



# Intermodal **AFRICA**

2021

DJIBOUTI PALACE KEMPINSKI, DJIBOUTI  
TUESDAY 3 TO THURSDAY 5 AUGUST 2021

**Port Management Association of  
Eastern & Southern Africa (PMAESA)**

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PMAESA Secretary General



# Outline

- Introductions
- Current scenario – regional perspective
- Pre and Post COVID19 scenario
- Overcoming challenges
- Conclusion



# PMAESA Introduction



- Established in 1973 under the auspices of the United Nations Economic Commission for Africa (ECA),
- A non-profit, inter-governmental organization made up of Port Operators, Government Line Ministries, Logistics and Maritime Service Providers and other port and shipping stakeholders from the Eastern, Western and Southern African and Indian Ocean regions,
- Has 25 countries under its jurisdiction
- Governed by a Council and the Board of Directors (6 – representing Coastal Countries, Island Countries and Land-Linked Countries) – currently chaired in Namibia



# Objectives

- Enable relationships among member ports with a view to promoting regional cooperation and subsequently regional integration.
- Framework for exchange of information and ideas among members and to enable members to interface with one another from the port, transport and trade spaces to exchange benchmarks and best-practices.
- Working towards improving conditions of operation and management of ports (coastal and inland) in its region of coverage with a view to increase their efficiencies.



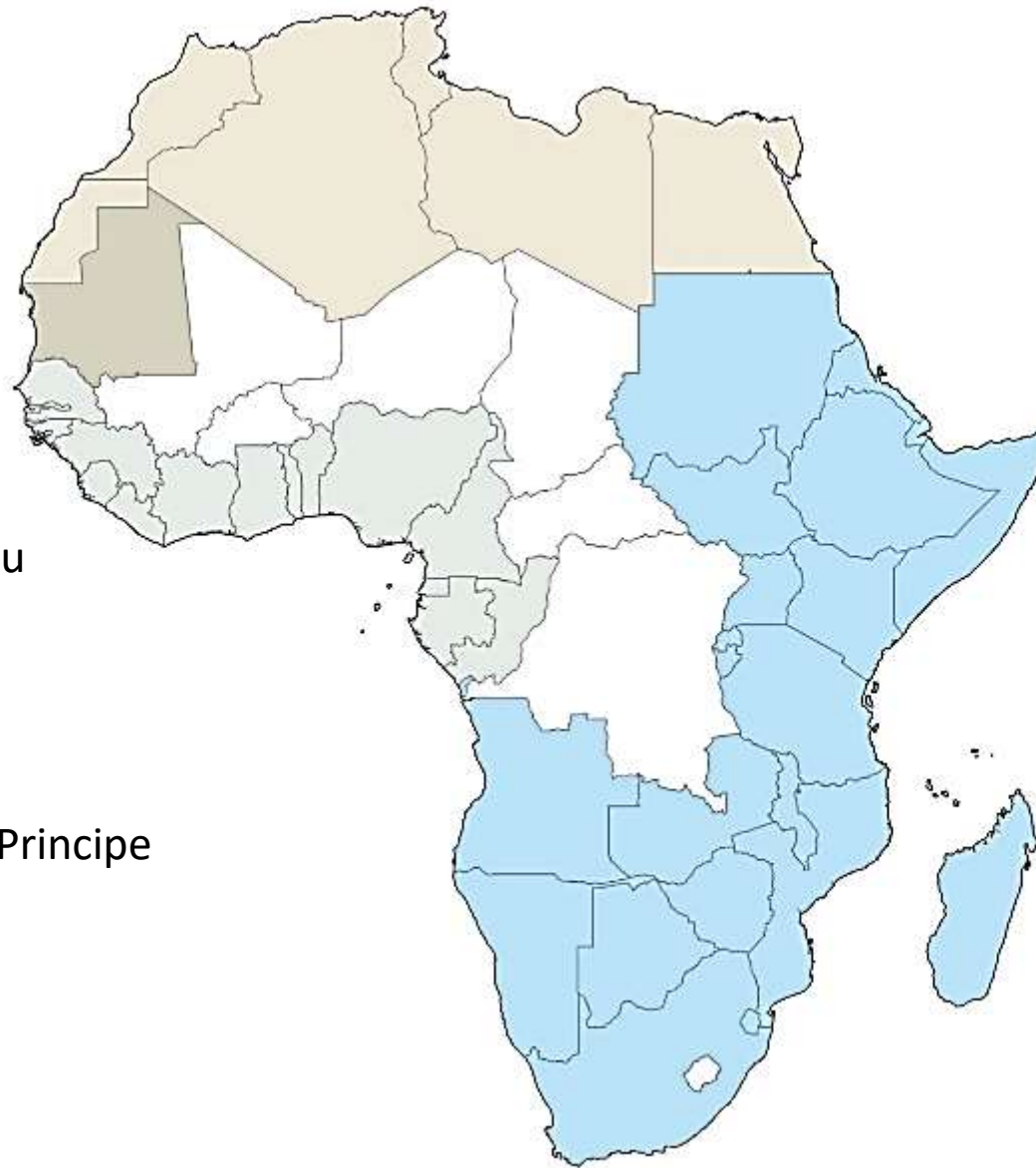
# The Continental platform for Ports - Pan-African Association for Port Cooperation (PAPC)

## UAPNA Members = 8

Algeria	Morocco
Egypt	Sudan
Libya	Tunisia
Mauritania	Western Sahara

## PMAWCA Members = 18




Angola	Guinea Bissau
Benin	Ivory Coast
Cameroon	Liberia
Cape Verde	Mauritania
Congo	Nigeria
Equatorial Guinea	Sao Tome & Principe
Gabon	Senegal
Gambia	Sierra Leone
Ghana	Togo
Guinea (Conakry)	



## PMAESA Members = 25

Angola	Namibia
<b>Botswana</b>	Rwanda
Burundi	Seychelles
Djibouti	Somalia
Eritrea	South Africa
Ethiopia	South Sudan
Kenya	Sudan
<b>Lesotho</b>	Swaziland
Madagascar	Tanzania
Malawi	Uganda
Mauritius	Zambia
Mozambique	Zanzibar
	Zimbabwe

### Legend:

-  PMAESA Region
-  PMAWCA Region
-  UAPNA Region



Darkened shaded areas imply membership to 2 associations

# Current scenario - Ports

- In Africa, maritime transport and ports occupy a strategic place in the development of trade
- With 30,700 km of coastline, Africa has 90 main ports and many other ports offering services for fishing and tourism
- African ports play a key role in the economic growth of the Continent
- However, Africa's share represents only 3% of the world's international freight transport, 5% of world trade and less than 2% of global container traffic

*Seaports are expected to guarantee the sustainability of the population, by providing reliable connectivity and facilitating the efficient distribution of supplies*

**- David Jean-Marie, CEO, Barbados Port Inc**

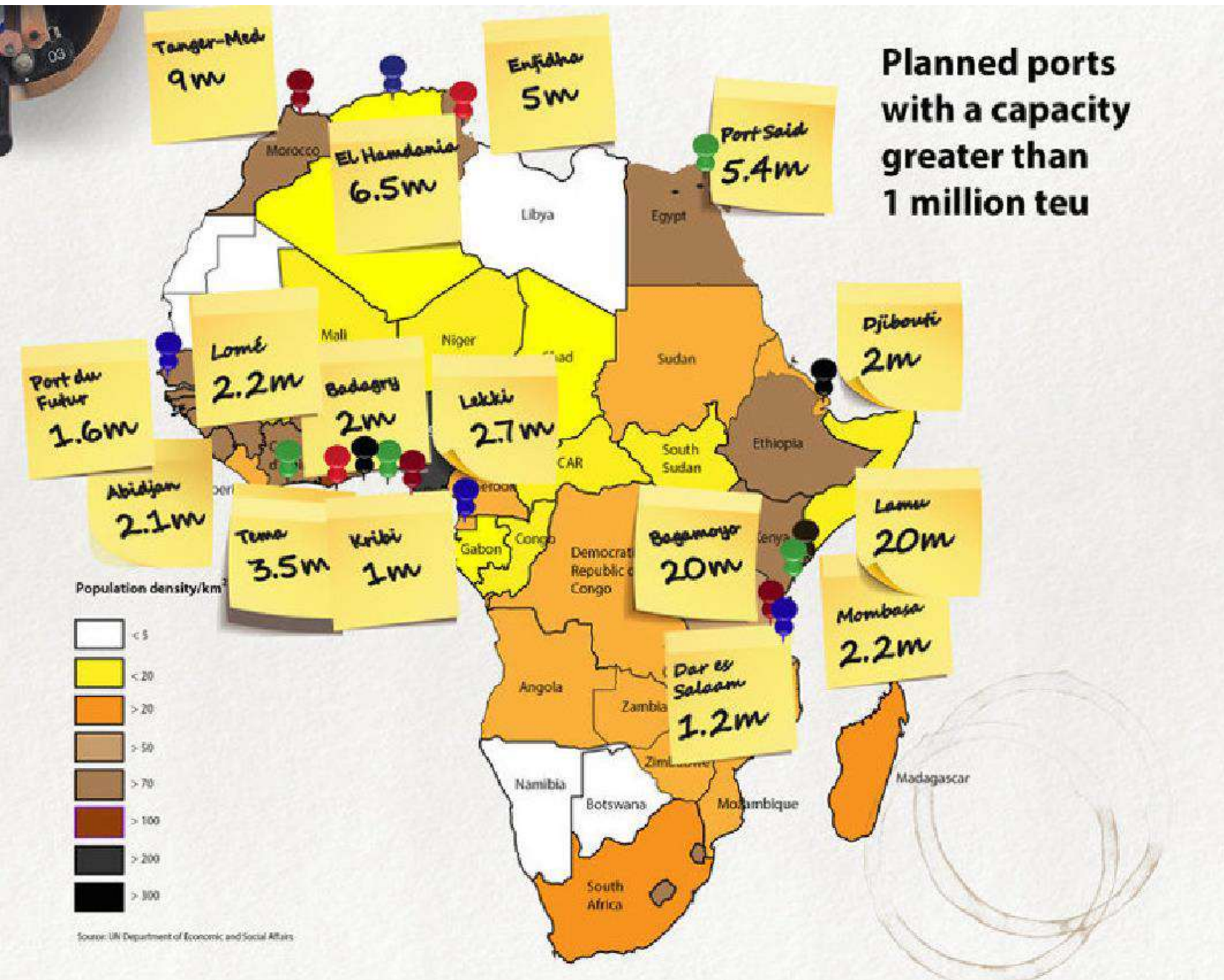


# Current scenario - Ports

- Several ports in Africa now handle more than 1 million TEUs annually,
- However, several ports in the Far East handle 20 million TEUs, and ports such as Rotterdam, Anvers and Jebel Ali, handle 10 million TEUs
- Low numbers, smaller ships, long dwell times, customs delays lead to high Ocean Freight Rates for import and export cargoes, push up import costs and increase prices of exports







The continent through the concerted push for the “million-TEU port”, is steering toward the path of economic take-off, similar to east Asia’s post-war development

Source: United Nations Department of Economic and Social Affairs (DESA)



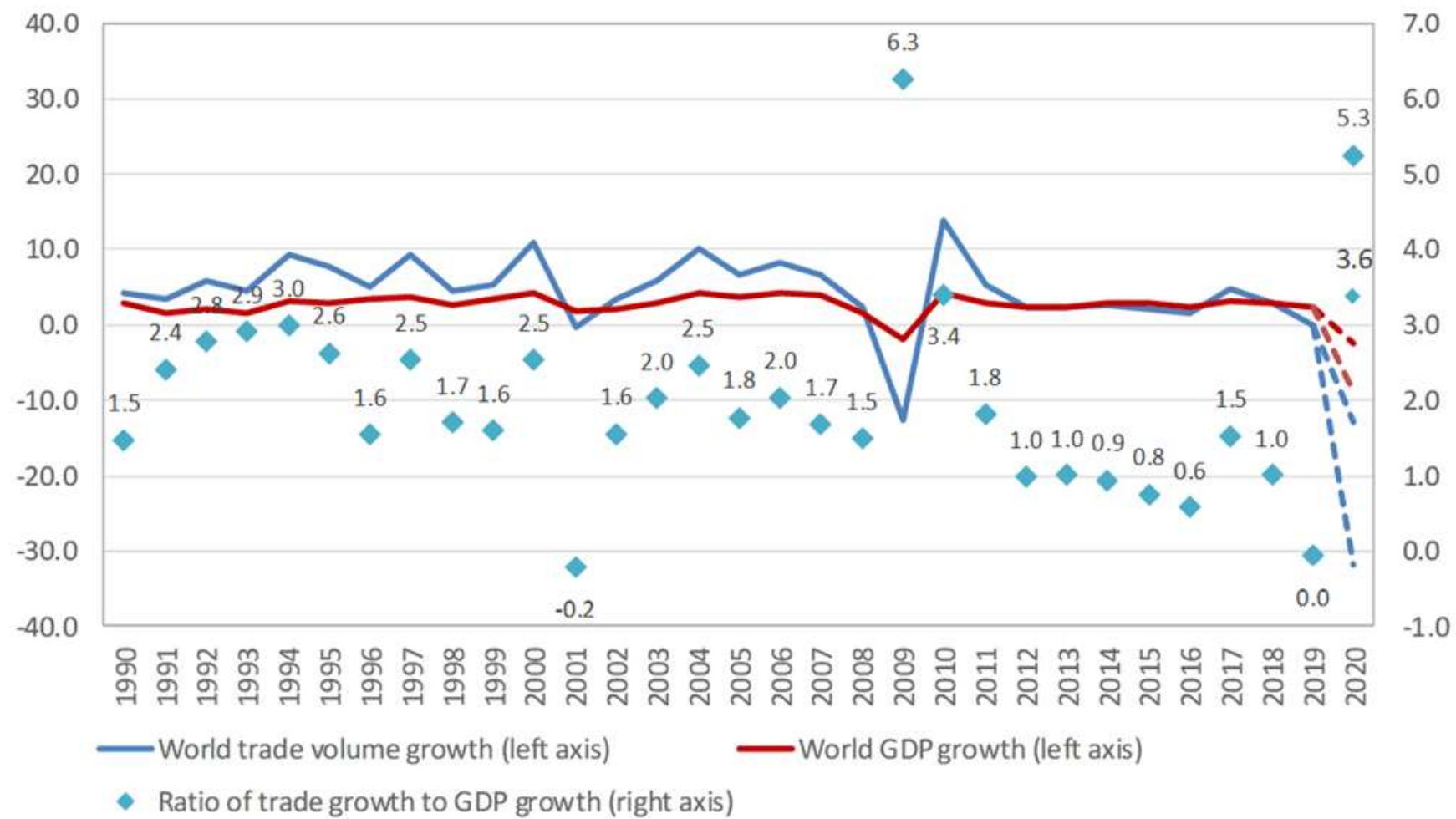
# Before the pandemic – connectivity trends

- Ports in Africa are generally more connected to each other.
- High connectivity was the result of being connected to the same overseas routes, in combination with feeder and transshipment services.
  - Durban and Cape Town: connected by services provided by 12 companies.
  - Luanda: most connected to Cape Town, South Africa with 7 companies,
  - Mombasa: most connected to Dar esSalaam, Tanzania through direct services by 10 companies (also: connected with Ningbo, China through services by 6 companies).



Source: UNCTAD (2020). Review of Maritime Transport 2020. Geneva: UNCTAD

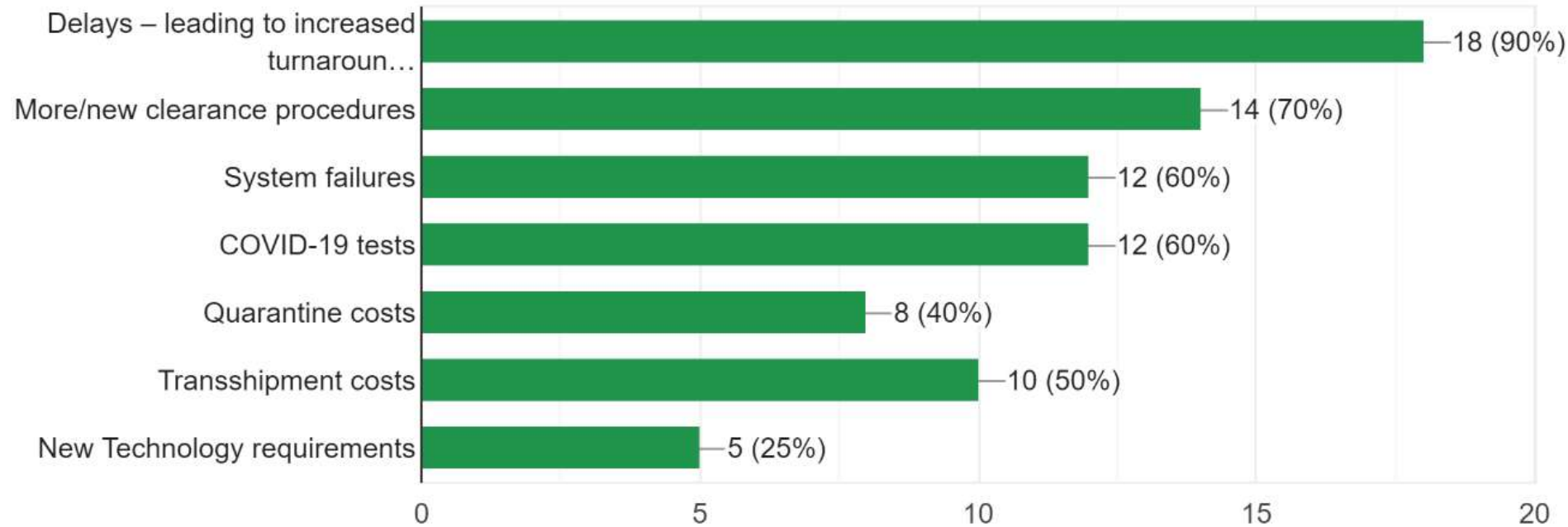
# External Shock: COVID 19 affects trade flows at unprecedented speed & scale



Ratio of world merchandise trade growth to world GDP growth, 1990-2020. Source: WTO



# IMPACT OF COVID 19 ON TRANSPORT & LOGISTICS BUSINESS IN EAST AFRICA



- More than 75% of the transport and logistics businesses in East Africa were significantly affected by the COVID-19 pandemic.
- According to a survey by Shippers Council of East Africa – the sector experienced 90% delays leading to increasing turnaround time, 70% more and new clearance procedures, 60% issues on system failures and 60% COVID 19 testing related challenges



# Trends in African Ports – Post-Impact

- African countries bearing heavy transit traffic experienced major challenges in forwarding cargoes to their destination as hinterland connections were heavily congested
- Trucks at borders severely delayed due to the restriction to enter neighbouring countries. Truck drivers quarantined for 14 days before the trip continues. This led to suspension of operations by truck companies also compounded by shortage of public health staff.
- Administrative problems due to the different approaches of neighbouring countries occurred as cooperation between national administrations during crisis was limited
- Digital-ready ports connected to different data systems are likely to be able to deal with sudden changes and uncertain timescales more rapidly.



# Hinterland Delays are most critical

Ports reporting hinterland transport delays compared to normal activity (%)



- Cross-border crossing delays resulted in long queues to/from the port
- In the early part of 2020 there were needs for adjustment of the procedures for going in/out of the port gate.

**Source: IAPH World Port Sustainability Program (WPSP) Covid19 Port Economic Impact Barometer**



# PMAESA Initiatives

- Promoted the harmonisation of response measures to mitigate impacts of COVID19 in Ports
- Promoted for membership participation in the IAPH-WPSP Port Economic Barometer surveys and the UNCTAD “Building port resilience against pandemics” course
- Advocacy campaigns on COVID19 safety measures for port authority staff; real time information exchange and updates sensitization campaigns against the Spread of COVID19
- Advocacy campaigns on deeper ICT integration in ports in collaboration with the World Bank and AfDB

**Individual solutions do not solve global problems**

***- Aurelio Martínez Esteve, the president of Spain's Valencia port authority***





# Response sustainability strategies

- Seeking partnerships with International Organizations for deeper outreach in Member Ports
- The Association has proposed interventions for ports which look at
  - Compliance measures
  - Impact assessment
  - Capacity building
- Promotion of enhanced ICT integration in Port Operations for better information sharing and harmonization



# Recommendations

- Accelerate the domestication and implementation of the Africa Continental Free Trade Agreement
- Enhanced digitization of economic activities
- Enhance private sector participation
- Promote clean technology investments during the infrastructure development process

