%), uncoupled with competitive transport supply to DRC, speedier than the first six months of 2021

Finally, despite this level of efficiency in transit cargo clearance at the Port and for container cargo at TICTS, it was observed to be below the Government of Tanzania target of five days. As well, ship turnaround time had weakened by half-a day from 3.1 days in July-September 2020 to 3.6 days in July-September 2021 (15%). Also, dwell time for transit containers at TICTS had weakened by 9% from 8.8 in July-September 2020 to 9.6 days in July-September of 2021.

The sections below provides detailed analysis of performance indicators where comparison is being made between July and September of 2021 with similar period 2020.



3.0 ANALYSIS OF PERFORMANCE MONITORING INDICATORS

3.1. Cargo Throughput

Cargo throughput includes all cargo that passed through the Dar es Salaam Port in a given period. In the period of July–September 2021 a total of 4.6 million metric tonnes passed through the Port, being an increase of 0.6 million tonnes, equivalent to a growth of 16% compared to similar period in 2020. Summary of cargo throughput for July–September 2021 and its comparative similar months of 2020 are provided below

Table 3-1: Cargo throughput, July–September 2021 (Metric tonnes)

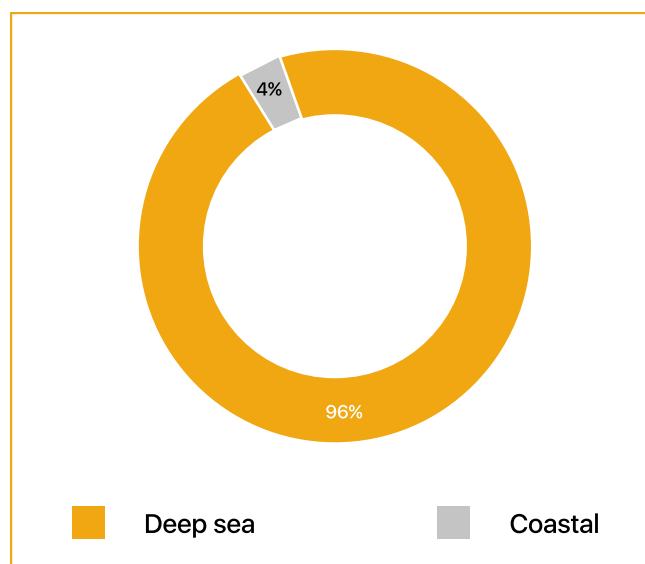
Year	Metric tonnes
2021	4,567,693.2
2020	3,922,931.0
Change	644,762.2
Percentage change	16.4%

Source: Tanzania Ports Authority

Cargo throughput distribution includes sea-borne (deep sea) cargo, coastal cargo and transshipment cargo. During the review period, deep sea cargo was 96 percent of total cargo throughput, same level as it was in similar compared period of 2020 (97%). The remaining four percent were coastal cargo traffic and a negligible proportion of transshipment cargo. The graph below illustrates cargo distribution by type of destination.



Figure 1: Distribution of Cargo throughput by Purpose, July–Sept 2021 (%)



Source: Tanzania Ports Authority

3.1.1 Deep Sea Cargo Throughput

Deep sea cargo traffic refers to cargo/goods on intercontinental routes, crossing oceans mainly destined to/from the corridor member states that are either discharged as imports to these countries or loaded as exports from these countries through Dar-es-Salaam Port. During the months of July to September 2021, deep sea cargo volume recorded an increase in traffic of 616,054 tonnes compared to July–September 2020, equivalent to a growth of 16%. In addition, the monthly cargo trends during July–September 2021 were also stable around 1.4 to 1.5 million metric tonnes compared to similar period last year when monthly output ranged on 1.1 to 1.4 million metric tonnes. Table below summarizes monthly throughput of deep sea cargo dynamics in July–September 2021.

Table 3-2: : Deep Sea Cargo Throughput, July-September 2021 (metric tons).

Year	July	August	September	Total
2021	1,409,401.1	1,477,960.3	1,511,776.0	4,399,137.3
2020	1,136,885.0	1,400,218.0	1,245,980.0	3,783,083.0
Increase (tons)	272,516.1	77,742	265,796.0	616,054
Increase (%)	28	3.8	18.7	15.9

Source: Tanzania Ports Authority

3.2. Imports and Exports of Central Corridor Countries

3.2.1 Volume of Imports by Country

Deep sea cargo throughput includes imports to, and exports from the Corridor. This section analyzes imports for the period of July to September 2021 from Dar-es-Salaam Port by destination country. The import cargo constituted 83% of deep sea cargo throughput during this period, same as it was in the comparative period of 2020. Total import volume during the period of July to September 2021 was 3,657,694 metric tonnes. The cargo volume during this period was higher by 500,928 tonnes compared to July-September 2020 (16%). The increase was recorded for Democratic Republic of Congo (58%), Rwanda (35%) and Burundi (10%).

The dynamics in importation through Dar Port for the period of July-September for each member states are presented in the table below:

Table 3-3: Imports discharged at Dar Port by Country of Destination, July to September 2021 (Tonnes)

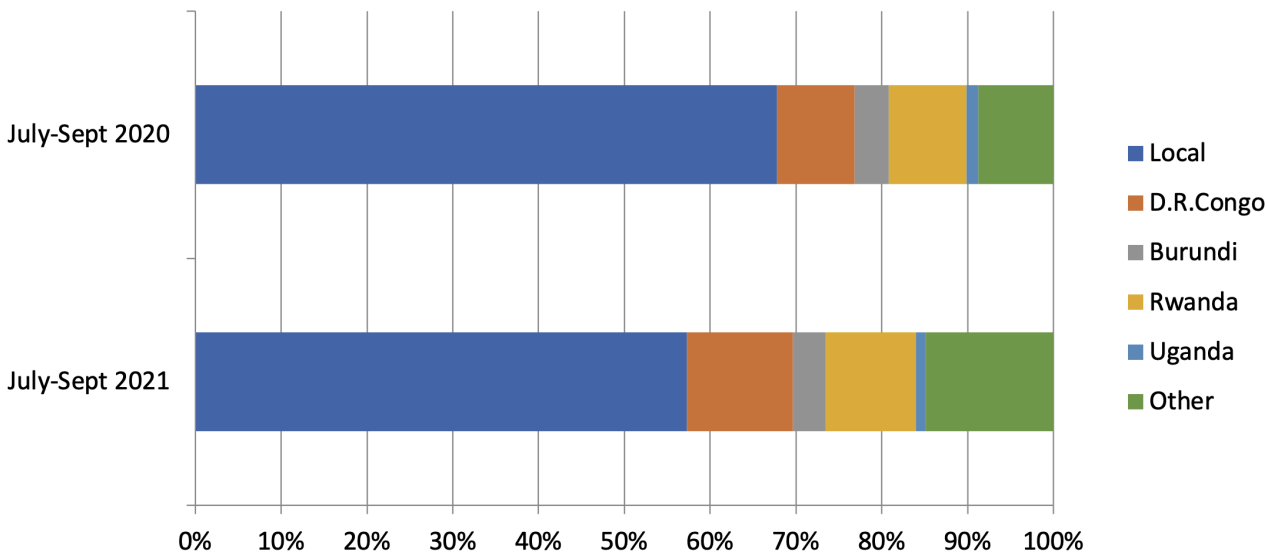
Country	July-Sept 2021	July-Sept 2020	Increase (Tonnes)	Increase (%)
Local	2,096,270	2,140,013	(43,743.00)	-2.0%
Congo	451,369	284,934	166,434.98	58.4%
Burundi	139,658	127,287	12,371.45	9.7%
Rwanda	382,958	284,547	98,410.57	34.6%
Uganda	41,901	43,237	(1,336.15)	-3.1%
Other	545,538	276,748	268,790	97.1%
Total	3,657,694	3,156,766	500,927.84	15.9%

Source: Tanzania Ports Authority



The distribution of import cargo country-wise was such that local cargo (Tanzania) in July to September was the largest share (57%) compared to 68% during the previous similar period, relative to all imports at Dar Port. Democratic Republic of Congo has remained as second largest importer through the Dar Port at 12% share of all imports at Dar Port for the period of July-September 2021. Other Corridor members, that is Burundi, Rwanda and Uganda, in combination, contributed 15% of Dar Port imports during this period. The distribution of imports by member states are shown in the graph below

Figure 2: Distribution of Corridor Import Cargo by Country of Destination, July-September 2021 (%)



3.2.2 Volume of Exports by Country

The table above, shows that the total exports from Central Corridor countries at the port of Dar es Salaam was 0.741 million metric tonnes in the period of July to September 2021. This level of exports had increased by 0.12 million tonnes relative to similar period of year 2020, or equivalent to 18%.

Table 3-4: Volume of Exports, July-September 2021 (metric tons)

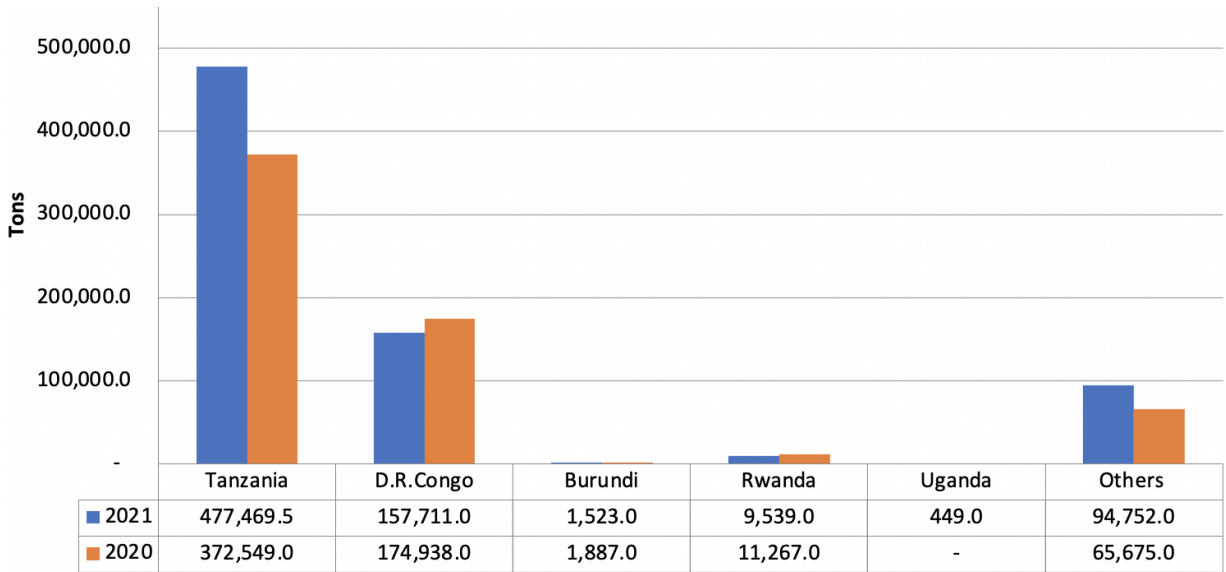
Indicator	July - September		Change	
	2021	2020	tons	%
Volume of exports (metric - tons)	741,444	626,316	115,128	18.4

Source: Tanzania Ports Authority

Country by country growth analysis shows that exports among the Corridor countries had increased only for Tanzania. This observation is attributed to fallen production in 2020 period and continued global COVID-19 affecting international trade. Graph below depict volume and changes in exports by country of origin for the period of July to September of 2020 and 2021.

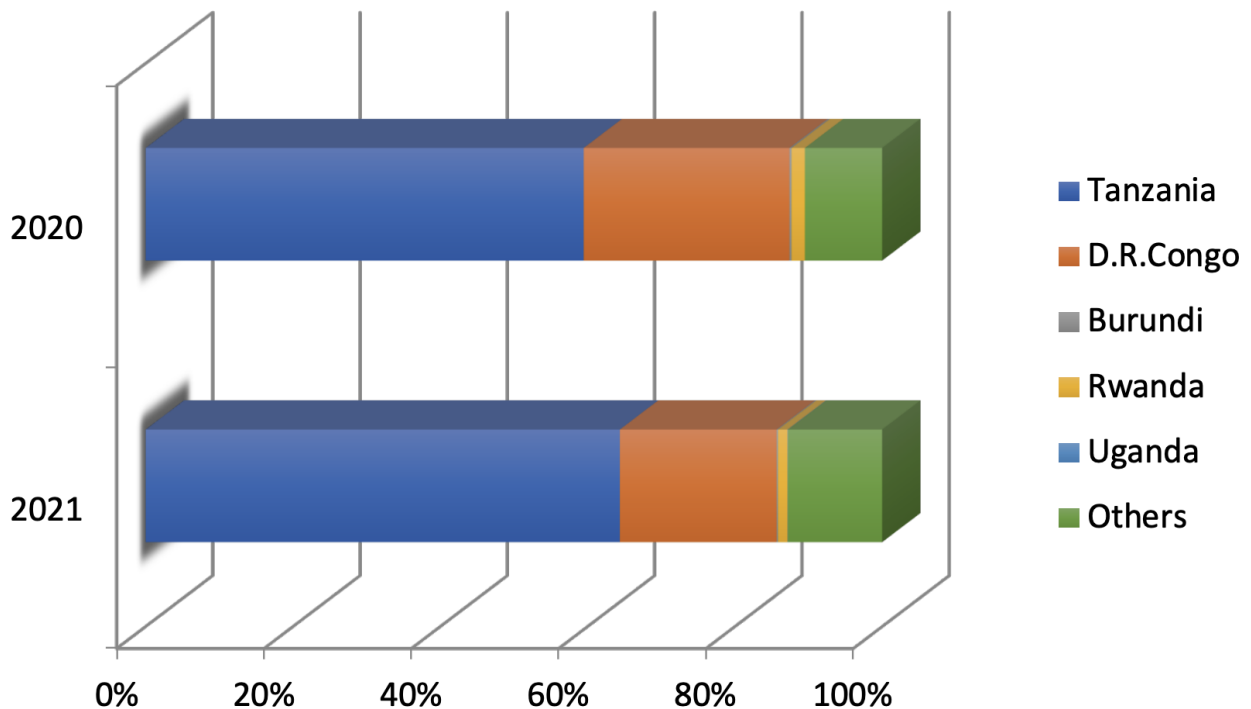


Figure 3: Exports loaded at Dar Port, July-September 2021 by Country of Origin (Metric Tonnes)



The contribution of Corridor countries to the total volume of exports had recorded a similar pattern in the periods of July-September of 2020 and 2021, with Tanzania exports having lion share (64%), followed by DRC (21%). The share of exports from other corridor member States have remained around 1-2% in both periods.

Figure 4: Distribution of Exports by Country, July-September 2021 (%)





3.3. Transit rates and costs to Corridor destinations

These are the rates of transportation services paid by the cargo owners/shippers to the road transporters for moving a container to a destination. To obtain standardized cost rate for comparison of destination of varied distances; the transit costs were computed per kilometer for each route.

During the period of July-September the cost rates for moving a container by road through a kilometer was at minimum 1.7587 USD (Dar-Bujumbura) and maximum of 2.8265 (Dar-Bukavu). The Central Corridor average cost rate per container per kilometer was USD 2.1712 during the period of July to September 2021, declining by 1.3 percent from the rate charged in similar period of 2020 (USD 2.2033). The Table below shows rate of transporting a container by a distance of kilometer along various corridor destinations.

Table 3-5: Monthly Average Transit Cost Rate per container/kilometre by Route (USD)

Year	2020	2021	Change %
Kigali	\$1.8060	\$1.8060	0.0%
Bujumbura	\$1.8405	\$1.7587	-4.4%
Kampala	\$1.8727	\$1.9101	2.0%
Bukavu	\$2.8265	\$2.7511	-2.7%
Goma	\$2.6707	\$2.6300	-1.5%
Average	\$2.2033	\$2.1712	-1.3%
Minimum	\$1.8060	\$1.7587	-4.4%
Maximum	\$2.8265	\$2.7511	2.0%

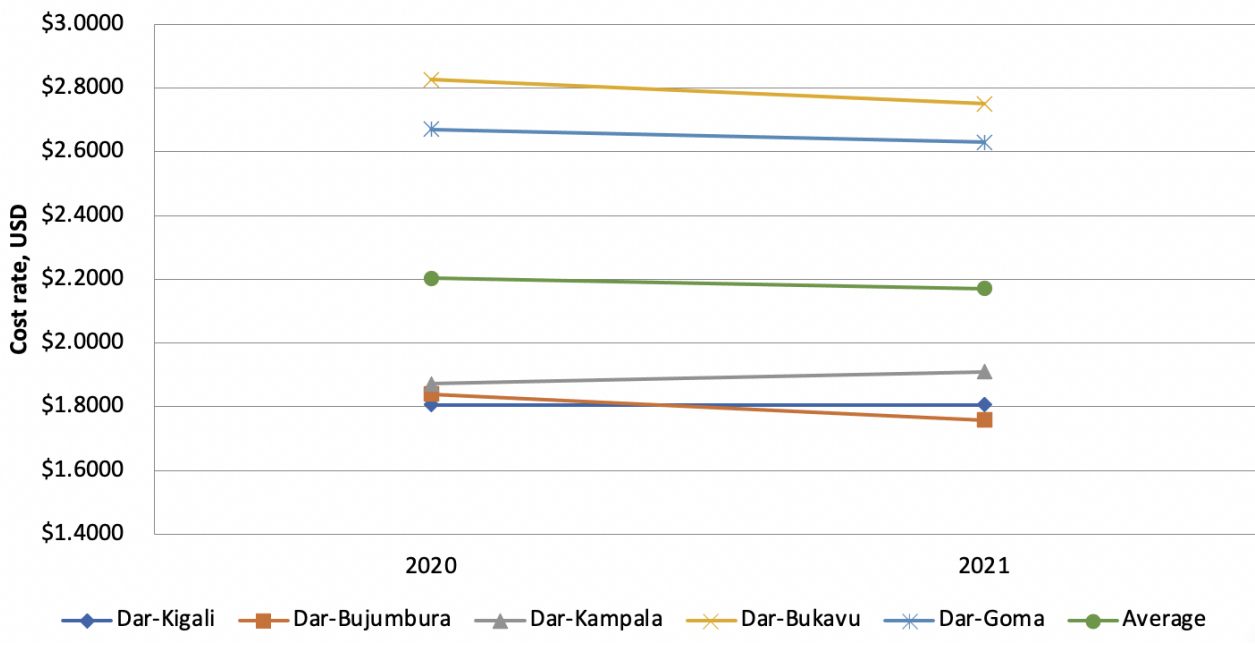
Transporters/Clearing and Forwarding Agents



The transit cost rate of moving a container in a kilometer for Bukavu has remained the highest of all corridor routes in both comparative periods despite a small reduction of 2.7% in JulySeptember 2021. The rates to destinations of Bujumbura, Kigali and Kampala have remained below the three-month’s average in both periods (July–September) of 2021 and 2020.

Table graph below is a summary of three-month average cost rate of moving a container by a kilometre towards the destinations of the Central Corridor for 2021 and compared with 2020 (Juy–September).

Figure 5: Three-month Average Transit Cost rates, July–Sept (Container/ kilometre -USD)



The variations of monthly average cost rates for individual member states have been observed to be less than 3% around their overall three month’s average in general. For the route of Dar-Kigali, the cost rate remained the same in the three-months periods of 2020 and 2021, resulting to zero variation.



Table 3-6: Relative variation of Monthly Average Transit Costs per container per kilometre

Period	July- Sept. 2020	July- Sept. 2021
Dar-Kigali	0.00%	0.00%
Dar-Bujumbura	0.00%	2.01%
Dar-Kampala	1.73%	0.00%
Dar-Bukavu	2.00%	1.19%
Dar-Goma	1.32%	0.00%
Corridor Average	0.54%	0.62%

Transporters/Clearing and Forwarding Agents

The average monthly freight charges to cover entire length from Dar-es-Salaam Port to the various destinations of Central Corridor between July and September 2021 are shown in the table below:

Table 3-7 : Monthly average transit charges per container by destinations, July-September 2021 (USD)

Period	July	August	September	Quarter average
Dar-Kigali	\$2,700	\$2,700	\$2,700	\$2,700
Dar-Bujumbura	\$2,800	\$2,900	\$2,900	\$2,867
Dar-Kampala	\$3,400	\$3,400	\$3,400	\$3,400
Dar-Bukavu	\$4,800	\$4,900	\$4,900	\$4,867
Dar-Goma	\$4,300	\$4,300	\$4,300	\$4,300

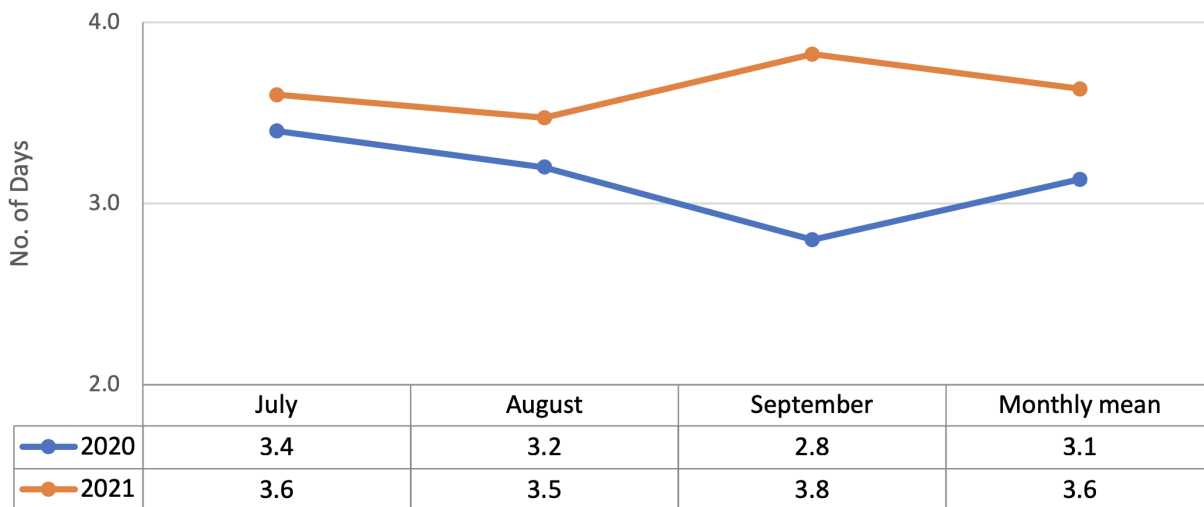
Transporters/Clearing and Forwarding Agents



3.4. Ship turnaround time

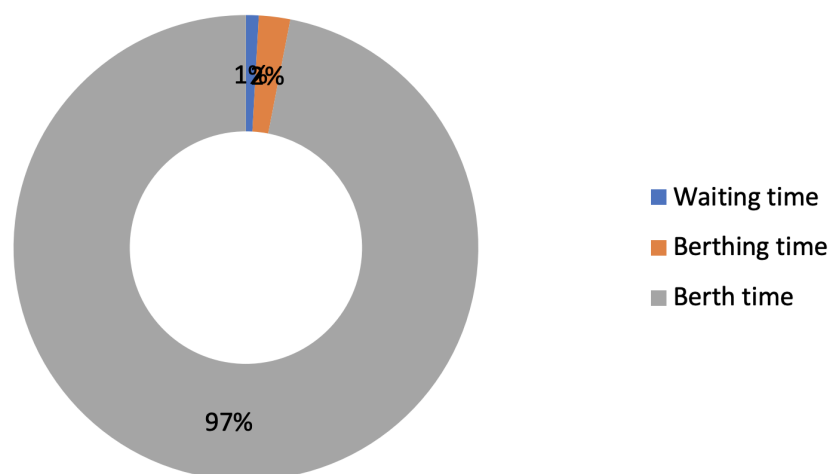
Ship turnaround time is the total time spent by a ship at the port; measured on monthly average time that each ship spend at the Port from when it is ON-Berth to when the ship is OFF-Berth. The time is captured in days from Tanzania Ports Authority (TPA). The graph below shows that containerized ship turnaround time for months of July–September 2021 was on average 3.6 days. This level has deteriorated by half a day of the level recorded in similar period of 2020 (3.1 days). This change is attributed to increased volume of ships at the Port of Dar during the period of return to normal business operations.

Figure 6: Monthly average ship turnaround in days at Dar Port, July-September 2021



Most of the turnaround time were used for ship at the berth in each of the three months, accounting for 97% of the ship turnaround time. As such, less than two hours were spent on waiting and berthing. The situation was the same for each individual months of the reporting period. The graph below shows the distribution of ship turnaround time components, that is waiting time, berthing time and berth time for July-September 2021.

Figure 7 :Distribution of Average Ship Turnaround time components at Dar Port, July-September 2021





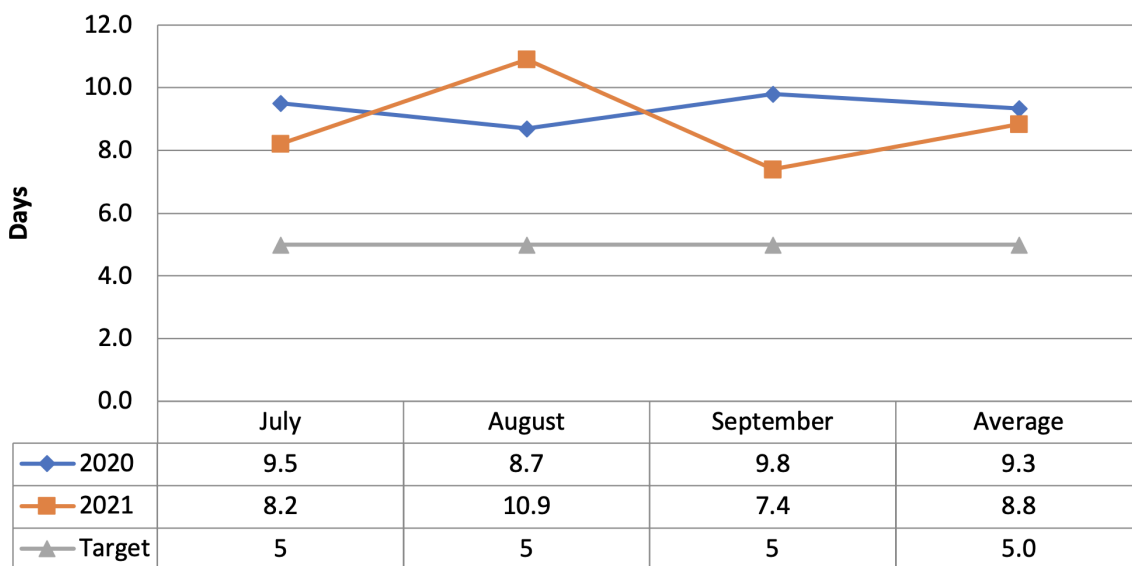
3.5. Containers Dwell time

Dwell time refers to the total time spent by containerized cargo at the Port from the time that cargo is discharged from the vessel until port exit. It is calculated for each month as an average number of days the container stays in a yard. The indicators below give out highlights on the dwell time per container for both Tanzania Ports Authority and Tanzania International Container Terminal Services (TICTS). The comparison of current reporting period with previous similar period of July to September shows return to business in response to the COVID-19 impact on dwell time that was observed in year 2020.

3.5.1 TPA Transit Import Container Dwell time

As depicted on the table and graph; the trends show the average dwell time for transit import containers in the period of July to September 2021 and its comparative period of 2020. The analysis also compared actual dwell time (average) with Government of Tanzania benchmark of five days. The dwell time for transit import containers in TPA decreased to an average of 8.8 days in JulySeptember 2021 compared to 9.3 days of the same period in 2020; indicating an improvement of half a day. It is worth highlighting that the current level of efficiency in dwell time is still below target by an average of 3.8 days. As such, efficiency needs to be improved further so that transit container dwell time at TPA is cut by another 3.8 days. Month to month comparison of dwell time in July–September 2021 shows an irregular pattern, indicating a process that was in little control.

Figure 8: TPA Monthly average transit import container dwell time in days, July–September 2021



3.5.2 TPA Local Import Container Dwell time

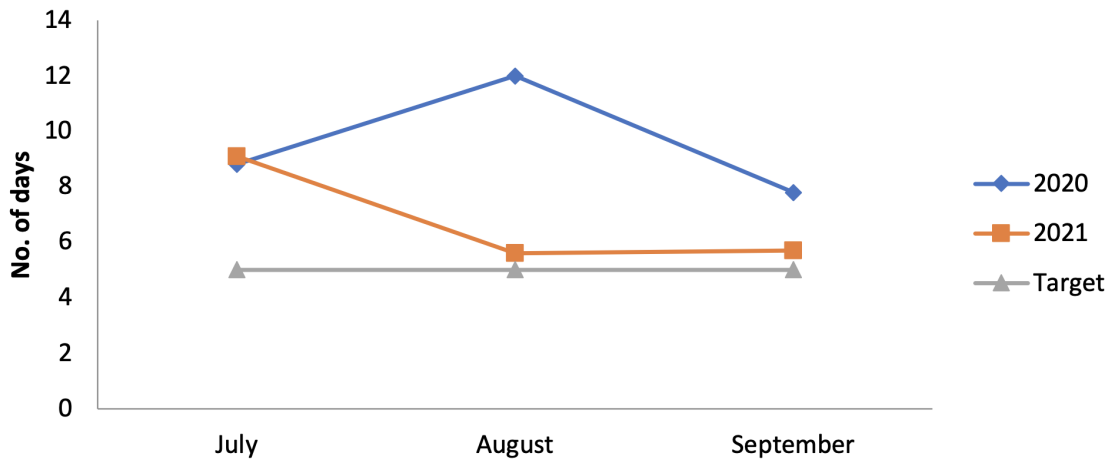
The dwell time for local import containers in TPA decreased to an average of 6.5 days in JulySeptember 2021 compared to 10 days of the same period in 2020; indicating an improvement of 34 percent.

This reduction of 3.5 days (34%) was similar to the January–June 2021 that had 3.0 days’ cut to the same level of 6.5 days, indicating that the first nine months of 2021 have recorded import container dwell time improvements following stabilization of COVID-19 shock at TPA. However, the current level of efficiency in dwell time is still below target by an average of 1.5 days.

Month to month comparison of dwell time in July–September 2021 shows a downward trend indicating continuous improvements, with July–September 2021 being closer to the target than a year before (24% off versus 50% off target for 2021 and 2020 respectively).

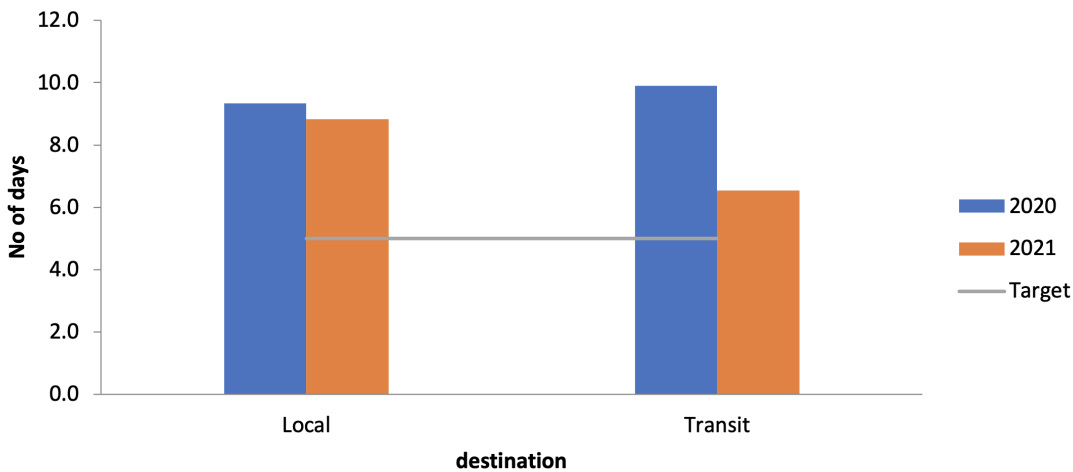


Figure 9: TPA Monthly Average Local Import Container Dwell Time (Days)



The comparison between local and transit container dwell time at TPA is shown in the graph below, showing improvements compared to similar period of 2020. The improvement, that is, reduction in dwell time has been larger for transit containers between the two periods. However, the Government set target for both local and transit containers has not been achieved in both types.

Figure 10: Local and Transit Container average dwell time at TPA, July-September 2021 (Days)

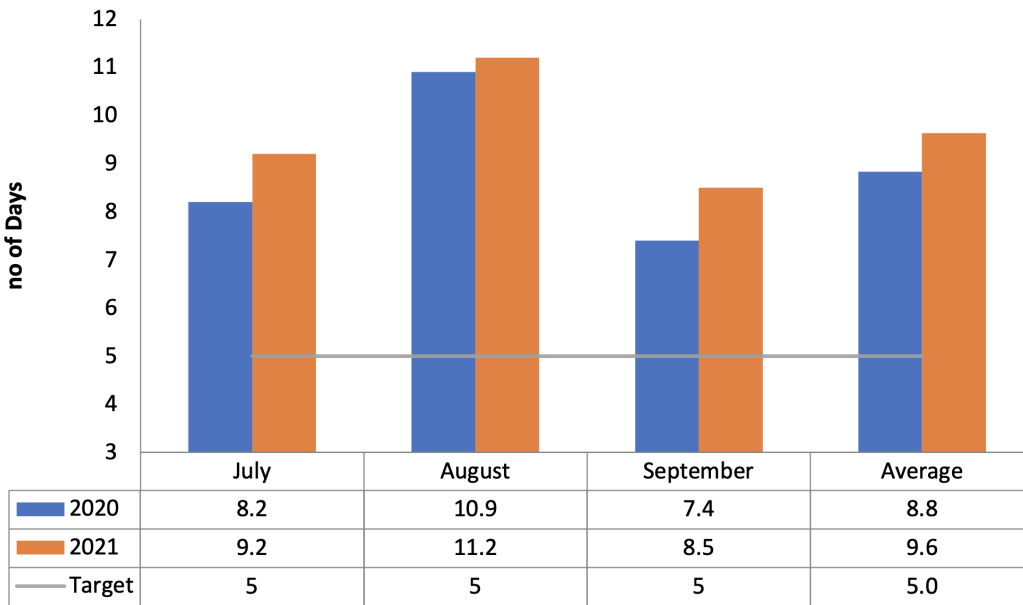


3.5.3 TICTS Transit Import Container Dwell time

The average dwell time for transit import containers at TICTS for the period of July to September 2021 was 10 days. The current level of performance of dwell time in TICTS has scaled back by half a day compared to similar period in 2020. Furthermore, the average dwell time for transit containers in TICTS was out of target in 2021 and 2020 by more than 100% at 11 and 10 days respectively compared to the Government of Tanzania target of five days. The graph below illustrates trends in monthly average dwell time for transit containers at TICTS, for the period of July-September.



Figure 11: Monthly Average TICTS Transit Container Dwell time in days, 20



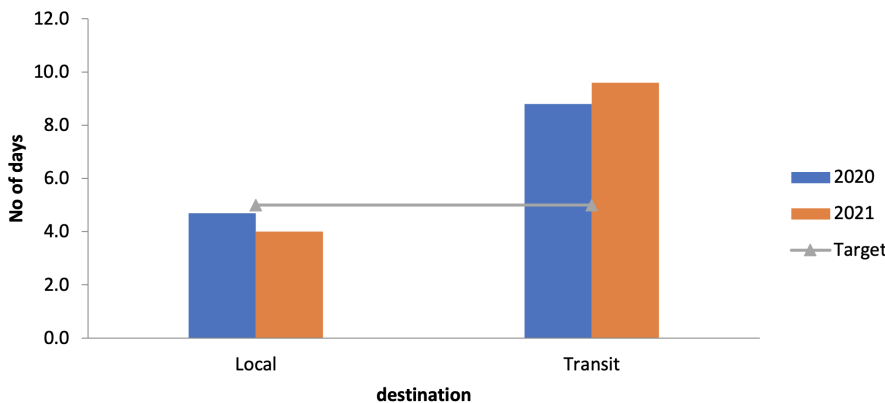
3.5.4 TICTS Local Import Container Dwell time

TICTS local Container dwell time was also analyzed for local container cargo in July-September 2021 and compared with similar period of 2020. Analysis was also done to compare current performance with Government set target of five days clearance time.

It was observed that local import container dwell time was 4.0 days in the period of July to September 2021; almost a day reduction from 4.7 days recorded in similar period of previous year.

This level of efficiency in container clearance at TICTS is well within the set target of 5 days. Furthermore, the comparisons between local and transit container dwell time for local and transit containers at TICTS is shown in the graph below.

Figure 12 : Local and Transit Container average dwell time at TICTS, July-September 2021



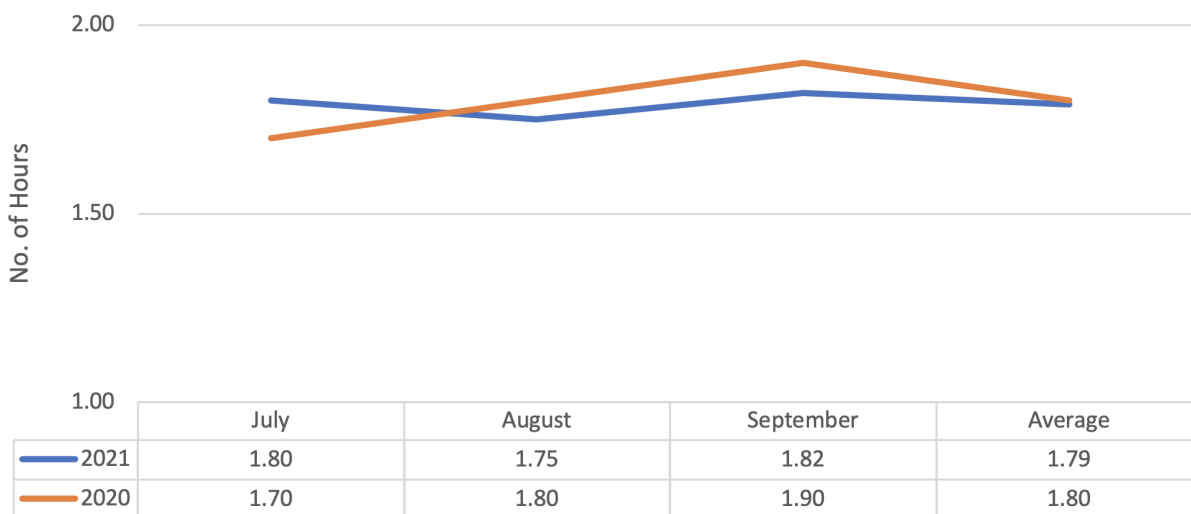


3.6. Truck turnaround time

Truck turnaround time refers to the amount of time (in hours) that a Truck uses at Tanzania International Container Terminal Services (TICTS) clearance and loading. This indicator is measured an average hours spent by all trucks serviced during a month and expressed as monthly average truck turnaround time. It is used to assess efficiency of container handling and loading services at TICTS.

The graph below shows that truck turnaround time between July – September 2021 was 1.8 hours or 1 hour and 48 minutes. This level in July –September 2021 has remained as it was in similar period in 2020. Also, month to month variations in truck turnaround time has leveled-up to a minimum, with a range of 12 minutes.

Figure 13: Trucks Turnaround time at TICTS in Hours, July-September 2021





3.7. Truck Transit time to destinations

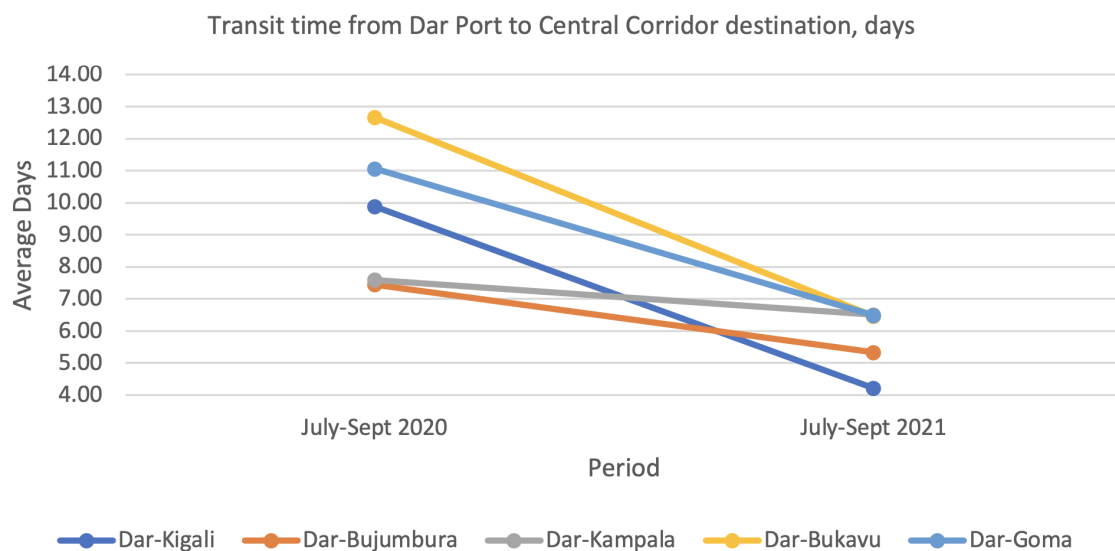
Transit time is the duration it takes for a cargo from the port of Dar es salaam to arrive at a destination along the Central Corridor routes. It is obtained from a sample of cargo trucks and computed as an average days for each month.

A general picture of the performance shows improvement between the comparative periods of July to September of 2021 and 2020 across all destinations namely Kigali in Rwanda, Bujumbura ni Burundi, Kampala in Uganda, Bukavu and Goma in DRC.

Trucks with destinations of Kigali, Goma and Bukavu recorded the largest reductions of 5 to 6 days each between the two periods. Trucks to Bujumbura and Kampala reduced their transit times by 1 to 2 days in between July-September of 2020 and 2021.

Graph below indicates the direction of transit time of the five major central corridor member countries’ destinations for the July-September periods of 2021 and 2020

Figure 14: Period Average Transit time from Dar Port to Corridor destination (days)



For each destination along the corridor, transit time has reduced and stabilized in the period of July to September 2021 as depicted by a smoother pattern compared to similar period in 2020 when the path was erratic from month to month.

Although the transit time has generally improved compared to similar periods last year, it remains at high level. Adherence to COVID-19 protocols has continued to affect the transit time at some borders whereby truckers have had to undergo screening tests which in one way or another increase the delays. In some countries, such as in Uganda, curfews and controlled movements have also curtailed the transit times.

Trucks with destinations of Kigali, Goma and Bukavu recorded the largest reductions of 5 to 6 days each between the two periods. Trucks to Bujumbura and Kampala reduced their transit times by 1 to 2 days in between July-September of 2020 and 2021.

Figures below details monthly average transit times for each destination for the period of July to September 2021 and comparative year 2020.



Figure 15: Dar-Bujumbura Average Transit Time in Days

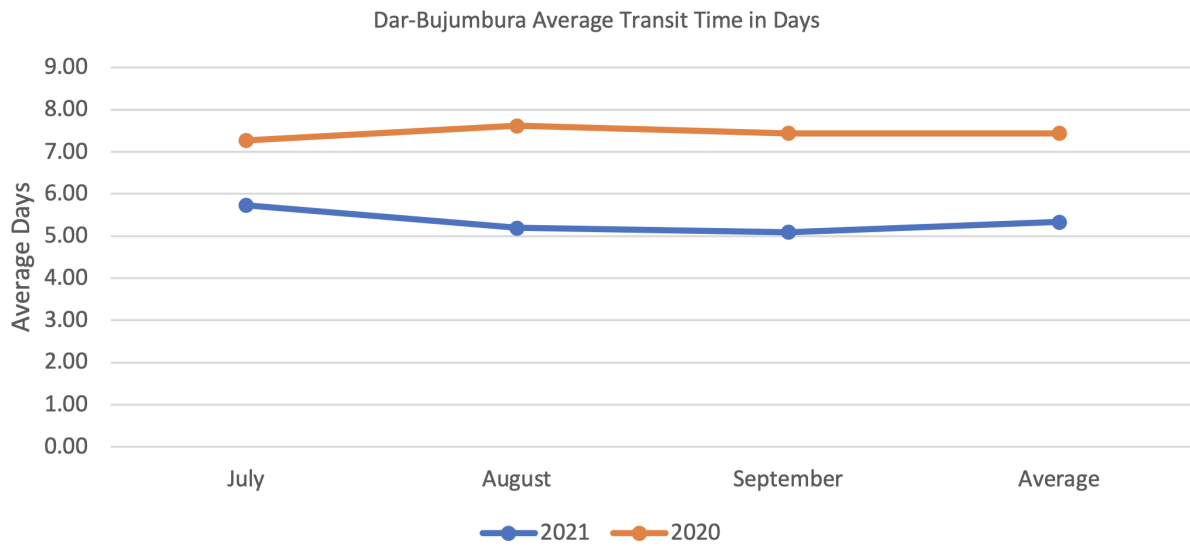


Figure 16: : Dar-Kigali Average Transit Time in Days

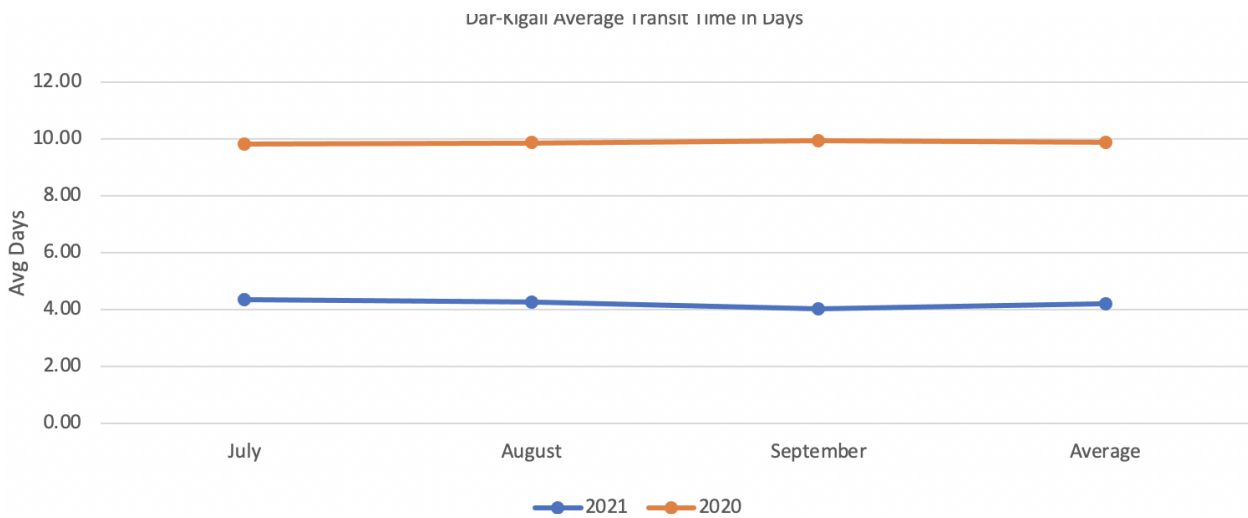




Figure 17: Dar-Kampala Monthly Average Transit Time (Days)

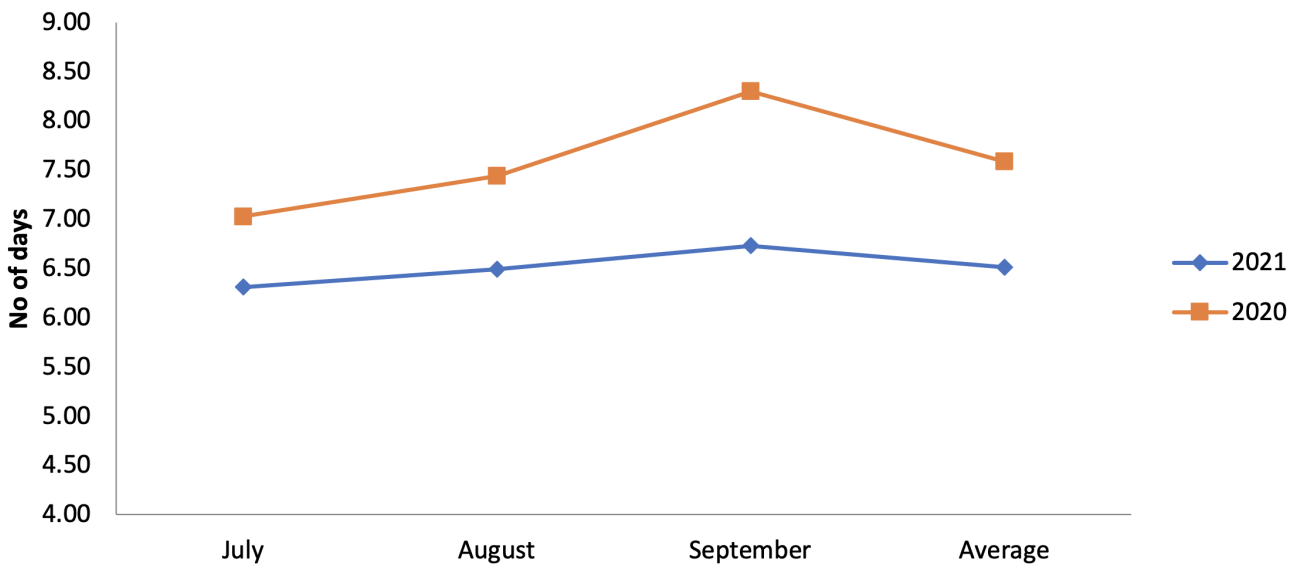


Figure 18: Dar-Bukavu Monthly Average Transit Time (Days)

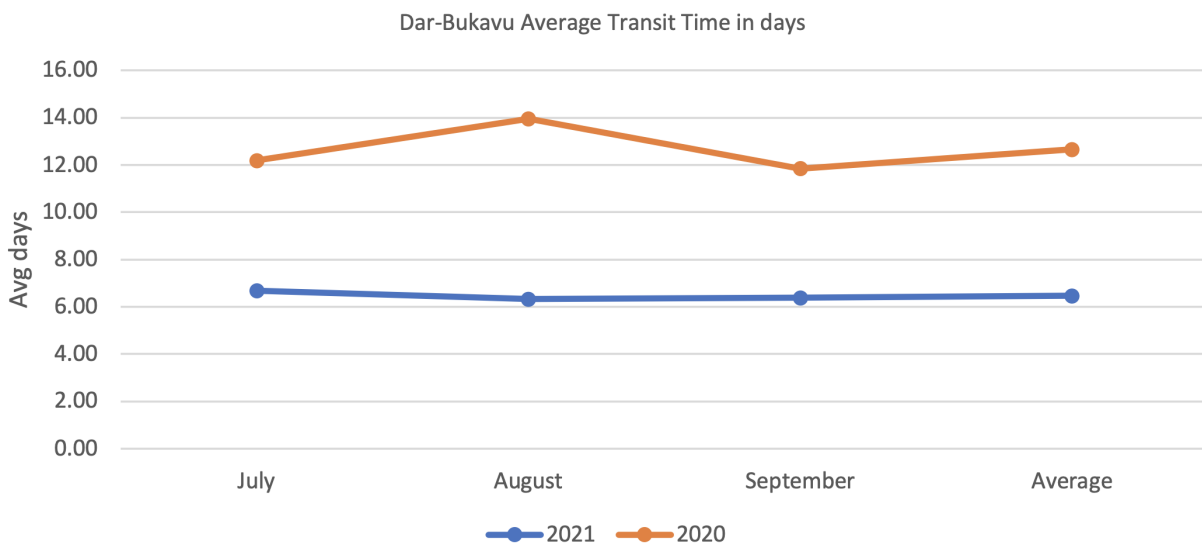
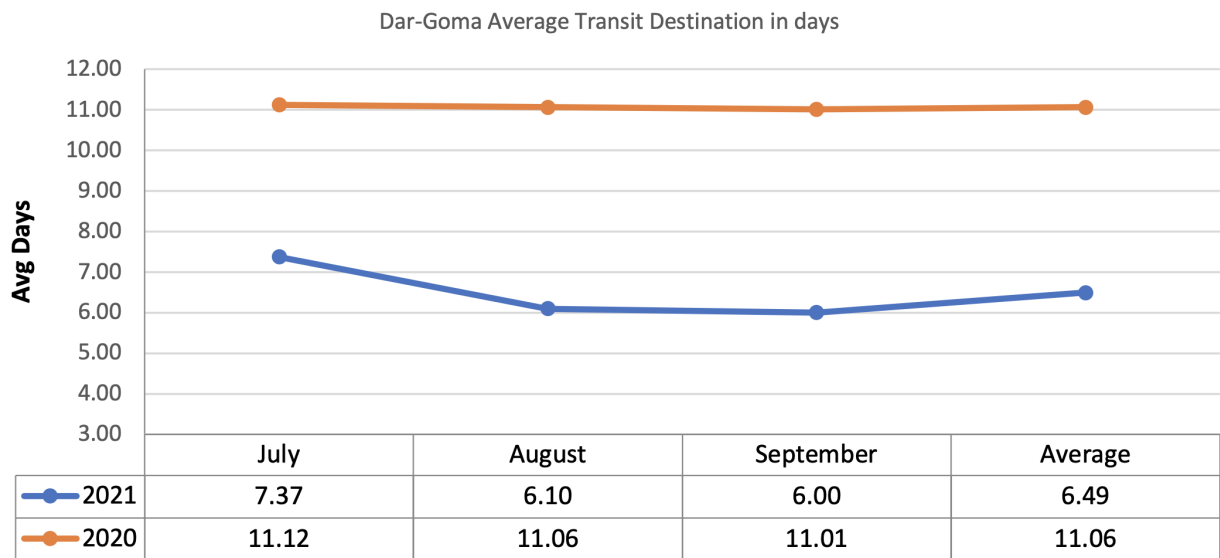




Figure 19: Dar-Goma Monthly Average Transit Time (Days)





4.0. CONCLUSION

During the quarter ending September 2021, the impact of COVID-19 on transport and trade patterns in the Central Corridor member countries were observed to have leveled-up as most of the performance indicators had improved comparatively to the year ago.

The impact of such shocks in the period of July-September 2020 did not disrupt the comparative picture of potential growth as assessed from different indicators. As such, changes observed in July-September 2021 could directly be attributed to improvements in the logistics chain during the current reporting period relative to similar period of 2020. Comparisons in the next quarters with comparable circumstances may show realistic picture.

5.0. ANNEX TABLES

Table 5-1: Cargo Throughput in metric tonnes by Type, July-September 2021

Type	Jul-21	Aug-21	Sep-21
Imports	1,195,022	1,227,481	1,235,191
Exports	214,379	250,479	276,585
Transshipment	260	276	373
Coastal Discharged	14,729	13,399	11,830
Coastal Loaded	31,251	35,865	30,416
Transshipment Out	-	-	245
Throuput Restow	8,914	14,778	6,220
Total Cargo Throughput	1,464,555	1,542,278	1,560,860

Table 5-2: Cargo Throughput in metric tonnes by Type, July-September 2020

Type	Jul-20	Aug-20	Sep-20
Imports	933,313	1,182,753	1,040,701
Exports	203,572	217,465	205,279
Transshipment	74	5,324	874
Coastal Discharged	11,673	11,617	9,627
Coastal Loaded	39,265	34,360	27,034
Total Cargo Throughput	1,187,897	1,451,519	1,283,515

Table 5-3: Import Cargo in metric tonnes by Country, July-September 2021

Country	July	August	September	Total
Local (Tanzania)	700,696	701,590	693,984	2,096,270
D.R.Congo	137,376	151,742	162,251	451,369
Burundi	52,401	49,811	37,446	139,658
Rwanda	130,900	130,537	121,521	382,958
Uganda	14,097	9,307	18,497	41,901
Other	159,552	184,495	201,491	545,538
Total Discharged	1,195,023	1,227,481	1,235,190	3,657,694

ANNEX TABLES

Table 5-4: Export Cargo in metric tonnes by Country, July-September 2021

Loaded/Exports	Jul-21	Aug-21	Sep-21	Total
Local (Tanzania)	142,340	154,683	180,447	477,469.50
D.R.Congo	38,499	59,068	60,144	157,711.00
Burundi	655	389	479	1,523.00
Rwanda	2,530	3,141	3,868	9,539.00
Uganda	431	18	0	449.00
Other	29,924	33,180	31,648	94,752.00
Total Loaded	214,379	250,479	276,586	741,444

Table 5-5 :Average Monthly Container Transit Costs in USD by Destination, July-September 2021

Route	Dar-Kigali	Dar-Bujumbura	Dar-Kampala	Dar-Bukavu	Dar-Goma
July	\$2,700	\$2,800	\$3,400	\$4,800	\$4,300
August	\$2,700	\$2,900	\$3,400	\$4,900	\$4,300
September	\$2,700	\$2,900	\$3,400	\$4,900	\$4,300
Average	\$2,700	\$2,867	\$3,400	\$4,867	\$4,300
Kilometres	1495	1630	1780	1769	1635
Transit Cost per TEU per Km	\$1.81	\$1.76	\$1.91	\$2.75	\$2.63

Table 5-6 : Average Monthly Container Transit Costs by Destination, July-September 2020

Route	Dar-Kigali	Dar-Bujumbura	Dar-Kampala	Dar-Bukavu	Dar-Goma
July	\$2,700	\$3,000	\$3,400	\$4,900	\$4,300
August	\$2,700	\$3,000	\$3,300	\$5,000	\$4,400
September	\$2,700	\$3,000	\$3,300	\$5,100	\$4,400
Average	\$2,700	\$3,000	\$3,333	\$5,000	\$4,367
Kilometres	1495	1630	1780	1769	1635
Transit Cost per TEU per Km	\$1.8060	\$1.8405	\$1.8727	\$2.8265	\$2.6707



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