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Kindu
BURUNDI
Lobito
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Mombasa
Dodoma
Lubumbashi
TANZANIA
ZAMBIA
NAMIBIA
Windhoek
Lusaka
MALAWI
BOTSWANA
ZIMBABWE
Harare
Gaborone
MOZAMBIQUE
COMOROS
MADAGASCAR
Durban
Maputo

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EAST AFRICA'S PORTS STEP UP COMPETITION OVER INDIAN OCEAN TRADE MARKET SHARE

From the Horn of Africa on the strategic Red Sea to the buoyant ports of Mozambique, East Africa's ancient "Swahili Coast" provides a logistical nexus between Africa's massive population centres and other continents. Foreign direct investment is driving expansion and rehabilitation of existing seaports, while entirely new facilities are also being rolled out. Ports that shun partnerships with experienced foreign investors are set to lose out as competition for market share intensifies.

"In Africa as with the rest of the world, the importance of seaports to trade, and therefore to the continent's economic performance cannot be overstated. Ports are crucial for trade of most African countries due to the continent's high dependency on exports of raw materials and imports of food, manufactured goods and fuel. For example, more than 90 percent of Africa's total trade (including imports and exports) pass through seaports" (UNECA, 2016). This statement demonstrates the importance of having well-managed, transparent, and efficient operations and management at Africa's ports.

In East Africa, the traditional dominance of the Port of Mombasa is being challenged by other regional facilities that are attracting more investment and are less resistant to reform, while entirely new deep-water seaports are being constructed to diversify regional trade and shipping routes. Turkish, Emirati, South African, and Chinese investors are leading the pack in the region to refurbish and expand East Africa's ports. The UAE and UK-led expansion of the Port of Berbera in Somaliland is a benchmark for other facilities as it creates a highly lucrative trade corridor to inland markets and population centres, while attracting fresh investments into associated sectors.

However, some foreign investments are creating ESG concerns or do not have the potential to reach their full potential. The Chinese plans for a new trade corridor at Lamu in Kenya are stalling, while revitalised Chinese plans for a new seaport at Bagamoyo are open to criticism over environmental and debt sustainability concerns. This report lists some of East Africa's major port facilities and explains their drivers of success, or disappointment.

SOMALIA / SOMALILAND

UAE AND TURKISH PORT OPERATORS ASSURE SUCCESS STORIES

The successful elections in 2022 have thrown the restive country of Somalia back into the spotlight as a growing economy in the Horn of Africa, a nascent oil producer, and exciting trade interconnector to the massive population centres of landlocked Ethiopia. Along its 3,333 kilometres long coastline, Somalia currently has five international port facilities, of which three lie within Somalia itself, one within the autonomous Puntland state, and one – perhaps with the most exciting prospects – in the de facto state of Somaliland. Out of the five seaports, only those three operated by foreign specialised companies are thriving, while only one is embarking on a massive development and expansion strategy that will benefit the entire Horn of Africa region.

1) Port of Mogadishu - Turkish conglomerate ensures effective administration

Somalia's largest port facility in the federal capital Mogadishu has been operated since 2014 by Turkish multinational conglomerate company Albayrak Group, which also runs Conakry port in Guinea in West Africa. Albayrak has made investments of approximately USD 80 million in the port as part of its rehabilitation project, which has doubled revenues from Mogadishu Port to the federal government. According to Albayrak, most of its revenue share will be re-invested in the seaport through additional port-based trade and new docks.

Due to the Albayrak investments, the port of Mogadishu is attracting new deals with African shipping lines and logistics services that also connect other ports in the country and wider region. By early 2022, the port contained six wharves, including five general cargo berths and a container berth. Around 245 cargo laden ships visit the port annually, predominantly shipping containers, as well as breakbulk such as cement, sand, and fuel. Some of Somalia's key exports are channelled through Mogadishu Port, including livestock, frankincense and myrrh, bananas, fish, animal hides, scrap metal, and charcoal.

Despite insecurity and political instability in the capital city over the past few years, operations at the port have usually continued without major interruptions, while Albayrak has ensured effective administration of these operations.

2) Port of Bosaso – DP World entity operates livestock export hub that competes with Australia

Bosaso is the commercial capital of the autonomous Puntland region in northeastern Somalia. Its port, which is also known as Bender Qaasim, is now classified as a major class port just like Mogadishu's port facility. Following an expansion phase that started in 2012, Dubai-based P&O Ports in 2017 won a 30-year concession for the management and development of a multi-purpose port project. P&O Ports, which is owned by DP World, has since committed to a USD 336 million investment in Bosaso. The work has included building a 455 metres long quay and a 5.5 hectares storage area. The port has been dredged to a depth of 12 metres and P&O Ports has also invested in the installation of the latest IT terminal operating system and port equipment.

Bosaso Port is geared towards exports of livestock such as cattle, sheep, and camels to the Arabian Peninsula, while also providing transhipment services for Yemen. Imports include bulk shipments comprising cement, sugar, rice, and construction material. P&O Ports' operations were temporarily disrupted in 2019 by the killing of its manager by local Islamist militants, but otherwise the port facility has been able to flourish and Bosaso now ensures that Puntland can compete with Australia for livestock exports to Saudi Arabia.

3) Port of Merca – Insecurity hampers port development

Despite its proximity to the major city of Mogadishu and its history as a banana export facility, the Port of Merca has been unable to develop at the same level as its Somali peers. Merca was destroyed during the civil war and port infrastructure was burnt. Since then, the area is vulnerable to militant activity and as recent as 2016, Merca was completely abandoned to the militant group al-Shabaab (later recaptured). As a result, no foreign investment has gone into the facility, and it is classified as no more than a jetty class port that is mostly used by small fishing vessels.

Foreign investors have expressed interest in developing Merca's port but only if the government can assure local security and stability.

The Port of Merca offers a clear example of how poor governance and insecurity can obstruct commercial development and result in missed opportunities for local communities.

4) Port of Kismayo – Lost opportunity for agricultural exports and humanitarian supply chain

Only slightly larger than the port of Merca, the facility in Kismaya, in Somalia's southern region of Jubbaland, offers exports of bananas but little else of major commercial value. Some 80 percent of port facilities are not operational, and the port is in urgent need of maintenance. However, no foreign investors have expressed interest in developing Kismayo's port, which is mostly due to weak governance by the local government of the Federal Member State of Jubbaland, which is corrupt and inefficient, while also open to foreign interference.

Revenues and resources generated from the port are channelled into Jubbaland's service delivery and security sector, rather than reinvested into the port. Kismayo port lacks sufficient handling equipment and has only four warehouses, while there are also no cold storage facilities. The port of Kismayo could be developed as a major humanitarian facility to connect to Somalia's famine-struck regions, as well as conflict zones further inland in Ethiopia and parts of Kenya. However, in the absence of good governance and foreign investment, Kismayo port attracts no more than 50 small ships and barges annually. The Mediterranean Shipping Company is the largest company that infrequently visits the facility.

5) Port of Berbera – Foreign investment provides game-changing opportunity for Horn of Africa

The Port of Berbera is by far the most exciting seaport facility in the region. The DP World New Port of Berbera is a game-changing project for Somaliland, providing a second trade gateway to neighbouring Ethiopia, which has been looking to diversify supply lines from Djibouti's congested ports that have also suffered from arbitrary government intervention in recent years. The Berbera Trade Corridor is expected to attract significant foreign investment, even while Somaliland remains unrecognised internationally.

The strategically located Port of Berbera has benefited since 2016 from a USD 442 million agreement signed between the government of Somaliland and Emirati multinational logistics company DP World to operate a regional trade and logistics hub. The DP World port expansion has added a new dock and an economic free trade zone, while the USD 100 million road corridor connecting Berbera with Ethiopia has been tested and is in use since 2020. Since 2018, DP World holds a 51 percent stake in the project, Somaliland 30 percent, and Ethiopia the remaining 19 percent (although Ethiopia has been late in acquiring its stake in the port).

As part of the deal agreement, Ethiopia has committed to building infrastructure to develop the Berbera Corridor as a trade gateway, while the governments of the UAE and Somaliland have put in place an additional Memorandum of Understanding to advance their strategic relationship. The Port of Berbera's new container terminal includes a new 400 metre berth and three ship gantry cranes. The terminal's container capacity has increased from 150,000 twenty- foot equivalent units (TEU) or containers to 500,000 TEU annually, and work is already under way for an expansion to handle up to 2 million TEU a year. Djibouti's ports currently handle one million TEU annually. The revamped port of Berbera now offers an alternative to Djibouti as a gateway to lucrative trade routes through the Suez Canal.

The DP World Berbera New Port is the first major foreign direct investment (FDI) and the first international non-mineral concession known in Somaliland. According to the World Bank's 2018 fact sheets, the volumes handled in the Port of Berbera are expected to increase from 3 million tonnes in 2016 to 18.1 million tonnes in 2050. By 2035, the Port of Berbera is expected to facilitate trade equivalent to nearly 27 percent of GDP and 75 percent of total trade, supporting indirectly 53,000 jobs in Somaliland. Berbera port also plays a key role in enabling humanitarian aid to enter the region, reaching close to 2 million refugees and internally displaced populations.

In October 2021, the UK's development finance agency CDC Group (now British International Investment, BII) joined DP World's investment project, which has almost doubled funding. The latest investment in the Port of Berbera comes as part of the CDC Group's USD 1.7 billion joint initiative announced last year. The long-term partnership is aimed at multiplying the capacity of the Port of Berbera and improving surrounding logistics facilities to create a regional trading hub.

The Port of Berbera expansion also has regional strategic significance. Ethiopia, in particular, is benefitting from DP World and the CDC Group's joint initiative. According to CDC Group, "in Ethiopia, Berbera port is expected to enable trade equivalent to 8 per cent of GDP and 32 per cent of national trade by 2035. This will support 1.2 million jobs in the economy – where 60,000 of these employment opportunities will be created through the port expansion – and increase access to vital goods and staples for 10 million people in Ethiopia."

Ethiopia's government is seeking new access to ports after Tigrayan rebels disrupted supply lines to Djibouti in 2021, while promised access to Eritrea's ports has not materialised. Today Djibouti handles up to 95 percent of all of Ethiopia's inbound trade.

Alternative gateways to Ethiopia, such as the Lamu Corridor from Kenya, have been delayed or are only partially complete. Ethiopia's government is therefore developing the Berbera Corridor, while it has also expressed interest in expanding the port of Zeyla (Saylac) in northern Somaliland. While Ethiopia's Chinese allies would support the expansion of Zeyla, such a move is likely to be opposed by Somaliland and its partners in the Port of Berbera such as the UAE and UK. The UAE is heavily invested in the Berbera Corridor, including a UAE-funded new airport.

DP World previously owned the Port of Doraleh, which is an extension of the Port of Djibouti and the main container terminal. In 2018, the Djibouti government expropriated the facility and placed it under the control of the government owned Doraleh Container Terminal Management Company, arguing inaccurately that the DP World contract violated Djibouti's sovereignty. In fact, the Doraleh port was then frequently ranked as the most efficient in Africa and DP World has won several international arbitration cases since then. Djibouti has since offered China Merchants Ports Holdings (via its subsidiary China Merchants Group) a quarter of the port's stake, in a perceived repayment on some of its debt owed to China.

KENYA

URGENTLY NEEDED INVESTMENT AND PARTNERSHIPS FOR EAST AFRICA'S TOP PORT

Kenya's ports sphere is completely dominated by the Port of Mombasa, which despite its massive size and handling capacity is suffering from congestion, delays, mismanagement allegations, and frequent industrial action. However, long-time plans to attract foreign investment and take onboard operational partners have been obstructed by localised concerns over sovereignty in Kenya's Coast region and misunderstandings by port labour unions over such a collaboration. If Mombasa does not soon attract fresh investment, it will lose its ranking to Chinese operated Lamu port and other regional facilities.

Port of Mombasa – East Africa's logistics hub faces challenges from newer and improved ports

Kilindini Harbour is the main facility of the Port of Mombasa, the only international seaport in Kenya, the biggest port in East Africa and the second largest on the continent after Durban in South Africa. However, Mombasa is steadily losing its edge over more recently developed or expanded facilities – it now only ranks as the fifth best port in Africa according to recent industry rankings. Mombasa port trails Tanger Med in Morocco, which is ranked as Africa's top port with a capacity to handle nine million containers. The new developments in Lamu, Kenya, and Bagamoyo, Tanzania, will challenge Mombasa's dominance, unless a new investor and operation partner can be found.

Kilindini Harbour is managed by the Kenya Ports Authority (KPA), which is a state corporation with the responsibility to "maintain, operate, improve and regulate all scheduled seaports" on the Indian Ocean coastline of Kenya, including principally Kilindini Harbour. Mombasa receives an average of 3,000 containers daily. Following an expansion and refurbishment from 2013, the annual handling capacity of the port is 2.65 million TEUs. In comparison, Morocco's Tanger Med Port Complex handled over 7 million TEU in 2021, up 24 percent compared to the previous year.

The wider Mombasa Port complex comprises 19 berths, a grain terminal, 2 oil terminals, 6 container berths, and 12 berths that handle only general cargo. The Port of Mombasa exists of Kilindini Harbour, the Mbaraki wharf that is operated by the Bamburi Cement Company, Mbaraki Bulk Terminal that deals with petroleum products. There is a separate gran handling terminal that is the biggest grain handling facility in Africa. There are two major oil terminals at the Mombasa Port including the Shimanzi Oil Terminal and the Kipevu Oil Terminal. Further expansion at the Kipevu Terminal has been ongoing for several years, including construction of a hydraulic dock and an onshore pipeline, which would greatly increase Kenya's oil transportation capacity.

Some of the persistent challenges at Mombasa port have been congestion and high ship turnaround time, low cargo handling productivity, especially at berths designated for bulk cargo, and inadequate water depth to berth high tonnage vessels. In 2021, reports emerged that the Port of Mombasa was experiencing a three-week congestion following a commercial dispute. The KPA subsequently denied such claims. Substantial investments at the port between 2017 and 2021 have seen significant improvements, although these expansions have not been sufficient to keep up with more sophisticated and larger ports such as Tanger med, or regional upstarts such as Lamu and eventually the new Bagamoyo port. Moreover, Mombasa also faces greater competition from Tanzania and other ports in the region.

Since 2015, the Kenyan government has considered a partnership between KPA and DP World. However, this process has been stalled by objections from labour unions in Mombasa that fear job and wage cuts – concerns with no real basis – and the local Coast region community, which has traditionally been highly sensitive to any perceived loss of sovereignty over Mombasa port. The matter has become highly politicised, particularly ahead of the 2022 general elections. However, without an actionable investment and expansion strategy, Mombasa Port risks losing out to other regional ports, and could fall into neglect like many of the other KPA facilities across the country.

Kenya's other ports – Various ports are neglected or too small to make a major economic impact

Kenya has about 15 ports, but at a far smaller scale than Mombasa's complex. Mombasa's Port Reitz has been neglected for years, while Kenya's coast is dotted with other small ports such as Kilifi, Malindi, Kiunga, Mtwapa, and Shimoni, which depend on modest tourism, fishing, and small-scale cargo. The KPA is planning developments at most of these facilities, although the impact of these investments will be small-scale and highly localised. Lake Victoria has Kisumu Port, which is a regional hub for petroleum exports to landlocked countries, such as Uganda and DRC. KPA plans to increase Kisumu's local imports to 130,000 tons by 2025, and 180,000 tons by 2035, from 22,000 in 2014.

Port of Lamu – Fresh investment and expertise required to drive impetus to the stalled LAPSSET

In 2014, the KPA agreed a deal with China Communications Construction Company (CCCC) for the construction of three Port Lamu berths that form part of the long envisioned USD 24 billion Lamu Port and Lamu-Southern Sudan-Ethiopia Transport Corridor (LAPSSET), also known as the Lamu Corridor. If completed, Lamu Port will have 32 berths and replace Mombasa's Kilindini Harbour as Kenya's largest port facility. The new port at Manda Bay would have the latest infrastructure and would comprise a railway terminal, storage tanks, container freight stations, an oil pipeline, oil refineries, and several airports.

However, the LAPSSET project has been stalled due to regional insecurity concerns on the border with Somalia, political instability in Kenya, and a lack of other investments. For several years, KPA has been in talks with DP World and other companies to operate the new Manda Bay port facility, once complete. The aim of the project is to cut over-dependence on Kenya's main Port of Mombasa, yet there are more commercially viable alternative pipeline and trade routes options through Tanzania or Ethiopia (and indeed Somaliland).

TANZANIA

RACING TO CHALLENGE KENYA'S PORTS MARKET SHARE

Tanzania has an active strategy to compete with Kenya for market share in the Indian Ocean ports sector. The Port of Dar es Salaam is offering faster and more cost-effective trade and transport solutions than Kilindini Harbour in Mombasa since Dar es Salaam is benefitting from ongoing expansion and investments. Plans for a new deep-water facility to be built by Chinese contractors at Bagamoyo are being revitalised, although there remain serious environmental, social, and governance (ESG) concerns.

Dar es Salaam – Offering alternatives for regional trade to the Port of Mombasa

The Port of Dar es Salaam is one of three ocean ports in the country and handles over 90 percent of the country's cargo traffic. Although it is smaller than Durban and Maputo, Dar es Salaam is fast catching up on the market share of the Port of Mombasa for Indian Ocean commerce and trade. Landlocked countries like the Democratic Republic of Congo, Malawi, Uganda, Zambia, Rwanda, and Zimbabwe are increasingly choosing Dar es Salaam over Mombasa, due to the latter's congestion problems. As such, Dar es Salaam is becoming a regional transhipment hub for soft commodity exports, such as tea, coffee, tobacco, oilseeds, cotton, sisal, and cashew nuts, as well as metals like copper.

Dar es Salaam port is designed to handle more than 10 million tonnes of cargo annually including approximately 4 million tonnes of dry general cargo, 6 million tonnes of liquid bulk, and 1 million tonnes of containers. An expansion programme is ongoing and will cost at least USD 421 million. The port's operator, the Tanzania Ports Authority (TPA), has a similar mandate as its Kenyan equivalent, the KPA.

Tanzania's other ports – Facilities running below designed capacity due to lack of opportunities Beyond Dar es Salaam, there are two more major seaports in the country, namely Tanga and Mtwara. Tanga is the second biggest port in the country with present annual cargo capacity of 1.2 million tonnes and is linked to Dar es Salaam port through a 350-kilometre highway. Tanga serves the north of Tanzania, as well as neighbouring nations of Burundi, Rwanda, and northern Uganda, with exports including coffee, cement, tea, beans, timber, animal hides, sisal, and fertilisers. import commodities are phosphates, chemicals, construction equipment, automobiles, ammonia, oil, sulphur, grains, and cereals.

Mtwara is the third major deep-water port of Tanzania located in the southern part of the country, from where it also serves Malawi, Mozambique, and eastern Zambia. Mtwara deals with general cargo and is known for exporting cashew nuts, cassava roots, and sisal.

It receives shipments of foodstuff, raw material, and cement. An industrial zone is planned to be constructed near Mtwara, which should increase capacity uptake at the port. Overall, the TPA offers sound management of these port facilities, although many ports run below their designed capacity.

Additionally, there is a port in Zanzibar, which provides ferry services but does not provide access for large cargo vessels. Mwanza is the main port facility on Lake Victoria but is smaller than Kisumu in Kenya.

Bagamoyo – ESG concerns over revitalisation of Chinese port construction

Since 2021, Tanzania's President Samia Suluhu Hassan has reopened negotiations with China Merchant Holdings (CMH) to build a USD 10 billion new port, 75 kilometres north of Dar es Salaam at Bagamoyo. The president's predecessor cancelled the project over three years ago, in June 2019, claiming then that the financing terms presented by Hong Kong-based CMH were 'exploitative and awkward.' Bagamoyo Port, financed by China and Oman's sovereign wealth fund, would have become the largest port in East Africa as a 20 million TEU (20ft-equivalent unit) container port. The Bagamoyo project was also a major connectivity initiative being pursued by China in East Africa under its Belt and Road Initiative (BRI) programme. The project included construction of several rail lines and roads to oil fields.

Tanzania has been trying to change conditions such as a guarantee of compensation for any losses incurred during project implementation, as well as to revoke tax waivers granted to the Chinese companies, including waivers of a land tax, workers' compensation tax, a skills development levy, a customs duty, and value added tax. The World Bank and several experts have criticised the Bagamoyo construction plans, saying that the port project would not be commercially sustainable under its current structure, but could attract business if developed as a regional maritime initiative by the East African Community.

Expert reports say that the port would be too large for its envisaged role and that it is located too close to other major regional ports, like Dar es Salaam and Mtwara in Tanzania, and Lamu and Mombasa in Kenya, which all compete for the same regional cargo business. The renegotiation of the Bagamoyo port project by Tanzania is therefore aimed at extracting improved terms for the country, while also seeking a more sustainable commercial agreement that will allow competition with other ports.

MOZAMBIQUE

GAS-FUELLED ECONOMIC BOOM DRIVES SHIPPING DEMAND

Mozambique's five main seaports are all undergoing expansion and rehabilitation as demand for shipping increases in the southern African region. Maputo port's operations are managed by a highly successful joint venture between the local government, and South African and UAE companies.

Maputo – Joint venture operation provides southern African success story

Since 2003, the Port of Maputo has been operated by a public-private joint venture, the Maputo Port Development Company (MPDC), which is a partnership between state-owned the Mozambican Railway Company (Caminhos de Ferro de Moçambique) and Portus Indico, comprised by Grindrod, DP World and local company Mozambique Gestores. DP World has since further invested in the company and its concession. MPDC holds the rights to finance, rehabilitate, construct, operate, manage, maintain, develop, and optimise the entire concession area. The company also holds the powers of a Port Authority, being responsible for maritime operations, piloting towing (tugboats), stevedoring, terminal, and warehouse operations, as well as port's planning development.

Due to MPDC's sound management, the port of Maputo has favourable loading rates and efficient services, which have made it an attractive facility for charterers and shipping companies. In 2021, Maputo Port achieved a new record as it registered a 21 per cent growth compared to 2020. The total volume of cargo handled in 2021 stood at 22.2 million tonnes versus the 18.3 million tonnes of the previous year. With a capacity to handle 100,000 TEU annually, the container facility is one of the busiest in southern Africa.

Thanks to the port, Maputo's economy is based on numerous industries like shipbuilding, breweries, ironworks, cement, and textiles whose finished products are also exported from this port. Matola Terminal is a separate deep-water facility that serves oil tankers and ore carriers. The aluminium wharf can handle one million tonnes of bulk alumina, petroleum coke and pitch annually. Moreover, the coal terminally handles 2.5 million tons of bulk mineral coal annually.

Mozambique's other ports – Facility expansion and refurbishments underway

Mozambique has four more notable seaports, including Beira, Nacala, Quelimane, and Pemba. The Port of Beira is the second largest port in Mozambique and is a major facility for shipping central African goods and serves as a transhipment port for the inland countries of Zimbabwe, Malawi, and Zambia. Beira's container handling facility is one of the most technologically advanced in the South African region. Meanwhile, the Port of Nacala handles most of the international trade of landlocked Malawi and is visited by over 200 ships annually. Nacala's port is operated by Sociedade do Corredor Logístico Integrado do Norte (CLIN), which is a joint venture between Brazil's Vale and CFM.

The two other ports, Quelimane and Pemba, are smaller facilities, serving the northern provinces of Mozambique, although Pemba is increasingly becoming a hub for the nascent natural gas sector. The government and CFM have extensive plans to expand these facilities, as well as other ports across Mozambique, as the country's economy is set to grow at record pace in coming years due to the natural gas boom.

THE PORT OF LAMU

This port has had its benefits of being the only port in the Eastern part of Africa that serves as a transhipment port.

Owing to its depth the port can accommodate the big container ship. Small ships have now started calling into the Lamu port for onwards transhipment to other ports of the world.
This has many benefits mainly proximity to transhipment port. So the containers move much faster. Secondly, they avoid the time to get to Salalah Port in Oman.

The port of Salalah is the biggest port in the Arabian Peninsula and most ships in Eastern Africa use this port for most transhipment both in and out bound.

This potentially put Salalah in direct competition to Lamu. However, Kenya must take a bolder step to market the port so that scheduled cargo are directed to Lamu.

The second and bigger plan is utilization of the port is for cargos headed to the Southern part of Ethiopia and South Sudan again the route will be fully utilized once the roads and rail connecting the two countries are developed.

Anthony Kariuki . GBS Africa

CONCLUSION

“For the continent to be fully integrated and for the vision of the Africa Free Continental trade agreement to be fully achieved, we must invest in Africa’s logistics sector, this will facilitate ease of movement of goods and services. It is therefore important to have predictable policies to attract investments in this sector”.

Agnes Gitau, Managing Partner of GBS Africa