



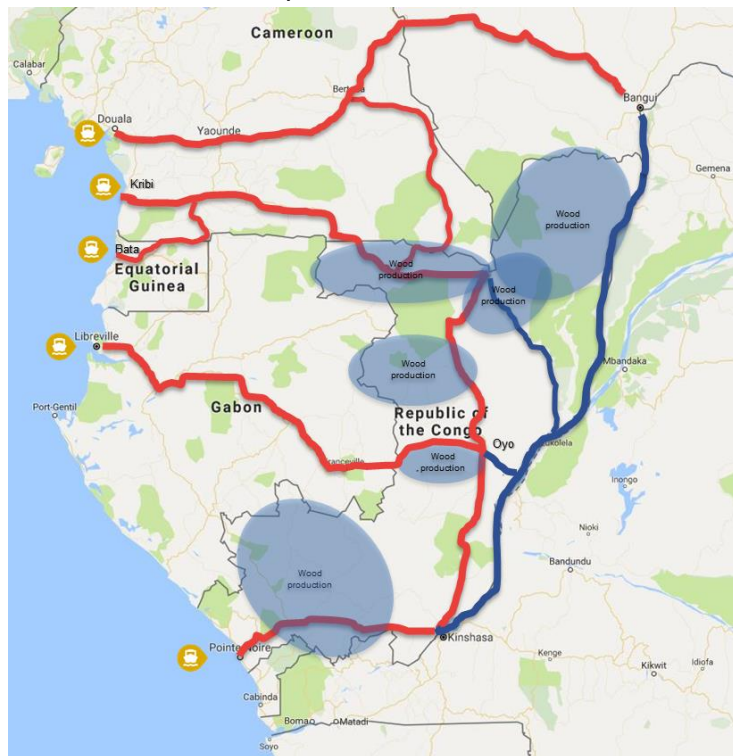
# ATIBT FORUM

PORTS AND LOGISTICS CORRIDORS IN AFRICA

6 MARCH 2017 – DUBAI

# GOOD NEWS FOR THE WOOD INDUSTRY

Main wood export corridors in Central Africa



## Main challenges

- › Scattering and remote production
- › Providers and clients diversity
- › Lack of infrastructure



Expensive costs

## STRONG INVESTMENT MADE

- › States and operators committed into developing wood export corridors with logistics capacity increase
  - › Further development: port of Douala (new dolphin & dock), port of Pointe Noire (expansion), port of Brazzaville (rehabilitation)
  - › New development and alternatives : port of Kribi (starting), waterway Bangui-Brazzaville/Kinshasa (Socatraf), port of Oyo (starting), port of Bata (alternative)

Relieving  
bottlenecks

Increasing options  
for export

POSITIVE  
IMPACTS

Optimizing traffic  
(more fluidity)

Reducing cost of  
export

Investment brings new options for developing business

# STRENGTHENING EXISTING GATEWAY

## Port of Douala



### REFERENCE PLATFORM FOR LOG WOOD EXPORTS IN CENTRAL AFRICA

- Port of Douala is privileged gateway for log wood export from Cameroon, North Congo and RCA
  - Closest location to production sites
  - Cost competitive
  - Efficient corridor connected to both to road and railway
  - Single window for custom clearance

New dolphin & dock at Port of Douala



- Recent investments to enhance Port of Douala competitiveness
  - Additional tugboat (2015) and new dolphin & dock (2016)
  - Reinforcing port wood-yard operational capacities
  - Accelerating delivery rate at port with full log vessels

### SEPBC : EXPERTISE MAKE THE DIFFERENCE

- Dedicated know how and equipment available
- Over 1,2 M m<sup>3</sup> handled in 2016 (both log and sawn wood)
- Complying with best international standards (ISO 9001 : 2008 for wood handling at port)
- Strong client track record (SEFCA, Rougier, SIM, Thanry, IFO, OLAM, etc.)

Activity and volumes at SEPBC, 2016

	Type	Volume (m3)	Total (m3)	Main countries of origin (in & stuffing) or destination (out), per type
In	Sawn wood	333 136	1 260 421	Cameroon 71%, Congo 22%, RCA 7%
	Log	927 284		Cameroon 68%, RCA 17%, Congo 15%
Out	Sawn wood	322 295	1 245 447	Belgium 44%, Senegal 14%, France 9% Spain 7%, China 5%
	Log	920 152		China 60%, Vietnam 30%, Belgium 3%
Stuffing	Sawn wood	58 940	119 991	Congo 58%, RCA 30%, Cameroon 12%
	Log	61 051		RCA 52%, Cameroon 34%, Congo 14%

Stuffed wood accounts for  
9,6% of total volumes

Europe is main destination for sawn  
wood, Asia is main destination for log



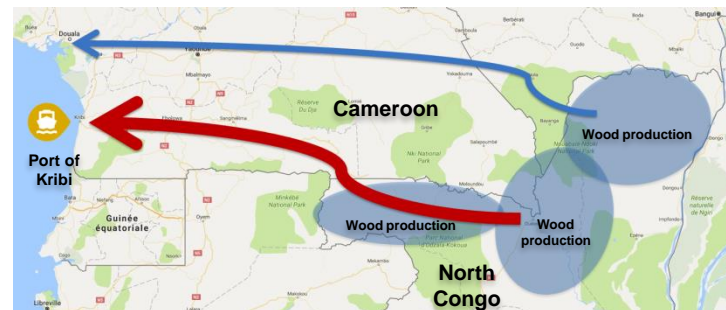
# DEVELOPING NEW CORRIDORS AND SYNERGIES

## Port of Kribi

### STRATEGIC GATEWAY FOR CONTAINERIZED EXPORTS OF WOOD

- › Natural platform for containerized wood export from Cameroon and North Congo
- › Outstanding infrastructure
  - › Modern multipurpose port
  - › Transshipment hub competing with main hub in the region
  - › Deep water (-16m), complementary to Port of Douala (limited draft)
  - › Capacity to accommodate large vessels (+ 8000 TEUs)
  - › 24 ha yard, 300 ha storage area
- › Cameroon authorities provide dedicated areas to facilitate wood transport and stuffing at port of Kribi with charge loading possible at both Kribi or Douala ports
- › **Main challenge** : achieving road and railway connection with inland Cameroon (South East) and hinterland (North Congo) allowing efficient linkage with remote wood production sites

Port of Kribi distance from wood production sites



Port of Kribi (view on container terminal)



**Kribi : new competitive gateway for containerized wood exports**

# REINFORCING CORRIDORS WITH POTENTIAL

## Ports of Pointe Noire, Brazzaville, Bangui, Oyo and Bata

### EXPANSION AND REHABILITATION WORKS

#### Port of Pointe Noire

- Deep sea port (-15m draft), main gateway to/from Congo
- Rehabilitation works undertaken to modernize port and increase capacity:
  - Yard rehabilitation at quay D (non containerized goods)
  - Yard rehabilitation at mole 1 (dedicated to wood activity)
- Road construction



Corridor Brazzaville/Kinshasa to Pointe Noire and view on port of Brazzaville works

#### Port of Brazzaville

- Outstanding location to serve as gathering port for Equatorial Africa commodities
- Connection to both road (RN1) and railway (CFCO) straight to Pointe Noire
- Global rehabilitation works undertaken to upgrade infrastructure and foster activity

### REVIVE AND OPEN NEW CORRIDORS

#### Waterway Bangui–Brazzaville/Kinshasa (SOCATRAF)

- Operated by Socatraf, 10 towboats and 50 barges
- Traffic development potential despite seasonality and limited draft

#### Port of Oyo

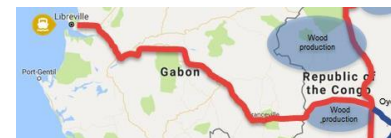
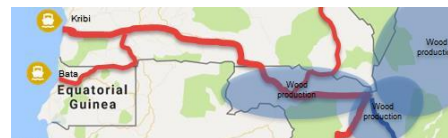
- At the crossroads of traffic from North Congo heading to Owendo and Brazzaville/Kinshasa

#### Port of Bata

- Reconstruction, dredging and extension works to improve port throughput and develop activity
- Proven efficient platform to export log



Corridors Bangui or Oyo to Brazzaville/Kinshasa



Corridors North Congo to ports of Kribi and Bata & Oyo to port of Owendo

# PROPOSING NEW SERVICES TO THE WOOD INDUSTRY

## DEVELOPING DEDICATED INLAND LOGISTICS PLATFORM

- › Platform ideally located on the roads of wood flows coming from production site and going all the way to port of export
  - › Centralization of flows, dedicated areas for wood storage and stuffing
  - › Handling, custom clearance and administrative procedures optimization
  - › Gathering logistics services for distribution to port
- › Main expected impacts
  - › Reducing costs and delays of export (shortened rotation, loading optimization and consolidation, reduction of storage time)
  - › Limiting congestion at ports (when existing), easing expansion possibilities
  - › Support local transformation and national forest industry cluster
  - › New national jobs and businesses created

## INTRODUCING TAILOR-MADE COMMERCIAL SERVICES

- › Making “packaged” freight tariffs available to wood industry clients (Through Bill of Lading) including :
  - › Transport to port of export (if required)
  - › Wood stevedoring & stuffing (in containers)
  - › Maritime transportation (sea freight)
- › At Kinshasa and Libreville, Bolloré Group and CMA CGM are working on a commercial offer dedicated to sawn wood exports aiming at :
  - › Making empty containers available (40') for wood stuffing (export)
  - › Proposing combined commercial offer (competitive tariffs)
- › Objective : allowing more competition by reducing costs, fueling wood export volumes with direct impact on local economies



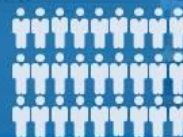
### Those projects involve :

- Experienced and strong investment capacity promoters (logistics, corridor management)
- Partnering with wood industrials (ensure and optimize wood flows)
- Coordination with shipping lines (containers availability, freight reduction)
- Support from public authorities (administrative procedures ease, tax incentives)



PRESENCE IN **105 COUNTRIES**  
ON **5** CONTINENTS

**2015** **€8,3Mds**  
**TURNOVER**



**36,000**  
EMPLOYEES



**1,600,000** M<sup>2</sup> OF WAREHOUSES

**3**

RAILWAY CONCESSIONS



**2,700 km**

OF RAILWAY LINES

**4**

BUSINESS UNITS



**450** MILLION EUROS  
INVESTED ANNUALLY

**No. 1**

INTEGRATED  
LOGISTICS NETWORK

IN AFRICA



**21**

PORT CONCESSIONS  
AROUND THE WORLD