



# CENTRAL CORRIDOR TRANSPORT OBSERVATORY

**ANNUAL REPORT OF THE PERFORMANCE OF  
CENTRAL CORRIDOR TRANSIT TRANSPORT**



**May 2023**





# ACKNOWLEDGEMENT

## ACKNOWLEDGEMENT

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The Secretariat also wish to extend deepest appreciation to stakeholders who provided data, information and validation of report towards the success of the 10th edition of the Central Corridor Performance Report (2022). The Secretariat also acknowledge the transport observatory team of consultants who provided technical inputs to the success of the report at various stages.

During the year 2022, we were once again enjoying partnership of Trademark East Africa (TMEA). We are grateful to them for seeing the upgrading of the CCTO portal to its current level whereby stakeholders are enjoying online dynamic access on 40 logistical indicators of the CCTO.

The 10th Edition of the Central Corridor Performance Report (2022) was prepared by a team of CCTTFA staff and consultants of the CCTO in data gathering stage, data processing and analysis, report-preparation, stakeholder consultations, incorporating views of stakeholders and graphic designing and dissemination of the final report. In this capacity, we acknowledge the leadership of Mr Engr. Melchior Barantandikiye, Head of Logistics at CCTTFA and team of consultants namely Mr Abdallah Mhagama (Statistician), Mr. Ally Kakomile (Monitoring & Evaluation Manager), Mr. Faraji Kondo (Database Manager), and Ms Sharon Mariwa (Communications Specialist).



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# ACRONYMS AND ABBREVIATIONS

AVG/AVRG	Average
CCTO	Central Corridor Transport Observatory
CERC	Contingent Emergency Rapid Response
CF&A	Clearing and Forwarding Agent
CFA	Clearing and Forwarding Agent
DMGP	Dar-es-Salaam Maritime Gateway Project
DRC	Democratic Republic of Congo
ECTS	Electronic Cargo Tracking System
ETWS	Electronic Train Warrant System
GDP	Gross Domestic Product
GPS	Global Positioning System
IMF	International Monetary Fund
Km	Kilometre
LATRA	Land Transport Regulatory Authority
mT	Metric Tons
OBR	Burundi Revenue Office
OSBP	One Stop Border Post
RRA	Rwanda Revenue Authority
RW	Rwanda
SCT	Single Custom Territory
TANCIS	Tanzania Customs Integrated System
TANROADS	Tanzania National Roads Agency
TANSAD	Tanzania Single Administrative Document
TAT	Tanzania Association of Truckers
TATOA	Tanzania Truck Owners Association
TICTS	Tanzania International Container Services
TIRP	Tanzania Intermodal Railway Project
TMEA	TradeMark East Africa
TPA	Tanzania Port Authority
TRA	Tanzania Revenue Authority
TRC	Tanzania Railway Corporation
TTFA	Transit Transport Facilitation Agency
TZ	Tanzania
UG	Uganda
UNRA	Uganda National Roads Agency
URA	Uganda Revenue Authority
URC	Uganda Railways Corporation

## FOREWORD

The Central Corridor Transport Observatory (CCTO) is a framework established for monitoring performance of logistics sector linking the Dar-es-Salaam Port with five countries of the Central Corridor as per the Cooperative Agreement signed on 2<sup>nd</sup> September 2006. The CCTO also compliments the activities of CCTTFA to enable achieve its vision of making the Central Corridor the most competitive corridor in East and Central Africa.

Monitoring of performance is conducted by analysing progress of a series of indicators agreed by stakeholders as performance framework. CCTO is the platform that provides up-to-date information to stakeholders on performance of various segments of the corridor, useful for business, policy and academic references. Regularly, the CCTO produce monitoring reports to convey performance progress of specific periods. The annual report 2022 is one of the products of CCTO, covering the period of January to December 2022. This report is prepared by the CCTTFA Secretariat in collaboration with stakeholders. In the years of 2014-2022, CCTO enjoyed active technical support from TradeMark East Africa (TMEA) in upgrading the portal, making it online and advancing the list of analytical indicators. CCTTFA and partners are thankful for the time together with TMEA and look forward to more endeavours.

The report is based on analysis of relative periodic changes on each of the performance indicators, through time; and in-comparison with targets that have been set out by the Governments. It aims to provide a framework for monitoring outcome of resolutions of identified issues and programs of transit transport along the corridor. The goal of the observatory is to have evidence that inform interventions in the corridor.

The 2022 CCTO Performance Report is the 10<sup>th</sup> Annual report which assesses 40 indicators along the Central Corridor. To this end I would like to request stakeholders to utilize this information for various programs and promoting of the corridor; and to increase focus on implementing the recommendations from this report so that stakeholders of trade and transport in the corridor member states can continue to experience easing of trade through facilitation of freight services to the region with the goal of making Central Corridor A Sustainable Trade Route of Choice.

I also take this opportunity to congratulate TMEA for the transformation to the current Trade-mark Africa (TMA) and their focus to a wider scale of the Sub-Saharan Africa. This year was the first of my leadership of CCTTFA and second year of implementation of CCTTFA Strategic Plan (2021-2025). I plead to continue harnessing the achievements recorded before my leadership and during the year 2022 to-date towards the objective of Enhanced Corridor Monitoring and Evaluation.



**Adv OKANDJU OKONGE Flory**  
Executive Secretary



## EXECUTIVE SUMMARY

The Transport Observatory report has continued its quest of ensuring the provision of evidence-based information to support the development of Central Corridor transport infrastructure. The 10th annual edition of the Transport Observatory Report covers 38 indicators of performance at segments and aspects along the corridor. There is a special focus on projects and policy recommendations that help to reduce the cost of transportation, delays and other logistic challenges.

The Transport Observatory project cycle consists of data collection provided by various stakeholders among the member states including Revenue Authorities, Roads Authorities, Ports, Railway Authorities, Transport Associations, Transporters and Private Sector Institutions closely affiliated to Trade and Transport; data processing and analysis; online and offline reporting; and dissemination in order to support trade and transport planning and operations in the member states.

The Annual Performance Monitoring Report 2022 compiles and publishes indicators covering six major trade and multimodal transport areas: volume of transactions, transport cost and rates, productivity and efficiency, transit times and delays and transport safety. The report includes all modes of transport that facilitate movement of goods along the corridor, namely marine, road, railway and inland waterways.

As CCTO endeavors to reach a wider audience with its information products, Online usage of the Transport Observatory is also monitored in order to respond to user needs on medium and/or content of information. The portal has been increasing gradually with more feedback and increased demands on reports and updates. Between 2021 to 2022, an online traffic increased from 7574 to 9301 (23%). The audience profile also widened to 51 states around the world, including people of diverse demographics and languages. The CCTO will be responding to user needs in order to serve them better. We shall upgrade to enhance operations of its information platforms, addition of other components such as the intra-regional trade between countries as well as improving the communications and advocacy strategy to widely disseminate its reports and findings. In 2022, CCTO advanced work on research, policy analysis, small area studies and outreach response in facilitating better understanding of trade and logistics in EAC through increased networking with The World Bank, Trade Mark Africa, Tanzania Shipping Agencies Corporation, The Northern Corridor Transport Observatory, Dar-es-Salaam Corridor and our esteemed seasoned partners.

The key performance indicators on volume of transactions demonstrate the performance of the Port of Dar es Salaam in terms of availed data on cargo flow both for imports and exports for the period of January to December 2022. The overall increase in cargo for imports was 17% while for exports it was by 27% in comparison to the same period in 2021. In terms of traffic share, Tanzania (local) cargo represented 57% of all imports passing through the port of Dar es Salaam while transit cargo to the Central Corridor member states represented 30% while 13% were other non-members of Central Corridor. For exports, the share of Tanzania cargo was 54% while export cargo from other Central Corridor member states represented 28% and other non-Central-Corridor states represented 14%.

On maritime operations along the Central Corridor, three major lakes of Kivu, Victoria and Tanganyika form the inland waterways transport and logistics chain for the member states. Specific to this report we have extensive data on Lake Victoria operations between Mwanza

## EXECUTIVE SUMMARY

Port in Tanzania and Port Bell in Uganda. During the year, one wagon ferry namely MV. Kaawa, owned by Uganda Railways Corporation (URC), of capacity of carrying 22 Wagons containers equivalent to 880 tons provided services on this route while MV Pamba was grounded. In 2022, cargo throughput MV Kaawa was 55,000 tons, equivalent to increase of 48% from 37,000 tons in 2021.

The efficiency and productivity indicators give a basic guideline on how well the corridor performs operationally. The objective of productivity measurement is to give the current performance in the transport logistics chain against desirable productivity measures as set by the Government of Tanzania, also ensuring that its outcomes live up to the expected values. On port efficiency, the dwell time for transit containers has decreased to approximately 10.7 days in 2022, similar to 2021. We note that there is work to be done to reach the target of 5 days set by the Government of Tanzania.

The truck turnaround at TICTS terminal has been 1.53 hours in 2022 indicating improvements resulting to 1 hour cut in time of operations during the period. The number of foreign registered transit trucks carrying transit cargo has increased significantly from less than 6% in the last 5 years to 14% in 2022. The increment of transit trucks is attributed to the harmonization of road user charges and significant improvement on the Central Corridor in terms of cargo handling at the port of Dar es Salaam and as well as road infrastructure that are encouraging other transporters to operate on the Central Corridor.

Road transit time to various destinations of the Central Corridor Member States have improved in terms of average time and reliability by reduction of 14 hours overall. Transit time from Dar- es-Salaam Port was recorded as 4.0 days (97 hours) to Kigali, 5.5 days (131 hours) to Bujumbura, 5.9 days (142 hours) to Kampala, 7.3 days (174 hours) to Bukavu and 6.5 days (157 hours) to Goma. However, the data does not show sustained improvements to be expected in 2023 from the monthly trends towards December if situation remain as it was in 2022. Despite remarkable progress in removal of COVID restrictions, new challenges in 2022 caused transit times to fluctuate without downward pattern.

Lastly, in addition to regular indicator-based performance monitoring, the Central Corridor Transport Observatory is mandated to carry out specialized surveys of different modes of transport along the corridor to appraise with ongoing state of affairs on the ground and chart way forward with stakeholders. This year, the report surveyed assets capacity and utilization for inland waterways and railways for Tanzania and Uganda to appraise on their performance and gaps. As such, there is a general understanding of performance and issues of inland waterways transport in Lake Tanganyika and Lake Victoria as well as Tanzania Railways Corporation and Uganda Railways Corporation. The report will support further advocacy on facilitation of Railways and Inland waterways infrastructure and operational improvements.

The Central Corridor Transport Observatory annual report highlights the key performance indicators from the period January to December for the year 2022.

### SUMMARY OF THE PERFORMANCE

The below table shows the summary of the performance indicators from January to December 2022 in comparison to the same period of 2021.

**Table 1: Summary of performance, 2021-2022**

S/N	Performance Indicator	Description	2021	2022
1	Total Cargo throughput (mil tons)		17.02	19.9
2	Deep Sea Cargo Share, %		97%	97%
3	Imports as share of deep-sea cargo, %		83%	83%
4	Country Imports (tons)	Tanzania	8,453,795	9,250,271
		Burundi	495,099	530,561
		D.R. Congo	1,672,218	2,312,864
		Rwanda	1,327,863	1,464,102
		Uganda	138,203	199,108
		Others	1,679,664	2,193,614
5	Country Exports (tons)	Tanzania	1,562,164	1,800,271
		D.R. Congo	685,649	1,013,479
		Rwanda	38,426	46,576
		Burundi	11,919	11,920
		Uganda	602	73
		Others	332,645	461,376
6	Transport rates (imports to)	Kigali	\$2,800	\$3,490
		Bujumbura	\$3,000	\$3,225
		Kampala	\$3,300	\$3,500
		Bukavu	\$4,900	\$5,200
		Goma	\$4,300	\$4,590
7	Ship turnaround time (Days)		3.9	10.0*

S/N	Performance Indicator	Description	2021	2022
8	Dwell time	Annual Average - Local container at TPA (days)	6.5	8.7
		Annual Average - Transit container at TPA (days)	9.5	10.7
		Annual Average - local container at TICTS (days)	4.6	4.6
		Annual Average - Transit container at TICTS	10.7	10.7
9	Truck turnaround time (hours)	Truck Turnaround Time at TICTS in Hours	1.84	1.82
10	Transit time to destinations (days)	Dar-Kigali	5.5	4.04
		Dar-Bujumbura	5.6	5.47
		Dar-Kampala	6.6	5.94
		Dar-Bukavu	7.33	7.27
		Dar-Goma	7.34	6.53

Source: CCTO Analysis, 2022, \*Waiting time at outer anchorage begun to be added to the component



# Section One

# INTRODUCTION

## 1.1 Macroeconomic Indicators

This section provides general information that put trade and transport in context. Macroeconomic indicators provide reflection on the economic circumstances of a particular country in relation to performance of trade and transport in the Central Corridor member countries of Burundi, Democratic Republic of Congo (DRC), Rwanda, Tanzania and Uganda. Most relevant macroeconomic indicators are discussed in this report; including population dynamics such as the size, density and growth; national income levels, economic structure, growth and inflation.

### 1.1.1 Population of Member States

Central Corridor Member States population has been increasing annually having a combined population projected at 228 million in 2022, growing from 226 million by December 2021 (World Economic Outlook). At this level, the population of corridor member countries, in their combination, has grown by an average rate of 3.0 percent in the period of 2020-2022. The population dynamics of Central Corridor present a huge market for internal trade in the long- time to come, compared to other low income countries whose annual growth rate is below 2%.

In addition, the region surface area of 3.587 million Sq.Km calls for complex trade and logistic interventions to facilitate smooth trade. In addition to land area, the average distribution of population on the land is an important indicator of logistical spread challenges and strategies as it explains spatial distribution of markets. The corridor member countries, in combination, had population density of 63.5 persons per square kilometre by 2022, rising marginally from 63.2 persons in 2021. However, there are marked variations in population density of member countries, with DRC having the most sparsely distributed population (41.3), followed by Tanzania (65) persons per Sq.Km. The population density of Uganda, Burundi and Rwanda were 181, 452 and 503 persons per Sq.Km in 2022 respectively. Summary table below represents population size, distribution and growth rate.

**Table 2: Central Corridor Population Size, Growth and Density, 2020-2022**

Indicator	2022	2021	2020	2019
Population Size (Mil)	227.8	226.7	219.9	213.2
Population Growth (%)	3.08	2.99	2.99	3.09
Population Density (persons/Sq.Km)	63.5	63.2	61.3	59.4
Land Area (Million Sq.Km)	3.588	3.588	3.588	3.588

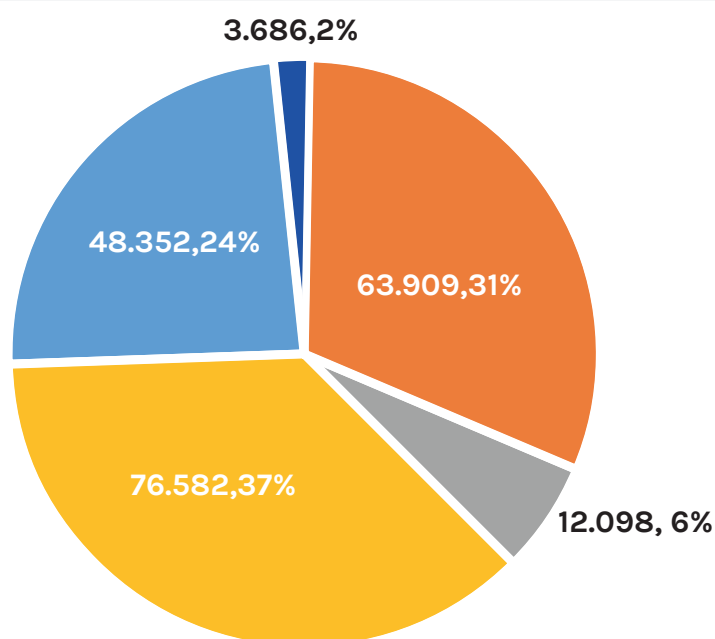
Source: World Economic Outlook 2022, IMF

### 1.1.2 National Incomes of Member States

This section provides selective information about economy of Central Corridor member states, enough to position trade and transport in context. As such, national income, exchange rate, and inflation are discussed. Furthermore, the major components of economy are highlighted as indicative of developments in trade, market potentials and logistics.

According to the World Economic Outlook (IMF: October 2022); national economy sizes as measured from the GDP of Central Corridor member states in combination, at current prices was USD 204,627 million distributed country-wise as in the graph below showing that Tanzania had 37% of Central Corridor GDP share followed by DRC at 32%. Uganda's share of Central Corridor total GDP was 24%, Rwanda (6%) and Burundi (2%).

Figure 1: Member States' GDP Status and Share in 2022, Bil USD



Source: World Economic Outlook: October 2022

Legend: Burundi (Blue), Democratic Republic of the Congo (Orange), Rwanda (Grey), Tanzania (Yellow), Uganda (Light Blue)

IMF (World Economic Outlook) also reported that GDP annual growth in 2022 among Central Corridor bloc of 5.3%, growing from an average of 3-5% growth in 2021. The economies showed sustained economic recovery, judged from positive growth in GDP as in year 2021 by each of Central Corridor member states<sup>1</sup>.

GDP of Central Corridor members growth at 5.3% is higher than that of Sub-Saharan Africa as a bloc (3.5%) and the global GDP growth (3.1%). It was encouraging that all member states recorded positive GDP growth in 2022 as it was in 2021, which shows sustained recovery from COVID-19 impacts of 2020.

Table 3: Annual GDP Growth rates (%), 2020-2022

Country Groups	2020	2021	2022
World	-3.12	5.88	3.1
Emerging markets and developing economies	-2.07	6.4	3.7
Sub-Saharan Africa	-1.66	3.69	3.5
Central Corridor members	1.96 <sup>2</sup>	4.5	5.3

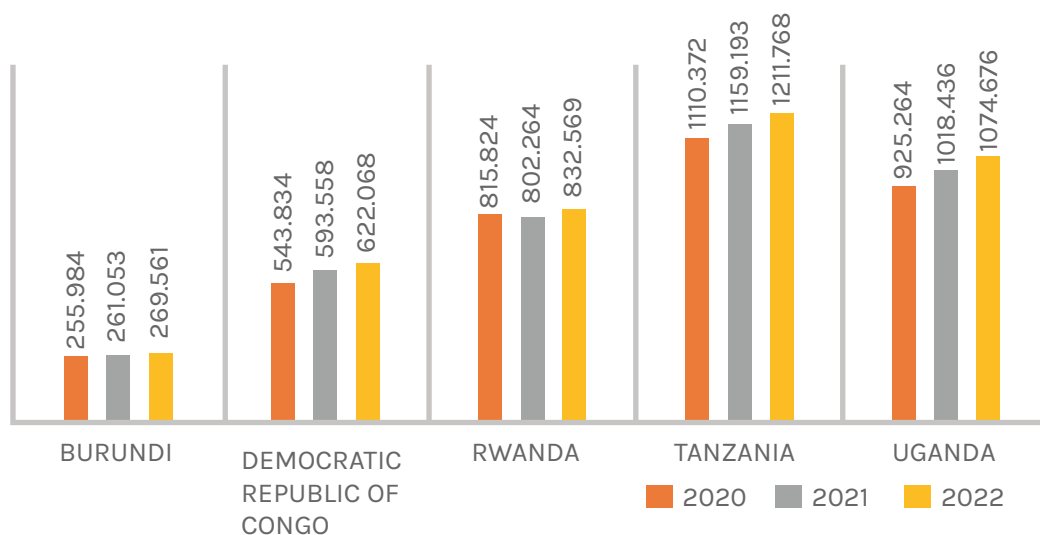
Source: WEO (IMF, 2020-2022), and CCTO analysis for Central Corridor average growth

Furthermore, the GDP per capita of Central Corridor member states as proxy measure of average income level per head of its population, had a wide range between USD 292 for an average Burundian to 1106 USD for average Tanzanian per annum in 2022. The three-year trend in average income of individual member countries (GDP per capita) are shown below:

<sup>1</sup>IMF (World Economic Outlook) provided GDP figures of individual countries. To obtain Central Corridor growth in GDP, individual growth rates in GDP, weighted average growth rate was computed with the weights being shares of combined GDP.

<sup>2</sup>Influenced by negative growths in 2020 for Burundi, Rwanda and Uganda of 1.04%, 3.36% and 0.84% respectively. Tanzania and DRC (with share of 38% and 30% of combined GDP had grown by 4.8% and 1.74% respectively

**Figure 2: GDP per capita at market prices of Member States (USD), 2020-2022**



Source: World Economic Outlook, 2020- 2022

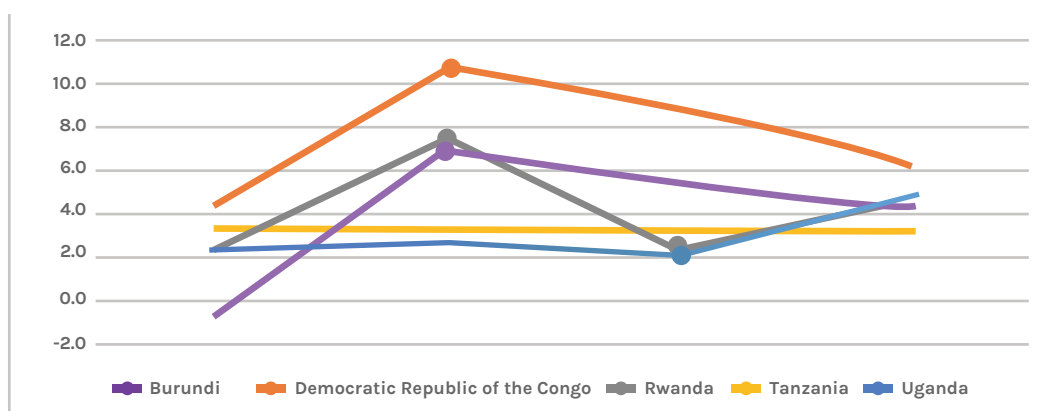
The graph above shows that overtime, the Corridor in general, and each member states are gaining in national economy relative to the gains in population.

### 1.1.3 Inflation rates

The price of goods and services in an economy influences the pattern of consumption and hence that of importation of goods. Importation prices on the other hand, influences the price of foreign currencies for international trading. On a more specific level to transport, the cost of transport services is also influenced by the price of essential vehicle utilities and parts as a factor of trade costs.

Analysis of data from World Economic Outlook (IMF) shows that the Central Corridor member states had ten-month average inflation rates in 2022 of 4.81%, nearly the same as it was in 2021 (4.84%). At this level, the consumer prices of Central Corridor states increased at lower level compared to Sub-Saharan African countries (14%). Graph below shows inflation rates of Central Corridor member states for the period of 2019-2022:

**Figure 3: Average Inflation rates of Central Corridor Member States, 2019-2021**



Source: World Economic Outlook, IMF (2019-2022)

Note: Central Corridor combined inflation was computed as weighted average of individual member states' rates of inflation, weighted by their relative sizes of GDP.

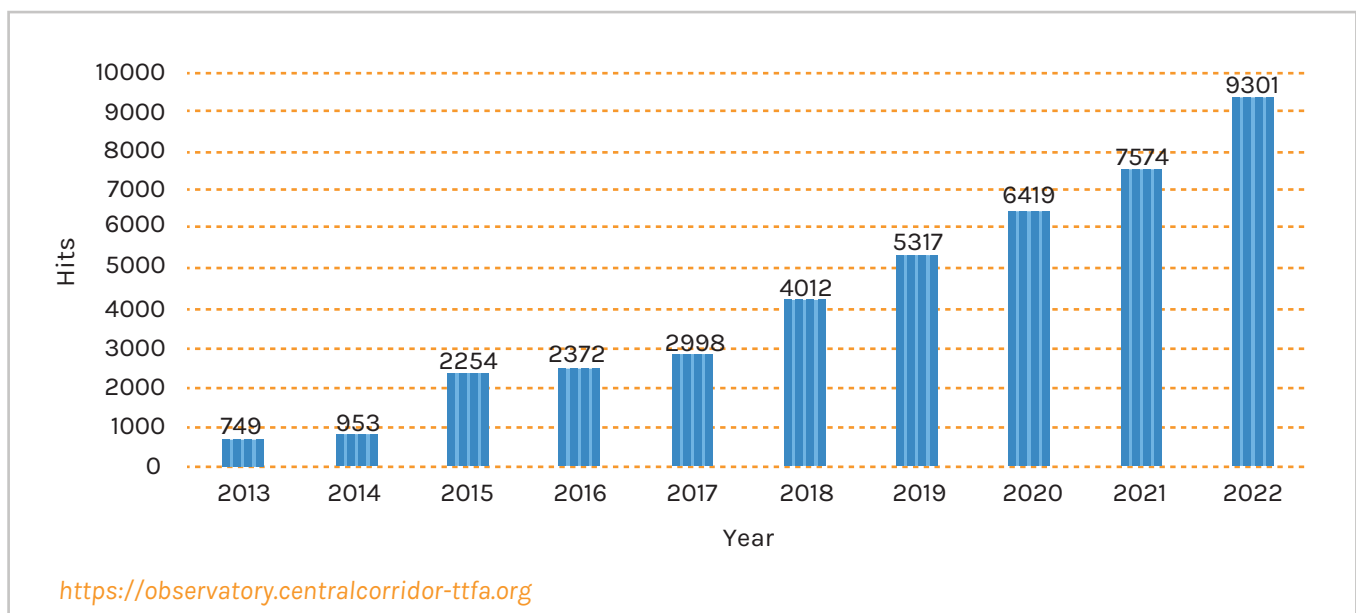


## 1.2 Central Corridor Performance Monitoring

The CCTFA uses the Transport Observatory Portal to monitor the performance of the corridor. The observatory portal includes the Main Observatory which features 40 performance indicators on regular basis, the dashboard which display selected KPIs among the main indicators and the GIS component which visualizes various nodes on the route in relation to various KPIs being monitored.

The portal has its inbuilt module for tracking audience using google analytics engine. By December 2022, audience to the portal had reached 9301 from 7574 in December 2021, equivalent to growth of 23%. Access to the portal was mostly from English-speaking users (80%) followed by Chinese-speaking users (12.5%). French-speaking users represented 3.54% and about 3.76% of other languages. The gender demand to the portal was distributed as 61% male users and 39% female users, distributed age-wise as 22% aged 18-24, 40% aged 25-34, 15% aged 35-44 and 22% aged 45-54 from a list of 51 states all over the world. Countries of top ten users to access the portal, representing 89% of audience were Tanzania, Kenya, China, United States of America, Rwanda, South Africa, Uganda, Netherlands, Burundi and DRC, of which 64% were from Central Corridor member states.

Figure 4: Trends in CCTO Traffic Hits, 2013-2022

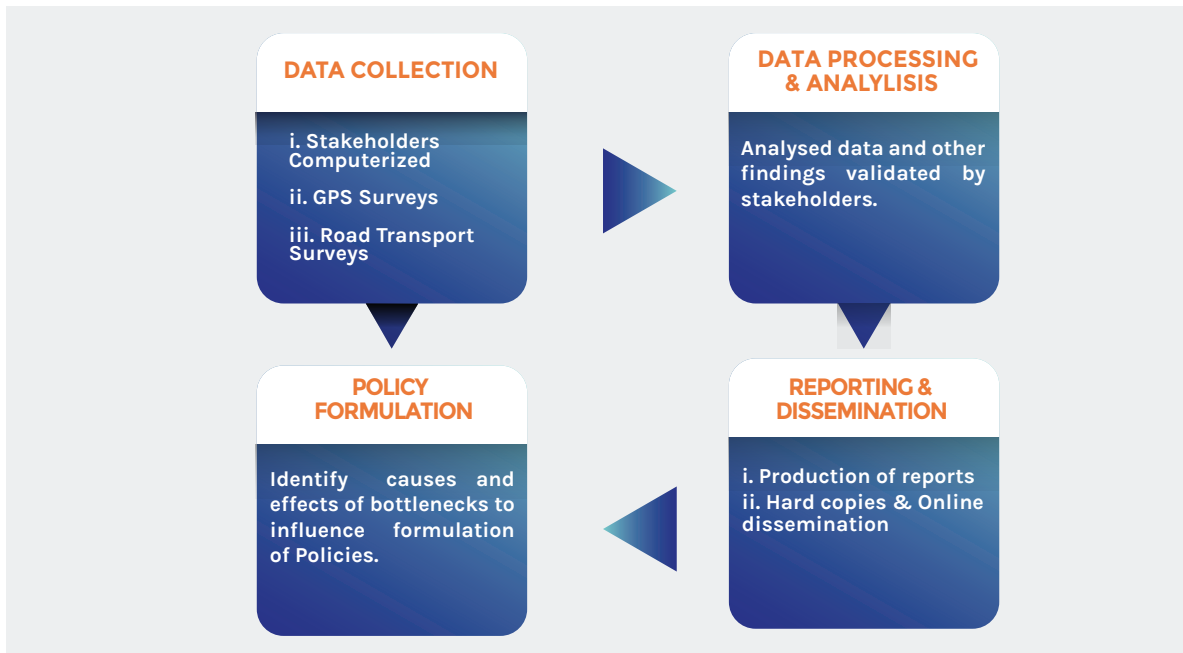


Online usage of the Transport Observatory portal has been increasing annually with more feedback and increased demand on the CCTO reports. From the year 2013 to 2022 a trending analysis observed that the traffic hits to online reports increased by 23% in 2022, compared to 18% in 2021.

### 1.3 Methodology

The Observatory has developed mechanisms, people and systems for collecting, processing, analysis, reporting and dissemination of evidence-based findings. The evidence in the performance is meant to advocate for policy and operational developments in favour of transportation and logistics on the Central Corridor.

Figure 5: CCTO Methodology



Data collection process involves a combination of various methods and sources. The main sources of data include Central Corridor stakeholder's electronic systems such as Ports Authorities (TPA and TICTS), Revenues Authorities (TRA, URA, RRA, DGDA and OBR), Railway Authorities (TRC & URC), Transporters, Clearing and Forwarding Agents. Other sources include digitized mobile application for survey data collection, specialized field surveys and observations of infrastructures along the corridor. Other information is collected from secondary sources such as policy documents and reports, within and outside the corridor for referencing and comparison.

The CCTO engages the data providers by signing the Memorandum of Understandings (MoUs) that specify the nature of data to be shared, schedules of the data sharing, formats and also acts as a platform that binds the data sharing processes with CCTO Stakeholders. Through these MoUs, CCTO has advanced its data sharing mechanism to an automated technology (system integration through modern technologies) which simplifies data collection process by reducing human interventions thereby improve the quality data being sourced and it is collected on time.

### 1.4 Processing, Analyzing and Reporting

Once the data is collected from various stakeholders, they are processed through various agreed formulae and scripts then analyzed focusing on various indicator categories of the Central Corridor Transport Observatory (CCTO). The results are presented in various sections and chapters as detailed in this report.

Analysis is both quantitative and qualitative in nature, with statistical tools used to produce tables, graphs and other visualization mechanisms. Prepared reports are then validated by data providers and stakeholders. Validated reports are graphically designed, printed and widely disseminated in hardcopies and online in the Central Corridor official

languages (English and French). Furthermore, findings and recommendations are communicated to respective institutions for action and way forward.

Lastly, the Central Corridor Secretariat is tasked with advising the member states on best practices in implementing the recommendations.







# Section Two

## VOLUME AND CAPACITY INDICATORS



## 2.0 Introduction

The Port of Dar es Salaam is Tanzania's principal port with a rated capacity of 4.1 million (dwt) dry cargo and 6.0 million (dwt) bulk liquid cargo. The port has a total quay length of about 2,600 meters with eleven (11) deep-water berths. Dar es Salaam Port handles about 92% of the Tanzania international trade.

The port serves the landlocked countries of Burundi, Democratic Republic of Congo, Malawi, Rwanda, Uganda and Zambia. The port is strategically placed to serve as a convenient freight linkage not only to and from East and Central Africa countries but also to Middle and Far East, Europe, Australia and America.

Tanzania Ports Authority (TPA) is implementing a number of major projects as outlined in the National Ports Master Plan (PMP) study undertaken by Royal Haskoning in February 2009. The study laid out long term strategy for Tanzanian Ports to create capacity for the expected demand. One of such projects is the Dar es Salaam Maritime Gateway Project (DMGP).

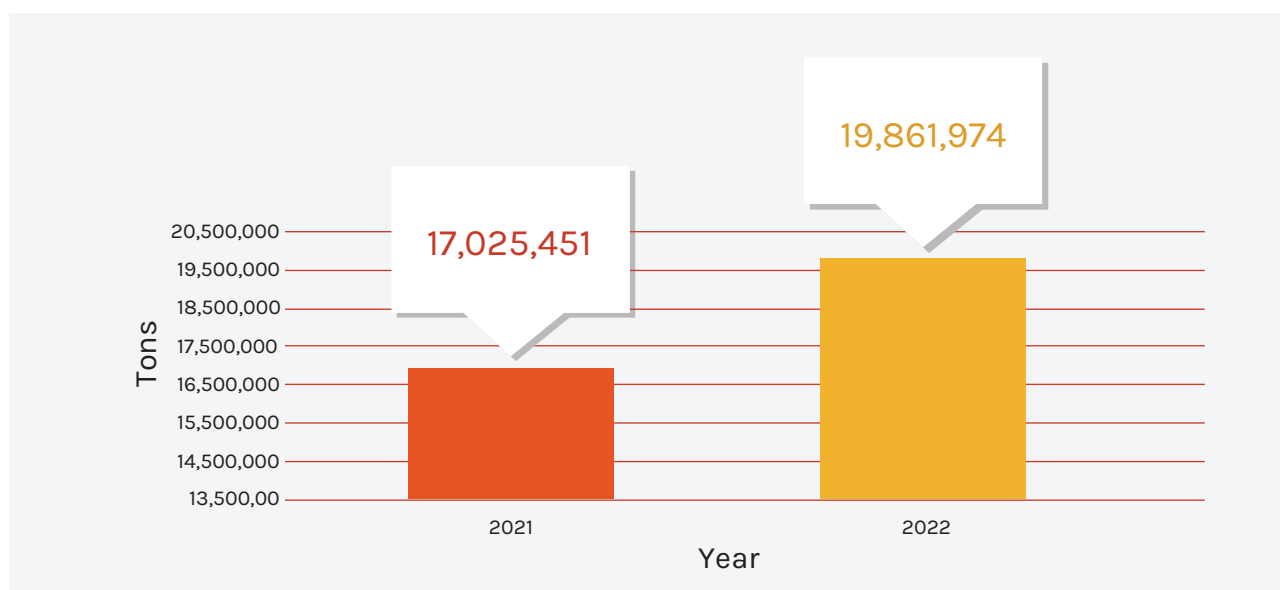
DMGP will improve the effectiveness and efficiency by converting the port to a world class port with optimized efficiency to accommodate the calling and reception of larger vessels. The DMGP is expected to increase the capacity of the port to 28 million metric tons by 2025.

The Port of Dar es Salaam modernization projects include but not limited to strengthening and deepening of berths 1-7 and RORO terminal, dredging of entrance channel, turning circle and harbor basin, strengthening and deepening of berths 8-11, and construction of a new terminal jet.

## 2.1 Cargo Volume

This section shows the performance of the Port of Dar es Salaam in terms of cargo stream both deep sea cargo which crosses Tanzania's national borders and coastal cargo which is local. During the year 2022, cargo volume was 19.86 million metric tons, representing 17% growth from the level recorded in 2021 (17.02 million tons), which is equivalent to an increase of 2,836,523 tons within a year. Graph showing cargo throughput for the period of 2022 compared to 2021 is shown below:

Figure 6: Annual Cargo Throughput in Tonnes, 2021-2022

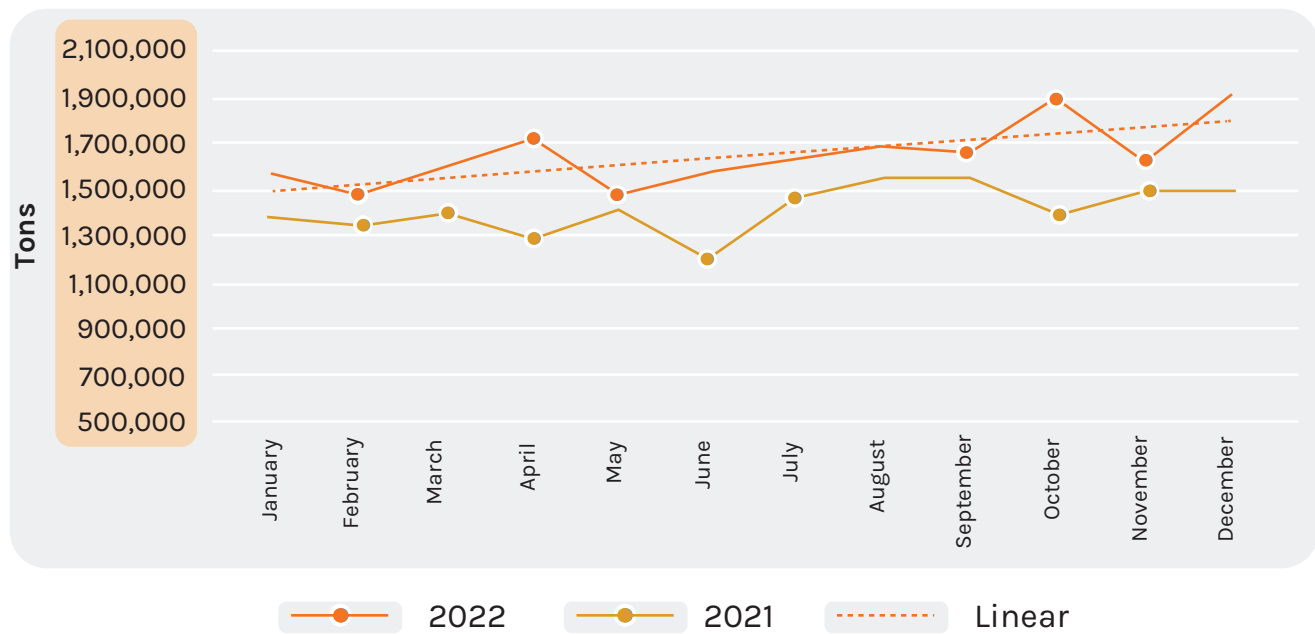


Source: TPA, 2021-2022

Analysis of monthly cargo throughput performance shows a nearly constant monthly average volume of 1.66 million tons, fluctuating within 8%. The level of monthly average volume of 2022 was higher than that of 2021 which was 1.41 million metric tons, well within 7% of the fluctuations. This is to say that monthly business output in terms of cargo volume would be predictable as they were around 92% of 1.66 million tons in 2022.

The trend in monthly cargo volumes in both years exemplifies slightly increasing pattern towards end of year, with troughs in the month of May-June. The maximum cargo throughput in 2022 was recorded in December at 1.92 million tons, while for 2021 it was recorded in September at 1.56 million tons. This indicates differing business peak cycles of 2022 compared to 2021 although low seasons remain close.

**Figure 7: Monthly Cargo Throughput in Tonnes, 2021-2022**



Source: TPA, 2021-2022

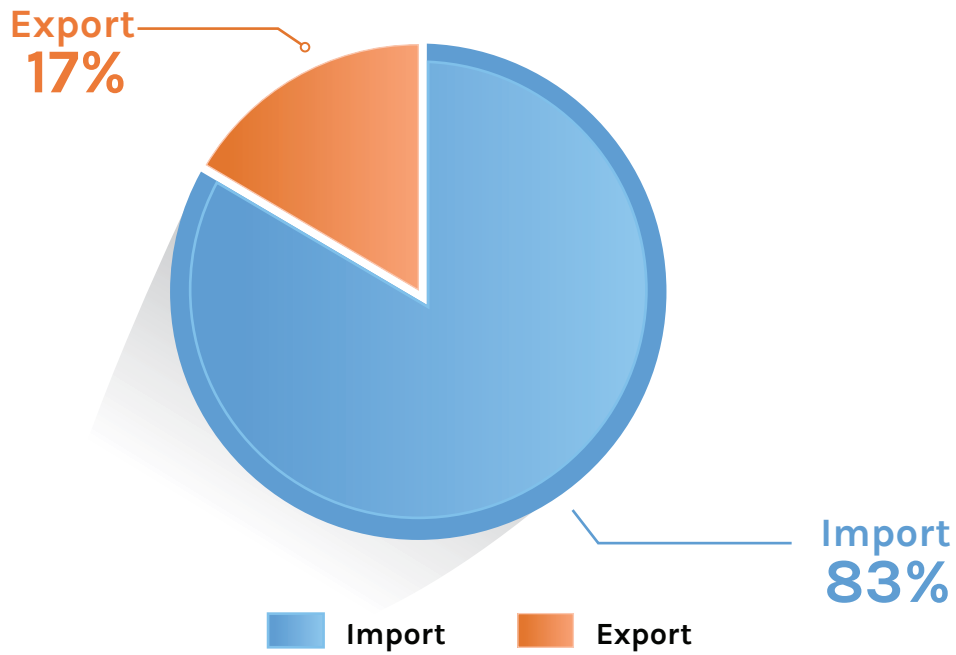
## 2.2 Cargo Traffic

Cargo that passes the Dar-es-Salaam Port originates or is channeled into deep-seas while some is shipped within local ports as coastal cargo. Deep sea cargo comes from international markets as imports or is destined outside the national boundaries of Tanzania as exports.

Deep sea cargo during the year 2022 stood at 19.2 million tons, being an increase from 16.4 million tons recorded in 2021. The distribution of cargo traffic was such that deep-sea cargo constituted 97% of total cargo in both years of 2022 and 2021, leaving the residual of 3% as coastal, transshipment and other cargo types. Furthermore, deep-sea cargo was split at 83% as import cargo traffic and 17% as export cargo, being a slight increase of two percentage points in import share and a corresponding similar decline in export cargo share between the two years. Other cargo traffic remained small and declining such as coastal cargo declined by 1.8% between 2021 and 2022 while transshipment declined by 33% in the same period.

The import cargo volume in 2022 was higher by 16% from the volume recorded in 2021 while that of export cargo was 27% higher than it was in 2021. This means, although export volumes at the Port of Dar-es-Salaam have small relative share compared to imports, its growth in 2022 is promising and calls for need to sustain the pace.

Figure 8: Distribution of Deep-Sea Cargo Traffic, 2022



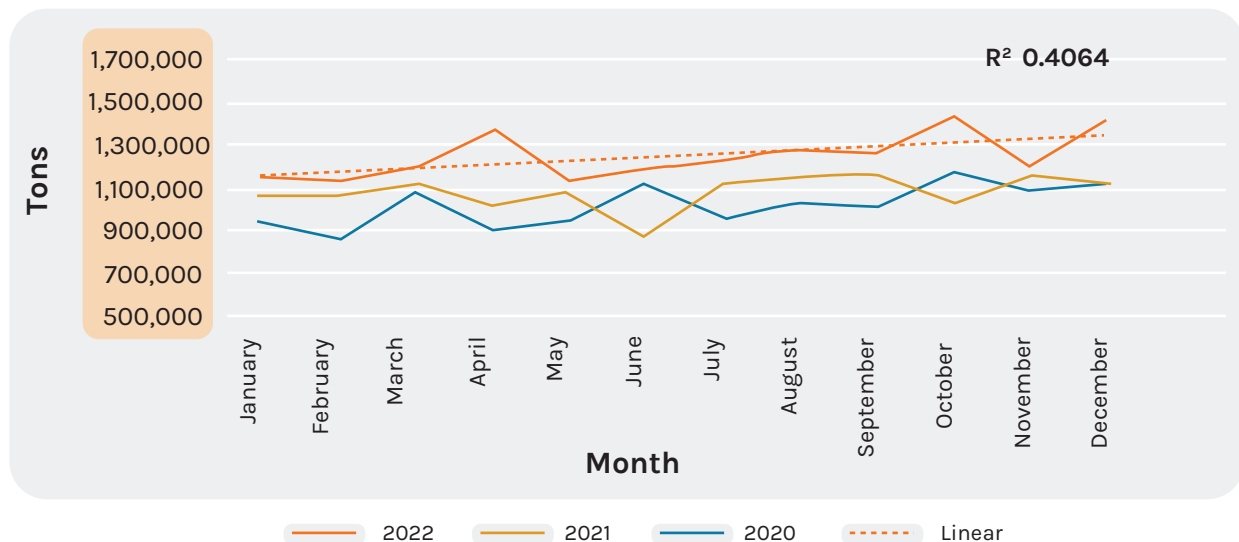
Source: TPA, 2021-2022

### 2.3 Import Cargo Traffic

The import cargo volume was recorded at 15.95 million tons in 2022. This was an increase of 2.1 million tons compared to 13.767 million tons in 2021, equivalent to 17%. The annual imports volumes translate to a monthly average import cargo volume of 1.33 million tons in 2022, an increase from a monthly average of 1.15 million tons in 2021. Growth in imports in 2022 at 17% was higher than last year when it grew by 7%.

Further, the monthly import cargo volumes are stable from month to month with fluctuations of 9% around the expectation. This means that monthly import cargo volumes were highly predictable in 2022 as it was in 2021. Furthermore, it was observed that the month of January 2022 had the lowest imports compared to the low season month of June in 2021. Moreover, in both years, the peak performance was recorded in September-October. Monthly series of import cargo volumes are shown below;

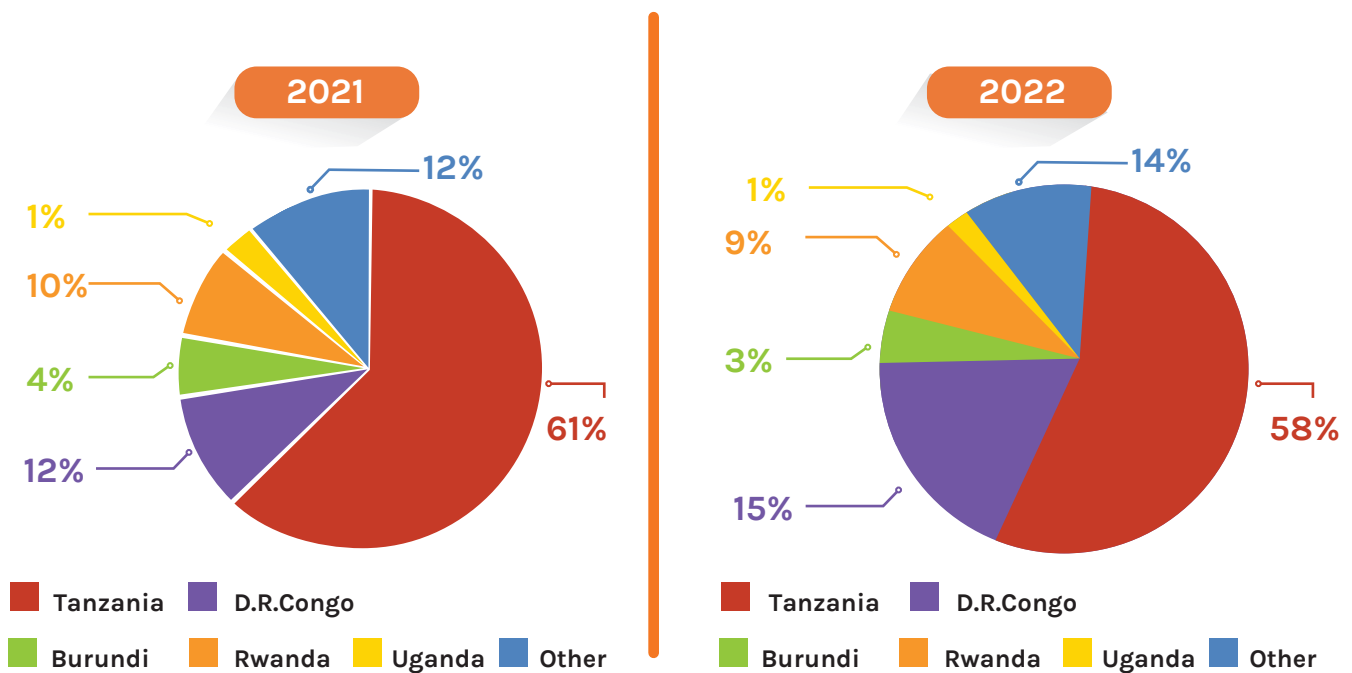
Figure 9: Monthly Import Cargo Trends, 2020-2022



Source: TPA, 2021-2022

The relative share of import cargo among the Central Corridor members display a decline of three points in share of local imports (Tanzania) relative to other member states. Tanzania's share dropped from 61% in 2021 to 58% in 2022. This was consistent with a gain in DRC's share of Central Corridor imports from 12% in 2021 to 15% in 2022. There was a one-point decline in Rwanda's import share of Central Corridor from 10% in 2021 to 9% of total volume in 2022. The share of Burundi's imports also declined relative to other members of the Corridor from 4% in 2021 to 3% in 2022 while that of Uganda has remained the same between 2020 and 2022 at 1% respectively. These dynamics are complemented by a rise in share of imports by other non-members of the corridor that use the Dar-es-Salaam port from 12% in 2021 to 14% in 2022.

**Figure 10: Share of Import Cargo Traffic by Country, 2021-2022**



Source: TPA, 2021-2022

The annual import volumes to each member state through Dar-es-Salaam Port in the period of 2020-2022 is shown below:

**Table 4: Annual Imports Discharged at Dar Port by Country, 2019- 2022 (Tonnes)**

Country	2019	2020	2021	2022
Tanzania	8,147,222	8,457,724	8,453,795	9,250,271
D.R. Congo	1,249,458	1,209,565	1,672,218	2,312,864
Burundi	430,543	464,458	495,099	530,561
Rwanda	1,200,640	1,204,321	1,327,863	1,464,102
Uganda	140,877	153,964	138,203	199,108
Others	1,819,513	1,357,571	1,679,664	2,193,614
<b>Total Loaded</b>	<b>12,988,253</b>	<b>12,847,602</b>	<b>13,766,842</b>	<b>15,950,520</b>

Source: TPA, 2019-2022

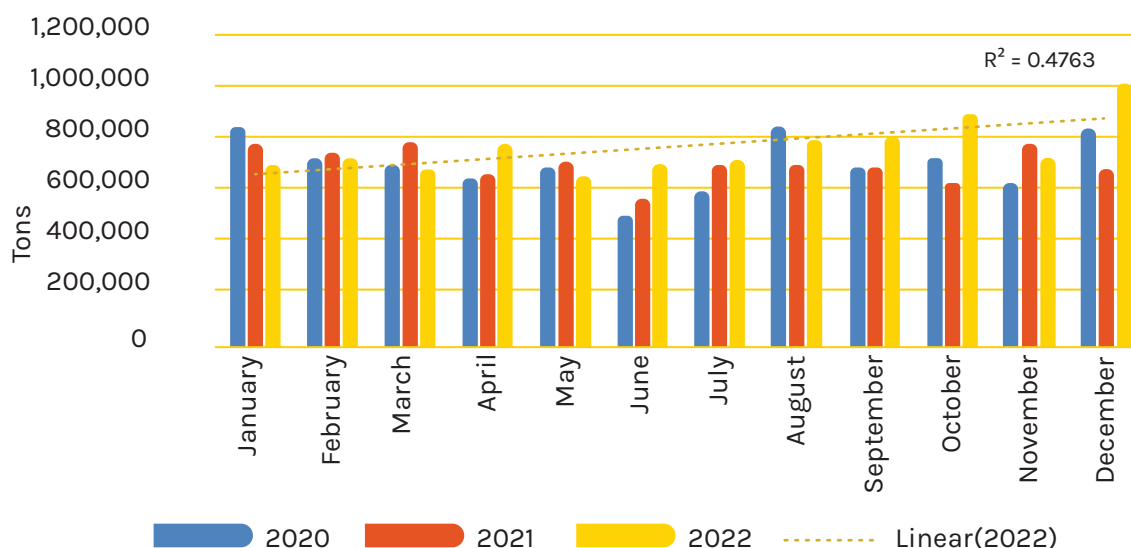


### 2.3.1 Local Imports Cargo (Tanzania)

Tanzania imports through the Dar-es-Salaam Port had an annual volume of 9.2 million tons in 2022. This volume in 2022 was an increase from 8.4 million tons in 2021, equivalent to 9.4%. The level of local import cargo translated to a monthly average volume of 0.77 million tons. It was also observed that month to month cargo imports to Tanzania had increased monthly fluctuations from 10% of annual average in 2021 to 13% in 2022. However, this level of fluctuations from month to month can be judged to be of “low fluctuations” in the period of 2020-2022.

Even though there were ups and downs in trends of monthly import volumes, in general there was a medium steady increase from beginning to the end of year. In effect, the highest performing month of import volume was recorded in December 2022 compared to August in 2021. On the other hand, the lowest volume during the year was observed in May at 0.65 million tons, compared to that of 2021 in which June was lowest season at 0.51 million tons. Another observation is that the month of January is showing sustained decline over the years of 2020-2022 while June and July are showing sustained growth from year to year between 2020-2022. Monthly trends in import cargo volume for Tanzania is shown below in 2021 and 2022.

Figure 11: Monthly Local Imports discharged, 2020-2022 (Tonnes)



Source: TPA, 2021-2022

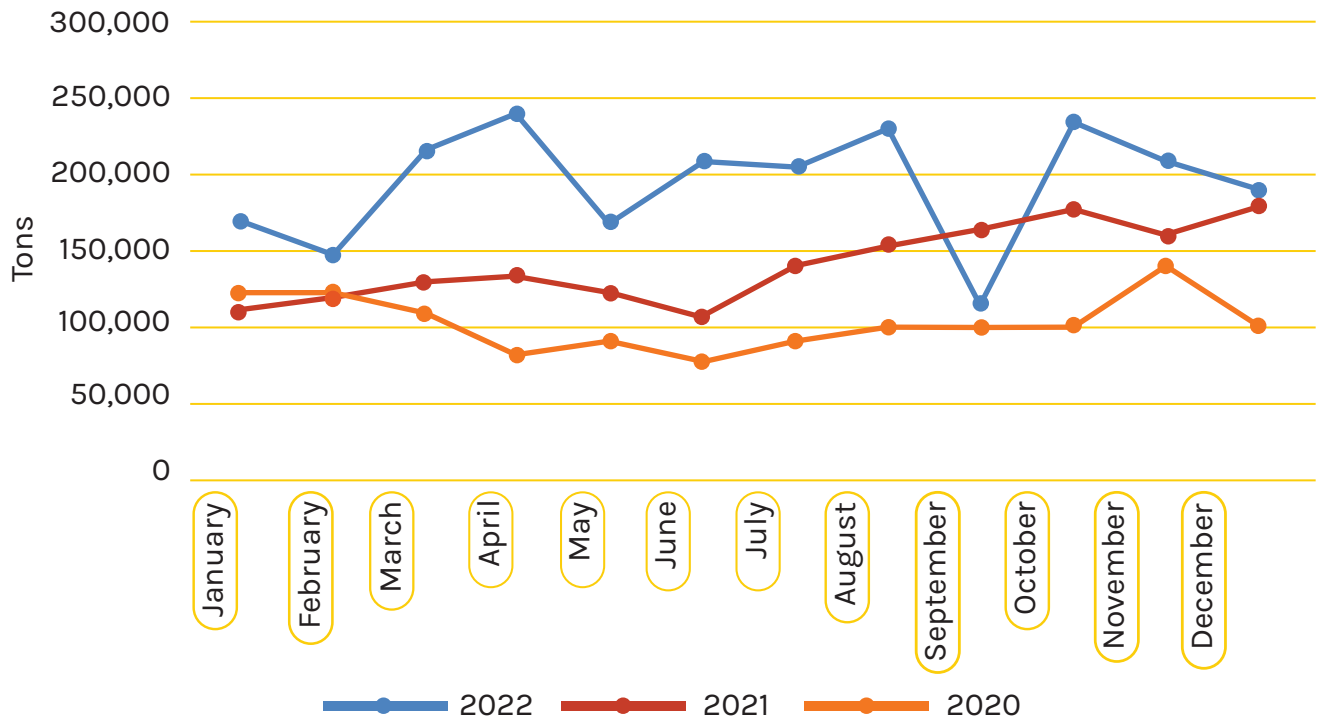
### 2.3.2 Imports Cargo Volume to Democratic Republic of Congo

Import cargo through Dar Port to Democratic Republic of Congo (DRC) was observed to increase from 1.67 million tons in 2021 to 2.3 million tons in 2022. This increase of 640,000 tons (38%) was at the same relative size of increase in previous year at 38%. At 38% increase during the year, it shows not only remarkable upturn from the post-COVID but also continued trust of DRC to Dar-es-Salaam Port utilization.

DRC recorded an average monthly import volume through the Corridor of 192,739 tons in 2022, increasing from 139,000 tons in 2021. Monthly imports to DRC had shown similar levels of fluctuations at the level of 19% in 2022 as compared to 18% in 2020- 2021. The trends in monthly imports to DRC would display random variations not easily predictable. Further, peak and low seasons could not be easily predicted from the monthly import data of the past three years (2020-2022) in that in year 2022, DRC highest import volumes recorded in April in 2022 while this was December in 2021 and November in 2020.

Similarly, the lowest peak month was September 2022 compared to June of 2020 and 2021. Except for September 2022, all other months of 2022 recorded superior performance to their corresponding months of 2020 and 2021. Monthly trends in import cargo volume for DRC is shown below in 2021 and 2022.

**Figure 12: Imports discharged at Dar Port to DRC, January to December, 2020-2022 (Tonnes)**



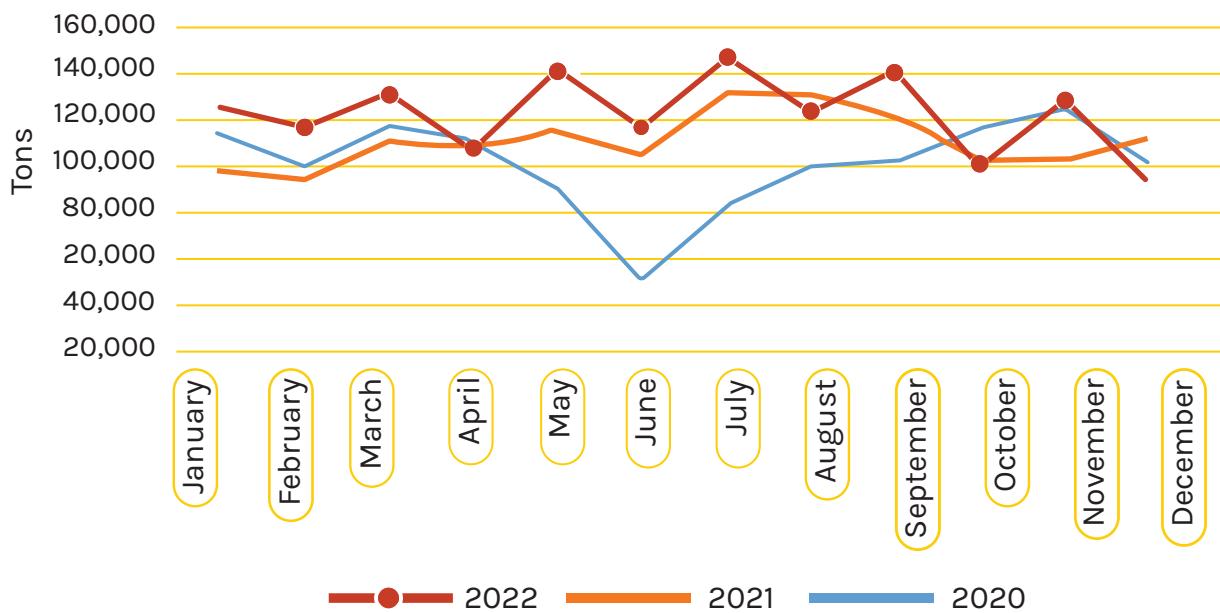
Source: TPA, 2021-2022

### 2.3.3 Imports Cargo Volume to Rwanda

Import cargo through Dar Port to Rwanda was observed to be 1.46 million tons in 2022. The cargo volume observed in 2022 was higher than that of 2021 by 136,239 tons or 10%. At this level, the monthly average volume of imports to Rwanda was 122,000 tons, increasing from 110,655 tons recorded in the months of 2021. Rwanda imports through Dar Port sustained its growth of 10% in 2022 as it was in 2021, showing positive post-COVID growth.

Fluctuations of month to month of import cargo for Rwanda had increased from 11% of the average in 2021 to 14% in 2022. However, this level of fluctuations was lower than during COVID peak year of 2020. Rwanda imports volume displayed erratic trends during the year 2022, similar as the months of 2021. This means, the monthly cargo volume had been dipping and rising for more than six times in a year demonstrated by low predictability even with polynomial fit of order 6. This is a pattern demonstrating decisions informed by monthly inventories. Monthly trends in import cargo volume for Rwanda is shown below in 2021 and 2022.

Figure 13: Imports discharged at Dar Port to Rwanda, 2020-2022 (Tonnes)



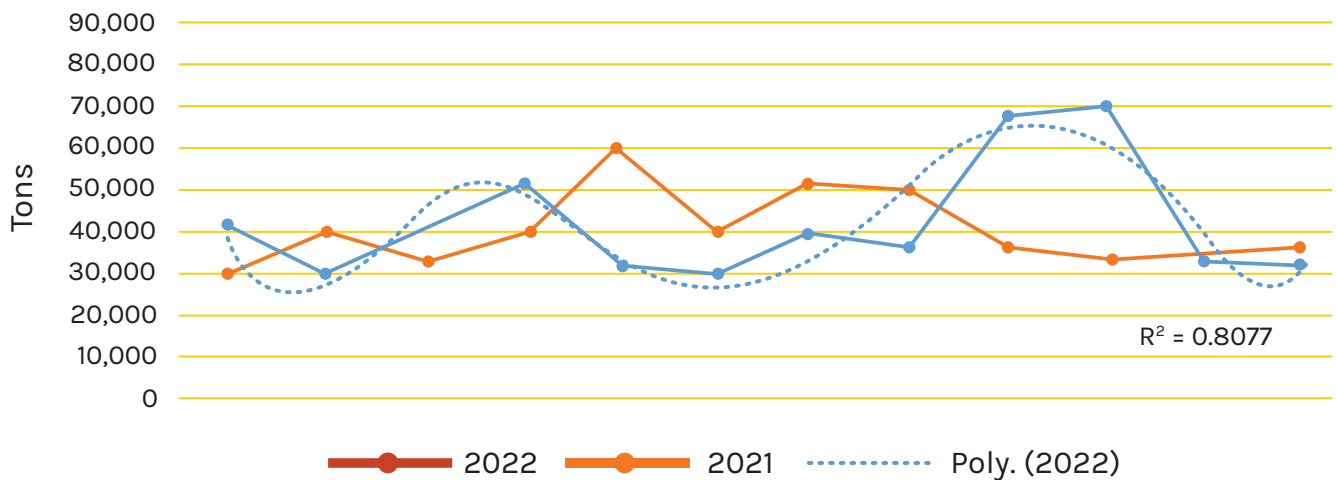
Source: TPA, 2021-2022

### 2.3.4 Imports Cargo Volume to Burundi

Import cargo through Dar Port to Burundi was observed to be 0.53 million tons in 2022. The cargo volume observed in 2022 was higher than that of 2021 by 35,500 tons or equivalent of 7.2%. At this level, the monthly average volume of imports was 44,213 tons, increasing from an average of 41,258 tons typical of the months of 2021. As such, positive growths in imports through the Port of Dar-es-Salaam to Burundi have been recorded in two consecutive years at 6.6% and 7.2% in 2021 and 2022 respectively.

Fluctuations in monthly trends of import cargo for Burundi has been increasing, indicating increasing randomness in business seasons from 2020 (16%) to 21% in 2021 to 38% in 2022. around the average. The pattern of monthly import cargo volume of 2021 displayed a complex relationship with time, a polynomial of order (6) strongly at 81% predictability. This means, the monthly cargo volume had dynamic patterns of ups and downs about six times in a year and that successive monthly volumes were strongly informed by inventories of previous months. Monthly trends in import cargo volume for Burundi through the Central Corridor is shown below in 2021 and 2022.

Figure 14: Imports discharged at Dar Port to Burundi, Jan-Dec of 2021-2022



Source: TPA, 2021-2022

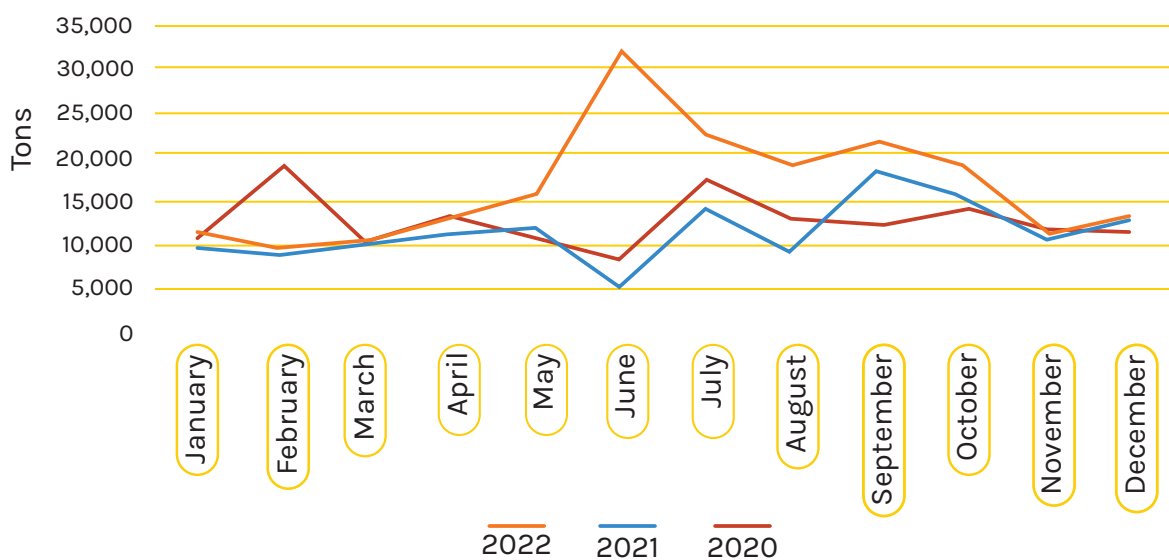
### 2.3.5 Imports Cargo Volume to Uganda

Import cargo through Dar Port to Uganda was observed to be 0.199 million tons in 2022. The cargo volume observed in 2022 was higher than that of 2021 by 61,000 tons or equivalent of 44% increase.

The year 2022 was expected to record larger increase in import volumes to Uganda due to election year in Kenya which was expected to disrupt trade through Port of Mombasa. However, despite the increase of 61,000 tons, not much can be accounted to the expectations. Imports through the Port of Dar-es-Salaam to Uganda had picked two months ahead of elections in Kenya (August 2022), untypical of the month of June in 2020 and 2021 when it the lowest season. However, volumes began to slow down from July towards December 2022.

As a result of eventful year for imports to Uganda through the corridor, there was an increase in fluctuations from 29% around annual average in 2021 to a corresponding 39%. Monthly trends in import cargo volume for Uganda through the Central Corridor is shown below in 2021 and 2022.

Figure 15: Imports discharged at Dar Port to Uganda, January to December, 2020-2022 (Tonnes)



Source: TPA, 2020-2022

## 2.4 Export Cargo Traffic

The export cargo volume in the period of January-December 2022 was recorded as 3.3 million metric tons. This performance was higher than the level of exports recorded in the period of January-December 2021 by 0.702 million tons or 27%. The annual volume of exports through Dar Port translated into a monthly average of 0.277 million tons in 2022, indicating an increase from a monthly average of 0.219 million tons in 2021, equivalent to 27%. Monthly import cargo fluctuations were observed to have declined slightly from 16% around overall average recorded in 2021 to 14% in 2022.

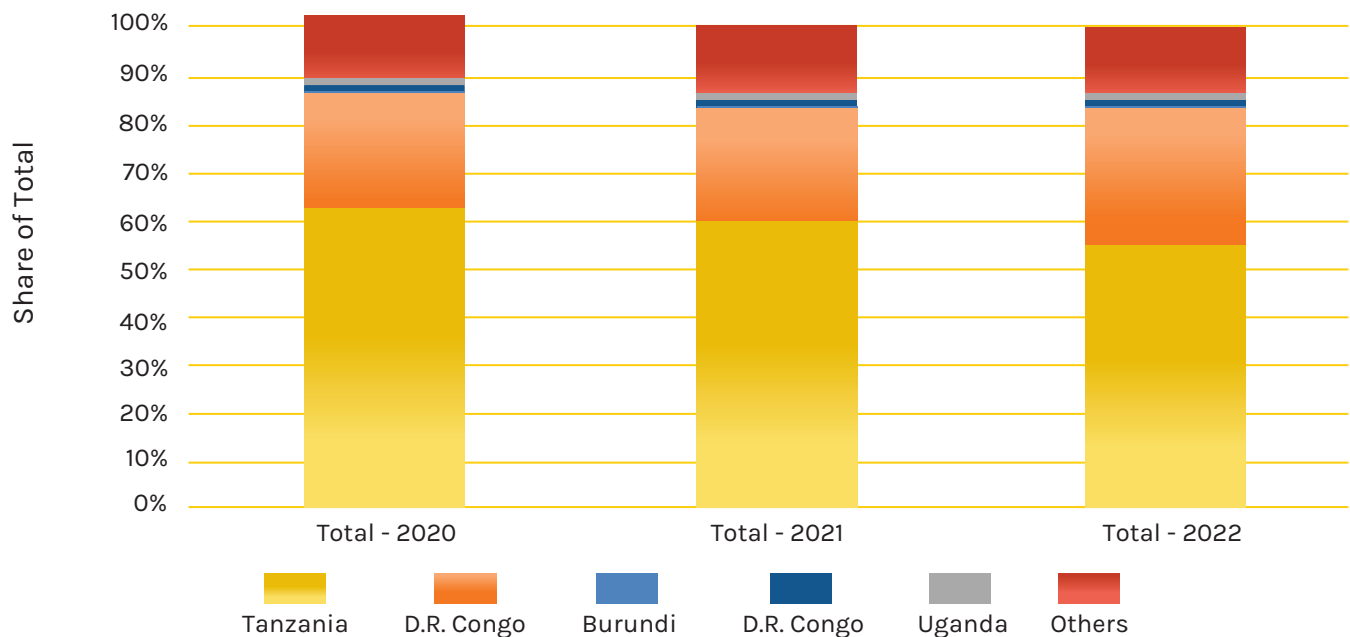
The share of export cargo among the Central Corridor member states was observed to have a relative decline for Tanzania by five-percentage points from 59% in 2021 to 54% in 2022 and a corresponding gain of DRC's share from 26% in 2021 to 31% in 2022 reaching 1.0 million tons by 2022.

Further, Rwanda's relative share of exports through the corridor has not changed in the period between 2021 and 2022 at 1.5% even though its absolute value has increased by 21% from 38,426 metric tons in 2021 to 46,576 tons in 2022.

Export volume from Burundi through the corridor has not changed in absolute and relative values at 11,200 tons and 0.5% compared to other members respectively. Uganda in the Corridor import volume share has remained minimal at less than 0.05% in the past three years with decline in absolute volumes in 2022.

Finally, it was observed that non-members of Central Corridor that use the Dar-es-Salaam Port had registered a one-point gain relative to Central Corridor members during the year, reaching 14% with absolute volume of 461,376 tons by December 2022.

**Figure 16: Distribution of Export Cargo Traffic by Country, 2020-2022**



Source: TPA, 2020-2022

The annual export volumes of each member state through Dar-es-Salaam Port in the period of 2020-2022 is shown below:



**Table 5: Exports loaded at Dar Port by Country, 2020- 2022 (Tonnes)**

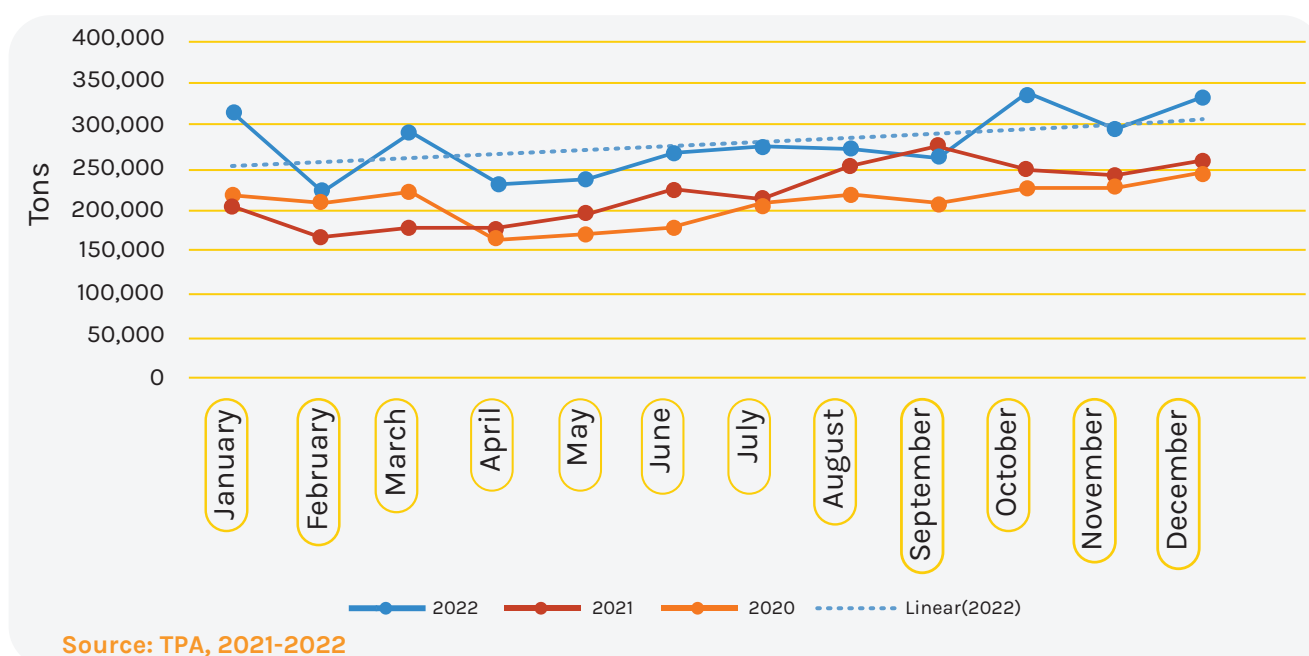
Country	2020	2021	2022	Change 2022(%)
Tanzania	1,532,985	1,562,164	1,800,271	15%
D.R. Congo	631,092	685,649	1,013,479	48%
Burundi	12,350	11,919	11,920	0%
Rwanda	34,917	38,426	46,576	21%
Uganda	30	602	73	-88%
Others	272,018	332,645	461,376	39%
<b>Total Loaded</b>	<b>2,483,392</b>	<b>2,631,405</b>	<b>3,333,695</b>	<b>27%</b>
<b>Monthly Average</b>	<b>206,949</b>	<b>219,284</b>	<b>277,808</b>	

Source: TPA, 2020-2022

The export cargo volumes through Dar Port were also observed to have a slight increasing pattern towards the end of year 2022, at a weak linear pattern over time with strength of 25%. In year 2021, the months had displayed a stronger month to month increase towards end of year at 72% strength.

The monthly series of export cargo volumes for 2022 in comparison to 2021 and 2020 are shown below:

**Figure 17: Central Corridor Monthly Exports at Dar Port, 2020-2022 (Tonnes)**



Source: TPA, 2021-2022

The monthly trends in export cargo volume through Dar Port for year 2022 among Central Corridor member states is shown below. The figure below shows a slow but steady growth in export cargo volume beginning April 2022 towards end of year for DRC, Rwanda and Tanzania while for Burundi they started to increase in August. The same pattern was observed in year 2021 from April, indicating that it is the period coinciding with agricultural harvests and exports.

Figure 18: Monthly Trends in Export Cargo Volume by Country, 2022

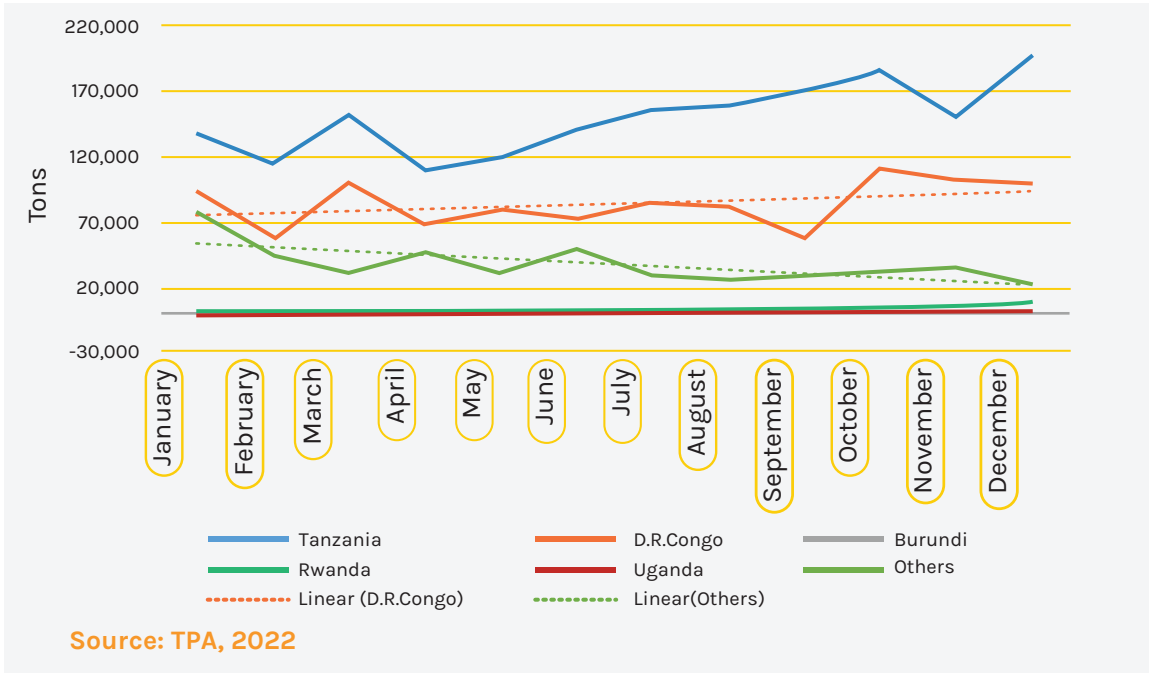


Figure 19: Monthly Trends in Export Cargo Volume for Burundi, 2022

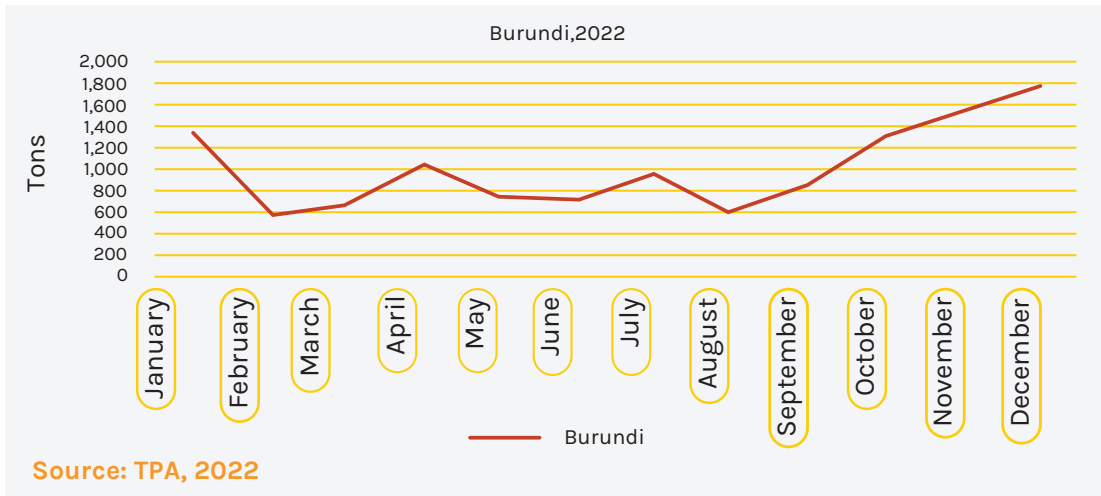
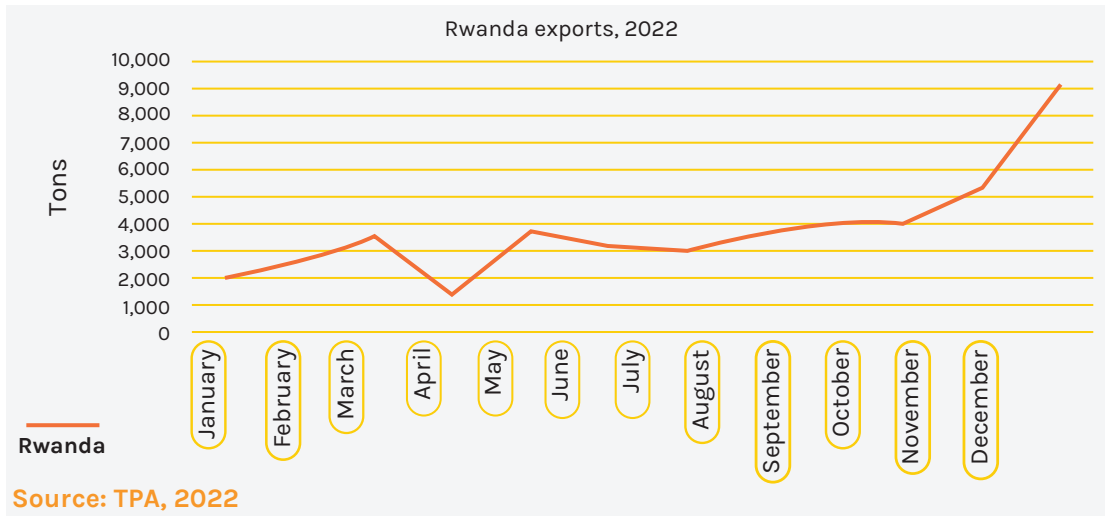


Figure 20: Monthly Trends in Export Cargo Volume for Rwanda, 2022



## 2.5 Transport Capacity by Rail

Tanzania Railways Corporation (TRC) was established under the Railway Act No. 10 of 2017 by merging the functions of Tanzania Railways Limited (TRL) and Reli Assets Holding Company Limited (RAHCO). The mandate of TRC is to provide rail transport services and to develop, promote and manage rail infrastructure.

Tanzania Railway Corporation (TRC) Performance review of rail sub-sector is measured into two categories. First category is performance based on key indicators and the second category is based on implementation of key projects.

### 2.5.1 TRC Performance Review

The performance of TRC in FY2021/2022 has been measured using actual status and comparison with TRC's own annual targets (%) on the following performance indicators; -

- Speed restriction (No.);
- Number of kilometres relayed (km);
- Number of metric tons of freight transported (Tones);
- Number of passengers transported (number)

Table 6: Performance of TRC compared to Targets, 2017/18 - 2021/22

Performance Indicator	2017/18	2018/19	2019/20	2020/21	2021/22
Freight cargo in '000 (Percent of Target)	363 103%	399 58%	295 40%	320 42%	416 66%
Mainline Passengership in '000 (Percent of Target)	531 89%	579 93%	432 65%	462 65%	428 82%
Actual commuters in '000 (Percent of target)	6046 121%	4231 62%	3197 64%	2857 54%	3167 67%
Track speed restriction (Km/Hr)	48.0	46.5	47.0	48.0	49.66
No. of kilometres relayed	-	264	515	44	271

Source: TRC 2017-2022

### 2.5.2 TRC Capacity and Utilization

From the data on available assets of TRC, it was determined that the line has annual carrying capacity of about 2-3 million tonnes<sup>3</sup> given its expected wagon turnaround time determined by actual speed restriction as determined by TIRP (70 kph) and average wagon capacity of 36 tonnes.

Railway speed restrictions improved from 48 kph in 2021 to 49.66 kph in 2022. This is accounted for by the relayed 271 kilometres of railway line in year 2022. Speed restriction is imposed as a safety measure to cope with infrastructure reliability. As well, speed has implications on service efficiency as it informs the most important indicator of operational efficiency, that is the turnaround time.

<sup>3</sup> Total annual Capacity = average wagon capacity multiply by number of available wagons, multiply by 365 days divide by wagon average turnaround time = 36 tons per wagon\*600 wagons\*365 days/(1216/25) = 2.1 million. Allow for combination of allocation of wagons towards Kigoma, Isaka and Mwanza would vary the potential only slightly

Improvement in speed restriction conveys improvements in infrastructure reliability. TRC continues to work towards achieving no speed restrictions (compared to the original design speed of the track) by rehabilitating existing meter gauge railway line through Tanzania Intermodal Railway Project (TIRP) which is under implementation through World Bank credit.

In the year 2022, TRC recorded an average speed of 25 kph in most of the months against the current restriction of 49.66 kph, meaning that speed efficient stood at 52%. Turnaround time was reported to be 17 days on average in most of the year, which means at the current average speed of 25 kph, it would need 2-4 days tracking return trip between Dar-es-Salaam and Isaka, Mwanza and Kigoma, around 1200 kilometres. As such, from the 17 turnaround days, 13-15 days on the average were waiting and loading time, equivalent to 76-88 of turnaround time.time.

Wagons were reported to be 600 at functional state and 800 at dysfunctional state. The number of available wagons is below the target to meet the expectations of moving annual volumes of 6.7 million tonnes of import cargo from TPA to Central Corridor member states, that is to Kigoma along Lake Tanganyika, Isaka and Mwanza along Lake Victoria. However, availability of locomotives was at 68% against planned target of 80% while that of wagons was 50% against planned target of 80%, meaning only about 300 of the existing 600 wagons were available during the year.

At negligible waiting and loading time and average speed of 25 kph recorded in most period of 2022, TRC would be have turnaround time of 78 hours (or 3.2 days) to Isaka, 100 hours or 4 days to Kigoma and also to Mwanza. In effect, at this speed, TRC would be able to move around 2.1 million tons or equivalent of 30-32% of import cargo discharged at TPA towards Burundi, DRC, Rwanda and Uganda. However, with the current levels of efficiency, whereby turnaround time was recorded as 17 days, it would be expected to move 0.5 million tonnes, nearly the same as it was actually observed in 2022.

This analysis point to the fact that there are apparent needs for improvements on infrastructure so as to reach the current speed restrictions of 49.66 kph and further to expected level of 70 kph on conclusion of TIRP; and operations necessary to push down the turnaround time as key indicator of efficiency. Pushing the turnaround time down to 2-3 days under the current speed restrictions would need additional 500 functional wagons to move the entire import cargo to Central Corridor member states, of average 36 tons, operating on full efficiency locomotive (maximum speed of 49.6 kph) and negligible waiting time.

### **2.5.3 TRC Freight Performance**

The indicators point to the observation that freight cargo performance stood at 66% of the TRC's planned target in FY 2021/2022, at 416,000 freight tons. This level of performance was comparable to 6% of total import cargo to the potential users of TRC mainline, that is Burundi, DRC, Rwanda and Uganda compared to 9% in 2021. However, it is noted that the cargo carried by TRC includes local and regional cargo and hence the transit cargo would be far below 6% in 2022. Further, it is noted that there is a gap of about 6.2 million tonnes towards the Central Corridor members which were carried by road sector. The gap is partly explained by wagon capacity gap and operational inefficiencies.

Despite infrastructure improvements in 2020-2022 that improved on speed restrictions, freight performance has deteriorated to an annual average of 358,000 tons during the period of 2018-2022, plus or minus 51,200 tons. Although there was some increase in volume of cargo handled by TRC in 2022, the current capacity to clear major transit and local cargo is still unmatched with trade volume increases at TPA.

## 2.5.4 Tanzania Intermodal and Rail Project (TIRP) Progress

Objective of the Project: To deliver a reliable open access infrastructure on the Dar es Salaam-Isaka rail segment. The Project had the following components:

### COMPONENT A: IMPROVEMENT OF RAILWAY INFRASTRUCTURE

S/N	Intended Activities	Current Status	Remarks
1	Rehabilitation of track and structures (bridges and culverts) in two sections between Dar es Salaam Port and Isaka Terminal, namely Dar es Salaam to Kilosa (283km) and Kilosa to Isaka (687km), with 120 and 250 weak structures (bridges and culverts) to be upgraded to a minimum of 18.5 tons/axial, respectively	Rehabilitation and conversion of 607.75Km (inclusive of loop lines) jointed track to an 80lb continuous welded rail track, as well as upgrading 375 "weak" bridges and culverts to a minimum capacity of 18.5 tons/axle, were completed 100%. The contract commenced on June 18, 2018 and concluded on November 19, 2020. Due to financial constraints, 416.43km (including loop lines) could not be implemented.	To address the gaps, the government is currently negotiating with the World Banks for the second phase of TIRP (TIRP II).
2	Procurement of the Train Control System to support the improvement of communication for safe train operations.	COVID-19 rendered this contract ineffective, and an amicable termination was agreed upon.	Proposed to be implemented under TIRP II

### COMPONENT B: ROLLING STOCK

S/N	Intended Activities	Current Status	Remarks
1	Procurement of 3 x 90t-3,000HP locomotives and 44 Freight Flat Wagons for container block train	The locomotives (3 x 90t-3,000HP and 44 Freight Flat Wagons) were delivered on November 15, 2021 and October 1, 2021, respectively.	



S/N	Intended Activities	Current Status	Remarks
2	Procurement of the Track Recording Car for mechanized track inspection	The track recording car was delivered on January 29, 2022	

#### COMPONENT C: DEVELOPMENT OF ISAKA TERMINAL, ILALA TERMINAL AND DAR ES SALAAM PORT PLATFORM

S/N	Intended Activities	Current Status	Remarks
1	Preparations for Detailed Engineering Design and Tender Documents for works contracts	The design and preparation of Tender Documents was completed on August 17, 2020.	
2	New works at Dar Port, Ilala Yard, and Isaka Terminal	Due to financial constraints, work contracts were not possible.	Proposed to be implemented under TIRP II

#### COMPONENT D: INSTITUTIONAL STRENGTHENING AND CAPACITY BUILDING

S/N	Intended Activities	Current Status	Remarks
1	Business Review of TRC and Preparation of 5 Years Business Plan	Done	
2	Strengthening of TRC Management - 3 Years Contract	Institutional reform has an impact (merging of TRL and RAHCO)	Proposed to be implemented under TIRP II
3	Provisional of Experts to reinforce the Implementation of TIRP	Done	
4	Technical Assistance - Project Implementation Team (PIT)	Done	
5	Technical Assistance to LATRA, Training to MoWT, TRC and LATRA staff	Partially done	Extra support is being proposed for implementation under TIRP II.

## Benefits of the Project

### During the Project

- ⦿ Job opportunities.
- ⦿ Enhance the economy of the people surrounding the project.
- ⦿ Building knowledge and skills.

### After the Project

- ⦿ Improvements on freight services.
- ⦿ Increase of Speed from 30kph to 70kph and reduce transportation costs.
- ⦿ Cut down time of uploading and offloading from Dar es Salaam port to Isaka Dry
- ⦿ Progressive plan in rail infrastructure rehabilitation to ensure reliable rail transport.
- ⦿ Building workers capacity to increase efficacy in services.
- ⦿ To reduce government burden in roads construction

## Preparations Status of the Second Tanzania Intermodal and Rail Development Project (TIRP II- P176682)

This project is currently in the preparations stages, with an expected effectiveness date of October 2023. The proposed Project Development Objective (PDO) is to improve the safety and operational efficiency of the railway for all users along the selected railway corridor (Dar es Salaam – Isaka) in Tanzania.

- A Component 1 – Strengthening of Infrastructure and Transport studies; (i) rehabilitation of the weak track and bridges to address speed restrictions gaps that were not addressed by TIRP I; (ii) strengthening of safety infrastructures at railway crossings and fencing of the line to address pedestrian trespassing at townships; (iii) implementation of intermodal terminals at Ilala and Isaka; and (iv) transport studies.
- B Component 2 - Institutional Safety and Operational Support; (i) development of an Electronic Train Warrant System (ETWS) for the meter gauge railways; (ii) capacity strengthening to TRC and LATRA for open access train operations; (iii) management support to TRC for implementation of the business plan; (iv) strengthening of railway safety systems; (v) development of track, bridges and rolling stock asset management capacity; and (vi) support the project implementation team, and
- C Component 3 – Contingent Emergency Rapid Response Component (CERC); this is a zero-dollar component will allow for swift reallocation of credit proceeds from the other components to provide immediate emergency recovery support following an eligible crisis or emergency. This CERC can be triggered for emergencies and/or disasters that affect the railway track along the Dar es Salaam – Isaka railway section.

### 2.5.5 Construction of Standard Gauge Railway along the Central Corridor

The United Republic of Tanzania and Tanzania Railway Corporation (TRC) extinguished to construct the Standard Gauge Railway (SGR) network that links Dar es Salaam, Mwanza, Kigoma, Katavi and neighbouring countries of, Burundi, DRC and Rwanda. The project will involve use of highly advanced train control (European Rail Traffic Management System – L2) technology with capacity of 35 tons per axle. The Tanzania’s SGR is the first railway in East Africa and central designed to use electricity to power locomotives and it has capacity to accommodate passenger trains traveling at 160 kilometres per hour and 120 kph for freight trains.

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The main objective of the SGR is to improve efficiency in Railway transportation sector by simplifying the following;

- Increase of freight service, whereby railway will be able to carry up to 10,000 tonnes merely equal to the 500 Cargo tracks.
- Cut off time for Passenger and freight trains will help to boost economic
- Increase of employment opportunities
- Improving Social Community Welfare through Corporate Social Responsibilities i.e., Building Schools, Hospitals in project surrounding areas.
- Boosting agriculture, mining, business and industry sector by ensuring safe and reliable rail transport of raw and processed Agriculture products in Tanzania and Neighbouring Countries.
- Economic benefits result from Cut off transport cost in road maintenance

### Status of Construction by January, 2023

- i Design and Build contract for construction under LOT 1 (Dar es Salaam- Morogoro (300 km) is ongoing under contractor YAPI MERKEZİ (TURKEY). The Overall percentage completion of the project is 97.91 percent up to January 2023 and the work is expected to be completed in September, 2023.
- ii Design and Build contract under LOT 2 (Morogoro-Makutopora (422km) is on progress under contractor YAPI MERKEZİ (TURKEY). The Overall percentage completion of the project is 92.23. percent up to January 2023 and construction work is expected to be completed in January 2024.
- iii Design and Build contract for construction under LOT 3 (Makutopora - Tabora (368 km) is ongoing under contractor YAPI MERKEZİ (TURKEY). The Overall percentage completion of the project is 4.59. percent up to January 2023 and the implementation of this project is 46 months including 6 months of testing and the expectation is to be completed in January 2026.
- iv Design and Build contract for construction under LOT 5 (Isaka –Mwanza (341km) is ongoing under contractor YAPI MERKEZİ (Turkey). The Overall percentage completion of the project is 25.75 percent up to January 2023 and the expectation is to be completed in May 2024.

- v Design and Build contract for construction under LOT 5 (Isaka –Mwanza (341km) is ongoing under contractor YAPI MERKEZİ (Turkey). The Overall percentage completion of the project is 25.75 percent up to January 2023 and the expectation is to be completed in May 2024.
- vi The government through the Tanzania Railway Corporation (TRC) signed a contract for the construction of the Central Railway from Tabora to Kigoma with a length of 411 kilometers of the main line by the Design and Build procedure on December 20, 2022 with a contractor company from the country China CCECC and CRC. The construction period is 42 months and this project is expected to be completed in March, 2026. The initial preparation of the project is ongoing.
- vi The government through the Tanzania Railway Corporation (TRC) signed a contract for the construction of the Central Railway from Tabora to Kigoma with a length of 411 kilometers of the main line by the Design and Build procedure on December 20, 2022 with a contractor company from the country China CCECC and CRC. The construction period is 42 months and this project is expected to be completed in March, 2026. The initial preparation of the project is ongoing.
- vii Government is underway to solicit financing for the remaining lots of Makutopora – Tabora (249km); Tabora – Isaka (133km) and Isaka –Mwanza (341km).

## **Recommendations for TRC**

- i To improve efficiency in operations targeting reduction of turnaround time;
- ii Under Component 2 of TIRP II, Central Corridor to advocate for deliver-as-one initiative by building capacity of TRC to coordinate key players; including developing opening access to private sector and its associated performance management framework;
- iii To develop asset management and utilization framework; including updating infrastructure and rolling stock asset data and linking rolling-stock with operations and commercial performance systems; and
- iv To facilitate roll-out of existing rolling-stock tracking system and extend visibility to stakeholders

### **2.5.6 URC Railway Capacity and Utilization**

The Uganda Railways Corporation (URC) also manages a nine-kilometres railway line linking Kampala and Port Bell. URC has dedicated 290 ferry wagons for the Central Corridor route between Port Bell and Mwanza. There are challenges of traceability of allocated wagons of URC that are operated by TRC.

During the year, twenty (20) wagons were rehabilitated through facilitation of CCTFA in order to improve the capacity to handle cargo between Kampala and Mwanza. There are currently no plans for further rehabilitation due to limited funding. URC operates on an annual budget of USD 130,000 (UGX 433.2 million). This budget was not only lower than previous year’s budget by 25% but it also faced adverse exchange rate situation during the year.

## **Recommendations for URC**

- i To facilitate development of rail tracking system to enhance visibility of wagons especially those crossing borders.
- ii To advocate for harmonisation of rail operations and to allow full visibility of key players of the logistics chain.

## 2.6 Maritime Transit Transport on the Central Corridor

This section analyses maritime operations along the Central Corridor, where three major lakes of Victoria and Tanganyika and Kivu plays bigger part in the whole transport and logistic chain in the Central Corridor member countries.

### 2.6.1 Lake Victoria Maritime Transit Transport Routes

The Central Corridor Rail – waterways intermodal route of Dar es salaam – Mwanza -Port Bell Kampala was re-opened in Mid-June 2018 after being idle for about 10 years. Responsible institutions in Tanzania and Uganda made necessary consultations aiming at re-opening of the Mwanza – Port Bell – Kampala Route, for handling Uganda’s export and import traffic to/from the international markets by rail and water transport, through the Port of Dar es Salaam up to Kampala. Upon arrival at the port’s facility of Mwanza and Port Bell by rail, cargo is being handled by wagon ferries which are operating across the route to provide modal connection between railways and inland waterways transport on Lake Victoria. This arrangement ensures no transshipment process of cargo to destination.



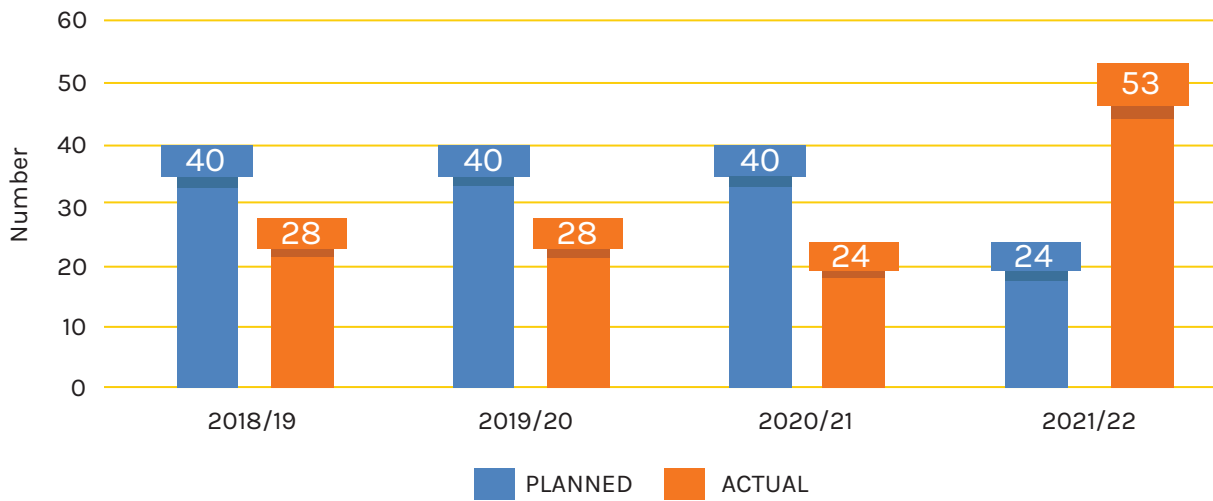
A Tanzania’s corporation namely Marine Services Company Limited (MSCL) provides maritime transport services across Lake Victoria from Mwanza Port to Uganda Railways Cooperation (URC).

#### 2.6.1.1 Ugandan-side Lake Victoria Maritime Transport

Uganda Railways Corporation (URC) manages both railways and maritime transport sub-sectors. Data from URC shows that during the period of period Jan – Dec 2022, one vessel operated, namely MV Kaawa plied between Port-Bell and Mwanza. During the year, MV Kaawa of URC planned to conduct 24 voyages during the year to between Portbell and Mwanza but ended up making 53 voyages. The under-planning during the year was because it was expected that MV Kaawa would be docked for period of the year but that was not realized and resulted to making more voyages than planned. A trend of planned voyages from FY 2018/2019 is shown below:



Figure 21: MV Kaawa Voyages for the FY 2018/19-2021/22



Source: URC 2019-2022

MV Kaawa has capacity to move 22 ferry wagons of 880 tons or 1248 tons of loose cargo per voyage. During the year 2021/2022, MV Kaawa managed to move a total of 55,000 tonnes. This was an increase from 37,000 tonnes recorded in 2021, equivalent to an increase of 47%. The annual cargo volume of 55,000 tonnes translates to average container performance of 47 tonnes compared to the standard of 40 tonnes per container. This can mean efficiency of 117% but overload could be an issue of safety.

Figure 22: Volume of Cargo handled by MV Kaawa (URC), 2018/2019 to 2021/2022



Source: URC, 2019-2022

Operational improvements for URC in year 2022 included rehabilitation of 20 wagons with support from CCTTFA. The turnaround time was recorded as 36 hours on a stretch of 9 kilometres to PortBell. There was no recorded accident during the year 2022.

**Recommendation:** Central Corridor to advocate for further periodical capacity building for mariners within Member States.

### 2.6.1.2 Tanzania-side Lake Victoria and Lake Tanganyika Maritime Transport

Inland waterways maritime transport on the Tanzanian side is operated by Marine Services Company Limited (MSCL). MSCL is a government owned company that provides services for transportation of both **passengers** and **cargo** on **Lake Tanganyika, Lake Nyasa, Lake Victoria**. As such, the company serves inland waterways maritime transportation between Tanzania and Burundi, Democratic Republic of Congo, Kenya, Malawi and Uganda. Updates on Central Corridor Marine Capacity and Utilization of Assets for MSCL is given hereunder;

**Table 7: Vessels Operated by Marine Services Company Limited (MSCL)**

S/N	NAME OF THE VESSEL	YEAR BUILT	CAPACITY		STATUS
			PASSENGERS	CARGO(TONS)	
1	MV.VICTORIA	1960	1200	200	OPERATE
2	MV.SERENGETI	1988	593	350	GROUNDING
3	MV.BUTIAMA	1980	200	100	OPERATE
4	MV.CLARIAS	1961	216	10	OPERATE
5	MV.LIEMBA	1913	600	200	GROUNDING
6	MV.MWONGOZO	1982	800	80	GROUNDING
7	MV.SONGEA	1974	213	43.5	GROUNDING
8	MV.IRINGA	1974	138	5	GROUNDING
9	MV.UMOJA	1964	0	1200	UNDER MAJOR REPAIR
10	ML.MAINDI	1938	0	120	GROUNDING
11	ML.WIMBI	1938	0	120	OPERATE
12	MT. NYANGUMI	1958	0	350	GROUNDING
14	MT. SANGARA	1981	0	350	UNDER MAJOR REPAIR
15	MT. UKERWE	1983	0	125	GROUNDING

MT	Marine Tag/ Tanker
MV	Marine Vessel
ML	Marine Lighter (Specialized in cargo and can be changed its use anytime)

#### i. Observations

Out of fourteen (14) vessels operated by MSCL only four (4) vessels are in operation equivalent to 29% of the available vessels. Also observed eight (8) vessels are grounded with a plan to undergo major rehabilitations equivalent to 57%. Two vessels are under major repairs which include MV Umoja and MT Sangara, it was noted that MT Ssangara is a tanker vessel with a capacity of carrying 350 metric tons.

MV Serengeti is the only vessel operated by MSCL with a ramp to carry vehicles and can be deployed even during low season. It is one of the crucial vessels that need funding to be rehabilitated due to its added advantages.

(i) ML Wimbi, is currently grounded as well (8 months now) with a plan to undergo major repair.

(i) MT Nyangumi and MT Ukerewe were budgeted in this FY 2023/24 and plans on going to undergo major repairs.

(iii) It was emphasized that TISHARI TK17 on Lake Tanganyika, Kigoma can be made operational/ revamped since it has the added advantage of carrying capacity of 360 metric tons. It is a water vessel (pulled facility) with a tanker for liquid cargo. It can also be put on an engine and operate itself without being pulled.

## ii. MV MWANZA “Hapa Kazi Tu”

The giant ship in the East African history ever to exist at 92.6-metres-long, 20-metres-high and 17-metres-wide, which has a capacity of carrying 1,200 passengers and 400 tonnes of cargo. The ship is expected to bring significant boost to the Lake Zone economy connectivity, competition and interdependence as it will act as a bridge for Tanzanians among other people in East Africa to trade, explore well the new emerging market such as in agricultural crops, fisheries resource, tourism and leisure to generate income through investment.

MV Mwanza “Hapa Kazi Tu” will complement the electrified Standard Gauge Railway’s (SGR) because passengers and cargo from Dar es Salaam going to Bukoba or Uganda will use it as the entry and exit point, saving huge amount of money and time which could be spent by using trucks or busses,”

The ship operation field to include Mwanza, Kagera, Geita and Mara within Tanzania while Uganda and Kenya will be served through Port Bell, Jinja Port and Kisumu Port respectively, thus increasing economic production and social welfare as it will reduce citizens’ spending on transportation while creating new market for agriculture, fishing business and tourism among other sectors.



### iii. Recommendations

- a) Need for a speed boat to easy transport movement along the lake, which will also reduce the sailing time between destinations
- b) Need to expedite the rehabilitation of ML WIMBI and MV SERENGETI
- c) Need to consider deployment of RESCUE boats on each lake for security purposes (fiber boats) were
  - ⦿ Three (3) speed boats for Lake Victoria at Mwanza, Nansio and Bukoba
  - ⦿ Two (2) speed boats for Lake Tanganyika at Kigoma and Karema
  - ⦿ Two (2) speed boats for Lake Nyasa as well
- d) Need to mobilize more funds for Hydrographic Surveys on improving Navigational Charts (the one available is very old). MSCL is investing and its high time to consider updating these charts.
- e) Need to advocate for joint marketing initiatives and surveys for All transport key players (Institutions) especially on international markets. If possible, formulate a task force that will be following up and report back on a quarterly basis.

### iv. Other Areas of Focus for MSCL Improvements

- a) MSCL is considering shifting to sea and there is a need to seek for funds to conduct a comprehensive study on the best approach to this initiative. The study will consider advising on which vessel is needed, which type of vessel will pay more economically and through which routes, either a tanker or cargo vessel or multipurpose vessel. On that vessel which modal will be suitable for Marine Services Company Limited (MSCL) either through a charter or constructing its own vessel.
- b) MSCL is requesting Central Corridor Secretariat to support this initiative either through mobilizing resources from DPs or direct funding of the study.



# Section Three

## TRANSPORT RATES AND COSTS

### 3.0 Introduction

This section provides highlights of the rates and costs of transportation services paid by the cargo owners/ shippers to the transporter and other service providers within the logistic chain. The cost is determined by various conditions related to distance, status of infrastructure, administrative barriers, energy costs and how the freight is carried from one point to another.

#### 3.1 Container Transport Rates and Charges by Road

The road transport charges can be categorized into three main groups namely; the costs paid to the transporter (truckers) which are normally referred as transport rates, the costs paid to the freight forwarders and the costs paid to the Customs Freight Agents (CFA) at the inland borders.

This section presents the road truck charges for moving an average 22-27 tonnage container to the destinations of Central Corridor. Annual average freight rates per container for the entire length of each route destination along Central Corridor is shown below for years of 2021-2022. Road transport rates for container imports via Dar Port to various destinations for the year 2022 are showing largest increase of 28% for the destination of Kigali and 11% for destination of Bujumbura while for Bukavu, Goma and Kampala the annual averages have increased by 6% during the year.

**Table 8: Annual average transit charges per container by destinations, 2021- 2022 (USD)**

Destination from Dar Port	2021	2022	Change (%)
Kigali	2,733	3,492	28
Bujumbura	2,900	3,225	11
Kampala	3,308	3,508	6
Bukavu	4,900	5,200	6
Goma	4,333	4,592	6

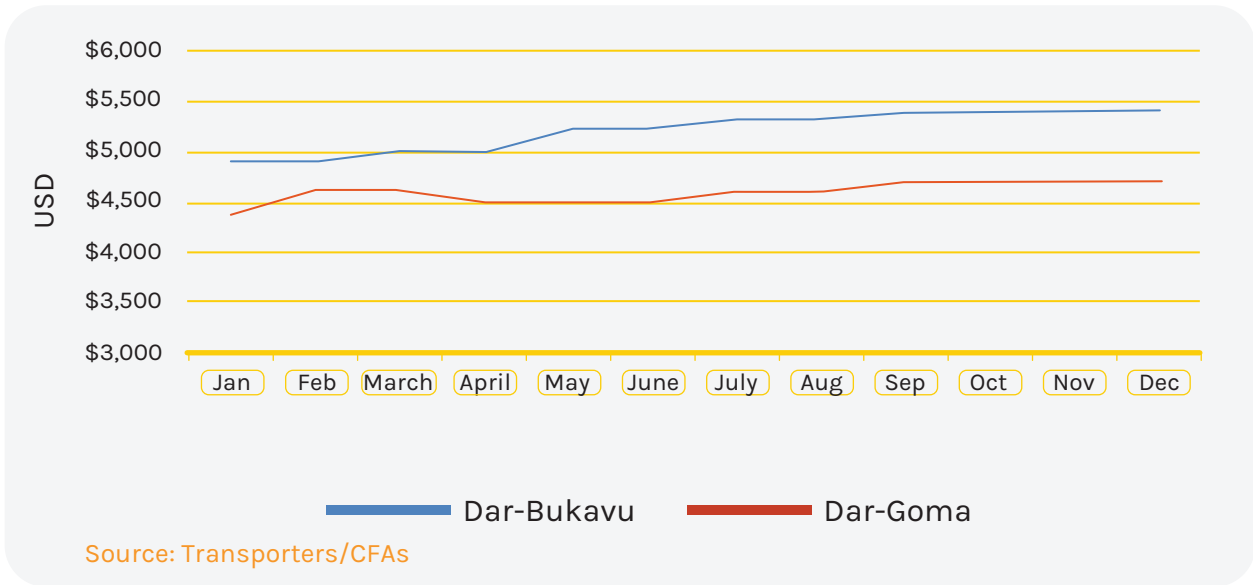
Source: Transporters/CFAs

In the months of 2022, road transport charges were reported to fluctuate due to reasons of low season in July-September and availability of return cargo which improved on economies of scale. However, the monthly fluctuations compared to annual average was between 2% and 6% for each Central Corridor route, implying low monthly fluctuation but generally higher charges in all months of 2022.

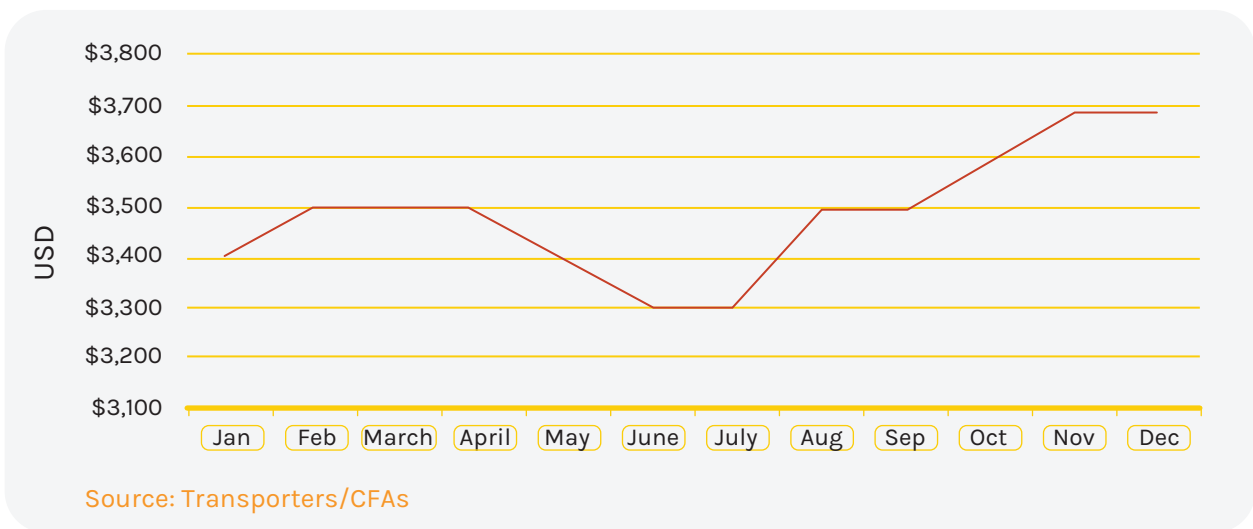
There was a general rise in freight charges towards Bukavu, Goma and Burundi that kept increasing towards end of year. However, for charges to Kampala were explained by monthly trade cycles whereas the charges to Kigali and Bujumbura had risen due to increase in road user charges in 2022 and increased post-COVID19 grains demand from Zambia to Rwanda that increased competition for trucks with Central Corridor.

Graphs below show monthly trends in freight charges towards each Central Corridor destination.

**Figure 23: Road Freight Charges from DSM to Bukavu and Goma, January- December 2022**



**Figure 24: Road Freight Charges from DSM to Kigali, January- December 2022**



**Figure 25: Road Freight Charges from DSM to Kampala, January- December 2022**

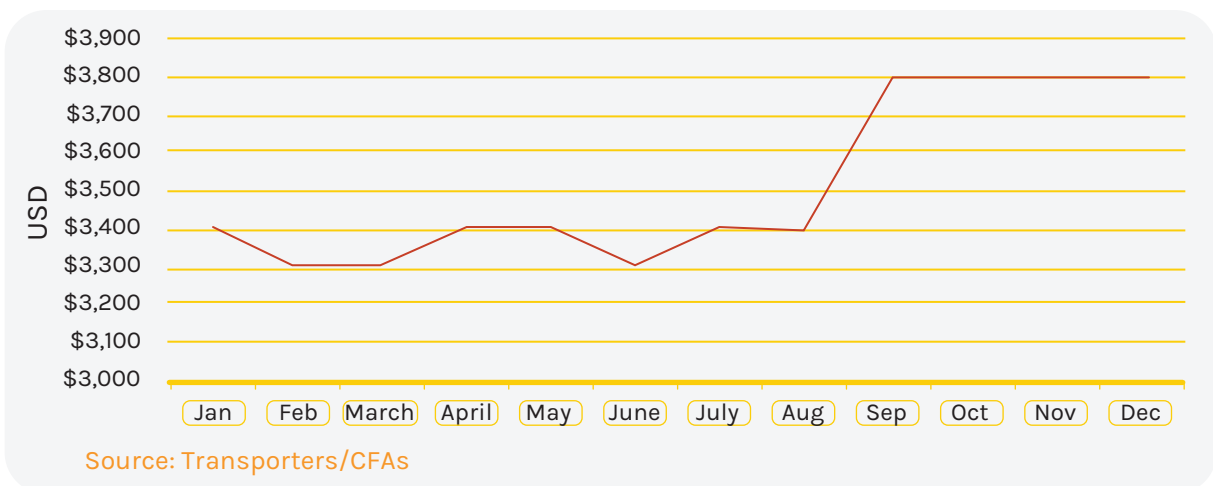
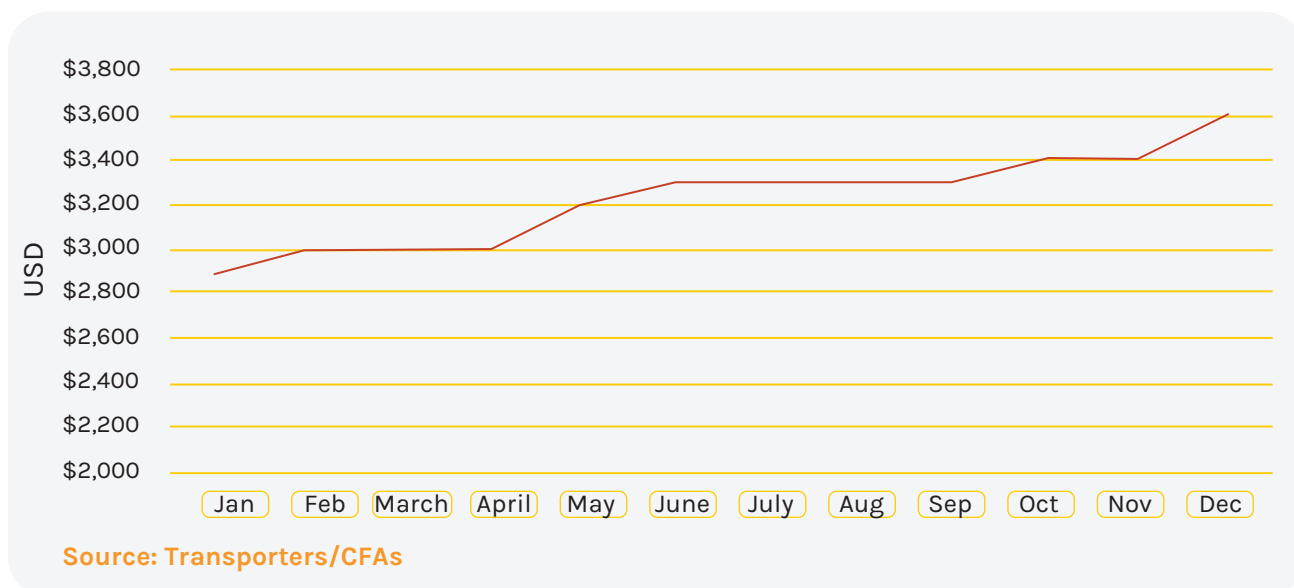


Figure 26: Road Freight Charges from DSM to Bujumbura, January- December 2022



Long-term trends in road freight direct charges are shown in the table below for the period of 2019-2022

Table 9: Annual Average Road Freight Charges in USD, 2019-2022

Route (Dar Por to destination)	2018	2019	2020	2021	2022
Kigali	\$3,000	\$2,900	\$2,775	\$2,733	\$3,492
Bujumbura	\$3,300	\$3,100	\$2,983	\$2,900	\$3,225
Kampala	\$3,400	\$3,250	\$3,325	\$3,308	\$3,508
Bukavu	\$4,800	\$4,900	\$4,917	\$4,900	\$5,200
Goma	\$4,300	\$4,200	\$4,308	\$4,333	\$4,592

Source: Transporters/CFAs





# Section Four

## PRODUCTIVITY AND EFFICIENCY



## 4.0 Introduction

Efficiency and productivity indicators give a basic guideline on how well the corridor performs operationally. The objective of productivity measurement is to give the current performance in the logistics chain against desirable productivity measures, that are usually obtained from industry best practices.

Efficient logistics chain entails reducing the wastage of inputs. Thus, it is imperative to make investments to develop and improve trading capacities such as ports and roads, customs administration and adoption of e-services. Efficiency gains in the transportation sector is also observed by CCTO because it is a key driver of competitiveness and growth. On this area, CCTO has five indicators.

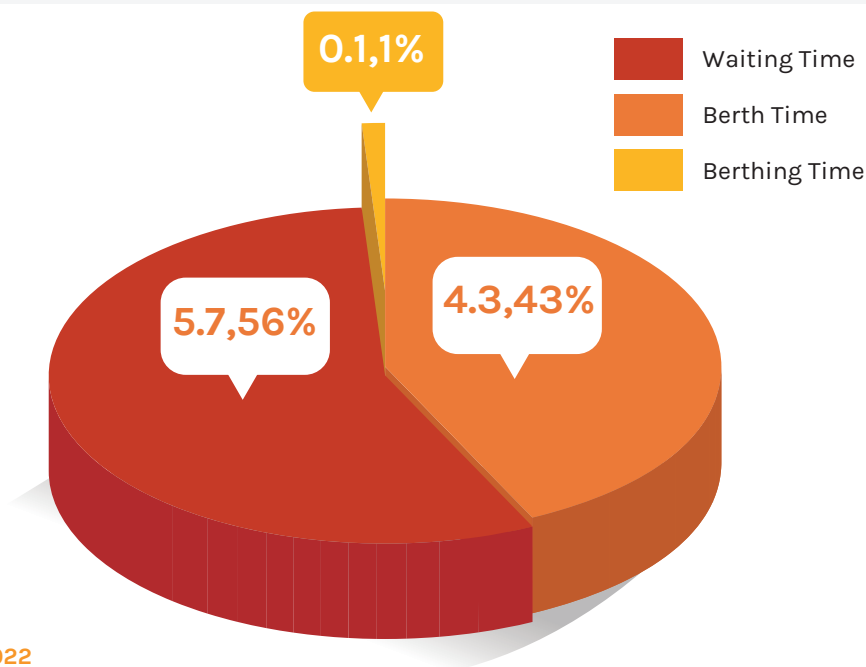
### 4.1 Ship Turnaround Time

Ship turnaround time is the total time spent by a ship at the port; measured from an average time difference per month from when a ship is ON-Berth to when the ship is Off-berth measured in hours per ship from Tanzania Ports Authority (TPA). It is built of three components namely; waiting time, berthing/un-berthing time and berth time (service time).

During the stakeholders' forum held in March 2022, stakeholders expressed the need to track ship waiting time at outer anchorage. This component was previously not recorded. It is thus the first year of availability of information on ship waiting time to lay foundation for understanding and strategizing on reducing it. As such, ship turnaround time of the year 2021 may not be comparable to that of 2022 due the additional component in 2022.

In the year 2022, ship turnaround time had annual average of 10.0 days. The component of waiting time contributed 56% of ship turnaround time at 5.6 days. Berthing time represented 4.3 hours, equivalent of 43% of total turnaround time.

Figure 27: Components of Ship Turnaround time at Dar Port, 2022 (Days, %)

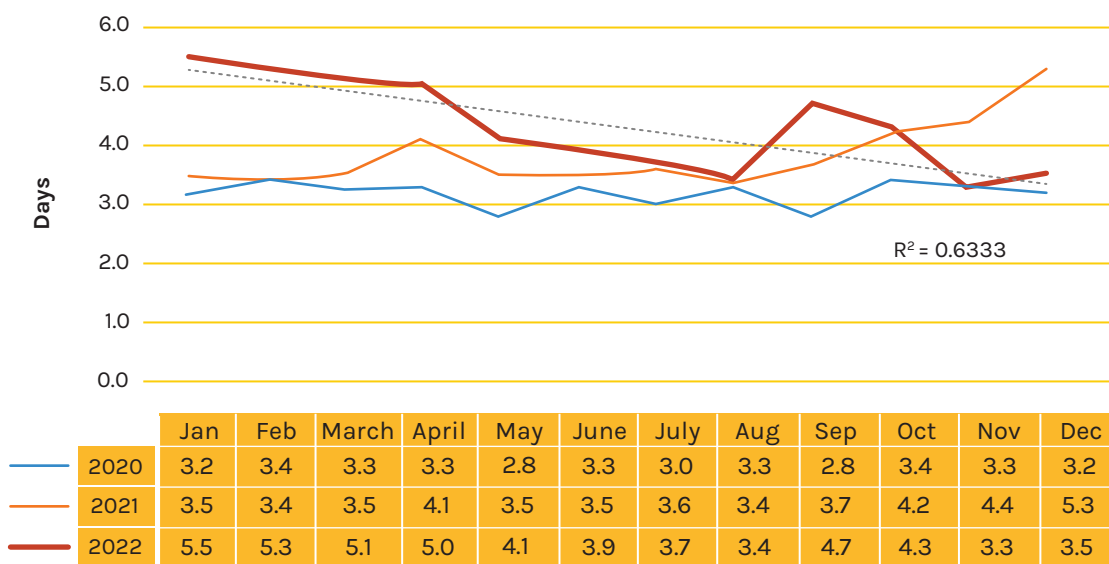


Source: TPA, 2022

The annual average ship turnaround time at 10.0 days in 2022 display incomparable picture from that recorded in 2021 at 3.8 days, but one that is important for future observation and strategy. The berth-time has thus been unfavorably increasing during the period of 2019-2022, from 3.0 days in 2019 to 3.2 days in 2020, 3.8 days in 2021 and 5.6 days in 2022.

The monthly trends of berth time component of ship turnaround time in 2022 can be compared to similar months of previous years. They display downward trends in the months of 2022 towards the end of the year but inferior to those of 2020 and 2021. The monthly trends in berth times for the year 2022 in comparison with previous two years are shown in the graph below. They indicate smoother monthly declining patterns predictable at 63% strength (coefficient of determination,  $R^2=0.6333$ ). However, the graph also tells us that ship berth times in 2022 need to be reduced further on their own observation.

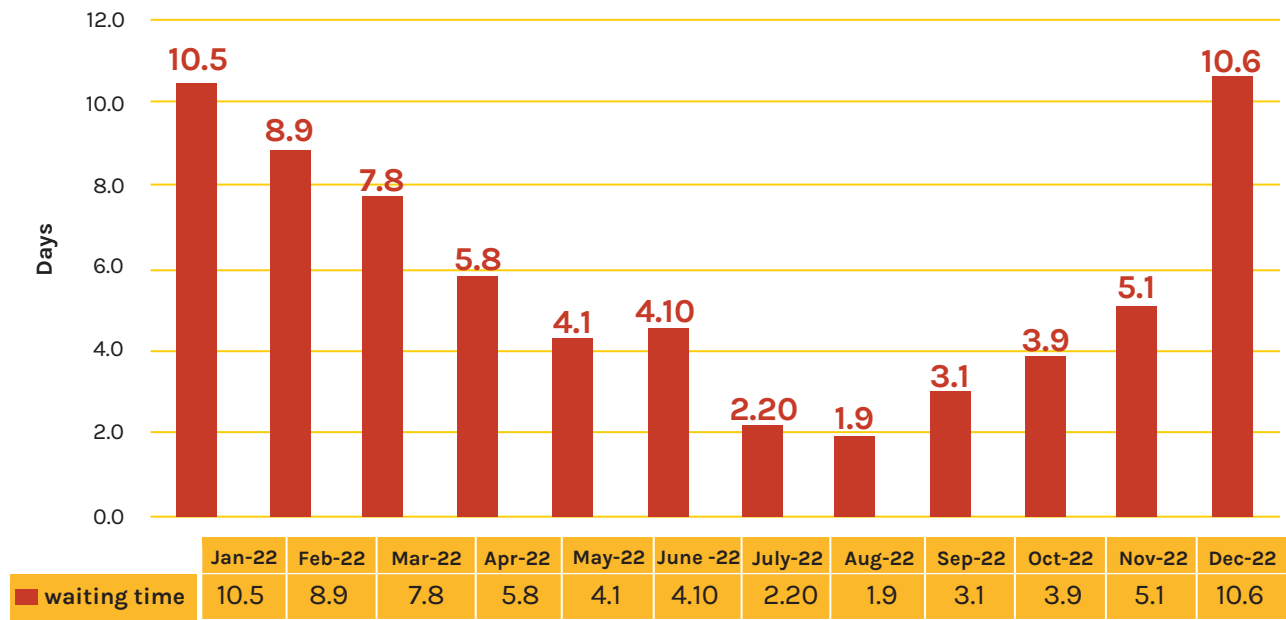
**Figure 28: Monthly Trends in Ship Berth Time (days), 2020-2022**



Source: TPA 2020-2022

Analysis of trends in components of ship turnaround time from January to December 2022 as the first year of observation of waiting time reveals new challenge to the efficiency at the Dar Port. It is apparent that waiting time at outer anchorage displayed favorable reduction, as desired, in the first eight months (January -August) of 2022, reaching lowest level of 1.9 days in August. However, the trend turned to unfavorable increase from September- 2022 towards the end of the year reaching 10 days in December. More investigation is needed on waiting time in order to develop workable strategy of reducing it.

Figure 29: Monthly Trends in Ship Berth Time (days), 2022

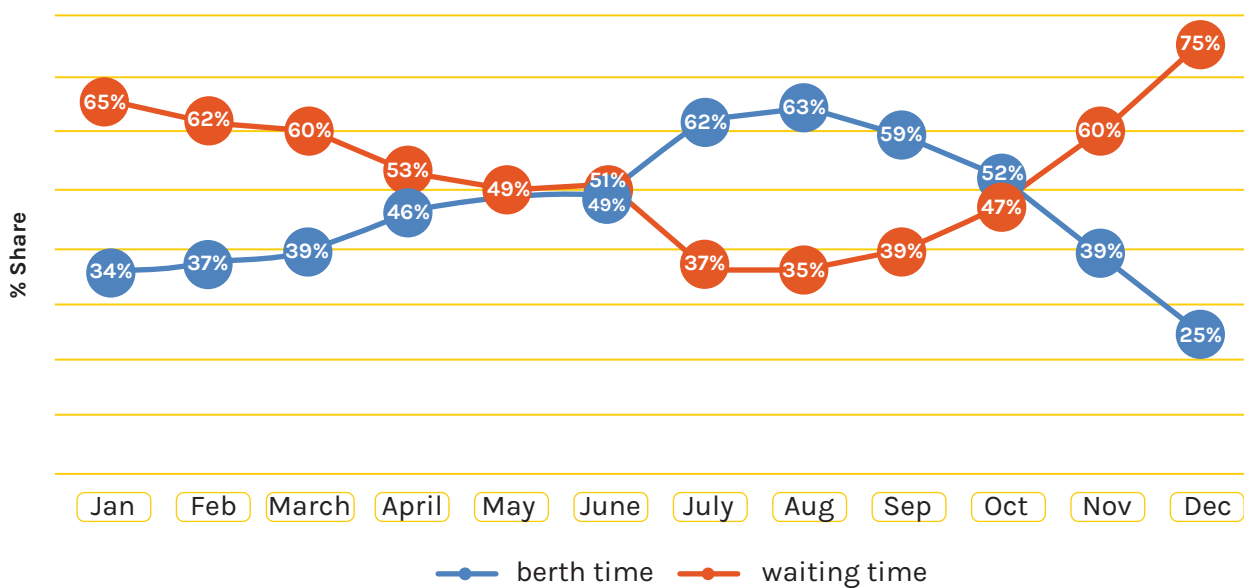


Source: TPA 2022

The relative contribution of berth time and waiting time in the total ship turnaround time for monthly observations displayed interesting results in 2022. The waiting time component had an annual average impact in ship turnaround time of 56%. The trends kept favorably decreasing until August 2022 and reversed from September towards December 2022. Waiting time impact in ship turnaround time, reaching annual high of 75% of total ship turnaround time in December 2022.

Further, the graph below displays distribution of ship turnaround time between its major components: waiting time and berth time for the months of 2022. Waiting time has been shown to contribute much of the delays in ship turnaround time.

Figure 30: Monthly Trends in Ship Turnaround Time Components (%), 2022



Source: TPA, 2022. Note: Residual 1% of berthing time to complement to 100% components of Ship Turnaround Time

In conclusion, Further, there is evidence of “losing the battle” on the improvements in berth time in 2022 from the levels of 2019-2021. When berth time is reduced, it can substantially reduce ship turnaround time and reduce shipping costs. A new challenge has emerged to track the ship waiting time at outer anchorage as it has not yet been contained in its first year of observation, year 2022.

A number of issues need to be resolved to improve the ship turnaround time including but not limited to addressing processes targeting the quantity of cargo a vessel has to load or discharge, the type and characteristics of a vessel, the type of port equipment and resources used at berth/port.

## 4.2 Dwell Time Indicators

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.

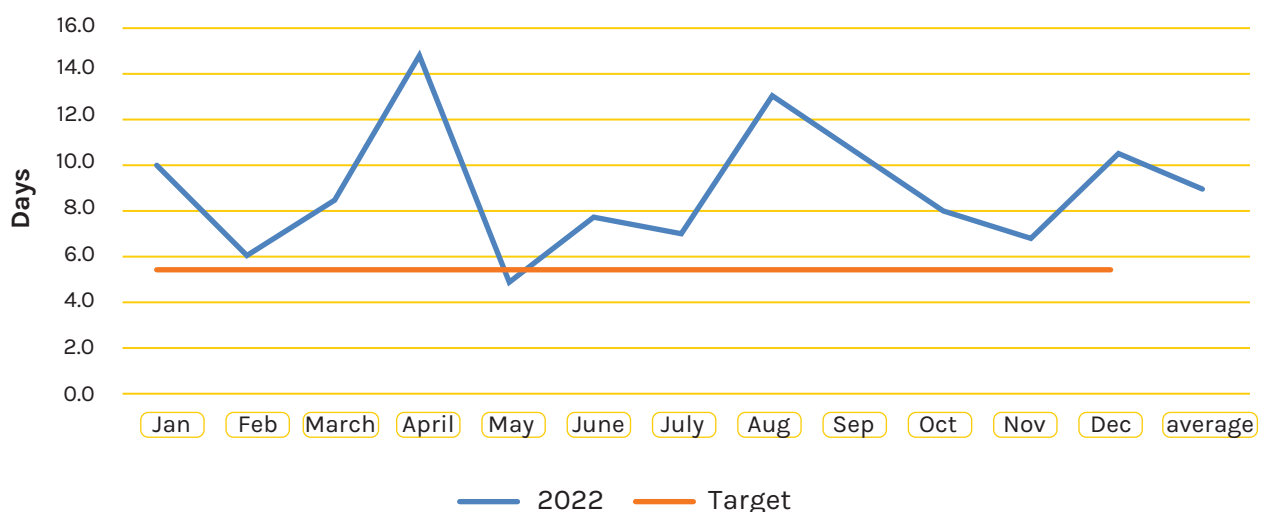
The indicators of dwell time are provided separately for Tanzania Ports Authority (TPA) and Tanzania International Container Terminal Services (TICTS). The comparative year of 2021 was nearly unimpacted by COVID-19 pandemic, hence it is expected that the dynamics will be attributed by logistics procedures at TPA and TICTS rather than global dynamics. Nearly all COVID-19 few barriers to travel in the East African States were lifted during this period. Dwell time is presented for local and transit containers at TPA and TICTS.

### 4.2.1 TPA Local Import Container Dwell time

The annual average dwell time for local import containers in TPA was an average of 8.7 days in 2022. This was an unfavorable increase of 2.2 days from the 6.5 days observed in 2021. As such, there was a scale back of 33% during the year. The current level of efficiency in dwell time is out of target by an average of 3.7 days.

Monthly trends of dwell time in 2022 show erratic trends, indicating a process in lesser control or some unknown erratic factors. Graph below displays monthly patterns:

**Figure 31: Monthly Average Dwell Time for Local Container at TPA, 2022 (days)**

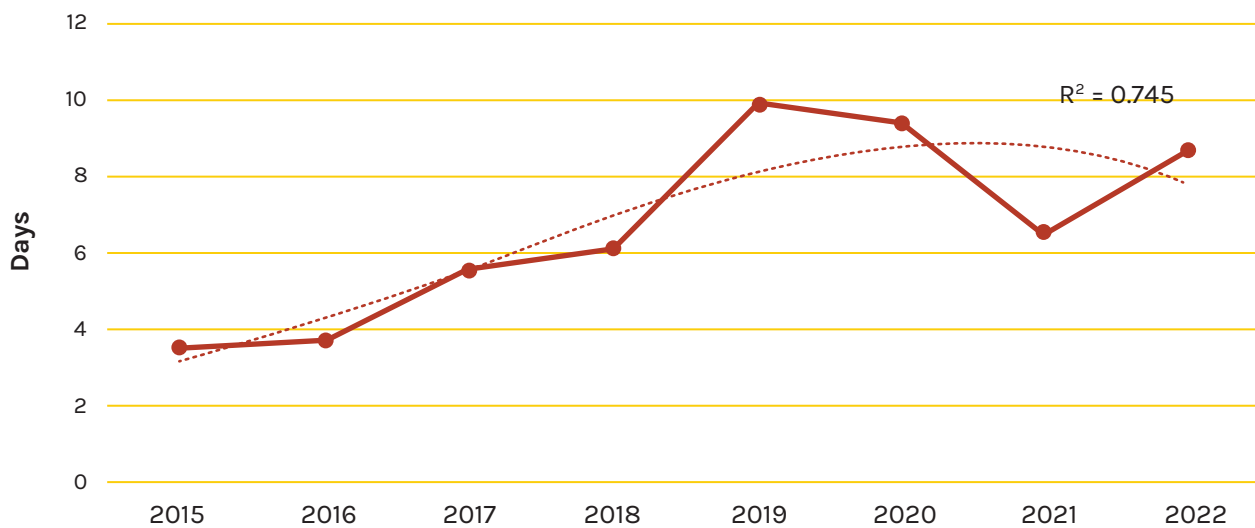


Source: TPA data, 2022

Additionally, annual average dwell time for local containers at TPA for the period of eight years (2015-2022) are displayed in the graph below. The graph indicates that there is a pattern of dwell time that changed every five years; going in the opposite direction from preceding three years. A strong polynomial of order (3) could estimate the path of dwell time strongly at 75%.

As such, 2015-2019 were observed to have increasing trend in dwell time for local containers; followed by decreasing trend in later years. The best case was observed in 2015 while the worst case was observed in 2019. The alternating three-year trends means the efforts to cut back on dwell time for local containers at TPA should be monitored closely to understand reasons for such alternating patterns.

**Figure 32: TPA Annual average local container dwell time, 2015-2022**



Source: TPA data 2015-2022

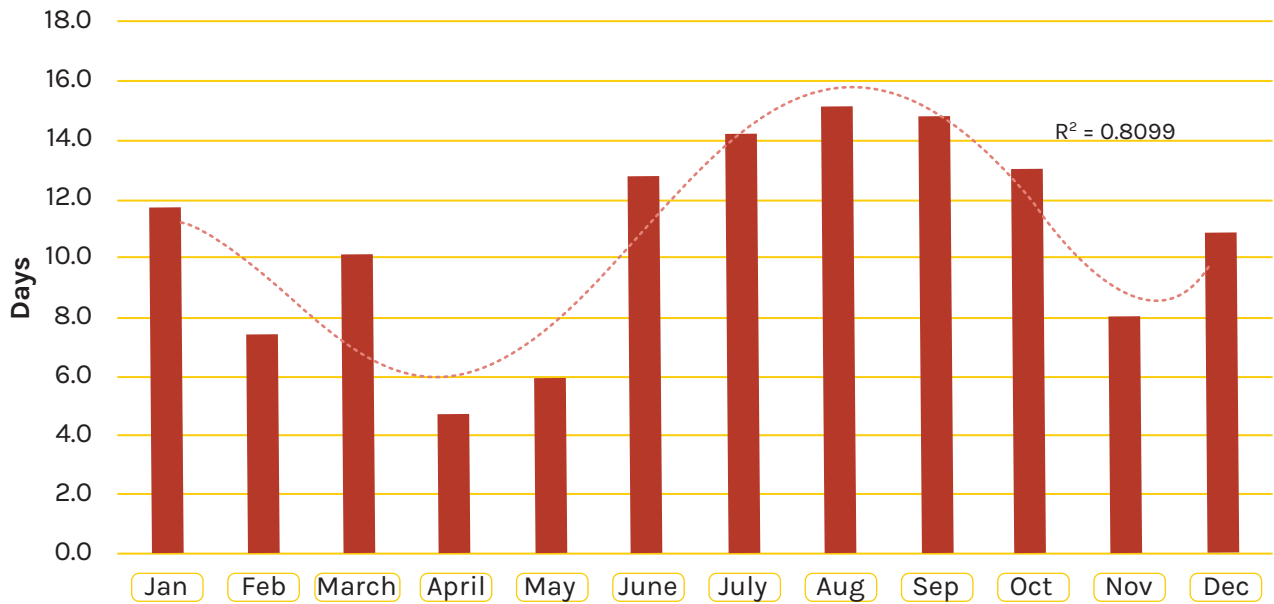
#### 4.2.2 TPA Transit Import Container Dwell time

The dwell time for transit import containers in TPA increased unfavourably to an annual average of 10.7 in the period of January-December 2022 compared to 9.5 days of the same period in 2021. This was a scale back of 1.3 days (30 hours) or equivalent of 13% deterioration. Moreover, the current level of dwell time needs to be decreased by an average of six days to attain Government target.

Month to month comparison of dwell time for transit containers between January and December 2022 display erratic and complex polynomial path that is different from the path of dwell time observed in the months of 2021 (linear at 45%). The situation in 2022 was predicted in 2021 when the path of dwell time for transit containers had smooth unfavourably increasing levels towards end of the year, which was indicative of process that was continually losing focus during the last quarter. In 2022, the situation has been compounded from the beginning to the end of year, as graph below shows;



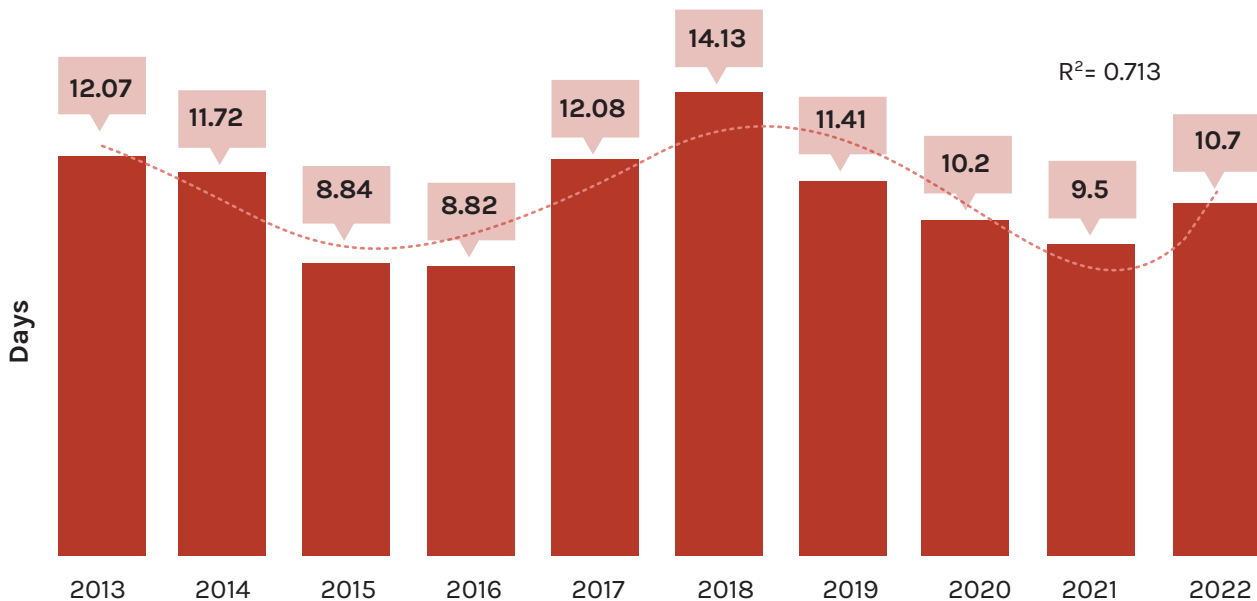
**Figure 33: Monthly Average Dwell Times of Transit Containers at TPA, 2022**



Source: TPA data, 2022

In annual comparisons between 2014 and 2022, the graph below shows that the path of transit container dwell time at TPA display cycles of ups and downs that alternate every 3-4 years. Slight slow-down in 2022 from the gains in 2021 indicate more efforts are needed. The gap towards the Government of Tanzania’s target had also increased in 2022. As such, TPA needs to reduce dwell time by another 5.7 days to reach the target of 5 days set out by the Government of Tanzania.

**Figure 34: TPA Annual average Transit container dwell time 2013-2022**



Source: TPA data 2013-2022

Further, the monthly fluctuations in transit container dwell times was a challenge in 2022 as a container was expected to be cleared within 10.7 days but this was also within 33% delays, compared to 25% fluctuations from expectations in 2021.

**Table 10: TPA Monthly Average dwell time for transit container, 2015-2022 (Days)**

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEPT	OCT	NOV	DEC	Annual Average
2015	9.4	11.4	7.2	6.0	7.0	9.7	8.7	10.2	7.2	10.7	10.1	8.5	8.84
2016	12.8	10.6	4.1	3.8	8.9	7.6	9.2	10.3	10.6	8.4	11.0	8.5	8.82
2017	9.6	10.7	11.5	9.7	9.4	11.5	9.1	11.3	15.1	15.5	17.4	14.1	12.08
2018	15.8	16.9	13.6	13.6	13.8	10.4	14.4	15.3	13.3	14.6	15.0	12.9	14.13
2019	13	10.4	13.2	9.7	17.8	12.2	12.1	13	9.5	9.8	9.1	7.1	11.41
2020	9.9	10.8	13.7	11.1	11.6	9.4	9.5	8.7	9.8	8.6	9.2	10.1	10.2
2021	8.0	8.8	7.7	8.6	9.1	7.7	8.2	10.9	7.4	10.2	12.0	14.9	9.5
2022	11.7	7.4	10.1	4.7	6.0	12.8	14.2	15.1	14.8	13.0	8.0	10.9	10.7

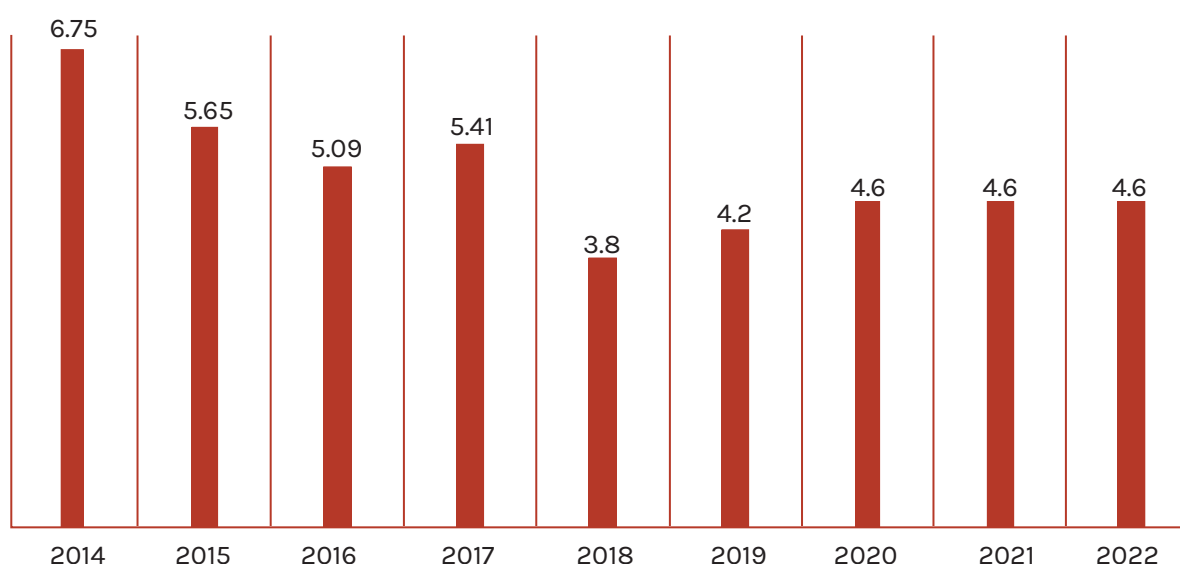
Source: TPA, 2015 – 2022

Efforts towards reducing dwell time have continued to be implemented. They include regular exchange of information and training between the respective Revenue Authorities. This has contributed to resolving the issue of systems compatibility. Other steps include the ongoing infrastructural Dar-es-Salaam Port improvements and increased stakeholder engagement in improving Port efficiency.

#### 4.2.3 TICTS Local Containers Dwell time

TICTS average local Container dwell time for the period of January-December 2022 was 4.6 days; the same level as it was in 2021. This level of efficiency in container clearance at TICTS is well within the set target of 5 days, since 2018. However, for the year 2022, the issue has been fluctuation of dwell time from one month to another at the average of 47% around the 4.6 days, which was at highest of the past nine years (2014-2022).

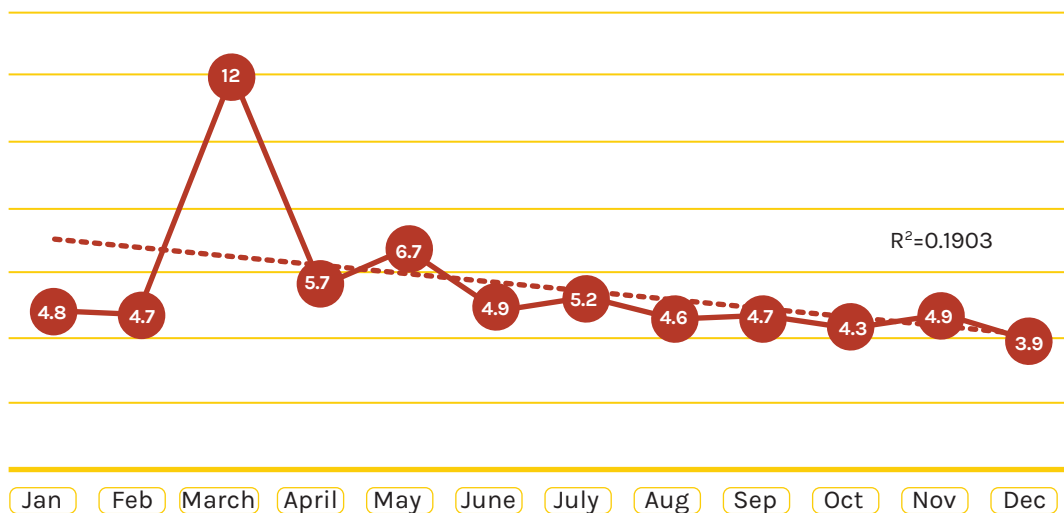
**Figure 35: Annual Average Dwell Times of Local Containers at TICTS, 2014-2022(Days)**



Source: TICTS 2014-2022

The fluctuations in monthly average dwell times for local containers at 47% around their annual average 2022 are displayed in the graph below. The graph displays the month of March 2022 having contributed to a larger instability in the annual trends of the local containers' clearance time at TICTS.

**Figure 36: Local Container Monthly Average Dwell time at TICTS in 2022**



Source: TICTS, 2022

**Table 11: Monthly Average Local Container Dwell Time at TICTS (days), 2015-2022**

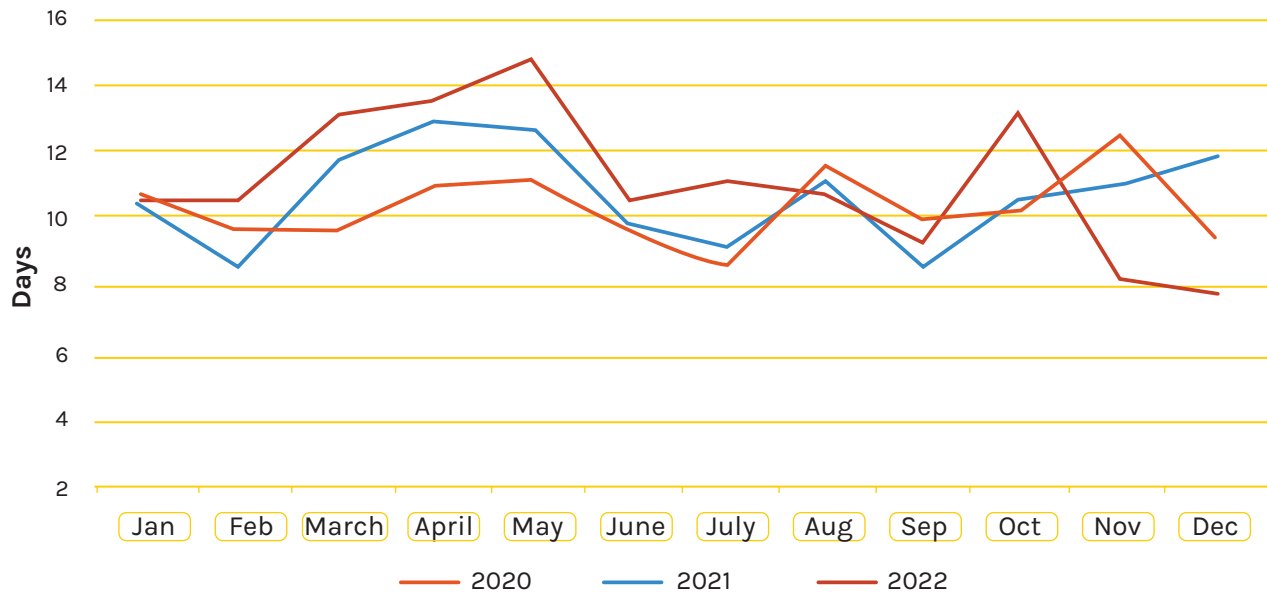
YEAR	JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEPT	OCT	NOV	DEC	Annual Average
2015	8	6	6	6	7	6	4.7	4.5	4.6	5.5	4.2	5.3	5.7
2016	5.8	5.3	5.2	4.6	4.7	4.3	5.1	4.8	3.7	5.6	6.4	5.6	5.1
2017	5.1	5	5	13	6	5	5	5	4	4	4	3.8	5.4
2018	4	3	3	3.3	4.3	5.3	3.7	3.8	3.6	3.9	3.9	3.8	3.8
2019	3.6	3.6	3.3	3.4	4.1	6.4	4.8	4.2	4.5	4.1	3.9	4.2	4.2
2020	4.7	4.0	4.2	4.8	4.6	3.9	4.6	5.5	4.0	4.8	6.1	3.9	4.6
2021	4.6	3.7	4.4	4.9	4.3	3.9	4.0	3.9	4.1	4.6	5.1	7.7	4.6
2022	4.8	4.7	12	5.7	6.7	4.9	5.2	4.6	4.7	4.3	4.7	3.9	4.6

Source: TICTS 2015-2022

#### 4.2.4 TICTS Transit Containers Dwell time

The average dwell time for transit import containers at TICTS for the period of January to December 2022 was 10.7 days, same as it was in 2021. Furthermore, the average dwell time for transit containers in TICTS were still out of target in 2021 and 2020 by more than 100% 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 January-December 2022 and comparative years of 2020-2021.

**Figure 37: Monthly Average TICTS Transit Container Dwell time (days), 2020-2022**

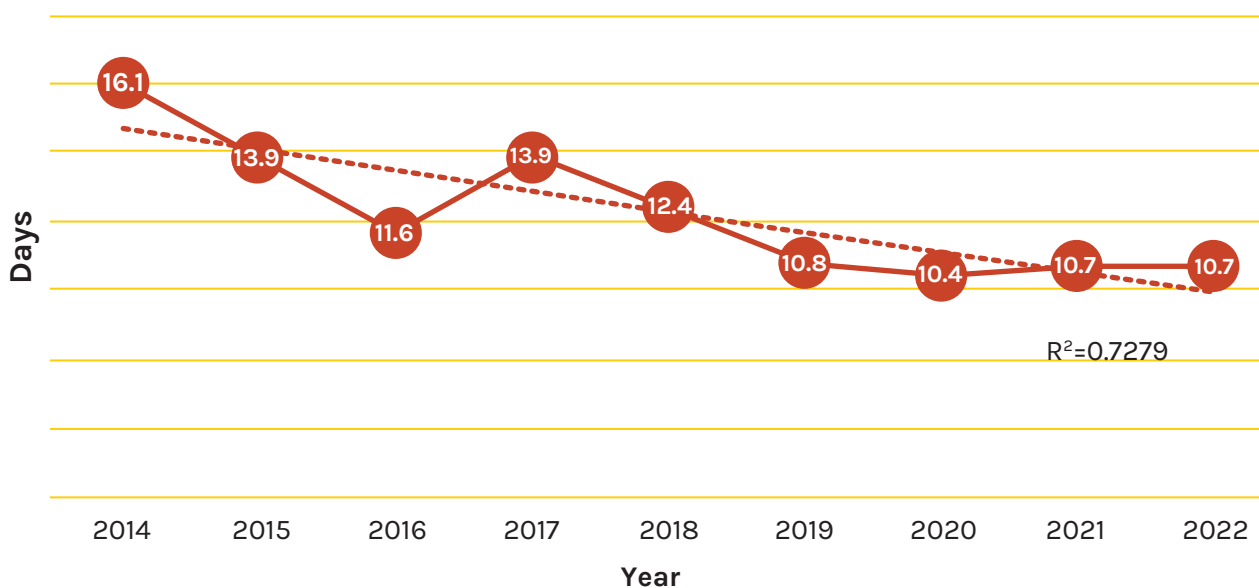


Source: TICTS 2020-2022

From the graph above it is clear that monthly average dwell times at TICTS for transit containers in 2022 had fluctuating patterns. However, the path of dwell time by months for comparative years of 2020-2021 appear the same in general terms, with rise in February to May, a fall in dwell time between June and July and randomness in later months of all the three years of 2020-2022.

Lastly on this topic, annual comparisons in transit containers dwell time at TICTS is shown below. The graph TICTS between 2014-2021.

**Figure 38: TICTS Annual Average Dwell Time for Transit Containers, 2014-2022 (days)**



Source: TICTS 2014-2022

### 4.3 Customs Release Time/Document Processing Time (DPC)

Customs release time provide the time taken in hours that elapse from when declaration is made by Clearing & Forwarding Agent till when the Release order is issued by the Customs for Transit Cargo declarations. It has been calculated from the average time difference between Release time and Declaration time, measured in Hours from Tanzania Revenue Authority.

#### 4.3.1 Tanzania Customs Release Time (Hours)/Document Processing Centre (DPC)

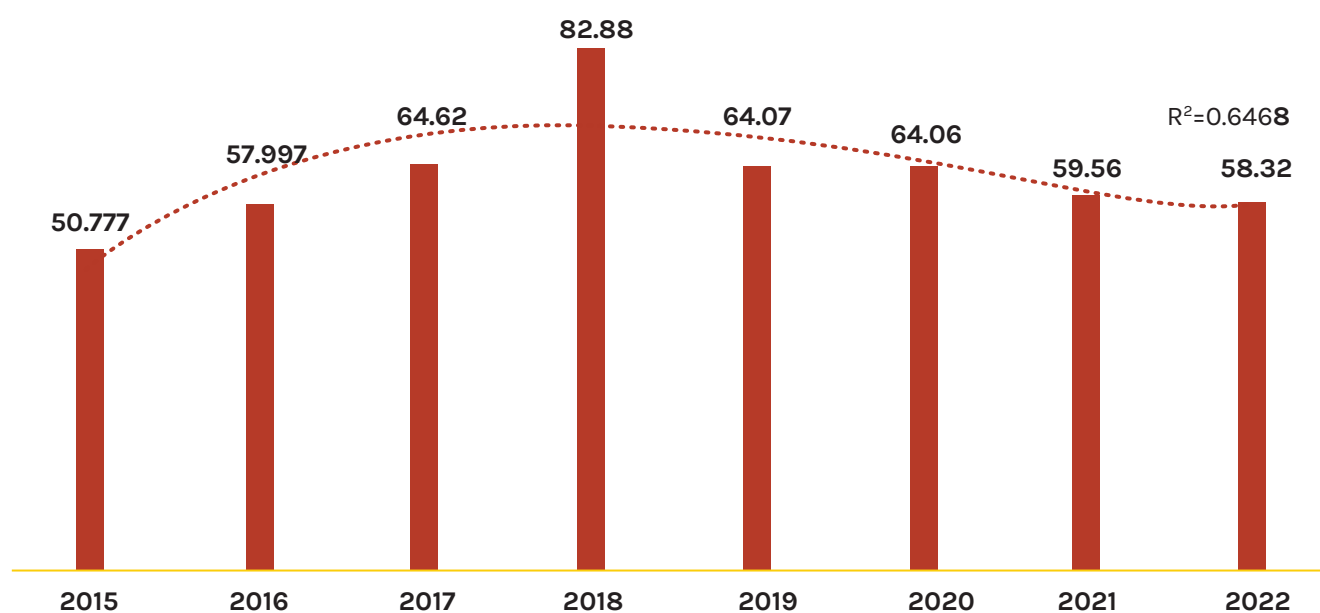
The table and graph below display monthly dynamics in customs clearance time between 2015 and 2022. It shows that the average document clearance time for the year 2022 was 58 hours compared to 60 hours in 2021, equivalent to improvement of 1 hour. The gains observed in 2022 were smaller than the improvement of 4 hours observed in the year 2021/2020. Transporters are still concerned with high DPC time and have been emphasizing on timely release of cargo.

**Table 12: Monthly Average Customs Release Time in Tanzania, 2015-2022 (Hours)**

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEPT	OCT	NOV	DEC	Annual Average
2015	51.2	52.9	50.5	50.2	51.6	51.2	51.1	50.8	50.3	50.1	49.7	49.6	50.8
2016	55.1	52.4	48.5	51.0	53.5	55.9	57.6	59.6	62.5	65.3	66.7	67.9	58.0
2017	65.6	67.2	68.8	64.9	65.1	64.0	63.3	62.6	62.6	63.7	63.3	64.4	64.6
2018	87.0	86.7	84.3	83.1	81.0	81.9	81.4	82.7	83.2	82.0	81.3	80.1	83.1
2019	64.7	64.8	63.0	62.3	62.8	63.3	63.4	63.9	64.7	65.2	65.3	65.5	64.1
2020	62.6	62.7	60.9	60.2	60.7	61.2	61.3	61.8	62.6	63.1	63.2	63.4	62.0
2021	62.7	63.2	59.2	58.1	59.2	58.6	58.3	59.4	58.0	58.3	60.1	59.5	59.6
2022	58.4	59.4	58.2	57.4	60.1	58.6	58.2	57.2	58.1	58.4	57.4	58.3	58.3

Source: TRA, 2015-2022

**Figure 39: Annual Average Customs Release Time in Tanzania, 2015-2022 (Hours)**



Source: TRA, 2015-2022



#### 4.4 Truck Turnaround Time

Truck turnaround time refers to the number of hours that a truck uses at Tanzania International Container Terminal Services (TICTS) clearance and loading. This indicator is measured in 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. Operationally, it is collected as time for **Truck Gate Out date** and **Truck Gate In date**.

The graph below shows that truck turnaround time between January – December 2022 was 1.53 hours. This level was an improvement from 1.82 hours recorded in January –December 2021, equivalent to improvement of 16%. The monthly range in truck turnaround time in the year 2022 was 24 minutes, that is the time difference between best served and worst served month. The range of 24 minutes, between 1.3 hours and 1.7 hours or 8% monthly variations indicates a process, that is stable even though this fluctuation is higher than the 5% of year 2021.

Truck turnaround time at TICTS is indicative of targets well achieved and stabilized in efficiency.

**Table 13: Monthly Average Truck Turnaround Time at TICTS, 2017-2022 (hours)**

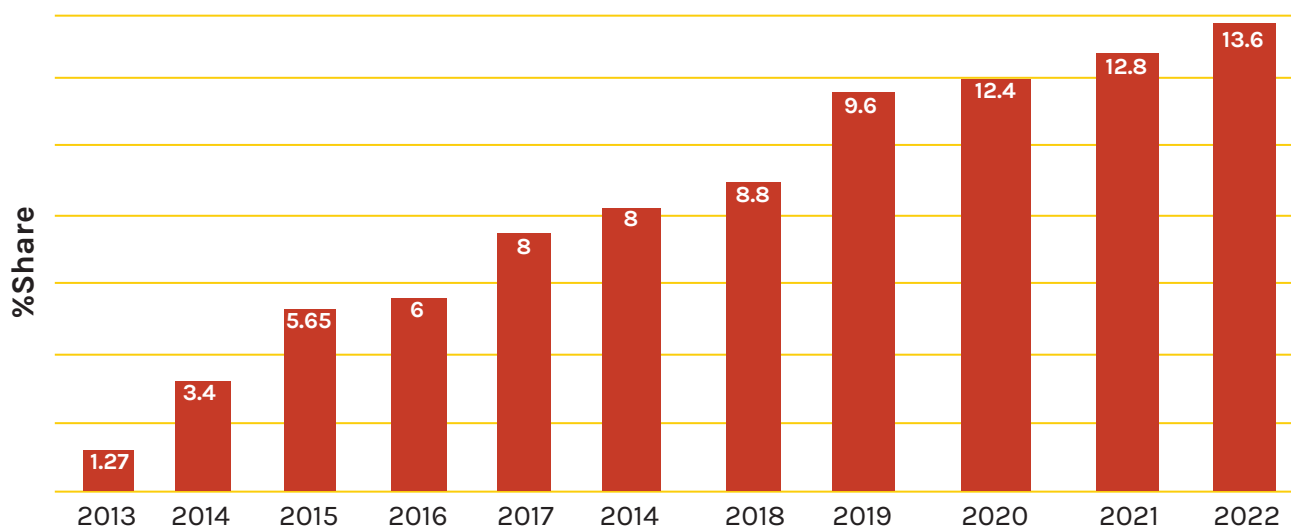
YEAR	JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEPT	OCT	NOV	DEC	Annual Average	Relative Variation
2017	2.4	2.4	2.2	2.3	2.3	2.3	2.3	2.3	2.3	2.3	2.4	2.4	2.3	2.4%
2018	2.12	2.03	2.01	2.47	2.04	2.31	2.5	2.03	2.4	2.5	2.3	2.41	2.3	8.9%
2019	2.3	2	2.1	2.2	2	2.2	2.1	2.3	2	2.2	2.1	2.2	2.1	4.7%
2020	1.8	2	1.7	1.7	2	1.8	1.7	1.8	1.9	1.8	2.1	1.8	1.82	7.4%
2021	1.9	1.8	1.76	1.84	1.82	1.8	1.65	1.82	1.8	2	1.76	1.88	1.82	4.7%
2022	1.7	1.6	1.7	1.5	1.6	1.4	1.3	1.5	1.4	1.6	1.5	1.6	1.53	8.0%

Source: TICTS 2017 – 2022

#### 4.5 Operating trucks by Registration Countries

This indicator gives out the origin of registration of transit trucks which operate within Central Corridor. The Tanzanian registered transit trucks dominated the Central Corridor trucking business at 86% in 2022, down from 87.2% in 2021. In effect, foreign registered trucks operating in transit freight service are gaining momentum and reached 13.6% in 2022, up from 12.8% in 2021. The graphs below shows trend in share of foreign registered trucks since 2013.

Figure 40: Share of Foreign Registered Trucks Operating in Central Corridor, 2013-2022



Source TRA, 2013 - 2022

The increase in trucking vehicles of non-Tanzanian registration signifies improvements in terms of cargo handling by encouraging participation of Central Corridor member states. This is attributed to the harmonization of road user charges to some of the member states of the corridor and increase in export cargo which provides return cargo.

#### 4.6 Cargo Containerization

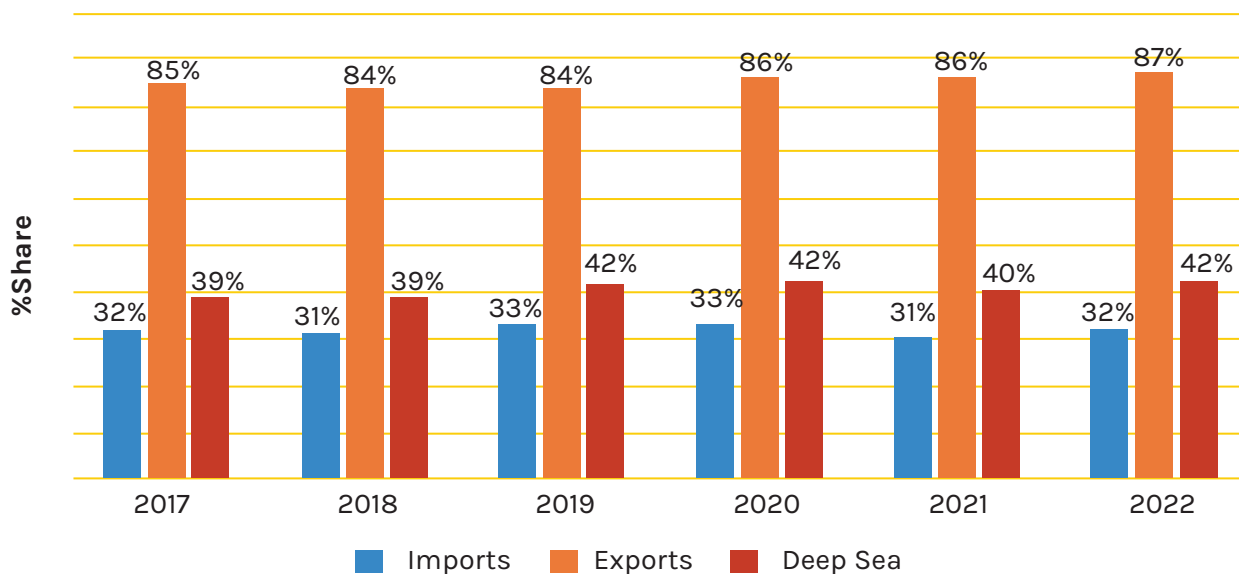
Cargo containerization as a method of liner shipping has been established to reduce vessel turnaround time, allow smaller fleet to carry a greater volume of goods and reduced handling costs, decreased damages and losses. Containerization has also revolutionized intermodal freight logistics.

The current trends in the global supply chain is towards containerization of liner cargo indicates that around 50% of cargo is containerized. At the Port of Dar-es-Salaam, containerization accounts for 42% of total cargo by year 2022, growing from 40% a year before.

A larger proportion of containerization is typical of export cargo (87%) than import cargo (32%), but since import cargo has the largest share of deep-sea cargo, more work is needed to stimulate containerization of import cargo, mostly from Eastern Asia to the Port of Dar-es-Salaam in order to achieve global levels.

The graph below shows historical trends in containerization at the Port of Dar-es-Salaam

**Figure 41: Share of Containerized Cargo, 2017-2022**



Source: TPA, 2017-2022

#### 4.7 Load Control of Vehicles

Load control data is obtained from 10 weighbridges scattered across the corridor roads. The indicator assesses safety of vehicles and road conditions. Central Corridor Transit nodes in Tanzania have the following weighbridge stations:

Five are operating as Weigh-In Motion (WIM)

- (i) Vigwaza,
- (ii) Mikese,
- (iii) Dakawa,
- (iv) Nala, and
- (v) Njuki.

Five are operating as static bridges:

- (i) Kurasini,
- (ii) Mwendakulima,
- (iii) Nyakahura,
- (iv) Kyamyorwa, and
- (v) Mutukula.

Transit vehicles through the central corridor are weighed and inspected at only three stops of Vigwaza, Njuki and Nyakahura. The below statistics indicate the summary of weighed vehicles at the respective weighing per quarters in Tanzania since 2017 to June 2022. It should be noted that Dakawa weighbridge started operations in April 2019 replacing Kihonda weighbridge. As such, data before this period reflects data measured at Kihonda weighbridge.

##### 4.7.1 Weighbridge Traffic in Tanzania

This indicator measures the average number of vehicles weighed in a quarter at various weighbridges on Tanzania’s roads along the Central Corridor. This indicator reflects flow of vehicles along the road to member states for those stations along the corridor. Weighbridge traffic also reflects the level and dynamics of utilization of roads in a period. Annually, in 2022 the weighbridge traffic stood at 4.1 million, distributed nearly equally in the first three quarters at 1.0 million trucks and a slight decline to 0.9 million in October-December 2022.

**Table 14: Weighbridge Traffic on Tanzania Roads, 2022**

Station	Jan-March	April-June	July-Sept	Oct-Dec	Total
Vigwaza	254,409	370,970	453,535	313,980	1,392,894
Dakawa	175,443	183,529	158,200	132,963	650,135
Mikese	131,908	117,023	97,065	87,499	433,495
Njuki	196,258	195,816	217,444	211,231	820,749
Nala	165,141	131,338	64,243	56,021	416,743
Nyakahura	25,099	35,979	40,149	40,238	141,465
Mwendakulima	28,815	28,019	29,851	29,321	116,006
Kyamiyorwa	17,414	18,936	21,945	20,304	78,599
Mutukula	11,603	9,520	14,307	10,010	45,440
Total	1,006,090	1,091,130	1,096,739	901,567	4,095,526
Quarter Share	25%	27%	27%	22%	100%

Source: TANROADS, 2022

From Table 14 above, distribution of weighbridge traffic had been nearly equally spread out between 22% and 27% per quarter. The lowest share of traffic was recorded in October-December 2022 at 22%. The pattern was not the same in 2021 whereby 30% of traffic was concentrated in the period of October-December while the lowest traffic was observed in April-June 2021 at 24%. This observation is indicative of varying business cycles of 2021 and 2022.

Annual trends for six years on weighbridge traffic as shown in the table below.

**Table 15: Annual trends in weighbridge traffic, 2017-2022**

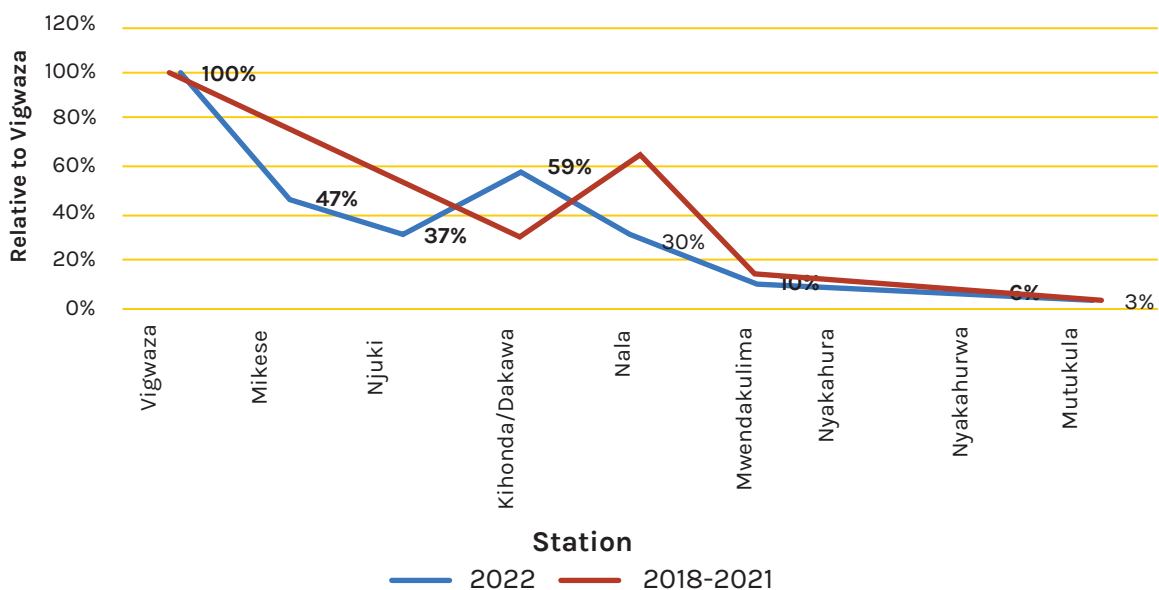
Station	Distance from Port	2017	2018	2019	2020	2021	2022	Daily traffic
Vigwaza	80.6	487,993	769,604	801,262	960,525	891,969	1,392,894	3,816
Mikese	159	304,913	288,811	441,772	843,036	859,988	650,135	1,781
Dakawa	245	84,473	116,097	272,735	689,270	891,180	433,495	1,188
Nala	463	186,794	219,463	266,005	202,479	265,033	416,743	1,142
Njuki	732	92,554	163,275	417,615	996,507	873,420	820,749	2,249
Mwendakulima	1016	86,870	129,105	90,389	118,280	111,668	116,006	318
Nyakahura	1259	70,559	71,985	68,774	73,373	91,494	141,465	388
Kyamiyorwa	1317	39,214	38,505	66,916	36,966	45,006	78,599	215
Mutukula	1496	8,698	9,675	19,139	45,144	40,670	45,440	124
Annual total		1,362,068	1,806,520	2,444,607	3,965,580	4,070,428	4,095,526	11,221
Daily Traffic		3,732	4,949	6,698	10,865	11,152	11,221	

Source: TANROADS, Google on distances from DSM

In 2022, the growth was marginal at 1% compared to increase of 3% in 2021. This marginal increase indicates saturation of traffic population recorded in weighbridge systems compared to larger increase in 2020 that was attributed to the conversion of most of the weighbridges into Weigh-in-Motion and improvement of recording systems at the respective weighbridge stations. These improvements resulted into improved data capturing for all vehicles passing the stations.

Vigwaza is the first weighbridge whereby all trucks from Dar-es-Salaam Port pass through, including those towards Central Corridor states, Dar-es-Salaam corridor and local vehicles requiring axle control. The traffic flow trends relative to the first station of Vigwaza Station where all trucks from Dar-es-Salaam Port passes are shown below:

**Figure 42: Annual Weighbridge Traffic Flows Along Tanzania Central Corridor Roads, 2018-2022**



Source: TANROADS, 2018-2022

#### 4.7.2 Weighbridge Compliance in Tanzania

This measures the percentage of trucks that comply with the gross vehicle weight and the axle load limits before or after re-distribution of cargo.

The East African Community Vehicle Load Control Act 2016, is an Act of the Community to make provision for the control of vehicle loads, harmonized enforcement, institutional arrangements for the Regional Trunk Road Network within the Community and to provide for other related matters including management of the weighbridges. In Tanzania, weighbridges are managed by TANROADS.

The compliance level of trucks at various weighbridges in Tanzania, taken for all measured vehicles at the static and mobile scales which are complying vehicles at allowable 5% tolerance weight was recorded at 98.6-99.99% in all quarters and weigh stations, implying that non-compliance of trucks to the set weight limit is less than 1% (TANROADS, 2021). Table below provides a range comparison of weigh station observations on compliance of trucks for the year 2021. From the trace back on stations recording lowest and highest compliance, it was observed that minimum compliance during the year was observed at Mutukula station (98.6%) in Quarter III while maximum level during the year was observed at Nyakahura (99.99%) in Quarter IV.



Table 16: Quarterly weighbridge compliance per station by quarter, 2022

Station	Jan-March	April-June	July-Sept	Oct-Dec	Annual Avg
Vigwaza	99.3	99.5	99.7	99.5	99.5
Mikese	99.9	99.9	99.8	99.8	99.8
Dakawa	99.9	99.9	99.9	99.8	99.9
Nala	99.9	99.9	99.9	99.9	99.9
Njuki	99.9	99.9	99.9	99.8	99.9
Mwendakulima	99.6	99.6	99.7	99.7	99.7
Nyakahura	99.6	99.5	99.7	99.8	99.6
Kyamiyorwa	99.9	99.9	99.9	99.9	99.9
Mutukula	99.6	99.5	99.6	99.6	99.6

Source: TANROADS, 2022







# Section Five

## TRANSIT TIME AND DELAYS

## 5.0 Introduction

Indicators of Transit time and delays within the Central Corridor are obtained from Electronic Cargo Tracking System (ECTS) from TRA and the GPS road survey results. Corridor monitoring starts from when goods/cargos arrive at the Port of Dar es Salaam until when they reach their final destinations. This time has been broken down to form different indicators depending on different activities and sections along the Corridor.

### 5.1 Transit time to destinations

The section highlights the transit time, which is it takes for a cargo to move from the Port of Dar es salaam to various destinations in the Central Corridor Member States. This transit time is greatly affected by stoppages along the Corridor. Some of the main stoppage reasons include; drivers' personal reasons, police checks, weighbridges, company checks, road conditions, customs check among others.

Some of the measures that have been put in place to minimize stoppages and improve transit time include the implementation of the High-Speed Weigh in Motion (HSWIM) weighbridges in Tanzania, implementation of one-stop border posts (OSBPs) almost at all border points in the Central Corridor member countries, Construction of One Stop Inspection station (OSIS) in Tanzania which will allow transit trucks to stop and be inspected at only three weighbridges, and Implementation of the Single Customs Territory (SCT) which is another measure that enhanced clearance of the goods across borders.

The Transit time to destination is measured from the time cargo starts its journey from Dar es salaam to the time it arrives at the various destinations in the Central Corridor member countries. The data used in the analysis of this indicator is from the Transporters tracking systems through Transporters associations of TATO and TAT in Tanzania. Indicators are analysed as monthly averages for 2021 while annual performance of 2021 is compared with annual figures between 2019 and 2022.

The table below shows transit times of trucks carrying transit import cargo from Dar-es-Salaam Port to various destinations of the corridor, along with their margins of fluctuations.

**Table 17: Annual Average Road Transit Times to destinations, 2021-2022 (days)**

Destination	Annual Average		Possible Delays	
	2021	2022	2021	2022
Dar-Kigali	5.50	4.04	25%	5.1%
Dar-Bujumbura	5.56	5.47	7%	7.7%
Dar-Kampala	6.60	5.94	7%	7.8%
Dar-Bukavu	7.33	7.27	15%	10.3%
Dar-Goma	7.34	6.53	18%	7.6%

Source: CFAs /Transporters

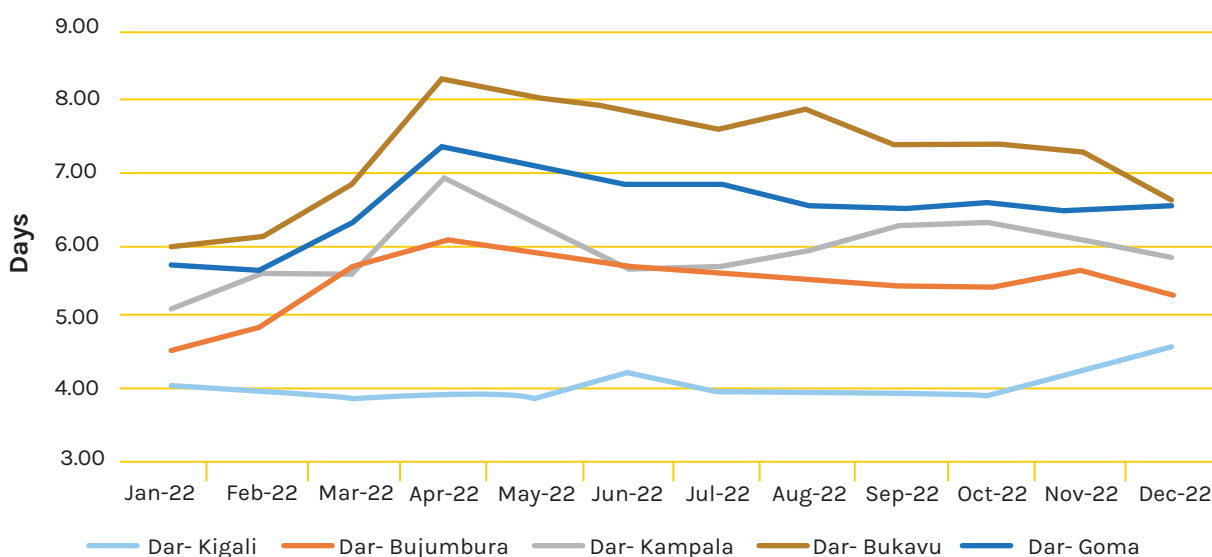
The table shows transit time to Kigali in 2021 was on average of 4.0 days or equivalent to 97 hours. Monthly observations on transit times to Kigali had small fluctuations of  $\pm 5\%$  or nearly 5 hours delays, equivalent to 5.1% around annual average. For Bujumbura, transit time was 5.47 days, equivalent to 131 hours plus a expected margin of delays of 10 hours (7.7%). For Kampala, this was 5.94 hours or 142 hours ( $\pm 11$  hours or 7.8%).

Transit times of trucks to Bukavu was an average of 7.27 days during the year, equivalent to 174 hours while this had expected delays of within 18 hours of the average. For trucks to Goma they were expected to arrive within 6.53 days or equivalent of 157 hours ((± 12 hours or 7.6%).

Transit times have been observed to decrease in general by 14 hours in 2022 taking all Central Corridor routes average decline in transit times. There was nearly no change in transit times to Bukavu where the decline between 2021 and 2022 was one hour. The route with largest decline in transit times within the year was DSM-Kigali whereby there was a cut of 35 hours.

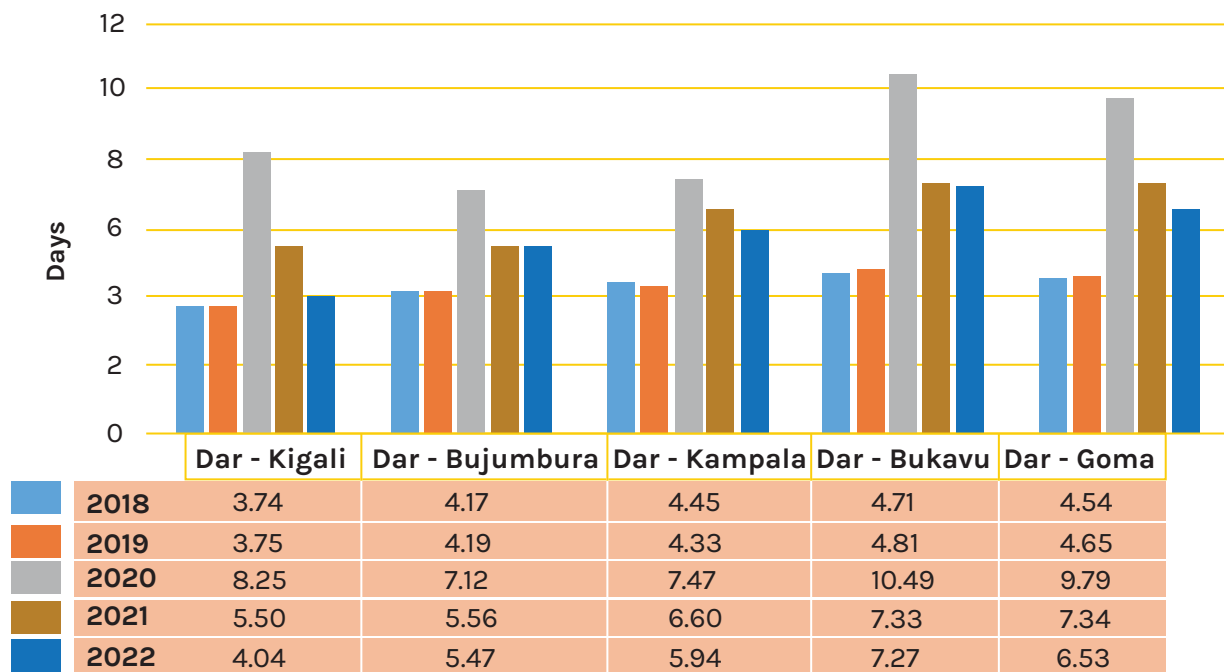
Further, monthly trends in transit times in 2022 were observed to unfavorably increase in the early months of January-April for all routes except DSM-Kigali whose trends remained nearly the same throughout the year. This situation has changed to unfavorable direction compared to year 2021 whereby transit times showed downward trend towards the end of year, despite lifting of COVID-19 restrictions. Graph below shows improvements of transit times from month to month within year 2022.

**Figure 43: Monthly Average Road Transit Times to Destinations, 2022 (Days)**



Source: CFAs /Transporters

Figure 44: Annual Average Road Transit times to destinations (days) 2018 - 2022



Source: TATO/A/TAT data 2018-2022



# ANNEX



## What is Pre – Arrival Declaration?

Pre – Arrival Declaration is the facility in the clearance system which allows the Importer/Agent to start the clearance procedures of the goods before the arrival of the goods at the entry point. This facility helps the importer to accomplish some of the procedures before arrival of the goods hence reduce the time to be spent for clearance of the goods upon arrival of the goods. Initial process starts with the importer through his/her appointed Clearing and Forwarding Agent (CFA).

### Note:-

The facility is applied to all imports with exception to importation of fuel (white products), goods imported through Post Parcel and courier services, Temporary Imported goods, Goods cleared under Provision declarations and Transit declarations

The facility enables the importer to know the amount of duties and taxes to be paid in a particular transaction prior to arrival of goods.

## Verification of Goods

The imported goods are subjected to selectivity which determines whether the goods are directly released (GREEN), undergo documentary check /scanned (YELLOW) or physically verified (RED). The determination of the selectivity is done by the system through the use of risk management whereby the parameters including origin of the goods, importer, Agent and type of goods. Goods are examined and released from Port, border station or Airport.

## Tanzania Customs Integrated System(TANCIS)

- The importer through his/her Agent lodges the document to the system electronically, attaching the supporting documents.
- If declaration is “Rejected” CFA is supposed to submit afresh declaration to accommodate TANCIS requirement.
- TANSAD will be processed to payment stage before manifest is submitted.
- Cargo Manifest write-off is shifted to a Customs Release Order stage (CRO).
- CFA will get Acceptance Notice with a Payment Notice generated based on declared Values.
- CFA will get Amendment Acceptance Notice once amendment and validation check are completed. If the officer rejects the amendment CFA will get Amendment Rejection Notice for TANSAD, otherwise officer will rework on the document classification, valuation and verification.
- Once verification is completed, the results will be registered by the officer.
- Verification results will be submitted to the supervisor for approval.
- CFA will receive Assessment Notice.
- CFA has to accept or object the Assessment Notice.
- CFA has to object the officer Assessment through Integrated Query System (IQS)
- If CFA accept the Notice and the assessment have increased compared to the declared values, an Additional Payment Notice will be generated within the assessment notice. This payment notice value will be the difference of the final amount and initial generated payment notice.

- ⦿ If there is a discrepancy between manifest data and declaration, CFA will receive Clearance Suspension Notice. CFA will need to amend the declaration as guided by inspection results and re-submit.
- ⦿ When Payment is received, inspection completed accordingly, CFA will receive Release Order for the respective goods.

### **How long does this process take before getting my goods?**

- ⦿ A total number of 24 hours (1 day) has been set for processing of Pre-Arrival Declarations from registration to issuance of the necessary clearance report (A-PAD) for PADs submitted with or upon receipt of sufficient documentation that meet the required standard.
- ⦿ The P-PAD for PADs submitted with complete set of final documents should be processed and issued within 24 hours.

**Note:** The P-PADs for PADs registered without complete set of final documents should be processed and issued 24 hours after receipt of the same, i.e if the final documents are received after two weeks, the process starts that day.

- ⦿ After lodgment of TANSAD and payment of duties if any, selectivity will be conducted within 24 hrs. Goods are selected for
- ⦿ Direct release (green), will get the release order from the port or entry point,
- ⦿ those selected for documentary check will be checked at Customs Service Centre (CSC), and
- ⦿ those selected for physical verification are examined and release at the port and point of entry.

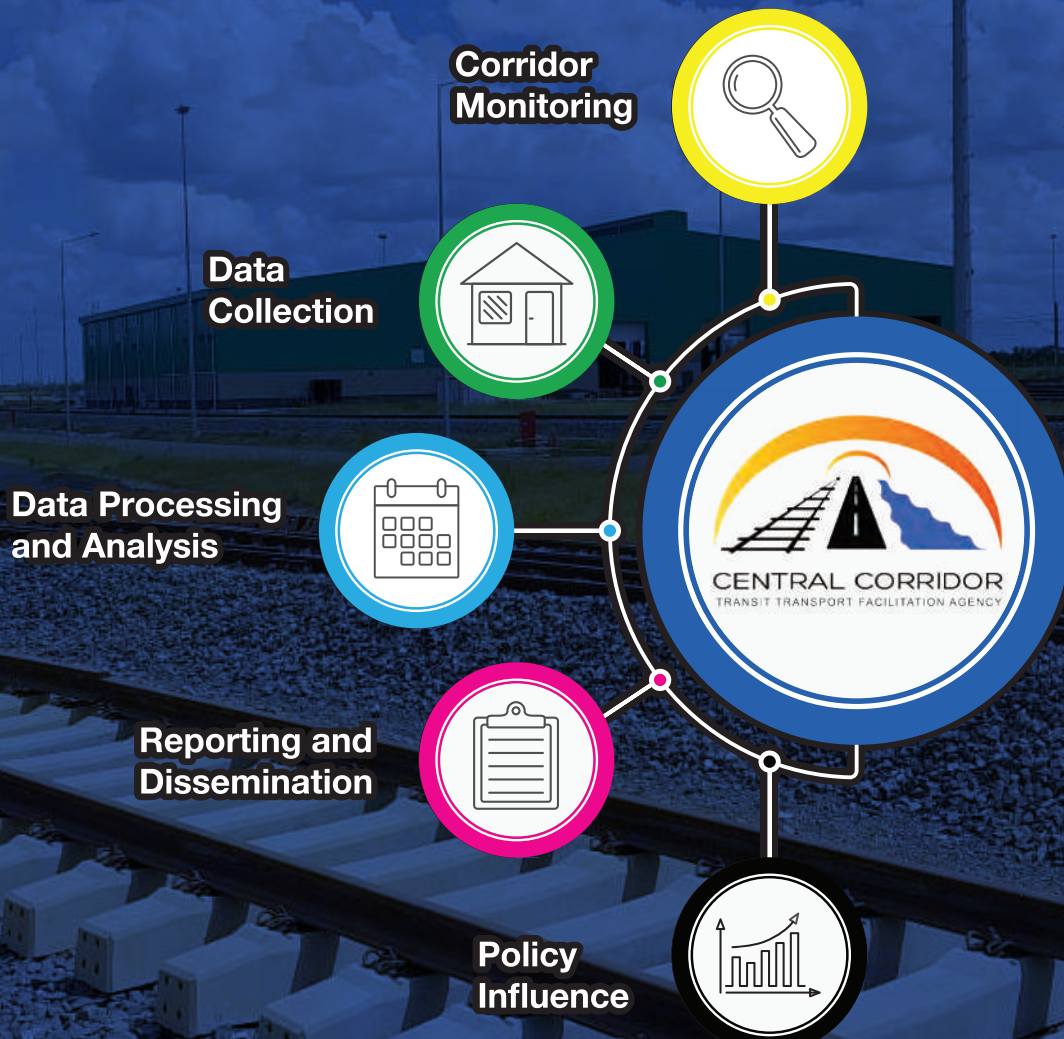








# TRANSPORT OBSERVATORY



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Plot 84 Kinondoni Road, Acacia Estates 2nd Floor - Office No. 202 & 207 P.O.Box 2372 Dar es salaam  
Mob: +255 687 440 941 | Email: [ttfa@centralcorridor-ttfa.org](mailto:ttfa@centralcorridor-ttfa.org) | Website: [www.centralcorridor-ttfa.org](http://www.centralcorridor-ttfa.org)

