

APRIL 2015



CENTRAL CORRIDOR TRANSPORT OBSERVATORY ANNUAL REPORT 2014



TRANSPORT OBSERVATORY
ANNUAL REPORT 2014

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ACRONYMS & ABBREVIATIONS

BRN	Big Results Now
CCTTFA	Central Corridor Transit Transport Facilitation Agency
DRC	Democratic Republic Of Congo
ECTS	Electronic Cargo Tracking System
GPS	Global Positioning System
KPI	Key Performance Indicators
MoU	Memorandum of Understanding
mT	Metric Tons
OSBP	One Stop Border Post
SMS	Short Messages
TATO	Tanzania Truck Owners Association
TANCIS	Tanzania Customs Integrated Systems
TTFA	Transit Transport Facilitation Agency
TICTS	Tanzania International Container Terminal Services
TMEA	TradeMark East Africa
CCTO	Central Corridor Transport Observatory
TOP	Transport Observatory Project
TPA	Tanzania Ports Authority
TRA	Tanzania Revenue Authority
STACON	Stakeholders Consultative Committee

EXECUTIVE SUMMARY

The Central Corridor Transport Observatory was officially launched in July 2013. This report covers the entire year 2014 (January to December). As the second annual report being issued by TTFA from its observatory, it aims to highlight the main KPIs of the corridor and give the trends comparatively to the indicators measured on the baseline year 2013. TTFA is keen in coming up with strategies that would ensure that the KPIs of the corridor are gathered and transmitted through the observatory have an impact on how the corridor is managed and indeed contribute to transforming it into a world class corridor in terms of efficient and effective movement of cargo from the port of Dar es Salaam to the landlocked countries of Burundi, DRC, Rwanda and Uganda.

The CCTO's objective is twofold: one is to identify areas along the central corridor that require improvement through longitudinal measurements of the effectiveness of designated programs that are meant to remove bottlenecks along the corridor. Two; provide reliable and high quality information to policy makers of the region that can be used to make policy decision that are based on and informed by factual evidence of the realities affecting operators and users along the corridor.

The KPIs of the CCTO are divided into four categories of indicators monitoring, transit time, transaction volumes, corridor efficiency and costs. Each set of indicators looks at critical areas of the corridor with the overall picture being how efficient and effective the corridor is in the movement of cargo. This system of indicators assists with surgical precision to establish where bottlenecks and inefficiencies are located along the corridor. The reliability of this system of indicators is affected by the quality of data that is provided to TTFA by the data providers. It is because of this fact that TTFA with the support of TMEA invested enormous resources in ensuring that there is an integrated process for channeling data from stakeholders to the CCTO. This has been achieved by signing MoUs with different data providers and also by hiring consultant for upgrading the web based transport observatory system that will soon automate the transfer of data from stakeholders to the CCTO. This latter system will guarantee that there is no possibility of manipulating or disrupting that nature of the data. By relying on raw data, the CCTO builds a credible set of indicators that with no doubt provides the decision makers with a tool that will enhance the process they use for formulating and implementing policies that affect the corridor.

As a monitoring tool, the CCTO only highlights and indicates the health of the corridor; it is then the role of the stakeholders to take a deeper look at how their operations are affected by the corridor's bottlenecks and take necessary measure to remedy or improve the situation; thus resulting at formulation and implementation of policies that transforms the competitiveness of the corridor in the region.

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The performance report for the year 2014 is based on four key indicators namely:

- i. **The indicators of transit time up to destinations** are measured by means of GPS installed aboard transportation vehicles. The measured transit time up to destination, is the sum of stop time recorded by GPS on weighbridges, police check points, personal stops and border posts.

The indicators of transit time to the borders are measured by means of Electronic Cargo Tracking Systems (ECTS) installed aboard transport vehicles from the port of Dar es Salaam up to the Tanzania borders of Kabanga, Rusumo and Mutukula in order to monitor the transit cargo along the road. Since the establishment of ECTS, the transit vehicles are no longer reporting to the TRA check points.

During the year 2014, it was observed that the average delays at the different stops are 600, 257, 30, 17 and 13 minutes respectively corresponding to personal night stops, border crossing time, personal day stops, weighbridges crossing time and police check points. In term of percentage, the personal night stops represent 65.4% of total delays followed by border crossing time 28%, the personal day stops 3.3%, weighbridges crossing time 1.9% and Police check points 1.4%.

It was observed also that the transit time to Tanzania borders is now about 3 days against the Tanzania BRN target of 2.5 days.

- ii. **The indicators of volume of import-export freight** transiting through the port of Dar Es Salaam in general and the traffic of the member countries of the Central Corridor in particular are got thanks to data from the port operators of Dar Es Salaam namely TICTS exclusively for the traffic of containers and TPA for the traffic of containers, bulk cargo, petroleum products and of vehicles.

In 2014, the volume of import cargo that has been passing through the port of Dar-es-Salaam is 13,311 Million Tons. This is over a doubling of the volume of cargo handled in just 10 years. The volume import cargo for year 2014 vs 2013 increased by 17% in total. The local volume increased by 18.5% while the transit volume increased 14.1%. The volume of imports from the Central Corridor Member States which is 11.230.069 Tons represent 84% of the total volume of imports through Dar port.

Regarding the export cargo, only 2.191.330 Tons or 16.5% of the volume of imports transited through Dar port. The export from the Central Corridor member states is 1.520.568 Tons or 69.4% of the overall export through Dar port. In general, the volume of export cargo through Dar port for year 2014 vs 2013 increased by 20% in total. The local export increased by 18.0% while the transit export increased by 22.0%.

- iii. **The indicators of effectiveness and productivity** of port operations and transportation systems are given by TICTS and TPA and they consist of setting the time spent by vessels at the berth, the time spent by containers at the port since their arrival until delivery time (Dwell time), the transported volume of transaction via road and railway as well as the share of each country in the transportation of in transit containers by means of trucks.

In 2014, it is observed that the ship turnaround time is improving especially for container vessels whereby the time passed from 9 days to 3 days since April 2014.

The general cargo ship turnaround stabilized to 2 days since July 2014 while the bulk vessel is about 7 days the whole year 2014.

Regarding the container dwell time which improved significantly from 25 to 10 days for the year 2008 to 2014, the present average dwell time is far behind the Tanzania BRN target of 5 days.

- iv. **The cost indicators** are derived from tariffs of port services and transportation tariffs. Being aware of the distances between the port of Dar Es Salaam and various destinations, the transportation costs per kilometer are also determined depending on the destinations.

During the year 2014 the costs of service along the Central Corridor including the handling port charges, the road transport costs, the clearing and forwarding charges, the shipping line charges remained stable. It was observed however that TRL reduced the container transport cost from 3.950 USD and 3.380 USD to 3.000 USD and 2.000 USD respectively for the transport from Dar es Salaam to Kigoma and Dar es Salaam to Isaka.

The road toll which used to be 500 USD in Tanzania and 152 USD in Burundi was also harmonized to 152 USD.

INTRODUCTION 1

1.1 The link between the Central Corridor and Economies of Member States

As the main corridor that services the larger part of Tanzania and the landlocked countries of Burundi, DRC, Rwanda and Uganda, the central corridor directly impacts the economic performance of these countries. The economic growth in the CCTTFA member states has been negatively affected by the high cost of doing business along the corridor caused by high cost of transport, numerous non-tariff barriers, delays and associated administrative costs on the transit logistics chain.

Table 1: Percentage GDP Growth of CCTTFA member states

Country	2010	2011	2012	2013	2014	2015	2016	2017
Burundi	3.79	4.19	4.02	4.47	4.74	4.80	5.01	5.20
DRC	7.17	6.88	7.15	6.22	10.49	10.25	9.31	6.63
Rwanda	7.22	8.24	8.00	7.50	7.50	7.00	7.00	7.00
Tanzania	7.04	6.45	6.93	6.97	7.19	7.05	6.88	6.72
Uganda	6.20	6.20	2.78	5.65	6.48	7.00	7.00	7.00

Source: World Economic Outlook, 2013

The geopolitical importance of the Central Corridor cannot be underestimated and over the years it is becoming the natural choice as a trade route for the member states. The economics of the countries served by this corridor are showing strong GDP growth rates of between 4 and 7.5 percent. Transit demand is forecast to increase from countries from 2.7 million to 9.8 million tons by 2030. So far the corridor captures averagely 14% of imports and exports of the member countries. This growth has resulted in the throughput at the port of Dar es Salaam to increase from 7.0 million tons in 2007 to 13.3 million tons by December 2014. This impressive growth in the usage of the corridor will increase the pressure for more infrastructural and policy development and enhancement to accommodate this growth. The role of TTFA and the Transport Observatory under these conditions will be more heightened. By strengthening the monitoring capacities and capabilities of the CCTO policy makers and implementers will have a tool at their disposal to ensure that they develop and execute strategies that will accelerate economic and social growth along the corridor.

1.2 The Central Corridor Transport Observatory's Objective

One of the main factors that hinder the growth of landlocked countries is the high cost of imported goods and the lack of competitiveness of exported products on the world market because of very high transportation costs.

Numerous tariff and non-tariff barriers, considerable delays due to administrative and police harassment, old infrastructure and facilities, insufficiency of transportation means, ineffective communication networks etc. are the main causes of the rise of transportation costs for landlocked countries.

The Transport Observatory is designed to collect computerized data of stakeholders, GPS and SMS data, data of road surveys and of border posts audits, to process them in order to generate performance indicators and to produce online or written reports, and to disseminate them among stakeholders so as to provide guidelines to solve the identified problems and to define policies.

Ultimately, the Transport Observatory will define and update a series of performance indicators of the movement of goods at different levels of the Central Corridor, thus playing a key role enabling the Transit Transport Facilitation Agency to accomplish its objectives through:

- The identification of areas that require an improvement on predefined objectives (or benchmarks),
- Measuring the progress over time of the Corridor in order to evaluate the effectiveness of designed programs in order to solve the problems / to remove bottlenecks identified during the diagnostic phase,
- Providing reliable information to policy makers of the region so as to encourage the development of policies that lead to a performing system of transit transportation and trade among Member States.

INDICATORS 2

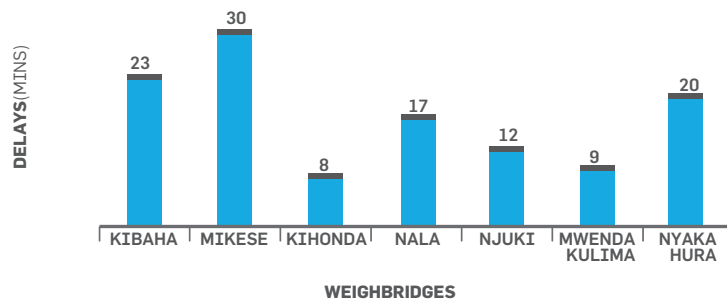
2.1 INDICATORS OF TRANSIT TIME

The indicators of cumulative transit time up to different destinations are generated from data collected from road surveys by GPS and questionnaires. The report contains the cumulative transit time considering the time delays on weighbridges, police check points, border posts and personnel stops in one hand and the driving time in the other hand.

2.1.1 Weighbridge crossing time,

is calculated by subtracting arrival time at the weighbridge from departure time from the weighbridge based on GPS and questionnaires data provided by drivers.

Graph 1: Average time at weighbridges



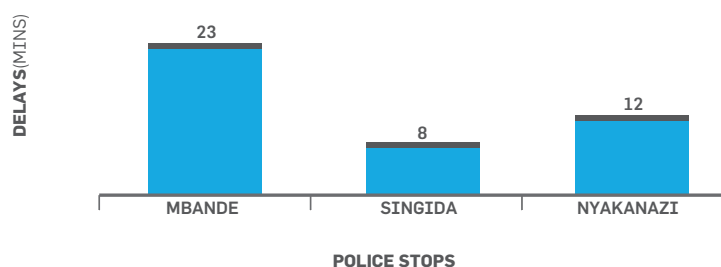
- Figure above indicate the average weighbridge crossing time recorded for the year 2014.
- Maximum delays were observed for weighbridges close to Dar es salaam and those close to the borders
- An average weighbridge crossing time for the year was 17 minutes
- At peak hours, delays of more than 130 minutes were recorded at Nyakahura weighbridge.

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2.1.2 Average delay at Police Check Points

Few number of checkpoints has been observed along the corridor due to the moving of police checks close to the weighbridges where all checks has to be done there.

Graph 2: Average time at Police Check Points

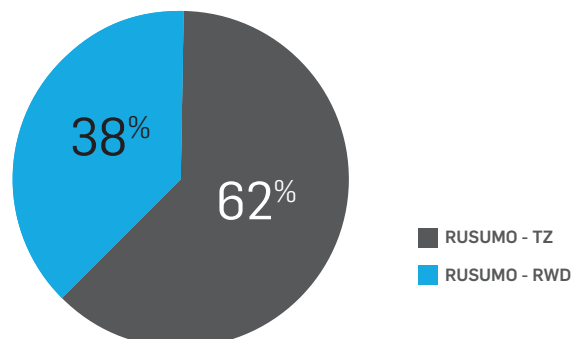


- In 2014 only 3 police check points were recorded.
- Most of the police check points are now located nearby the weighbridges
- The lowest average time was 13 minutes recorded at Mbande.
- The highest average time was 37 minutes recorded at Singida.

2.1.3 Border crossing time

This indicator were measured by taking the difference between the departure time from the border and arrival time at the border based on Road/ GPS surveys.

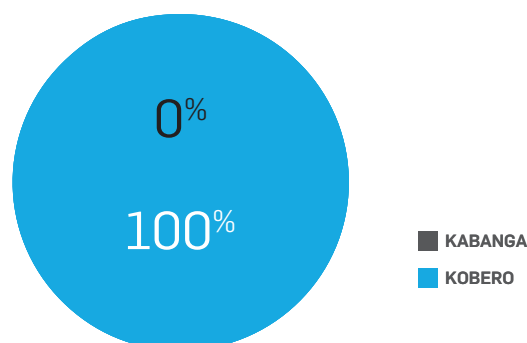
Graph 3: Average time at Rusumo Tz/Rw borders



- RUSUMO in Tanzania Border recorded an average maximum border crossing time of about 158.0 Minutes.
- RUSUMO in Rwanda side has the lowest average border crossing time of 98.7 Minutes.

INDICATORS

Graph 4: Average time at Kabanga/Kobero borders



- Due to the implementation of One Stop Border Post (OSBP) all border clearance towards Burundi are done at Kobero border only in Burundi side.
- KOBERO Border recorded an average of border crossing time of about 115.8 Minutes.

2.1.4 Transit time up to Tanzania borders,

are generated from the TRA computerized data given by the Electronic Cargo Tracking System. The ECTS helps monitoring the diversion or theft of cargo into Tanzania territory and the transit time with the objective of reducing it at a bar of 2.5 days according to the Tanzania initiative of "BIG RESULT NOW". The concerned borders are: Kabanga/Kobero borders with Burundi, Rusumo/ Rusumo with Rwanda and Mutukula/Mutukula with Uganda.

Graph 5: Average time at Rusumo Tz/Rw borders

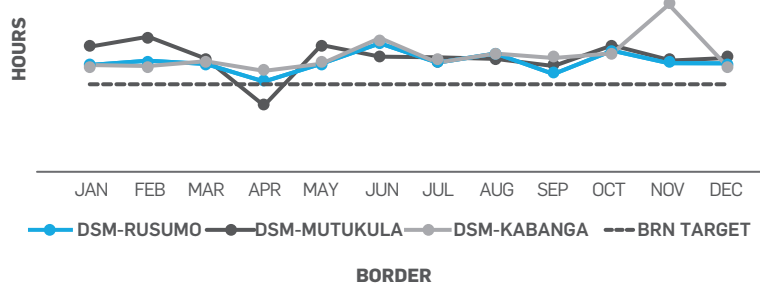


Table 2: Average Transit time to Borders

BORDER	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
DSM-RUSUMO	68.5	69.7	70.4	61.9	69.4	77.6	71.3	73.8	65.1	75.6	70.7	70.0
DSM-MUTUKULA	77.0	81.0	72.1	52.2	77.0	72.9	72.2	71.7	67.1	75.7	70.5	71.5
DSM-KABANGA	68.3	68.5	71.0	65.3	69.6	79.3	71.3	73.2	70.9	73.6	95.6	67.7

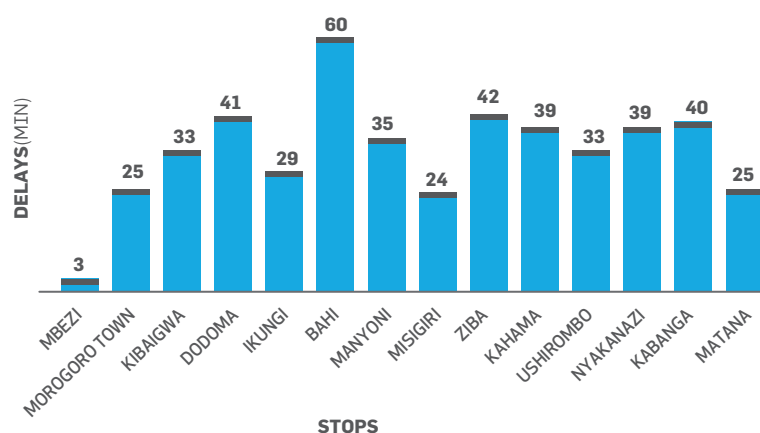
Source: TRA ECTS Data 2014

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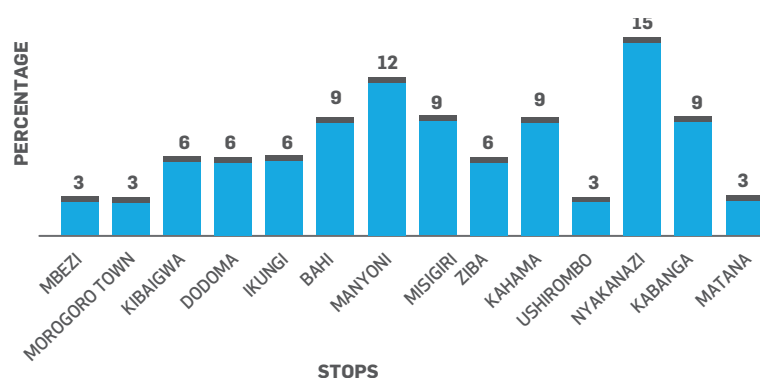
2.1.5 Average time at Personal day stops,

include time spent by drivers and their crew during the day for health meals and rests, also picking up personal garbage and buying of personal staffs. Also some other drivers stopped for praying.

Graph 6: Average time at Personal day stops



Graph 7: Percentage no. of trucks recorded per each day stop

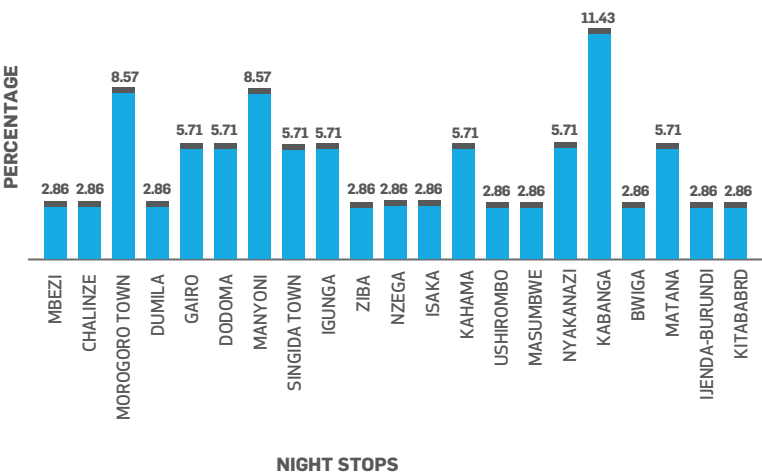


- Day stops for health meals and rests, time spent picking up personal garbage and buying of personal staffs.
- The lowest day stop time recorded was 3 minutes at Mbezi,
- The average day stop time recorded was 30 minutes,
- The highest day stop time recorded was 60 minutes at Bahi.
- Higher Number trucks stopping during the day were recorded at Nyakanazi, followed by Manyoni, Kabanga, Kahama, Misigiri and Bahi. Mbezi, Morogoro and Ushirombo in Tanzania; and Matana in Burundi recorded fewer numbers of trucks stopping during the day

INDICATORS

2.1.6 Average time at Personal night stops, include stops and time spent by truck drivers and their crew at night at the designated areas for night rests.

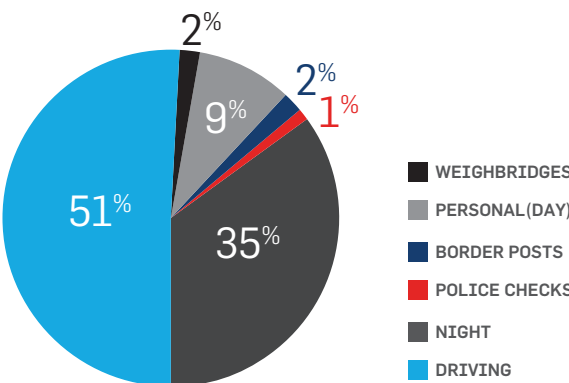
Graph 8: Percentage number of trucks recorded per night stop



- Kabanga were recorded with higher average Night stop of 12:57:30 (Hours: minutes: seconds)
- The average night stop time recorded was about 10 hours.
- Higher Number trucks were recorded at Kabanga, followed by Manyoni and Morogoro Town
- Mbezi and Chalinze recorded fewer numbers of trucks with less delay during the night of about 6:40 (Hours: minutes).

2.1.7 Transit time to Destinations, refers to time taken when the truck start the journey until it reaches the destination. Calculated by subtracting the time taken when Truck started the journey from the time taken when the truck reached at the destination based on Road Surveys/GPS.

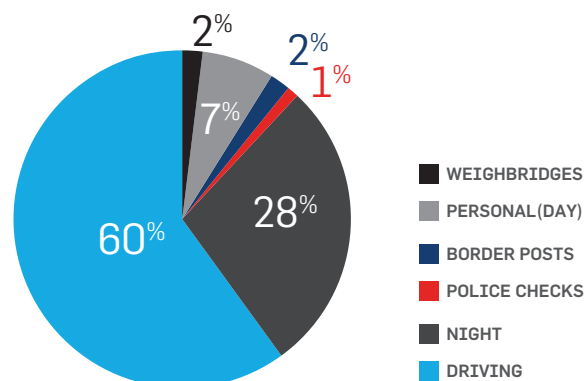
Graph 9: Transit time to Kigali



- The average transit time to Kigali is 86.6 hours at a distance of 1,495 km.

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Graph 10: Transit time to Bujumbura



- The average transit time to Bujumbura is 105.7 hours at a distance of 1,630 km.

INDICATORS

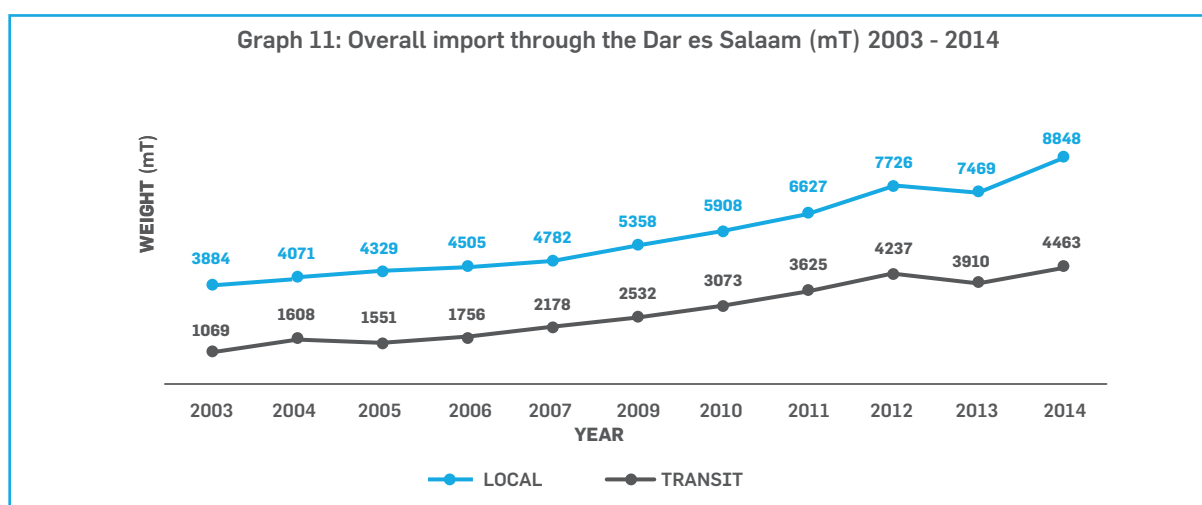
2.2 INDICATORS OF VOLUME OF TRANSACTIONS

2.2.1 Imports

Table 3: Overall Imports through the Dar es Salaam (mT) 2003 – 2014

DESIGNATION	YEAR										
	2003	2004	2005	2006	2007	2009	2010	2011	2012	2013	2014
LOCAL	3884	4071	4329	4505	4782	5358	5908	6627	7726	7469	8848
TRANSIT	1069	1608	1551	1756	2178	2532	3073	3625	4237	3910	4463
TOTAL	4953	5679	5880	6261	6960	7890	8981	10252	11963	11379	13311

Source: TPA Data 2003 - 2014



The volume of import cargo that has been passing through the port of Dar-es-Salaam has been increasing over the years from 4,953 Million Tons in 2003 to 13,311 Million Tons in 2014. This is over a doubling of the volume of cargo handled in just 11 years. From 2003 to 2014, the overall volume of cargo handled has increased by 269% that is an average of 24.5% per year. The local cargo has increased by 228% while the transit cargo has increased by 417%.

The volume import cargo for year 2014 vs 2013 increased by 17% in total. The local volume increased by 18.5% while the transit volume increased 14.1%.

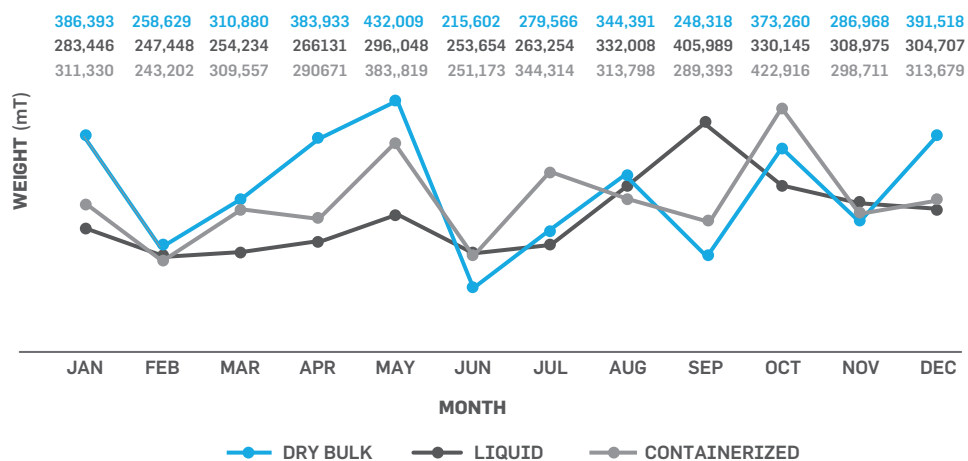
Table 4: Overall Import per Commodity 2014 (mT)

COMMODITY	MONTH											
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
DRY BULK	386393	258629	310880	383933	432009	215602	279566	344391	248318	373260	286968	391518
LIQUID CARGO	283446	247448	254234	266131	296048	253654	263254	332008	405989	330145	308975	304707
CONTAINERIZED	311330	243202	309557	290671	383819	251173	344314	313798	289393	422916	298711	313679
TOTAL	981169	749279	874671	940735	1111876	720429	887134	990197	943700	1126321	894654	1009904

Source TPA Data 2014

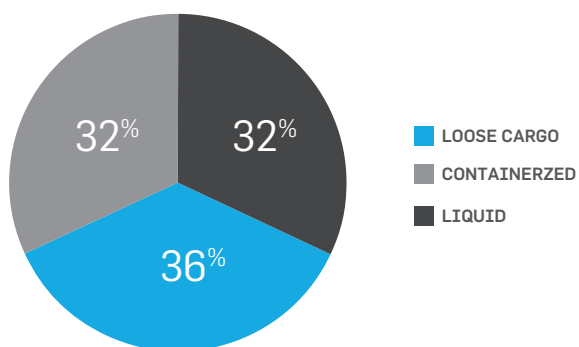
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Graph 12: Overall import per commodity 2014



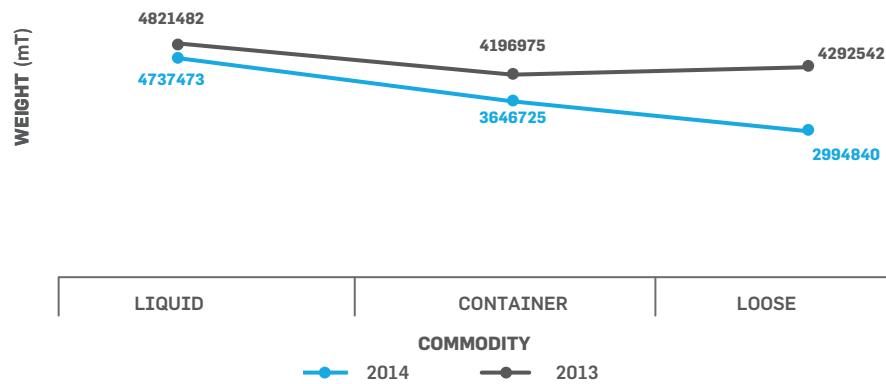
For the year 2014, all imported cargo through the port of Dar-es-Salaam, containerized and loose cargo accounted for just about 32% while liquid based imports accounting for 36%.

Graph 13: Rate per commodity 2014



INDICATORS

Graph 14: Volume per commodity 2013 vs 2014



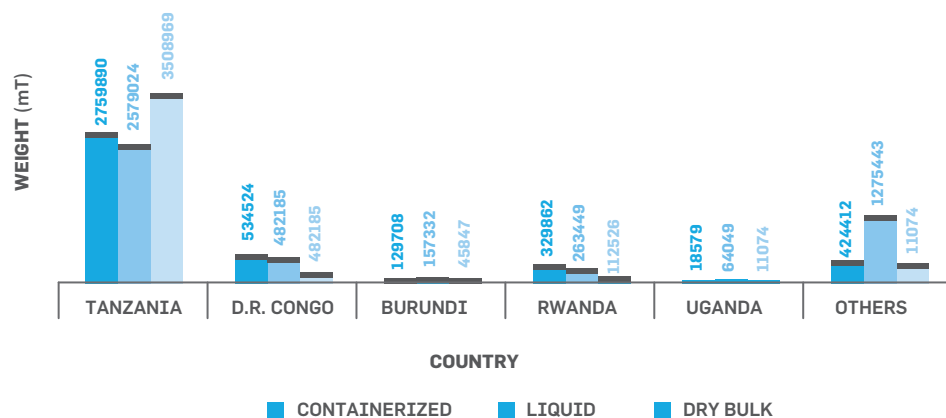
Comparing 2013 vs 2014, the loose cargo increased considerably by 43% followed by containerized cargo by 15%, while the liquid increased for only 2%.

Table 5: Overall Imports per Country per Commodity 2014 in Tons

COUNTRY	CONTAINERIZED	LIQUID	DRY BULK	TOTAL
Tanzania	2759890	2579024	3508969	8847883
D. R. Congo	534524	482185	233051	1249760
Burundi	129708	157332	45847	332887
Rwanda	329862	263449	112526	705837
Uganda	18579	64049	11074	93702
Others	424412	1275443	381075	2080930
TOTAL	4196975	4821482	4292542	13310999

Source: TPA Data 2014

Graph 15: Overall import per country per commodity



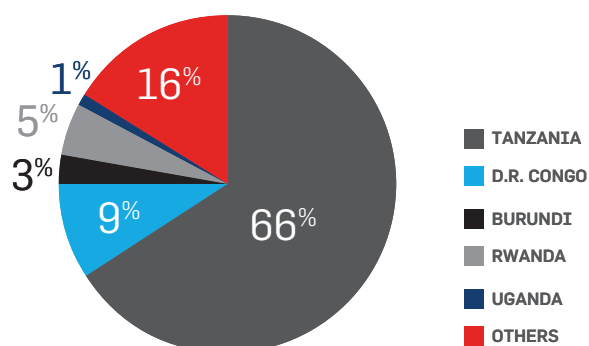
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Table 6: Overall Imports Rate per Country

COUNTRY	RATE (%)	TOTAL(TONS)
Tanzania	66	8847883
D. R. Congo	9	1249760
Burundi	3	332887
Rwanda	5	705837
Uganda	1	93702
Others	16	2080930
TOTAL	100	13310999

Source: TPA Data 2014

Graph 16: Rate Imports per country



The overall imports through Dar es Salaam port for the year 2014, the local cargo represent 66%, while the transit cargo represent 34% whose 18% are from Central Corridor Member States with 9%, 5%, 3% and 1% respectively for DRC, Rwanda, Burundi and Uganda.

INDICATORS

2.2.2 Exports

Table 7: Overall Export through the Port of Dar es Salaam 2014 vs 2013 (mT)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
2014	162946	146094	183427	145716	161285	164416	196230	175451	203888	208372	236238	207267	2191330
2013	143677	148851	145093	128703	144100	146436	165334	141245	151685	173842	179349	159171	1827486

Source: TPA Data 2013 & 2014

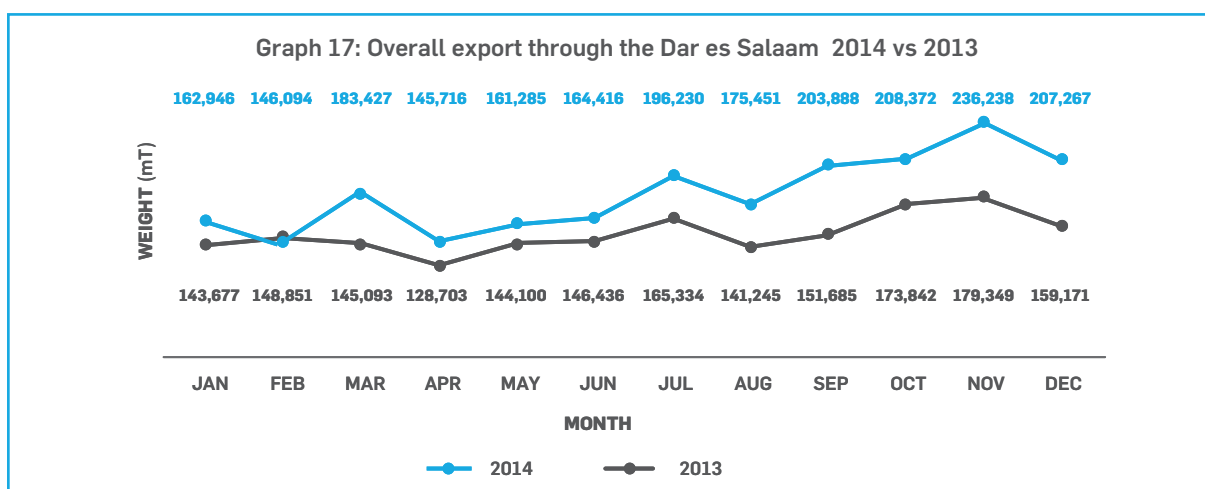
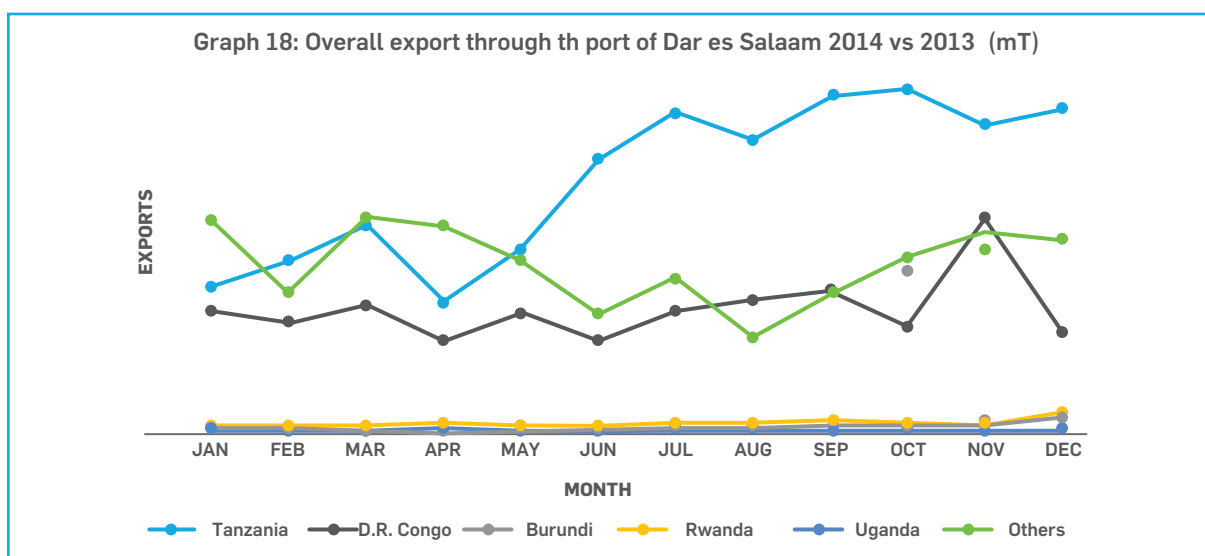


Table 8: Overall Export per Country 2014 (mT)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
Tanzania	49282	56638	67149	43998	60776	87106	102266	94143	106309	109318	98301	102543	977829
D.R.C	41564	37935	43380	32236	41298	32613	41589	44923	47718	36711	69200	35168	504335
Burundi	1679	1725	1115	714	697	850	434	622	1166	2106	2402	2608	16118
Rwanda	431	2158	1796	1572	1423	2230	733	2397	2004	2600	511	2959	20814
Uganda	521	282	0		73	37	37	55	92	37	37	301	1472
Others	69469	47356	69987	67196	57018	41580	51171	33311	46599	57600	65787	63688	670762
Total exports	162946	146094	183427	145716	161285	164416	196230	175451	203888	208372	236238	207267	2191330

Source: TPA Data 2014



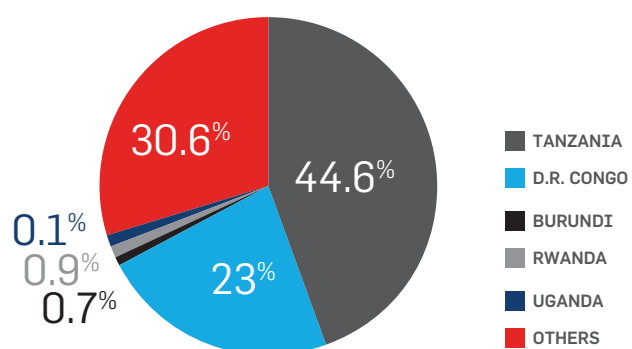
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Table 9: Rate of Export per Country

COUNTRY	RATE (%)	TOTAL
Tanzania	44.6	977829
D.R.Congo	23.0	504335
Burundi	0.7	16118
Rwanda	0.9	20814
Uganda	0.1	1472
Others	30.6	670762
Total exports	100	2191330

Source: TPA Data 2014

Graph 19: Rate Imports per country



The overall exports through Dar es Salaam port for the year 2014, the local cargo represent 44.6%, while the transit cargo represent 55.4% whose 24.8% are from Central Corridor Member States with 23%, 0.9%, 0.7% and 0.1% respectively for DRC, Rwanda, Burundi and Uganda.

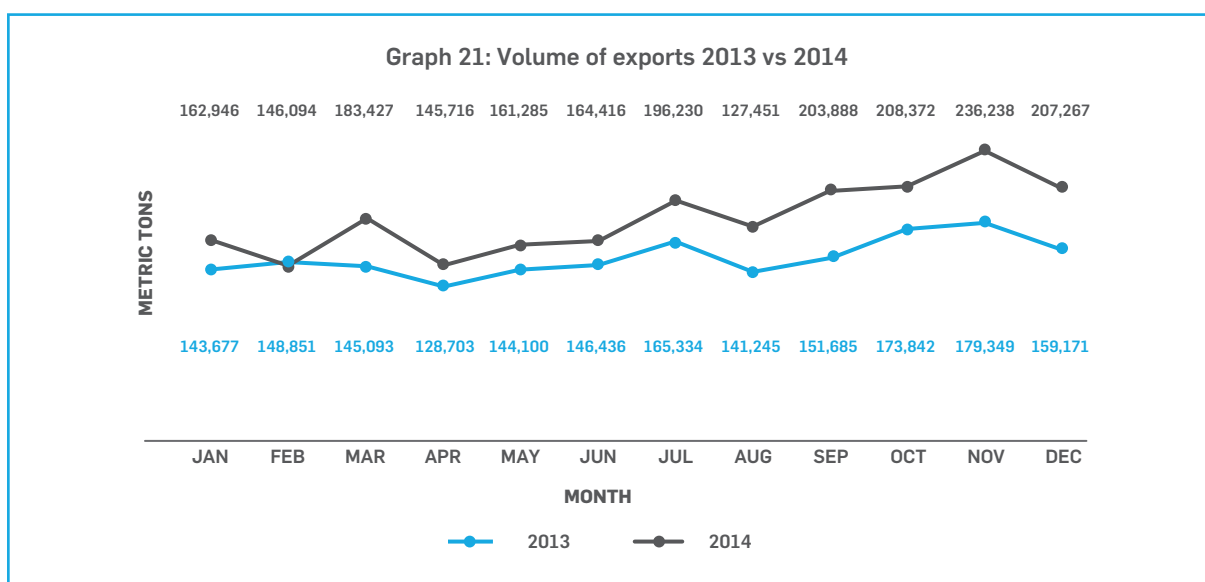
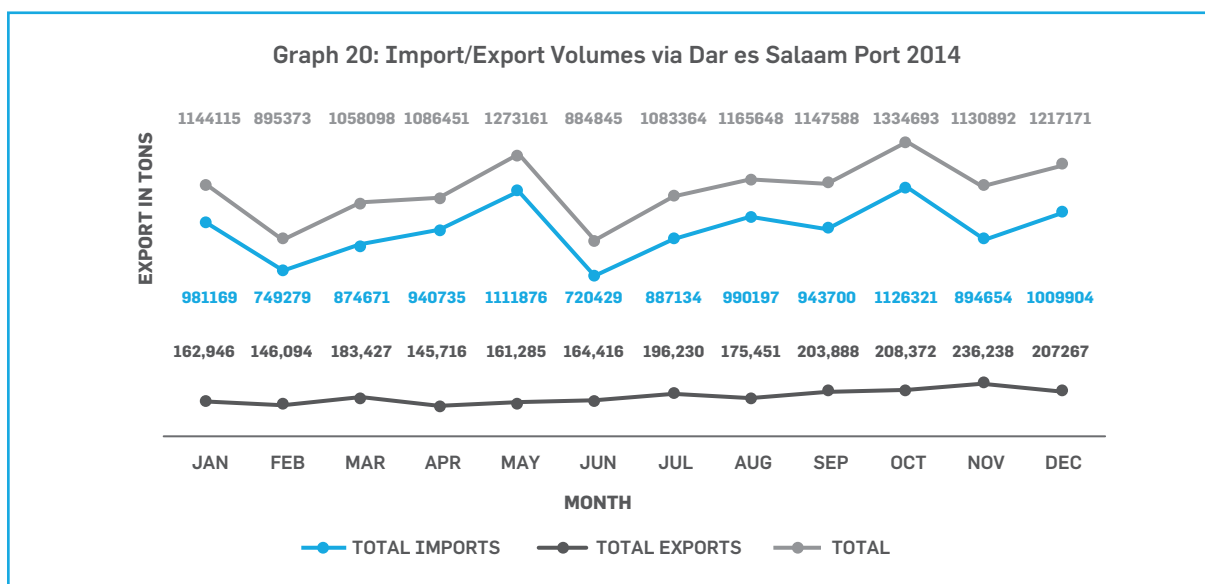
INDICATORS

2.2.3 Overall Imports and Exports

Table 10: Imports/ Export Volumes 2014 (Tons)

DESIGNATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Total Imports	981169	749279	874671	940735	1111876	720429	887134	990197	943700	1126321	894654	1009904
Total exports	162946	146094	183427	145716	161285	164416	196230	175451	203888	208372	236238	207267
TOTAL	1144115	895373	1058098	1086451	1273161	884845	1083364	1165648	1147588	1334693	1130892	1217171

Source: TPA Data 2014



The total volume of exports through Dar port for the year 2014 is 2,191,330 Tons. The volume of exports from Central Corridor Member States which is 1,520,568 Tons represent 69.4% of the volume of exports through Dar port. The volume of export cargo for year 2014 vs 2013 increased by 20% in total. The local export increased by 18.0% while the transit export increased by 22.0%.

2.3 INDICATORS OF EFFECTIVENESS AND PRODUCTIVITY

The indicators of effectiveness and productivity are generated from data collected from TICTS and TPA for the time spent by containers at the port (Dwell time).

The Government of the United Republic of Tanzania has set in its program "BIG RESULT NOW "until 2015, the duration of customs and port formalities (Dwell Time) to 5 days for containers in transit.

The destination countries should also set the maximum time for customs clearance and for offloading trucks in order to absolutely reduce the time taken by trucks at destination. This contributes significantly to the increase in transportation costs to the extent that it is considered as a dock time of trucks.

The major challenges to face are:

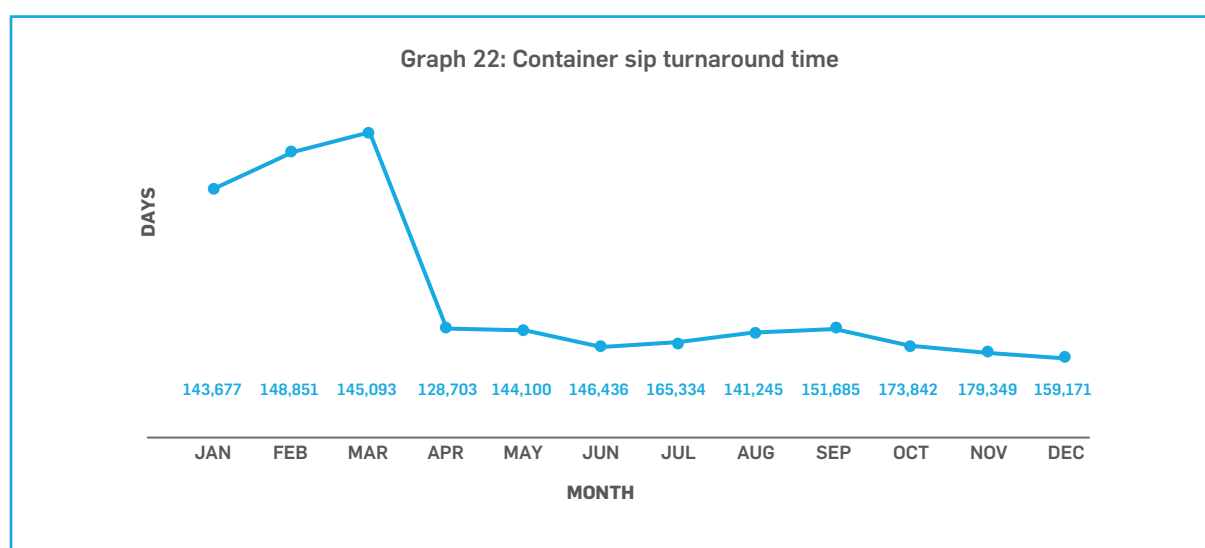
- The slow customs procedures by TRA (T1 delivery)
- The slow port procedures in Dar es Salaam
- The slow customs procedures at destination
- The traffic congestion at the port of Dar es Salaam.

2.3.1 Containerized vessels turnaround

Table 11: Containerized Ship Turnaround Time 2014

MONTHS	JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEPT	OCT	NOV	DEC
Turnaround Time	7.1	8.1	8.6	3.3	3.3	2.8	2.9	3.2	3.3	2.8	2.6	2.5

Source: TPA Data 2014



On the Graph above, observed on average the ship turn round time was 7.93 days for the first three months, then occurs a drastic drop to 3.1 days for second quarter.

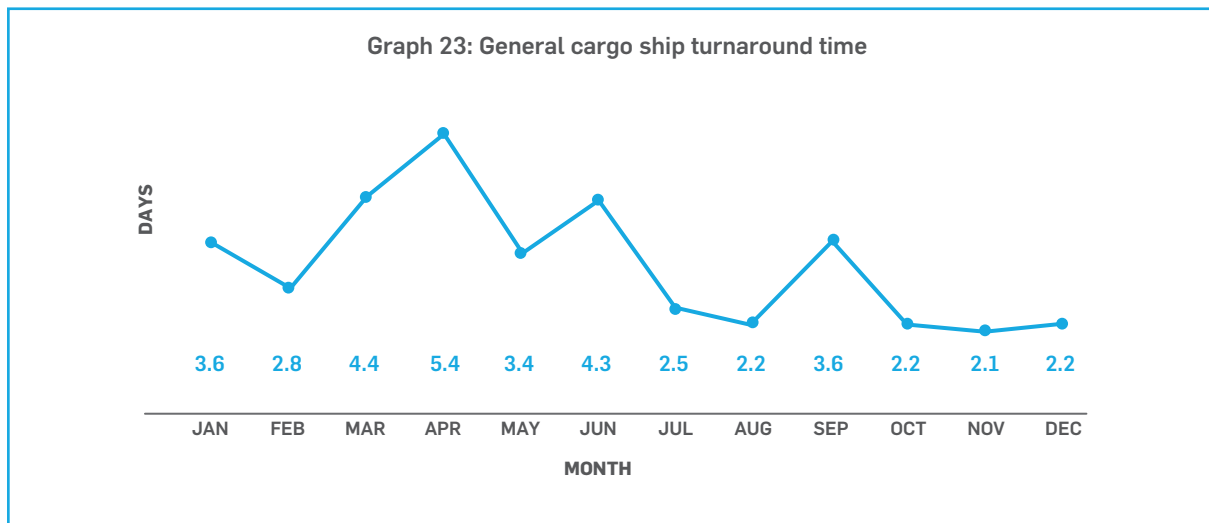
INDICATORS

2.3.2 General cargo vessels turnaround

Table 12: General Cargo ship Turnaround Time 2014

MONTHS	JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEPT	OCT	NOV	DEC
Turnaround Time	3.6	2.8	4.4	5.4	3.4	4.3	2.5	2.2	3.6	2.2	2.1	2.2

Source: TPA Data 2014

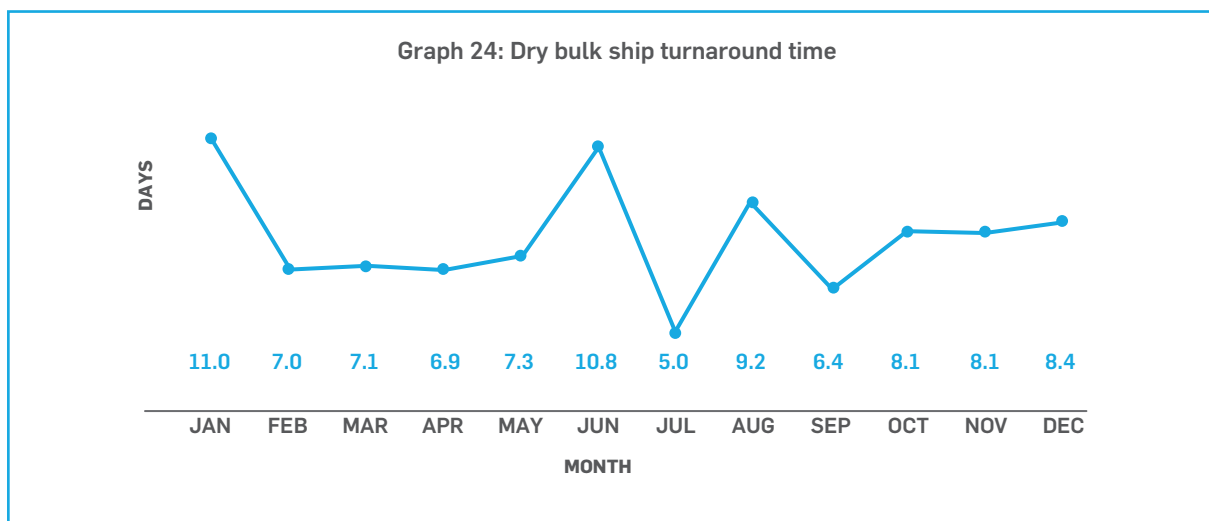


2.3.3 Dry bulk vessels turnaround

Table 13: Dry Bulk Vessels Turnaround Time 2014

MONTHS	JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEPT	OCT	NOV	DEC
Turnaround Time	11.0	7.0	7.1	6.9	7.3	10.8	5.0	9.2	6.4	8.1	8.1	8.4

Source: TPA Data 2014



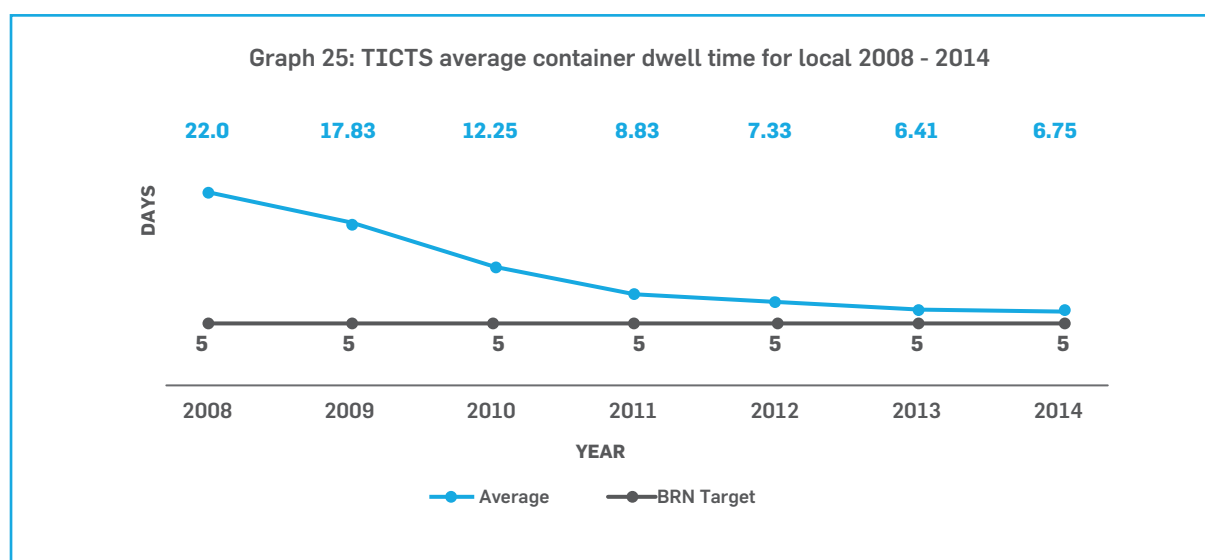
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2.3.4 Container Dwell Time

2.3.4.1 Average monthly local container dwell time: DSM container terminal (TICTS) year: 2008-2014

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVERAGE
2008	19.0	23.0	20.0	21.0	21.0	22.0	28.0	22.0	22.0	24.0	21.0	21.0	22.00
2009	17.0	16.0	18.0	21.0	25.0	22.0	19.0	19.0	16.0	15.0	15.0	11.0	17.83
2010	12.0	12.0	13.0	12.0	13.0	11.0	13.0	12.0	10.0	12.0	12.0	15.0	12.25
2011	13.0	11.0	10.0	10.0	9.0	7.0	8.0	7.0	7.0	7.0	8.0	9.0	8.83
2012	7.0	7.0	6.0	6.0	7.0	9.0	9.0	8.0	7.0	7.0	8.0	7.0	7.33
2013	8.0	7.0	6.0	6.0	7.0	7.0	6.0	6.0	6.0	6.0	7.0	5.0	6.41
2014	7.0	6.0	6.0	6.0	6.0	6.0	5.0	7.0	6.0	6.0	9.0	11.0	6.75

Source: TICTS Data 2008 - 2014



The Graph above shows a summarized trend from 2008 to 2014 on average of dwell time for LOCAL, the trend shows that the dwell time is reduced on average from past years to the current year, from 22 days on average in 2008 to approximately 7 days on the current year 2014.

Table 15: Average Dwell Time Transit Containers TICTS

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVERAGE
2008	26.2	19.2	24.8	27.8	30.3	33.2	38.5	28.3	31.5	32.7	28.0	31.3	29.32
2009	26.2	19.2	24.8	27.8	30.7	23.0	21.2	26.3	15.3	13.5	17.5	13.8	21.61
2010	23.3	13.8	15.2	13.8	14.5	15.2	15.2	14.0	15.8	17.8	16.3	20.7	16.3
2011	20.2	16.7	15.5	14.7	16.3	16.5	17.7	19.0	19.8	19.0	14.2	16.0	17.13
2012	13.5	14.2	14.2	15.8	16.7	13.5	14.5	15.2	12.3	14.3	13.3	15.3	14.4
2013	18.3	20.2	17.5	18.0	16.3	13.2	13.7	12.3	11.7	10.5	13.0	14.7	14.95
2014	17.3	21.8	18.0	19.0	16.5	13.8	15.8	15.1	13.0	12.5	14.7	15.5	16.08

Source: TICTS Data 2008 - 2014

INDICATORS

Graph 26: TICTS average container dwell time transit 2008 - 2014

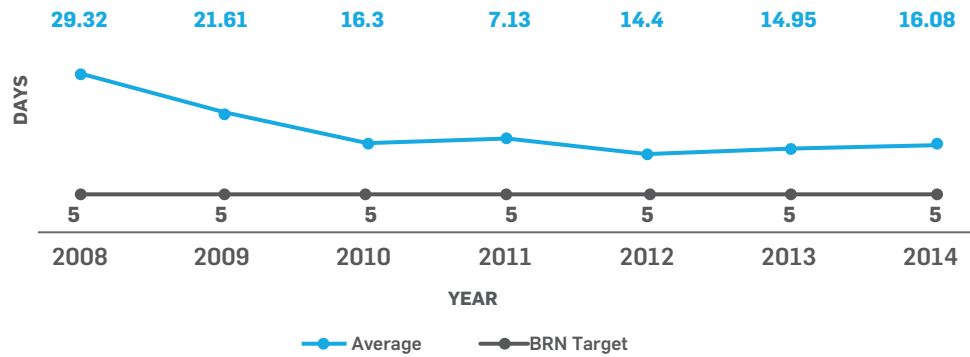
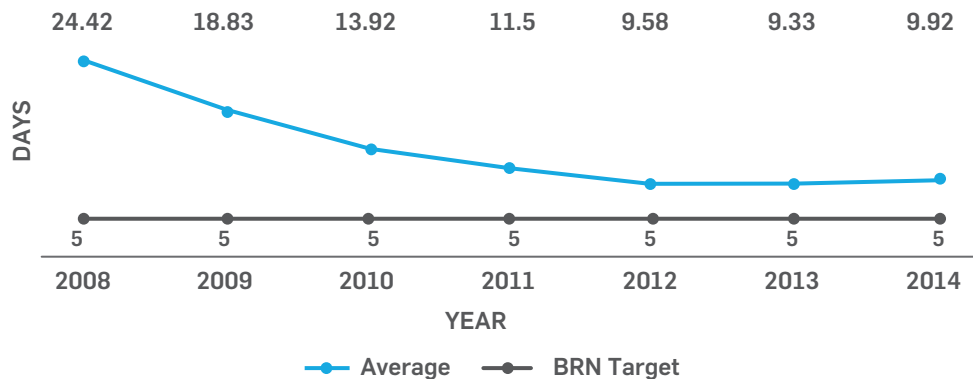


Table 16: Overall Container Average Dwell Time TICTS

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVERAGE
2008	24.0	27.0	26.0	23.0	24.0	26.0	25.0	25.0	26.0	29.0	24.0	26.0	25.42
2009	20.0	17.0	21.0	25.0	25.0	22.0	18.0	19.0	16.0	15.0	15.0	13.0	18.83
2010	14.0	12.0	13.0	13.0	14.0	13.0	15.0	13.0	13.0	15.0	16.0	16.0	13.92
2011	15.0	13.0	11.0	11.0	12.0	10.0	10.0	11.0	11.0	11.0	11.0	12.0	11.5
2012	9.0	10.0	8.0	10.0	10.0	11.0	11.0	9.0	9.0	10.0	9.0	9.0	9.58
2013	12.0	11.0	9.0	10.0	11.0	8.0	8.0	8.0	8.0	8.0	10.0	9.0	9.33
2014	11.0	11.0	10.0	11.0	10.0	9.0	10.0	10.0	9.0	8.0	9.0	11.0	9.92

Source: TICTS Data 2008 - 2014

Graph 27: Overall container average dwell time TICTS 2008 - 2014



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2.3.4.2 Average monthly container dwell time TPA terminal period: 2013 & 2014

Table 17: Average Local Container Dwell Time TPA

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEPT	OCT	NOV	DEC
2013	18.5	15.3	7.8	6.3	7.3	7.6	7.0	9.7	14.1	8.4	8.8	8.5
2014	10.5	9.0	6.5	7.8	8.8	8.1	3.1	9.9	8.7	7.8	4.2	8.5

Source: TPA Data 2013 & 2014

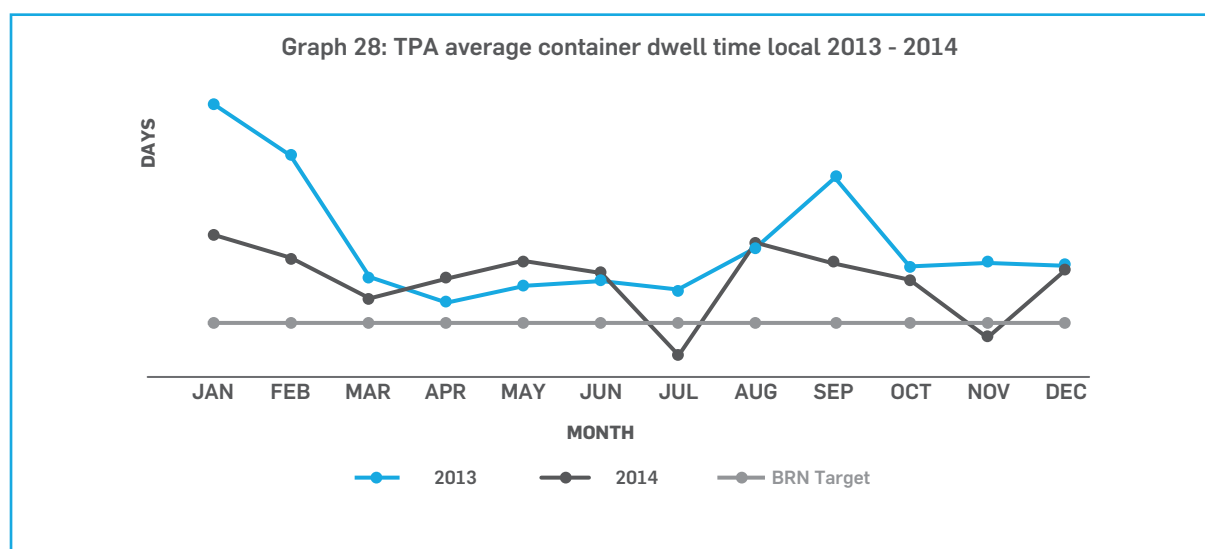
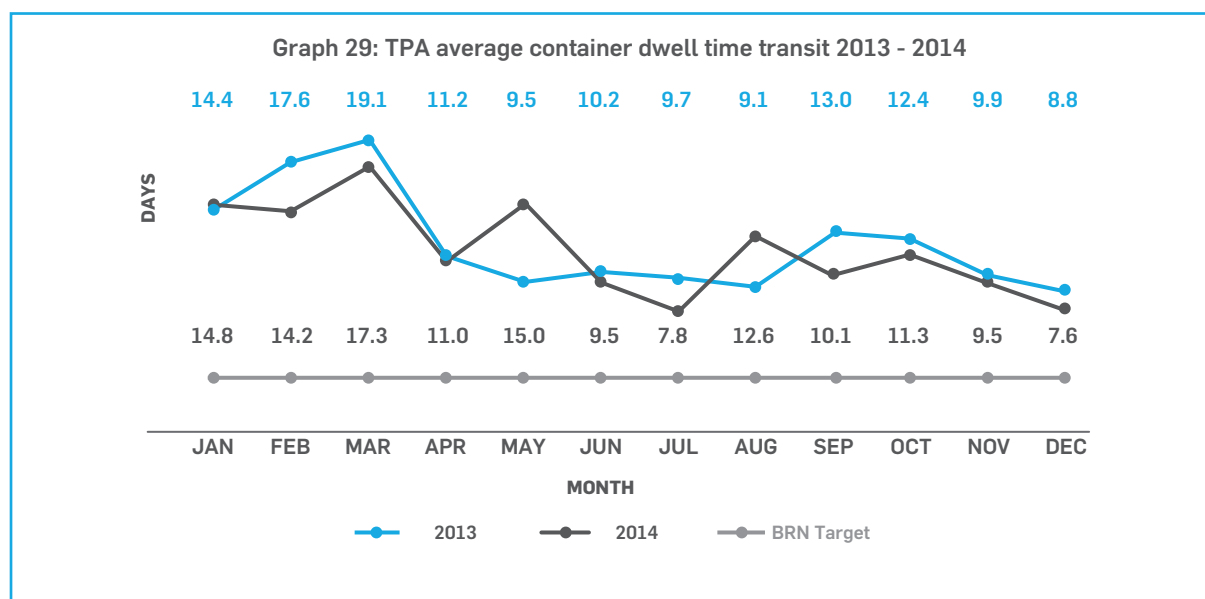


Table 18: Average Dwell Time Transit Container TPA

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEPT	OCT	NOV	DEC
2013	14.4	17.6	19.1	11.2	9.5	10.2	9.7	9.1	13.0	12.4	9.9	8.8
2014	14.8	14.2	17.3	11.0	15.0	9.5	7.8	12.6	10.1	11.3	9.5	7.6

Source: TPA Data 2013 & 2014

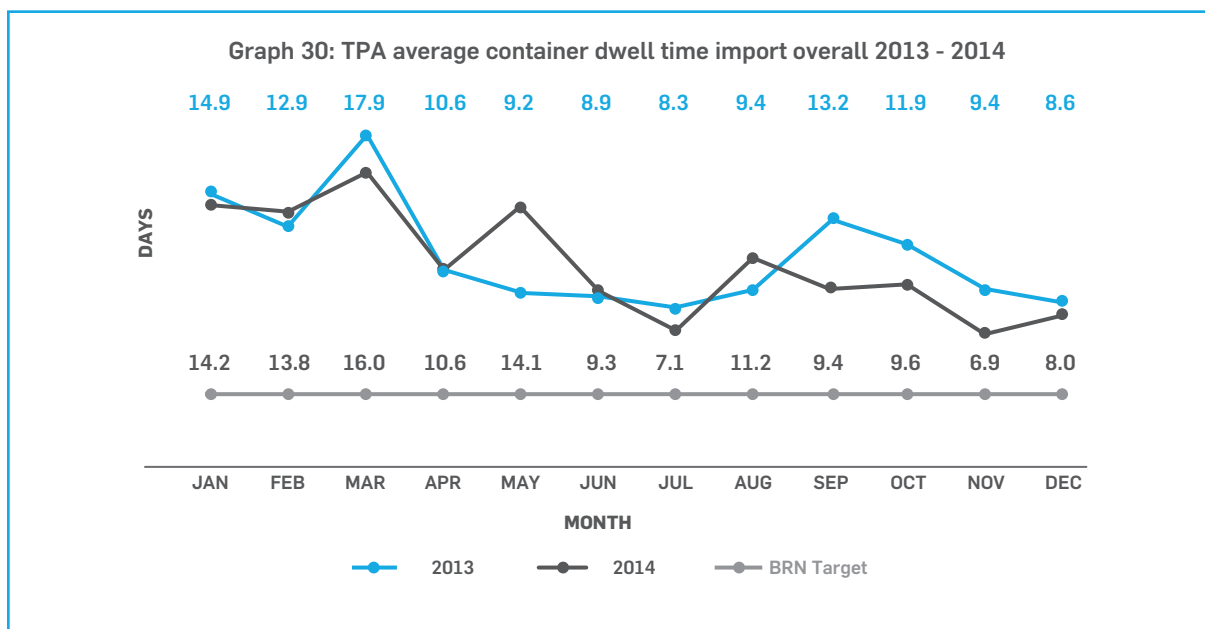


INDICATORS

Table 19: Overall Import Container Dwell Time TPA

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEPT	OCT	NOV	DEC
2013	14.9	12.9	17.9	10.6	9.2	8.9	8.3	9.4	13.2	11.9	9.4	8.6
2014	14.2	13.8	16.0	10.6	14.1	9.3	7.1	11.2	9.4	9.6	6.9	8.0

Source: TPA Data 2013 & 2014



- The container Dwell time at Dar port passed from 6 days in 2013 to 7 days in 2014 for local containers and from 15 days in 2013 to 16 days in 2014 for transit containers. This can be attributed to the installation of the new customs' system in TRA (TANCIS),
- The containers delivered within the targeted Dwell time of 5 days are insignificant for local containers and null for transit containers.

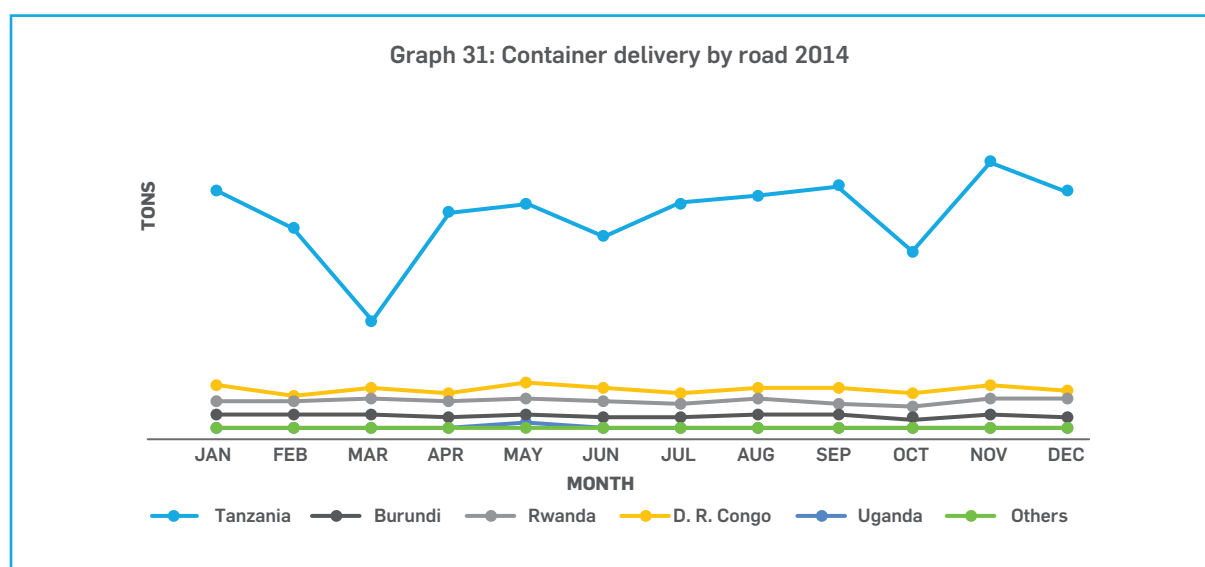
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2.3.5 Delivery by Road

Table 20: Delivery of Containers by Road and per Country 2014

	TANZANIA	BURUNDI	RWANDA	DR CONGO	UGANDA	OTHERS	TOTAL(MT)
Jan	216702	11782	25901	37164	695	164	292408
Feb	184691	11832	23975	29139	622	754	251013
Mar	96654	9515	26717	37078	1091	41	171096
Apr	197858	8343	23920	32174	947	328	263570
May	206111	11183	27109	41416	3745	655	290219
Jun	176033	6978	23230	34945	2339	941	244466
Jul	205684	7747	21026	30968	955	1876	268256
Aug	213346	10273	25337	37589	551	320	287416
Sep	223102	10288	21225	35731	869	689	291904
Oct	162145	7679	19062	31056	562	106	220610
Nov	243958	11377	25550	39127	663	640	321315
Dec	217328	9680	25533	35650	1028	476	289695
TOTAL	2343612	116677	288585	422037	14067	6990	3191968

Source: TPA Data 2014

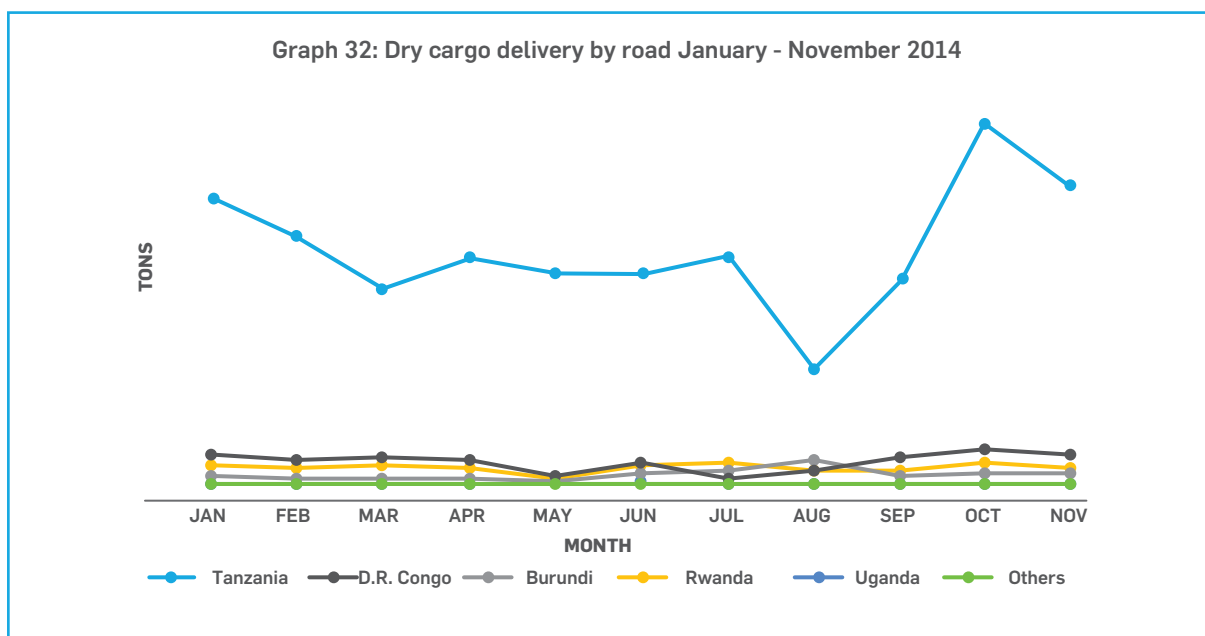


INDICATORS

Table 21: Dry Cargo Delivery by Road 2014

COUNTRY	Tanzania	D.R. Congo	Burundi	Rwanda	Uganda	Others	Total Road delivery
Jan	404098	45312	12420	27803	768	164	490565
Feb	351871	30755	11995	24161	681	754	420217
Mar	279272	39120	10138	26908	1131	41	356610
Apr	321729	33531	8555	24047	1016	328	389206
May	299399	14359	3152	8007	559	639	326115
Jun	298489	28641	12863	25152	2459	503	368107
Jul	323343	13201	17845	30996	994	1885	388264
Aug	163552	27498	7511	17117	655	-	216333
Sep	289809	37437	12625	21875	994	689	363429
Oct	511243	48790	13676	29661	904	1109	605383
Nov	423047	40951	14445	26019	754	640	505856
TOTAL	3665852	359595	125225	261746	10915	6752	4430085

Source: TPA Data 2014



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2.4 COSTS INDICATORS

2.4.1 Distance from Dar es Salaam Port to Destinations

Table 22: Distance from Dar Port to destinations

ORIGIN	DISTANCE(KM)	DESTINATION	DISTANCE(KM)	DESTINATION
Dar es Salaam	1495	Kigali		
Dar es Salaam	1630	Bujumbura		
Dar es Salaam	1635	Goma		
Dar es Salaam	1704	Bukavu		
Dar es Salaam	1780	Kampala		
Dar es Salaam	982	Isaka		
Dar es Salaam	1230	Mwanza	310	Port Bell
Dar es Salaam	1254	Kigoma	135	Kalemie
		Kigoma	210	Kalundu
		Kigoma	210	Bujumbura

Source: CCTTFA/TANROADS 2014

■ Road ■ Railways ■ Inland waterways

2.4.2 Costs

Table 23: Charges and fees

OPERATION	COMMODITY	WARFAGE & HANDLING USD		ROAD TRANSP CHARGES USD				RAIL TRANSP CHARGES USD		SHIPPING LINES USD	CLEARING FEES USD
IMPORT		TPA	TICTS	KIGALI	BUJU MBURA	KAMPALA	BUKAVU/ GOMA	KIGOMA	MWANZA		
	Contain 40"	300	280	4200	4400	5500	6200	3950	3950	62	300
	Contain 20"	170	160	2100*	2200*	2750*	3100*	-	-	50	200
	Dry/CBM/Ton	9	-	150	155						
EXPORT	Contain 40"	250	245								
	Contain 20"	150	145								
	Bulk/CBM/Ton				70						

Source: Transport Surveys 2014

The transport cost for a heavy 20 feet container is the same as a 40 feet container.

Table 24: Average Transport Cost per km and per destination

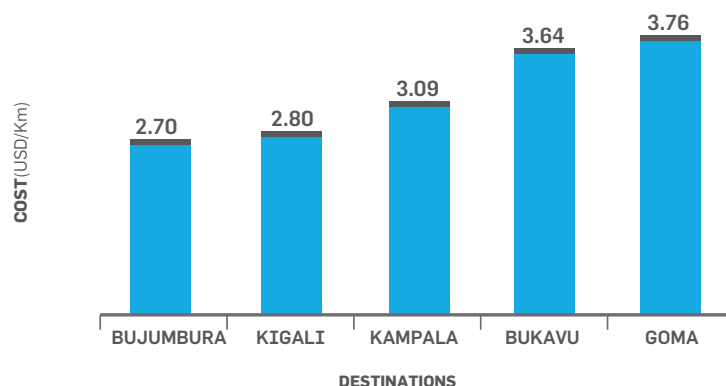
DESTINATION	COST USD/KM
Bujumbura	2.7
Kigali	2.8
Kampala	3.09
Bukavu	3.64
Goma	3.76

Source: Road Transport Surveys 2014

Table 25: Transport Tariffs and import offloading Dar-Bujumbura in USD

INDICATORS

Graph 33: Rate USD/Km per destination



COMMODITY	ROAD			RAIL/LAKE				
	Transport	Offloading Buja	Total	Transport Rail	Transport Lake	Loading Kigoma	Offloading Buja	Total
Container 40"	4500		4500	3915	1013	548	86	5562
				3000*				4647*
Bulk cargo	155	0.9	155.9	97.88	19.66	11.5	1.63	130.66
Petrol	140		140	131.45	22.84			154.29
Gasoil	140		140	125.44	22.84			148.28

Source: Market surveys 2014

From the TRL tariffs, only the loose cargo can compete with the road mode of transport since a wagon can carry 40 Tons against 26 Tons for a truck.

Table 26: Transport Dar-Buja USD/TKm per commodity and per transport mode

COMMODITY	ROAD	RAIL	LAKE
Bulk Cargo	0.100	0.078	0.094
Petrol	0.090	0.105	0.109
Diesel	0.090	0.100	0.109
Container 40" (26T)	0.111	0.092	0.222

Source: Market surveys

Table 27: Transport Dar-Buja USD/TKm by road and rail/lake combination

COMMODITY	ROAD	RAIL/LAKE
Bulk Cargo	0.1	0.091
Container	0.111	0.125
Petrol	0.09	0.108
Diesel	0.09	0.104

Source: Market surveys 2014

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Graph 34: Tariff Dar es Salaam - Bujumbura USD/TKm road vs rail/lake

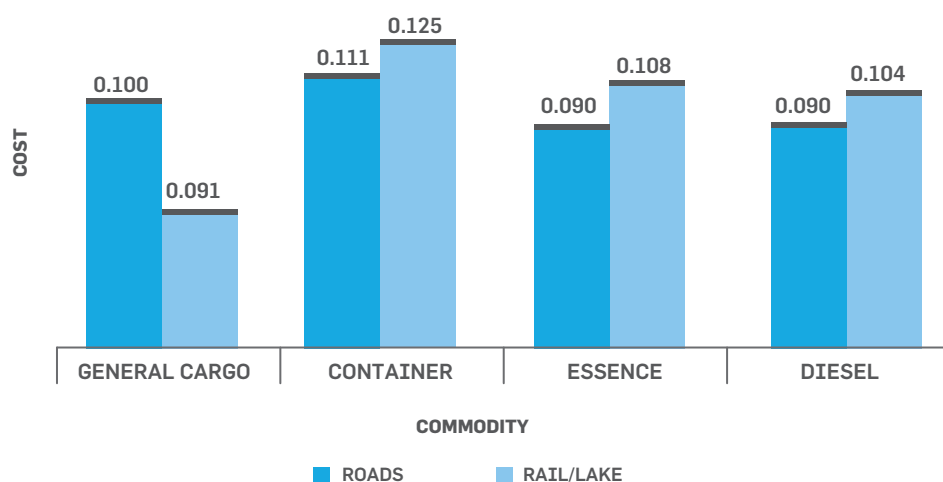


Table 28: Structure of costs of export transport Buja-Dar

COMMODITY	ROAD			RAIL/LAKE				
	Transport	Offloading Buja	Total	Transport Rail	Transport Lake	Loading Kigoma	Offloading Buja	Total
Container 40" (26T/40T)	2500		2500 (96.15/T)	2390	503	548	86	3527 (88.18/T)
Others products (40T)				2390	503	460	65.2	3418.2 (85.45/T)
Coffee (40T)				2390	388	460	65.2	3303.2 (82.58/T)

Source: Market Surveys 2014

Table 29: TRL Imports Tariffs in USD

NATURE OF CARGO	DESTINATIONS		
	DAR-KIGOMA (1254 KM)	DAR-ISAKA (982 KM)	DAR-MWANZA (1230 KM - SPECIAL TARIFF UGANDA)
Bulk Cargo (40 T)	3915	3285	2400
Container (1x40/2x20)	3950 3000*	3380 2000*	2444
Petrol (47.000 litres)	6180	5100	3080
Gasoil (45.000 litres)	5645	4660	3080
Gas	7900	6440	3080

Source: TRL 2014

- TRL has reduced the tariff for container to DRC, Burundi and Rwanda for 6 months starting on 20th August 2014.

INDICATORS

Table 30: TRL Exports Tariffs in USD

NATURE OF CARGO	DESTINATIONS		
	KIGOMA-DAR (1254 KM)	ISAKA-DAR (982 KM)	MWANZA-DAR (1230 KM – SPECIAL TARIFF UGANDA: 30 USD/T)
Coffee	2390	1877	1200
Others (40 T)	2390	1877	1200

Source: TRL 2014

2.5 CONCLUSION

2.5.1 Impact of OSBP on Border Crossing Time

The constructions of the main border posts along the Central Corridor namely Mutukula/Mutukula between Tanzania and Uganda, Rusumo/Rusumo between Tanzania and Rwanda and Kabanga/Kobero between Tanzania and Burundi are almost completed. The Kabanga/Kobero OSBP is operating under one roof since October 2014, while the other borders are still operating separately.

The joint operation at the OSBP is a key factor for reducing the border crossing time. Indeed, the average crossing time at Kabanga/Kobero OSBP has reduced to 116 minutes versus 420 minutes in 2013 that is an improvement of 72% due to OSBP operations.

2.5.2 Observations of the Stakeholders Consultative Committee

During the validation workshop of the CCTO annual report 2014 held in Kigali, 13th May 2015, the Stakeholders observed that:

- The EAC is implementing a number of initiatives aimed at trade and transport facilitation in the region including:
 - Vehicle Load Control Bill
 - One Stop Border Post Bill
 - Standardization of road construction
 - Construction of the Dar es Salaam southern bypass road
- The STACON meeting appreciated the progress of the development of the web based Transport Observatory software and made some recommendations to help solving the issues raised in the annual report:
 - The truck owners sensitize the drivers on the trade facilitation issues and motivate them in order to avoid unnecessary stops and delays;
 - The TTFA train the drivers on the road safety issues in accordance with the EAC harmonized curriculum;
 - The Member States provide adequate facilities at the borders such as water, energy and internet network;
 - The Member States implement the joint operations at the OSBP of Rusumo and Mutukula borders;
 - The Member States consider solving the issue of cabotage that can help to reduce the cost of transport;
 - The Stakeholders set up targets at different level of services;
 - TTFA to conduct annual road survey and border audits in order to determine the causes of different delays and the responsibilities and to support the annual reports;
 - Northern & Central Corridors to agree on key performance indicators to monitor their efficiencies and provide relevant information to the stakeholders; and
 - TTFA to continue monitoring the corridor performance indicators accordingly and report regularly to the stakeholders.

