

Seaport competitiveness in Africa



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Content

- **Introduction**
- **Seaports performance in Africa : recent trends**
- **Determinants of sea port competitiveness in Africa**
- **Concluding remarks and way forward**

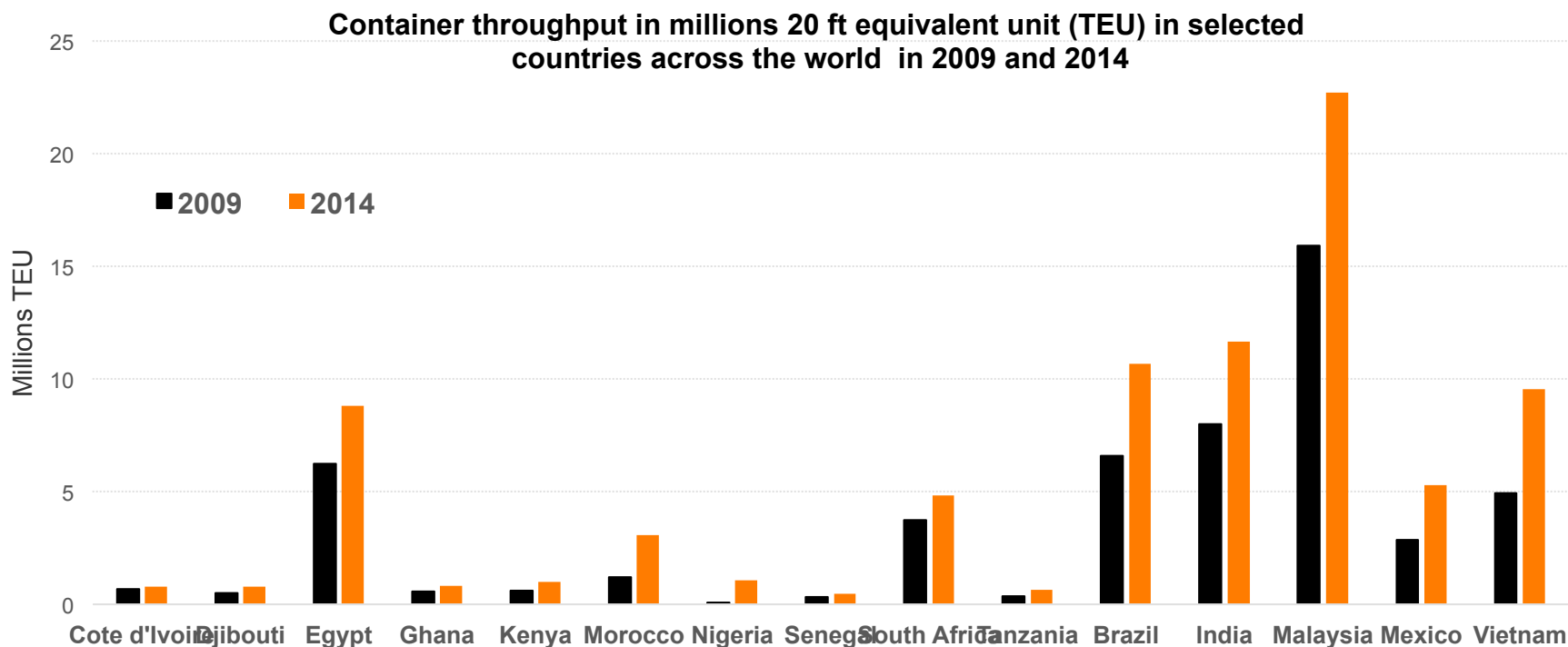
Introduction

- **Significant increase of world seaborne shipments over the past decades :**
 - 1985: 3.33 billion tons
 - 2015: 9.84 billion tons
- **Sea port in Africa : over 90% of the continent's trade flows**
- **Port traffic flow in Africa : expected growth from 265 million tons in 2009 to more than 2 billion tons in 2040.**



Seaports performance in Africa : recent trends

Africa generally lags behind, except for few countries :Egypt, South Africa

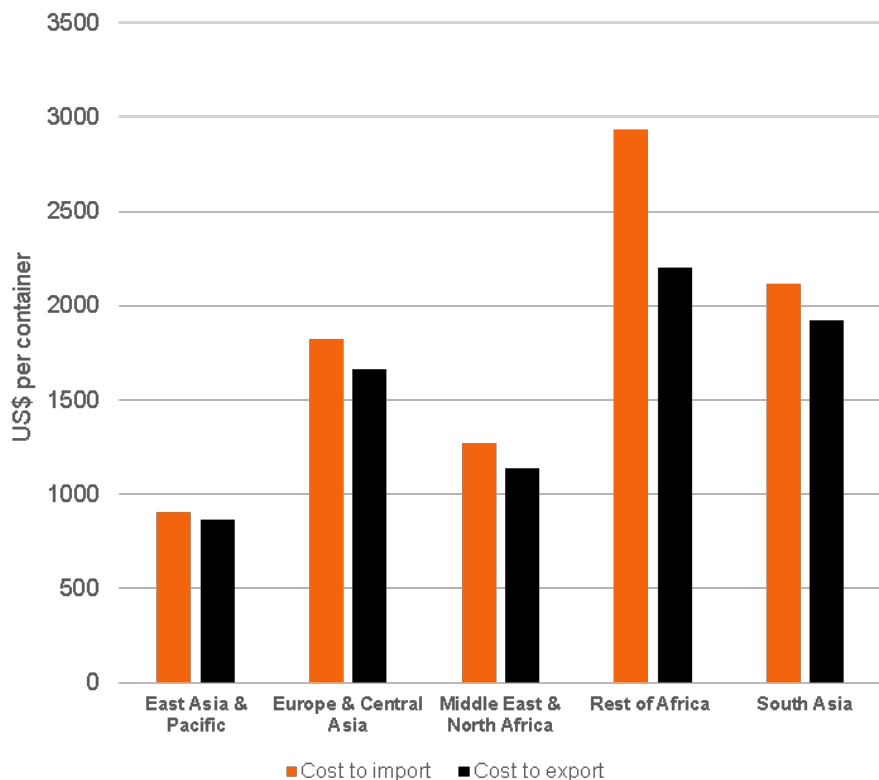


Source: based on data from World Bank database

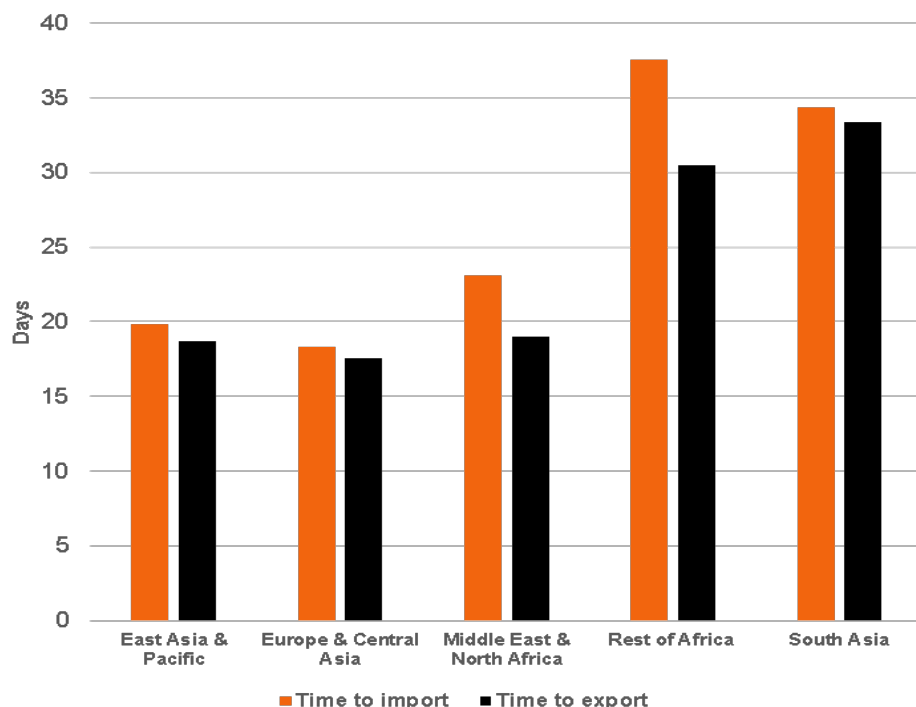
Seaports performance in Africa : recent trends

Where does Africa stand in terms trade facilitation ?

Costs to export and import (in US\$ per container) in selected regions across the world in 2014



Times to export and import (in days) in selected regions across the world in 2014



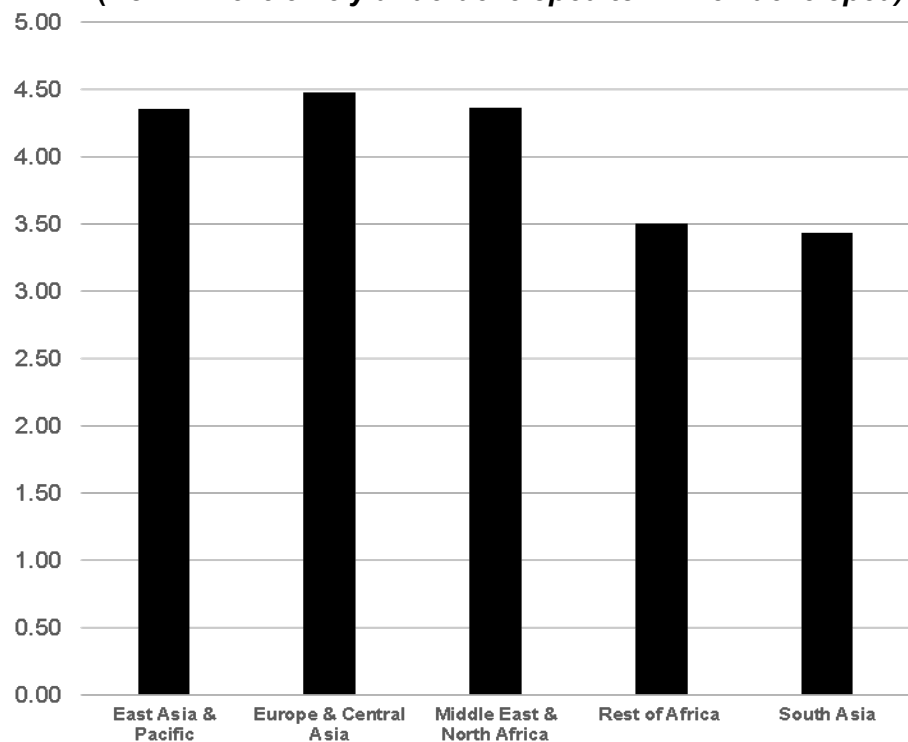
Source : based on data from World Bank database
 Note : Rest of Africa = Africa excluding North Africa

Seaports performance in Africa : recent trends

Where does Africa stand in terms trade facilitation ?

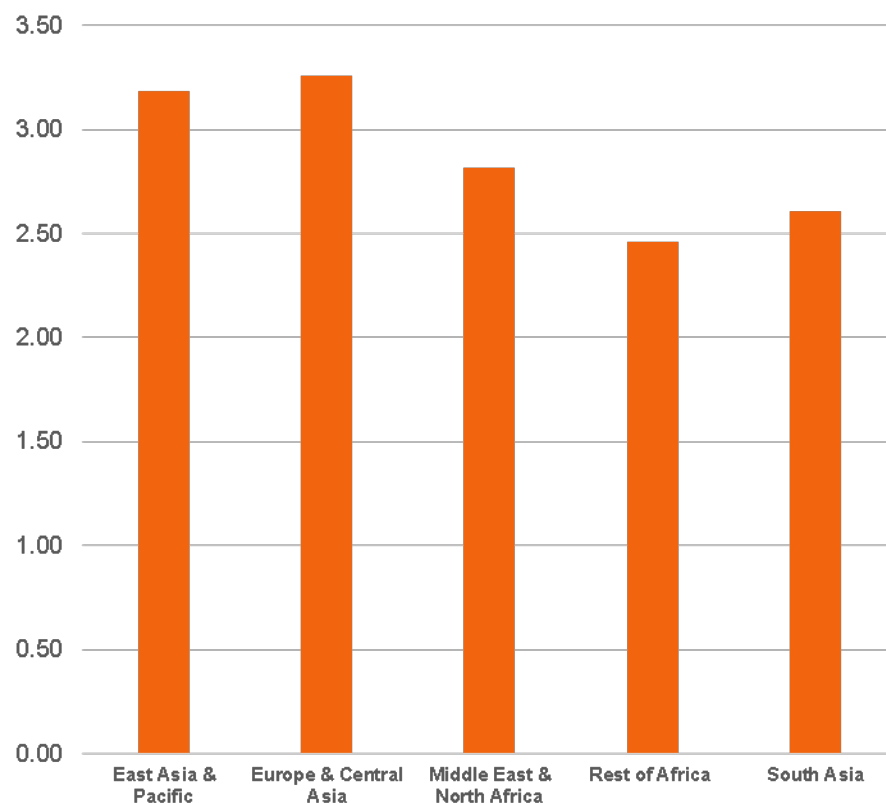
Quality of port infrastructure in selected regions across the world in 2014

(from 1 = extremely underdeveloped to 7= well developed)



Logistic Performance Index in selected regions across the world in 2014

(1=high 5=low)



Source : based on data from World Bank database
Note : Rest of Africa = Africa excluding North Africa

Source: based on data from World Bank database



Ongoing ECA Study : determinants of Port performance in Africa

Objective of the study : Evaluate how some key determinants of ports activities are associated with seaport competitiveness in Africa.

- **Port performance variable : throughput per unit of time**
- **Explanatory variables:** Cost per container; Quality of Port Infrastructure (QPI); Logistic Performance Index (LPI); GDP; Effect of Piracy attacks
- **Sample : 12 African countries over the period 1995 – 2014 are considered based on data availability**
- **The selected countries per region, are:**
 - Eastern Africa (Djibouti, Kenya, and Tanzania);
 - Northern Africa (Algeria, Egypt, and Morocco);
 - Southern Africa (Mauritius, Mozambique, and South Africa);
 - West Africa (Côte d'Ivoire; Ghana; Nigeria).



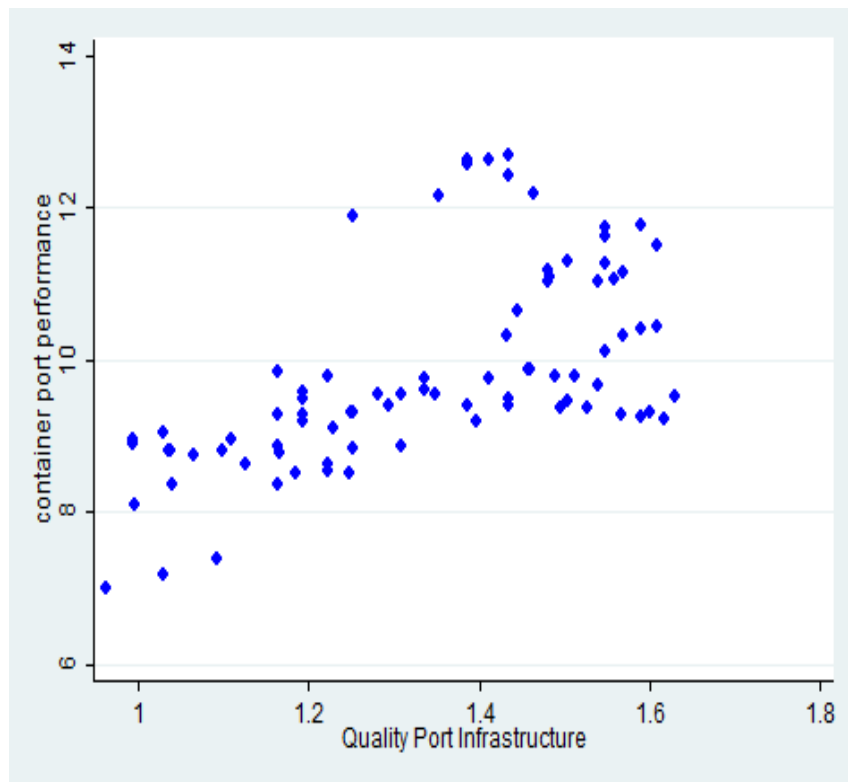
Seaport competitiveness : key to understand factors driving maritime trade.



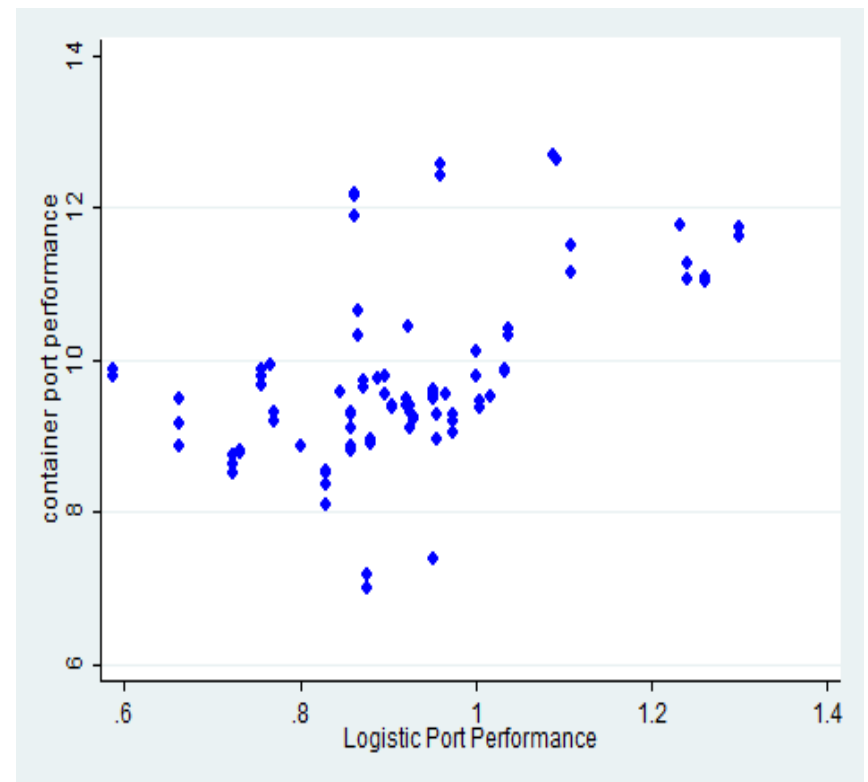


Preliminary findings

Relationship between port performance and QPI :
A priori, positive



Relationship between port performance and LPI :
A priori, positive

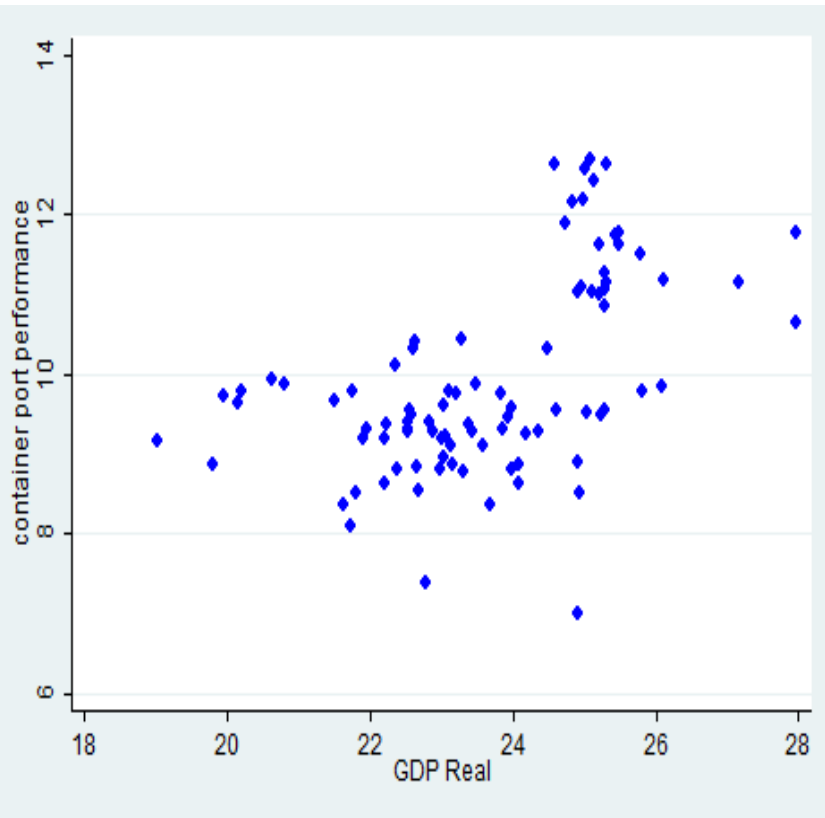




Preliminary findings

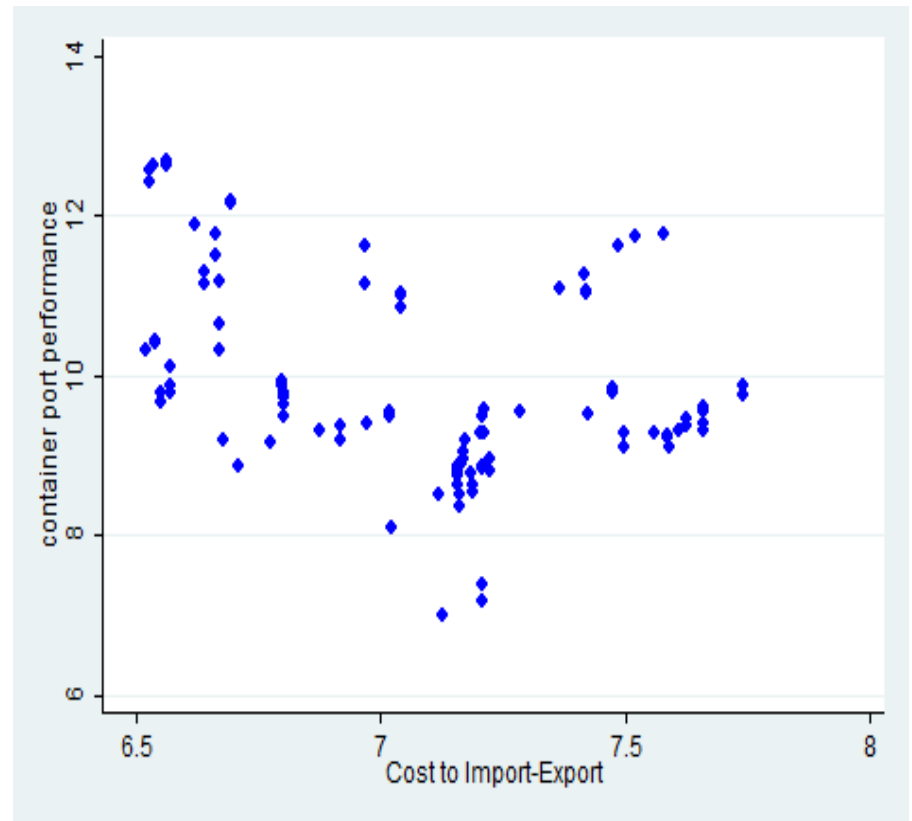
Relationship between port performance and real GDP

A priori, positive



Relationship between port performance and cost

A priori, not clear





Summary of the preliminary modeling results

- **Effect of the determinants of port competitiveness in Africa**
 - **Quality of port infrastructure (+);**
 - **logistics performance environment (+);**
 - **Piracy attacks (-);**
 - **Regional gap (Yes) ;**
 - **Shipping costs (?) : negative but limited impact.**



Preliminary conclusions

- **Enhancing the quality of port infrastructure and their logistics environment in Africa remain critical**
- **Continued collaborative efforts needed to combat maritime piracy , through constructive and coordinated partnership (e.g. recently adopted Charter on maritime security);**
- **Experience sharing is critical to break regional gaps in maritime transport.**



Way forward

- **Expanding the study including more countries, regional corridors and intermodal transport**
- **Ongoing research project ECA: Achieving Regional Integration in Africa: the role of Transport Corridors and Seaports in Trade Facilitation.**
 - Analyze the role of transport corridors and seaports as enablers to intra-African trade and, ultimately to a sustainable and inclusive economic development of Africa
 - Contribute to designing evidence based policies based on countries cases studies to support efforts towards boosting intra African trade



THANK YOU !