

Topical issues and challenges for West Africa's transportation and logistics infrastructure

Intermodal Africa 2023 Conference

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Agenda

- 1 Context: West Africa within Africa and global benchmark
- 2 Context: West Africa's main ports
- 3 Gateway port throughput in West Africa
- 4 Gateway throughput and outlook by region
- 5 Transshipment throughput, maximum ship sizes and connectivity in West Africa
- 6 Waiting times and terminal productivity in West Africa
- 7 Overview of ship sizes constraints

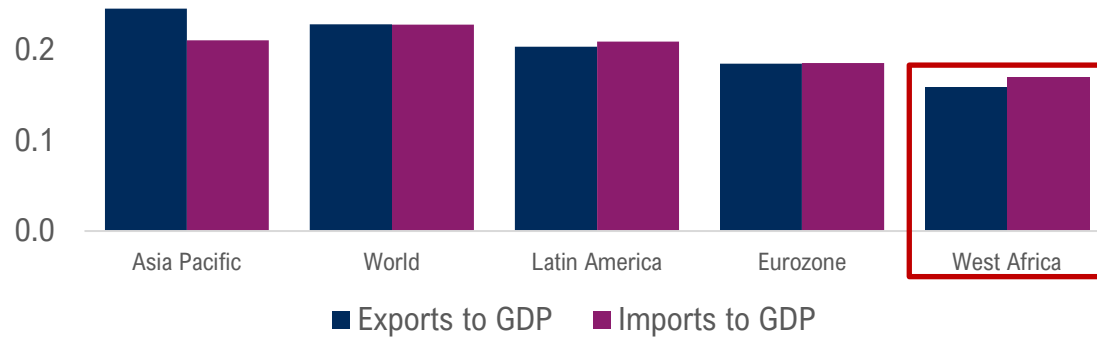


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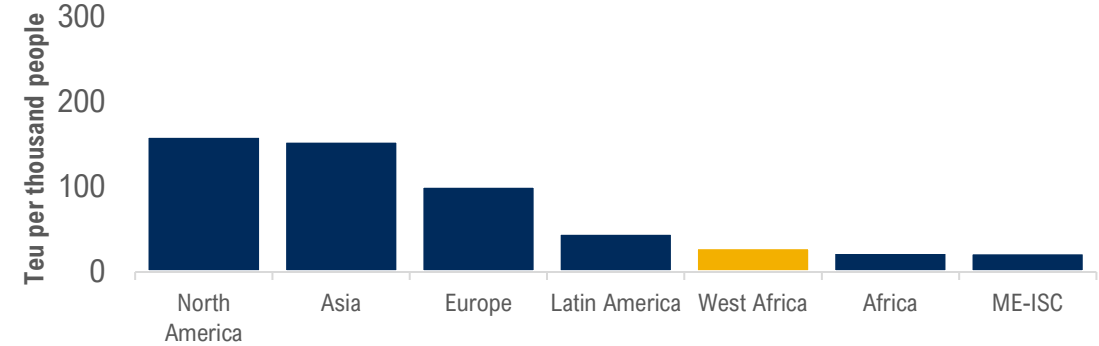
Rigorous analysis – Practical advice

Context: West Africa within Africa and global benchmark

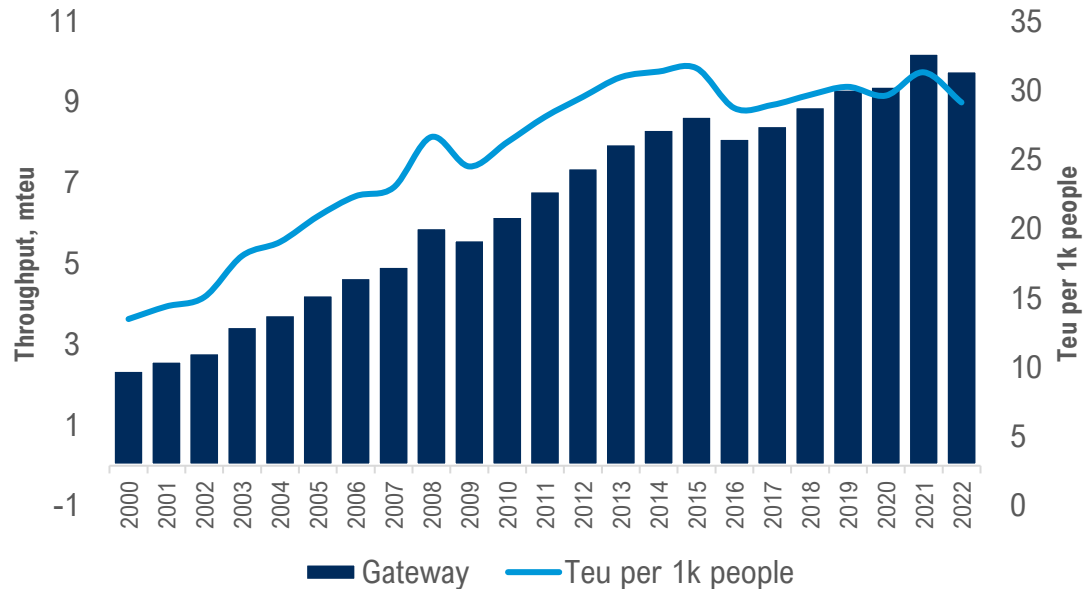
Goods exports and imports to GDP ratio, 2022



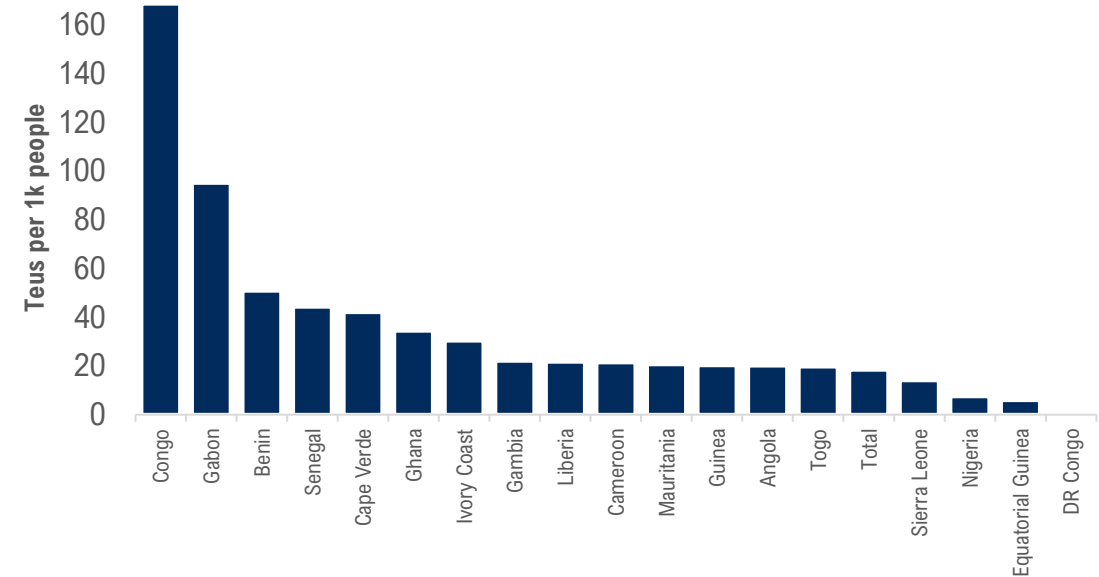
Throughput per capita (gateway)



Gateway volumes in West African ports



Throughput per capita in 2022, West Africa. Islands not included. Gateway only.

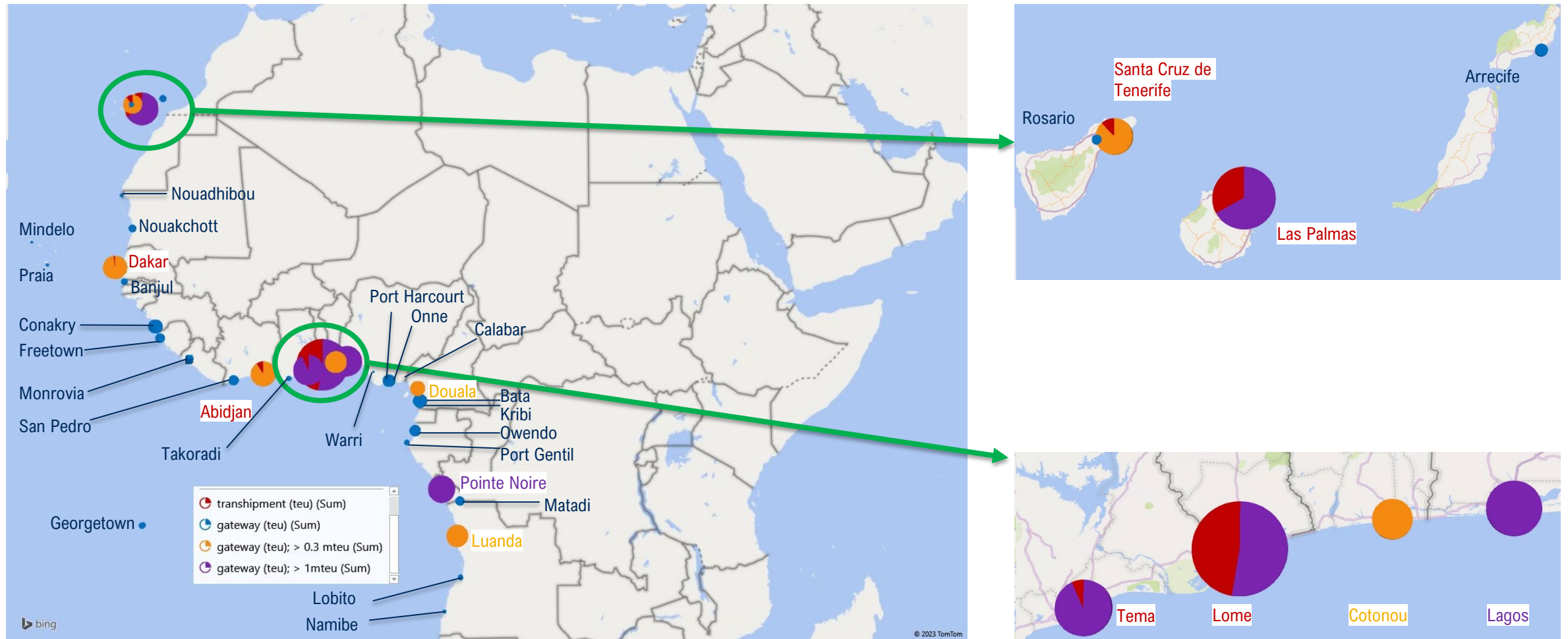


Source: Drewry Maritime Research, Oxford Economics, The Global Economy, Our World in data – CIA.

* Gateway volumes, excluding Guinea-Bisseau, Ascension Island, and Canary Island for partly missing data.

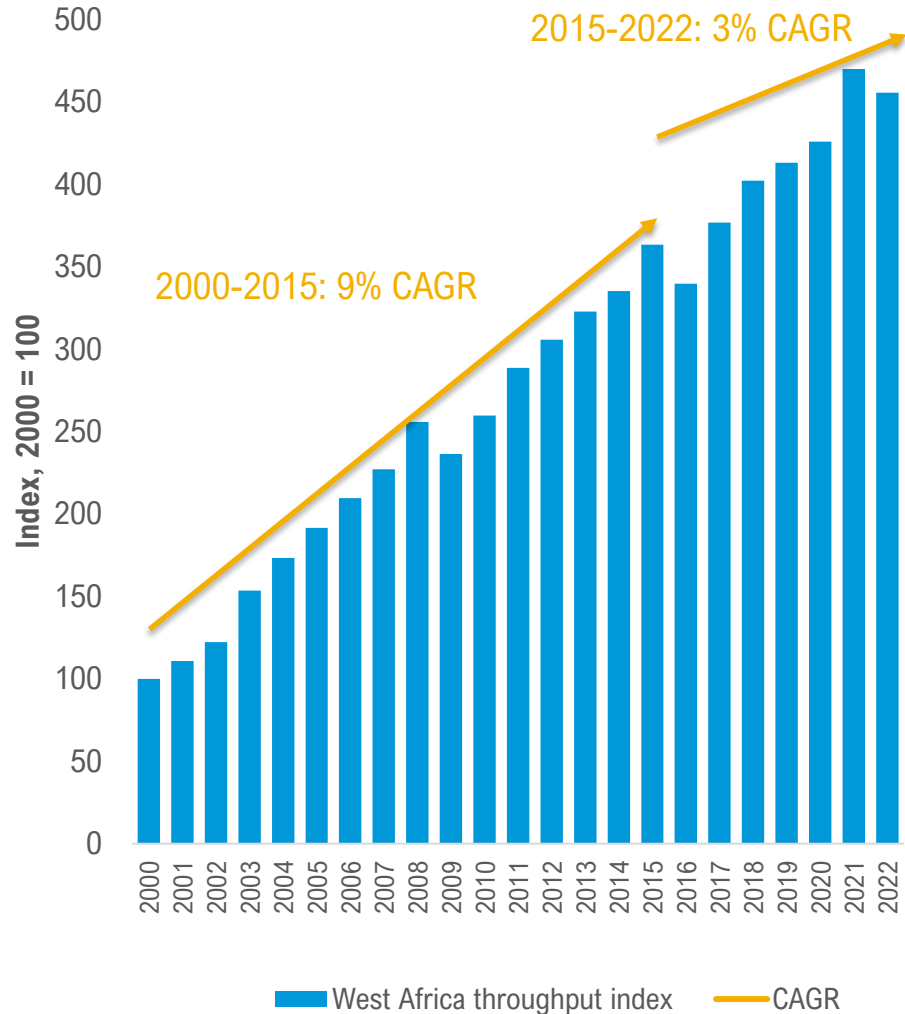
Context: West Africa's main ports

- 29 Gateway ports and 6 transshipment ports, 2022 teu throughput

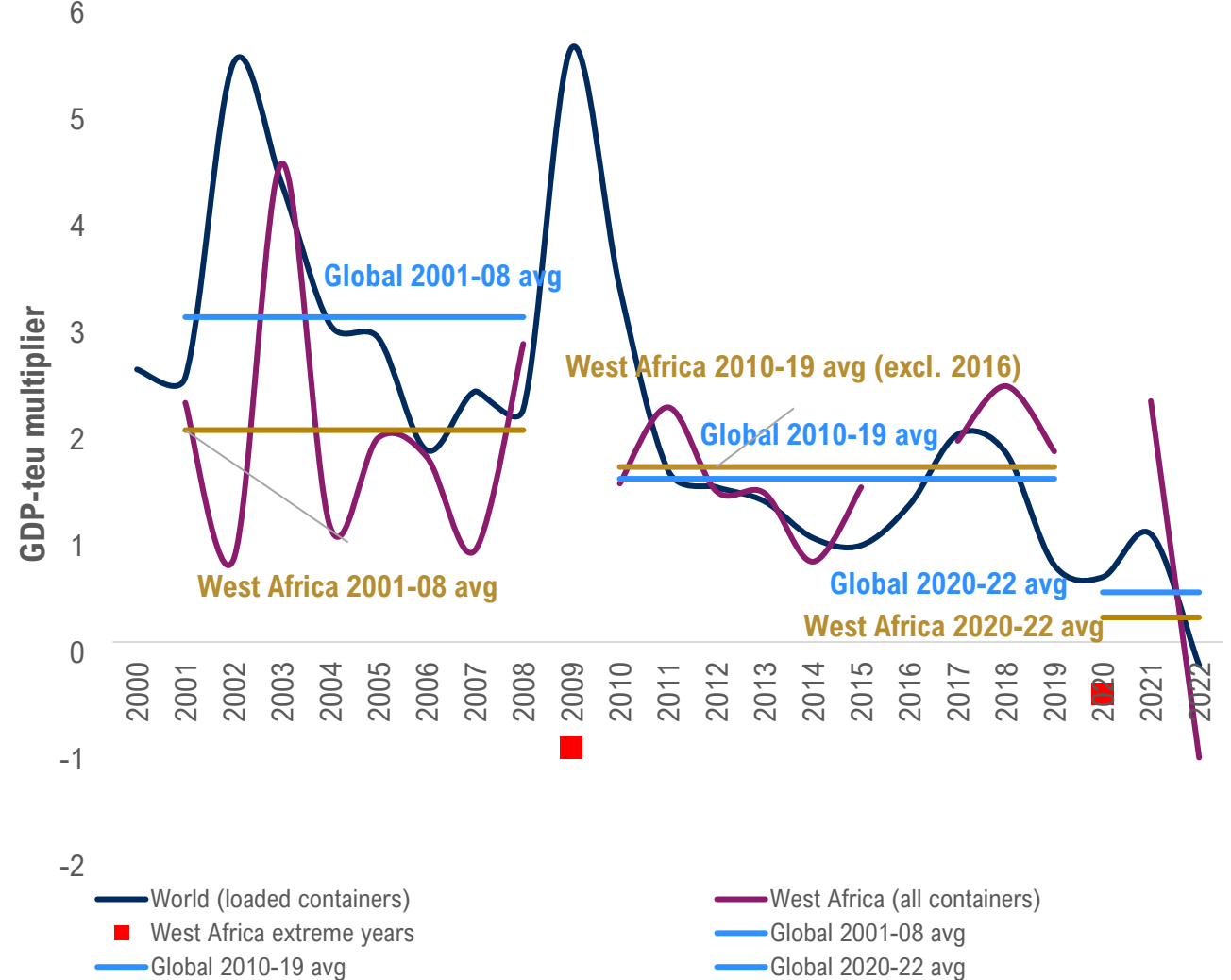


Gateway port throughput in West Africa

Port gateway throughput in West Africa ports

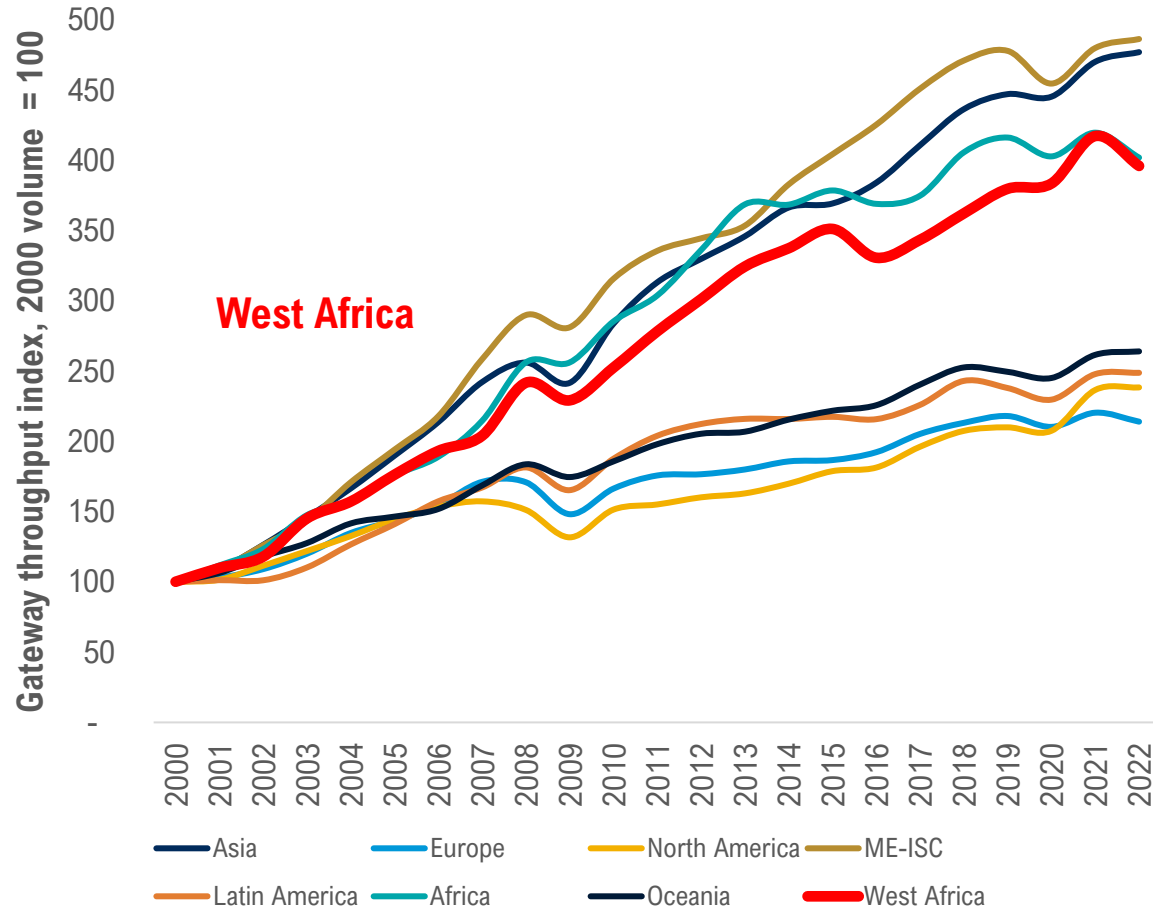


GDP-teu multiplier - Global and West Africa

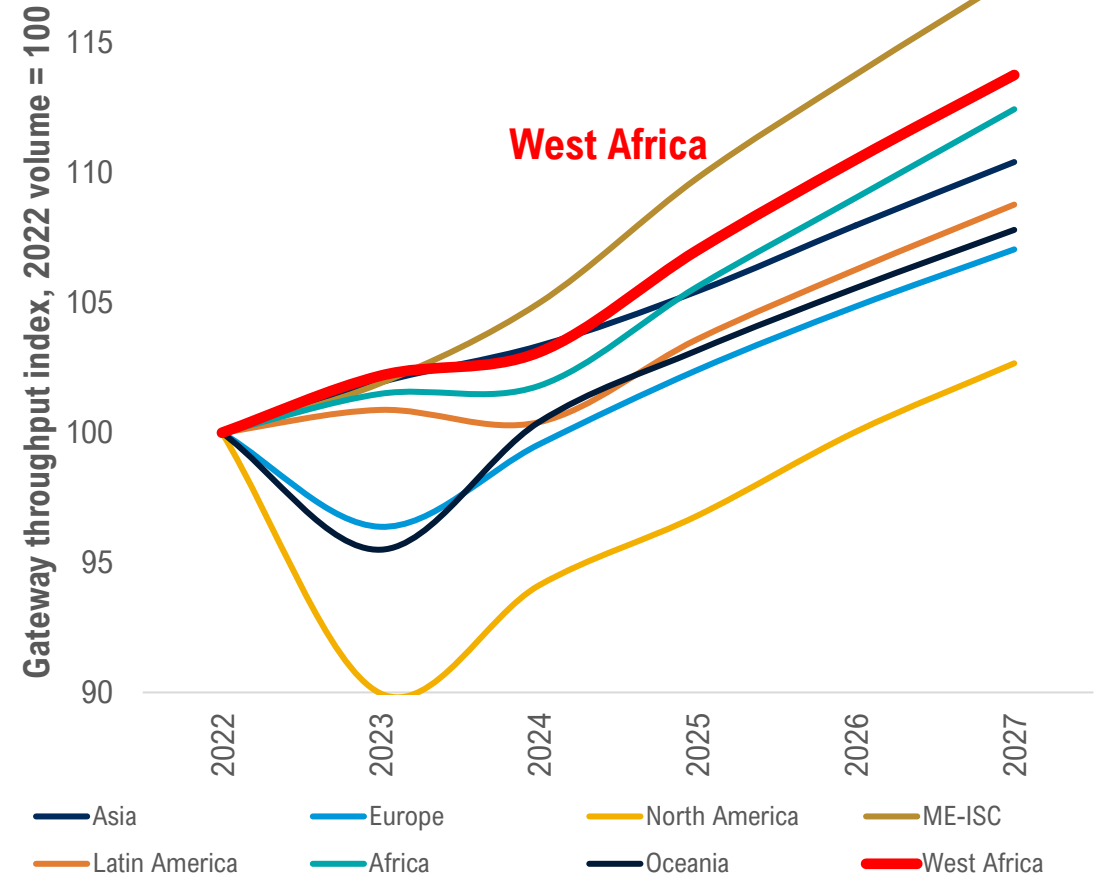


Gateway throughput historical and outlook by region

Regional historical gateway throughput index chart, 2000 volume = 100

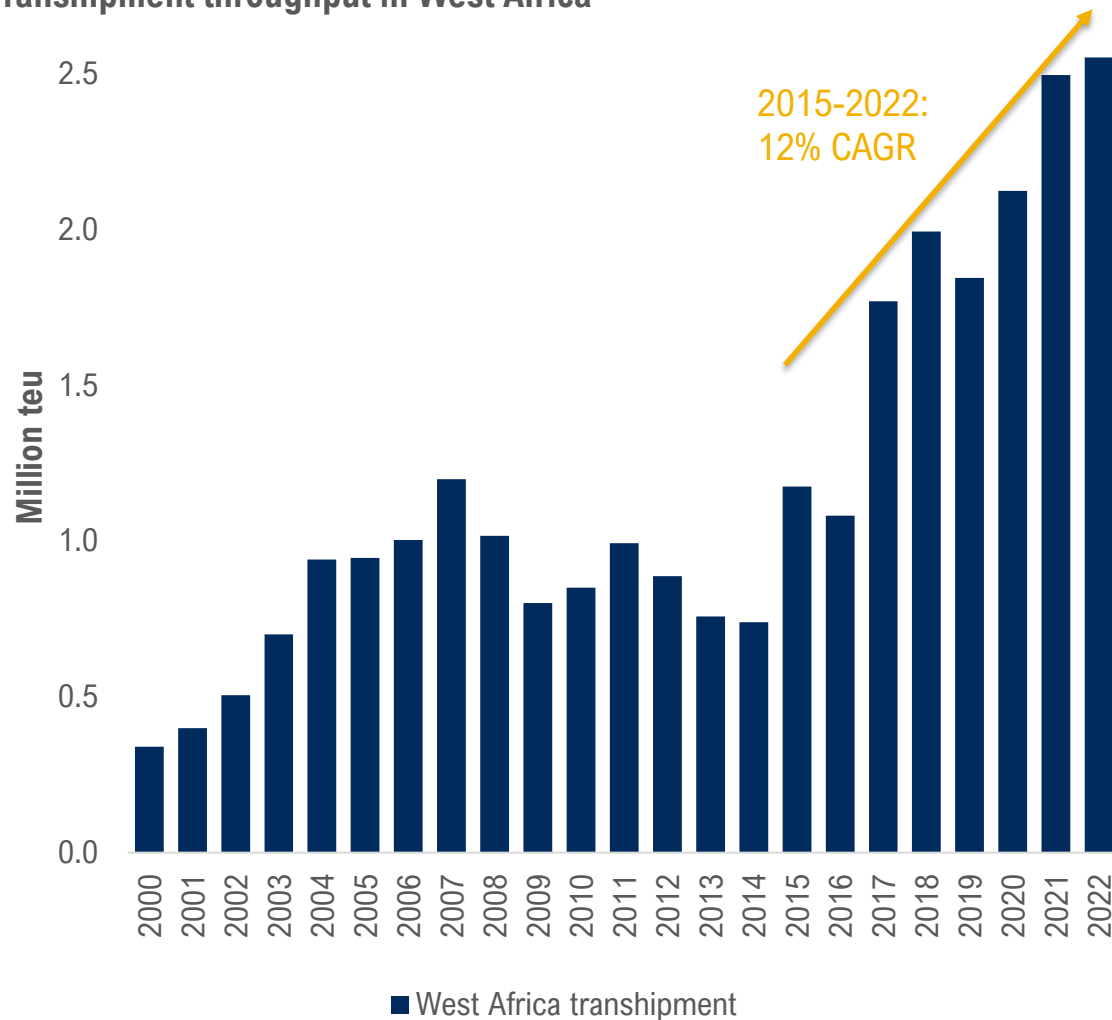


Market outlook for different regions in the World, 2022 volume = 100

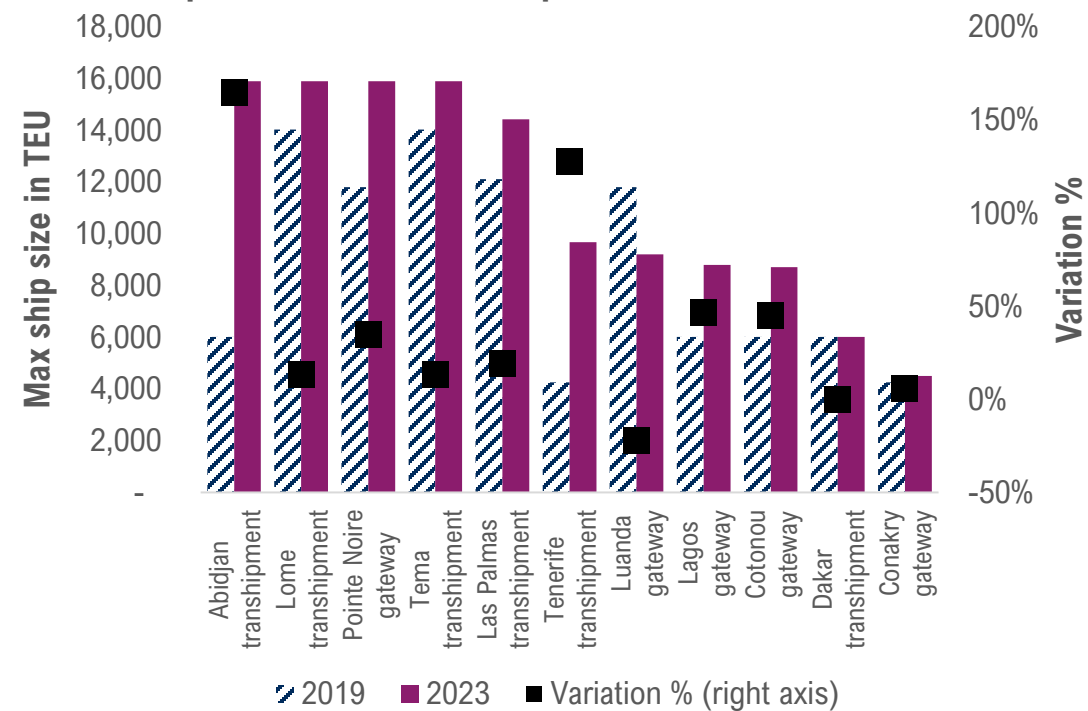


Transshipment throughput, maximum ship sizes and connectivity in West Africa

Transshipment throughput in West Africa



Maximum ship sizes in West African ports

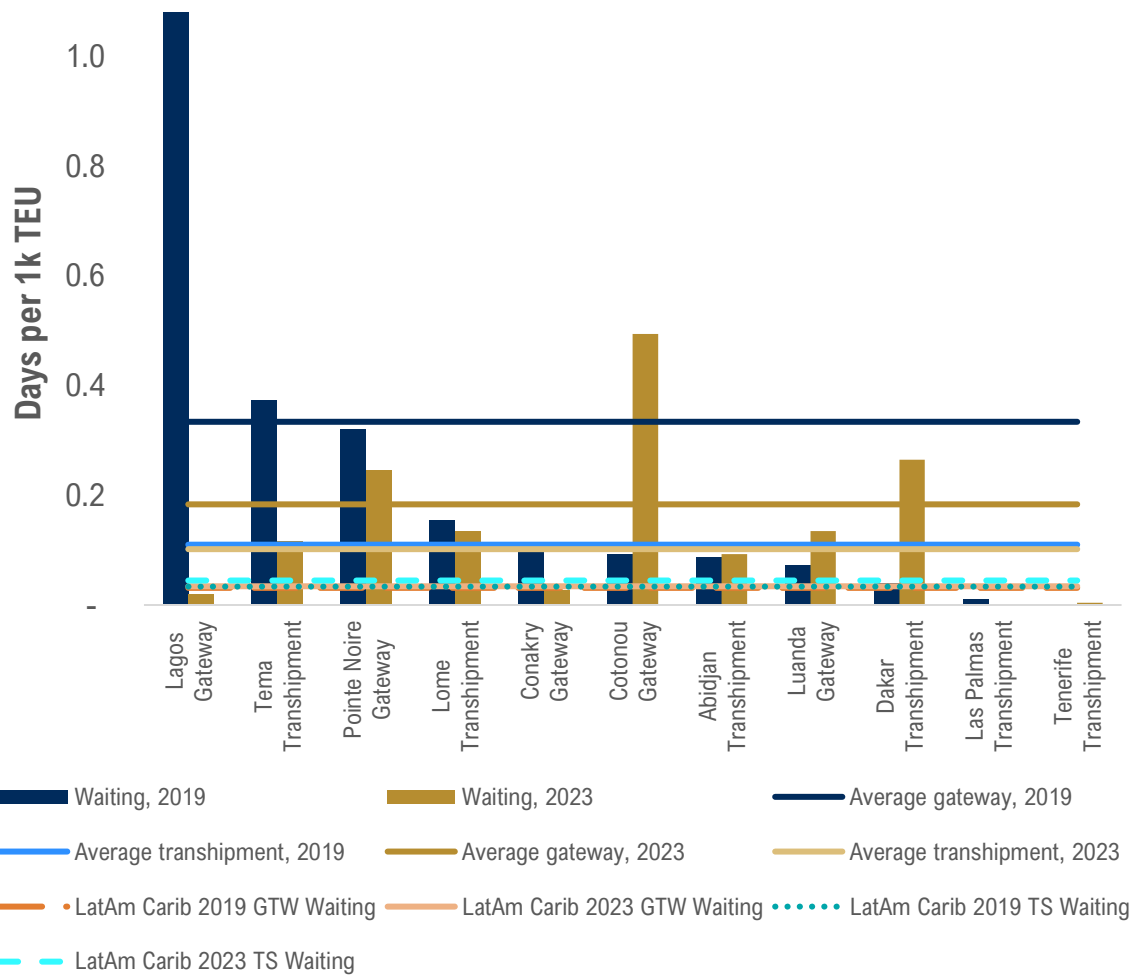


Transshipment ports , 2019 vs 2023: Abidjan, Dakar, Las Palmas, Lome, Tema

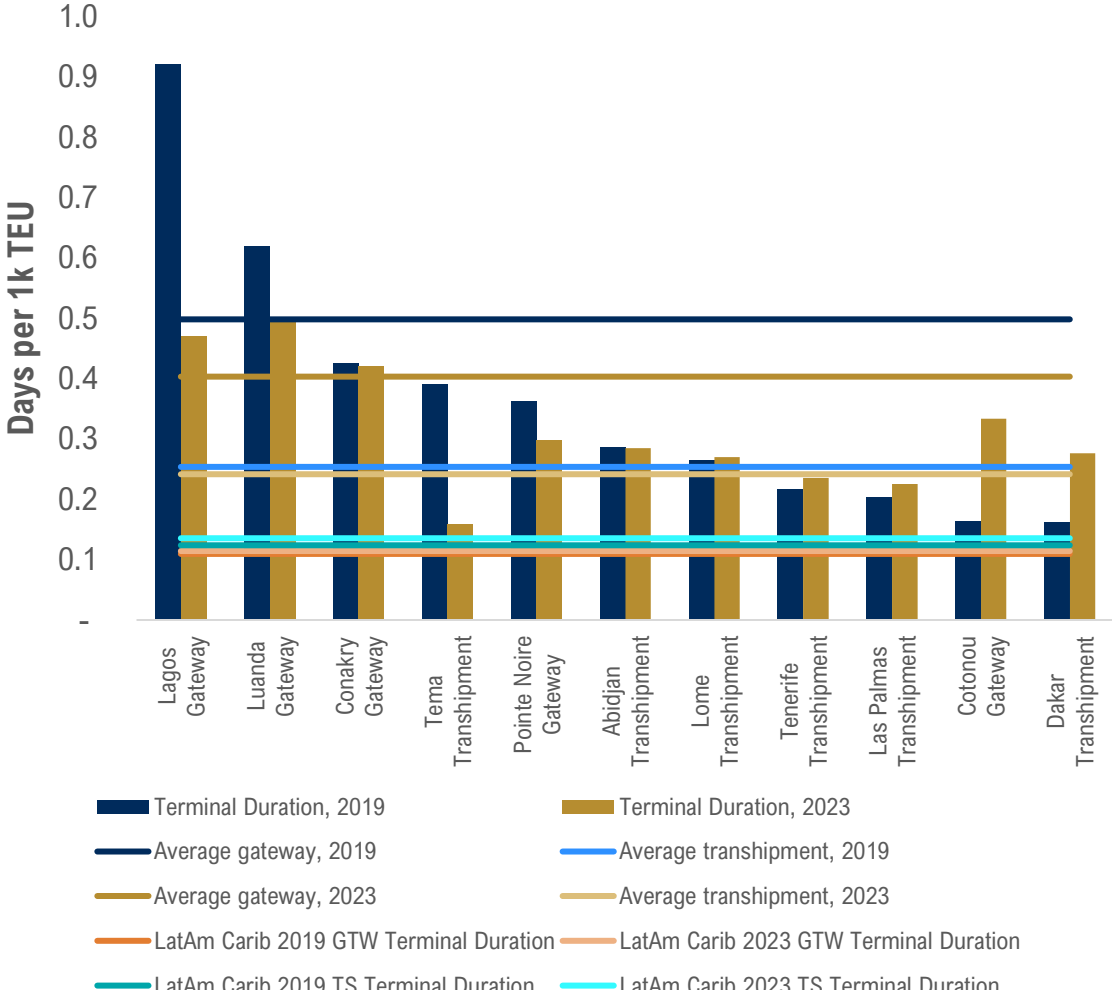
	Total Services	Port Rotation	Frequency (days)	Total ship TEU capacity	Maximum ship TEU
2019	27	108	8.6	666,772	14,036
2023	30	112	8.0	1,060,506	15,900
Var. %	11%	4%	-7%	59%	13%

Waiting times and terminal productivity in West Africa

Port waiting time per 1k TEU, 2023

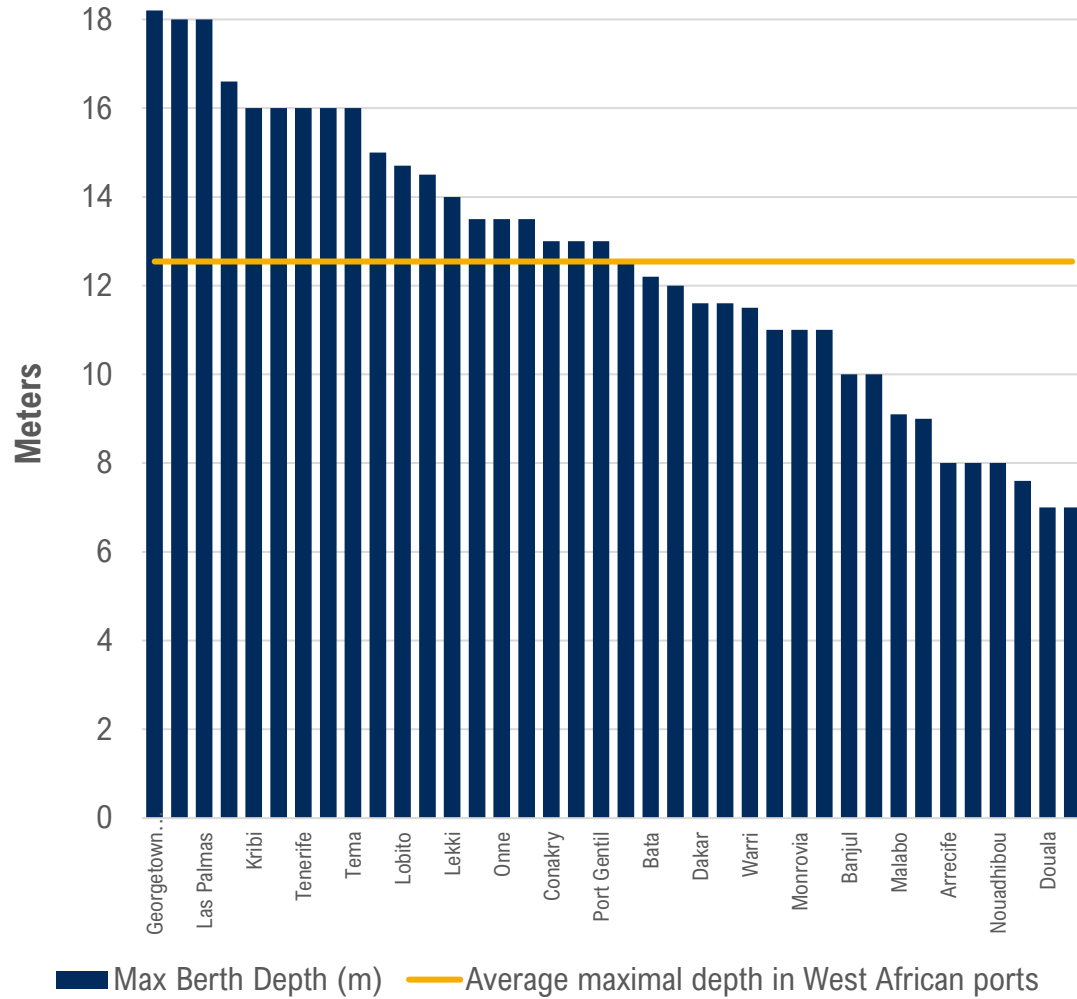


Terminal duration per 1k TEU, 2023

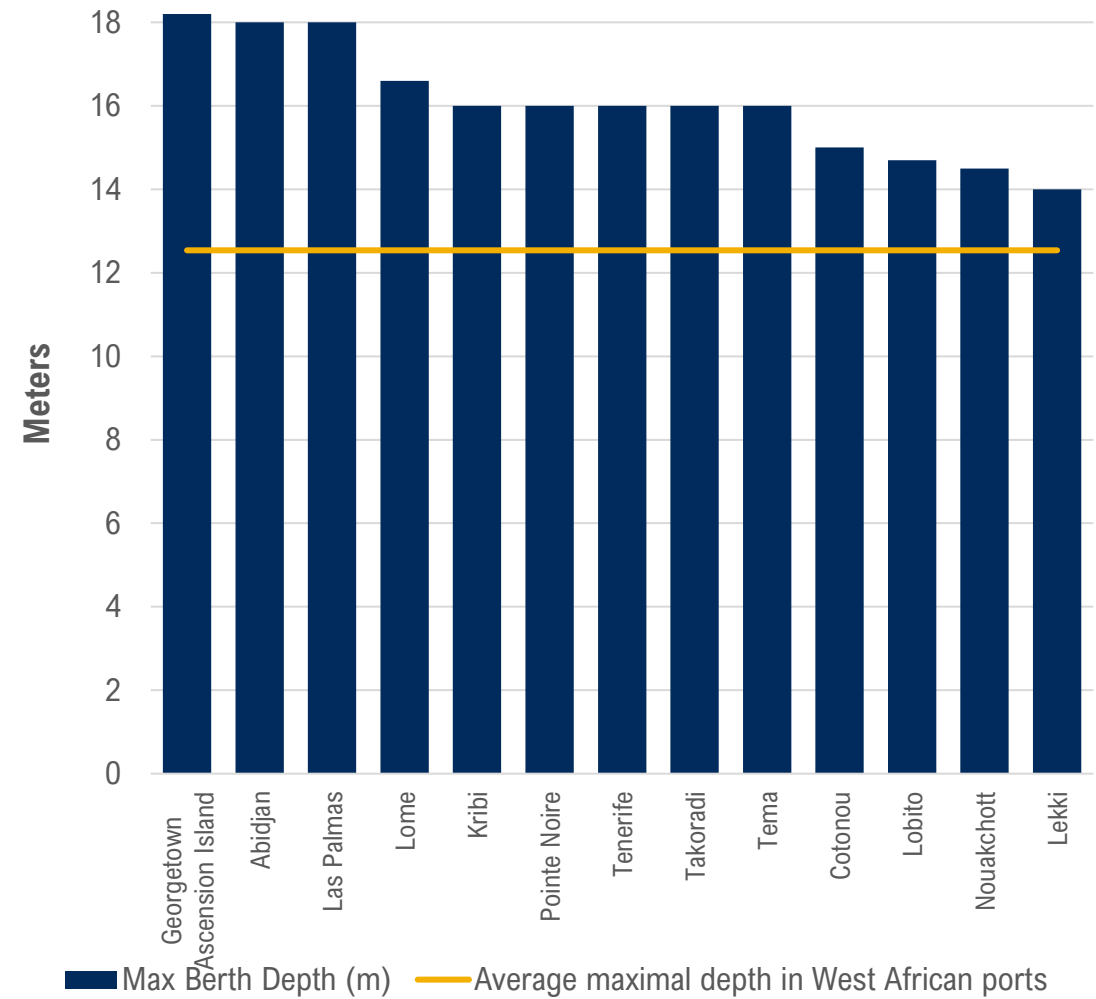


Overview of ship sizes constraints

Maximum berth depth (m) – West Africa



Maximum berth depth (m) in biggest ports – West Africa



Conclusion

1. West Africa: one of the fastest growing regions in port throughput. Second fastest after the ME-ISC in the next 4 years. Resilient during crises.
2. New port developments: ship sizes increases. Growing transshipment connectivity.
3. Issues to solve: low productivity and implied waiting times. Ship sizes constraints.



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