BREAKING DOWN THE BARRIERS TO REGIONAL AGRICULTURAL TRADE IN CENTRAL AFRICA

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August 2018

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Cover design by: Odilia Renata Hebga

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Acknowledgments

This report has been prepared by a team co-led by Joanne Gaskell and John Keyser and consisting of Gabriel Boc, Chloe Cangiano, Carmine Soprano, Robert Nkendah, Diego Arias Carballo, and Bodomalala Rabarijohn. Valuable research assistance in the field was provided by Mbouassie Adjac, Jean Marie Assiga, Said Mariam Ben, Ousseni Ayiagnigni Fifen, Arsene Mendomo, Xounkifirou Mongbet, Moussa Njoupouognigi, and Fifen Zounkaraneni.

The team acknowledges the excellent guidance and support received from Elisabeth Huybens (Country Director), Dina Umali Deininger (Practice Manager), Issa Diaw (Program Leader), Mazen Bouri (Program Leader), and Alberta Mascaretti (Chief Africa Service, FAO/TCIA) throughout the process. Helpful comments on technical aspects related to gender from Kilara Suit are gratefully acknowledged. The team would also like to thank the peer reviewers, Norbert Fiess, Paul Brenton, and Myriam Chaudron, for their very valuable insights.

The work was made possible through a collaboration between the World Bank and the Investment Center Division of the Food and Agriculture Organization of the United Nations (FAO/TCIA) as part of the FAO/World Bank Cooperative Program.

Publication and dissemination of the report benefitted from the support of the Umbrella Facility for Trade Trust Fund with contributions from the Governments of the United Kingdom (DFID), Sweden (Sida), Norway (Ministry of Foreign Affairs), Netherlands (Ministry of Foreign Affairs, and Switzerland (SECO).

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Acronyms and Abbreviations

AGASA	Gabonese Food Safety Agency *(Agence Gabonaise de Sécurité Alimentaire)*
BARC	Central Africa Republic Bureau of Road Chartering *(Bureau d'Affrètement Routier Centrafricain)*
BGFT	Cameroon Land Freight Management Office *(Bureau de Gestion du Fret Terrestre)*
CEM	Country Economic Memorandum
CEMAC	Central African Economic and Monetary Community (*Communauté économique et monétaire d'Afrique centrale*)
CFAF	Central African CFA Franc
CGC	Gabonese Council of Loaders *(Conseil Gabonais de Chargeurs)*
CGE	Computable General Equilibrium
CIG	Common Initiative Group
DGCC	Gabonese Directorate General for Competition and General Consumption *(Direction Générale de la Concurrence et de la Consommation Générale)*
DGRE	Cameroon Directorate General of External Research *(Direction Générale de la Recherche Extérieure)* (Cameroon Intelligence Agency/Secret Service)
FAO	Food and Agriculture Organization of the United Nations
GDP	Gross Domestic Product
Ha	Hectares
HDI	Human Development Index
ICT	Information and Communication Technology
IDK	I Don't Know (perceptions survey)
JBC	Joint Border Committee
LVO	International Vehicle Letter for Road Transportation of Goods *(Lettre de voiture internationale)*
MINADER	Ministry of Agriculture and Rural Development of Cameroon *(Ministère de l'agriculture et du développement rural du Cameroun)*
MINEPIA	Ministry of Livestock, Fisheries, and Animal Industries of Cameroon *(Ministère de l'élevage, de la pêche et des industries animales)*
PIDMA	Agriculture Investment and Market Development Project *(Projet d'Investissement et de Développement des Marchés Agricoles)*
PO	Producer Organization
PRODEL	Livestock Development Project *(Projet de Développement de l'Élevage)*
ROW	Rest of the World

SPS	Sanitary and Phytosanitary
UDE	Equatorial African Customs Union *(Union Douanière Equatorial)*
UDEAC	Customs and Economic Union of Central Africa *(Communauté économique et monétaire de l'Afrique centrale)*
UEAC	Economic Union of Central Africa *(Union Économique de l'Afrique Centrale)*
UEMOA	West African Economic and Monetary Union *(Union économique et monétaire ouest-africaine)*
UMAC	Monetary Union of Central Africa *(Union Monétaire de l'Afrique Central)*
UNDP	United Nations Development Programme
WFP	World Food Programme

Executive Summary

This study supports Central African Economic and Monetary Community (*Communauté économique et monétaire d'Afrique centrale,* CEMAC) countries in their efforts to diversify their economies through increased agricultural trade. The report's contribution can be summarized in four points: (a) there is substantial potential for regional trade to drive agricultural development and poverty reduction through increased farm revenues and lower food prices and, at the same time, to reduce food import bills and improve the balance of payments; (b) the potential is not being achieved primarily because of weak links between farmers and markets, poor market-related infrastructure, and high trade costs due to corruption along regional trade corridors; (c) coordinated action to increase the capacity of producer associations, invest in market facilities and warehouses, improve the effectiveness of legitimate checkpoints, and remove harassment along trade corridors would have substantial economic impacts that would benefit producers and consumers on both sides of the border; and (d) addressing these constraints will require cross-sectoral collaboration and strong political leadership to overcome the inevitable political economy resistance from those who currently extract rents from the system at the expense of the poor.

Upon gaining their independence, the nations of Central Africa embarked on a journey of economic integration that led to the signing of the CEMAC Treaty in 1994. Today the members of CEMAC are Cameroon, the Central African Republic, Chad, the Republic of Congo, Equatorial Guinea, and Gabon, representing a market of 48.5 million people.

Despite CEMAC's natural potential, the agriculture sector remains largely underdeveloped; oil and minerals tend to dominate the economies and exports of CEMAC countries. Crude petroleum accounts for 86 percent of CEMAC's exports; the Republic of Congo depends on oil for 61 percent of gross domestic product (GDP), Gabon for half, Chad for 40 percent, and Cameroon for nearly 10 percent. As such, the region has been strongly affected by the fall in oil prices, and CEMAC countries are now exploring options for diversification and reduced food import dependency. Agricultural value added as a share of GDP varies widely in CEMAC countries, from 2.6 percent in Equatorial Guinea to 50 percent in Chad. Agriculture, however, does employ a large share of the population in most CEMAC countries, and the region exports a wide variety of agricultural products.

While the monetary component of regional integration has been operational for many years, provisions related to the free movement of goods, people, and services remain problematic. The transit regime represents one of the major complications for trade integration in CEMAC. Two members (the Central African Republic and Chad) are landlocked and significantly dependent on transit from the port of Douala in Cameroon, while the other members' national systems are not harmonized to provide a redistribution of import levies when goods are introduced in the community.

Provisions for intra-community trade in agricultural are unclear, and provisions for free movement of people (that is, cross-border agriculture traders) are uneven. As the report details, border crossing processes vary significantly from one border post to another in terms of procedures and costs. Despite CEMAC countries agreeing to eliminate all tariffs on intra-regional trade, duties are still charged at some borders and, even where tariffs have been eliminated, there are many nontariff costs, often levied by customs authorities themselves, which play a similar trade-limiting role as

a tariff. Moreover, intra-community trade is negatively affected by the insufficient application of the agreed principle on the free movement of people in CEMAC, which is fully effective only in Cameroon, the Republic of Congo, the Central African Republic, and Chad. Elsewhere, cross-border agriculture traders and others are subject to visa requirements, document checks, and other controls that stifle competition and raise the cost of agriculture trade.

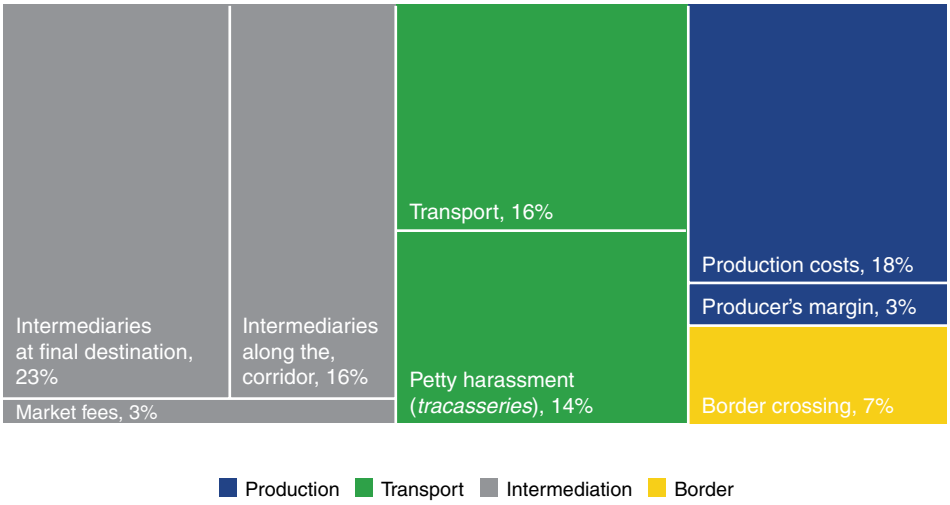
Therefore, despite the political drive for regional integration, intra-regional trade remains low. For CEMAC member states, exports within CEMAC account for only 2.1 percent of total exports, and imports for only 3.9 percent of total imports, according to official statistics. In the agriculture sector, more than 95 percent of recorded agricultural exports went to third countries in 2015 and more than 75 percent of recorded imports came from outside CEMAC. These data, however, need to be interpreted cautiously, given that regional agricultural trade takes place mostly through informal channels and is not systematically recorded in statistical systems.

The analysis uses a "corridor approach" to understand current conditions at selected border crossings and in nearby assembly markets that shape CEMAC's competitiveness in food production and ability of Central African farmers to compete in their own regional market. The analysis focuses on staple commodities that are most relevant to poor producers and poor consumers and looks in detail at the performance of agriculture trade corridors to identify factors that either take away from the profits available to be paid to farmers and/or raise the prices paid by consumers. On the qualitative side, the report describes what happens at the border and types of constraints faced by large and small traders, men and women, who operate in the formal and informal economy. On the quantitative side, the report breaks down differences in commodity prices in buying and selling markets that are due to costs of licenses and trade permits, marketing fees, and official and unofficial charges associated with buying and selling agriculture commodities in the CEMAC region. The report draws conclusions based on four trade corridors: Cameroon–Gabon, Cameroon–Equatorial Guinea, Cameroon–the Central African Republic, and Cameroon–Chad.

The study concludes that there is substantial potential for regional trade to drive agricultural development and poverty reduction through increased farm revenues and lower food prices and, at the same time, to reduce food import bills and improve the balance of payments. Spread over more than 3 million km^2, the CEMAC region is endowed with a diverse climate and substantial land resources that make it particularly suited to the development of agropastoral activities. Nevertheless, about 45 percent of the population in the CEMAC zone suffers from undernourishment, and of these, 10 percent suffer from an extreme food deficit. Boosting regional trade in agricultural commodities would promote economic diversification, improve food security, and create jobs for vulnerable populations in CEMAC. Many agricultural products that could be produced within CEMAC are imported from the rest of the world. According to formal sector data (UN Comtrade 2017), rice, palm oil, and poultry are among the leading agriculture imports accounting for several hundred million dollars of trade annually. There is also known to be substantial amount of unrecorded cross-border trade of fresh vegetables and food staples including trade between CEMAC countries and non-CEMAC neighbors with good potential for expansion (Amin and Hoppe 2013; Nkendah 2013; World Bank 2013; WTO 2013). Allowing informal traders to flourish and gradually integrate into the formal economy would boost trade and the private sector base for future growth and development. Reducing trade costs would also promote lower consumer food prices, improving access to food and food security.

The potential of intra-regional agricultural trade in CEMAC is not being achieved primarily because of weak links between farmers and markets, poor market-related infrastructure, and high trade costs due to corruption along

Figure E.1 Price buildup for selected commodities on the Cameroon to Gabon corridor (percentage of final consumer prices)



Source: Estimated from data collected for this report.

key corridors. The study finds that intermediation costs along the trade corridor, at the destination, and including market access costs, are the most important cost driver, accounting for 42 percent of the final consumer price (see Figure E.1). Transport costs and petty harassment account for about a third of the final price, while production costs are only 20 percent. Border crossing costs on their own make up roughly 7 percent of the consumer price, and the producer's margin is just 3 percent. Intermediation costs are high, in part because producer organizations (POs) are generally established to facilitate production only, with very few organized for group sales or other commercial links, particularly with foreign value chain actors. Consequently, producers have little negotiating power while selling their production—a fact confirmed both by the survey and field observations. Infrastructure is another challenge. Short-distance transport costs, from the field to the nearest market, represent between 15 percent and 25 percent of the total production cost, depending on load size and perishability. Both short- and long-distance transport result in important losses due to the poor condition of the roads. Finally, all participants along the trade corridors identified petty harassments (*tracasseries*) as a major problem in Cameroon, at the border and in the neighboring CEMAC countries. Actual trading costs at the surveyed locations are consistently higher than official listed tariffs. The culture of petty harassment is so recognized, generalized, and institutionalized that market actors internalize these payments in the transport costs. There is an urgent need to make legitimate functions (such as vehicle weight limits and sanitary and phytosanitary [SPS] measures) more effective and efficient while eliminating *tracasseries*.

Coordinated action to increase the capacity of producer associations, invest in market facilities and warehouses, and remove harassment along corridors would have substantial economic impacts that would benefit producers and consumers on both sides of the border. Along transport corridors, solutions to eliminate petty harassment could reduce food prices by as much as 14 percent and—according to a computable general equilibrium (CGE) model prepared as part of the CEMAC Country Economic Memorandum—increase exports by 23 percent. The report's findings about marginal cost accumulations along selected trade corridors and perceived opportunities

to reduce these costs suggest five priority areas for intervention. The top two recommendations target market intermediation costs. Investment in developing regional agricultural trade needs to start from improving the market access of producers—both commercial and physical access. The third priority area targets reducing pervasive petty harassments (*tracasseries*). The fourth priority area is to reduce other transport costs, and the fifth is to improve border conditions. Although border costs appear to account for only 7 percent of the final consumer price, border posts serve multiple corridors and can be choke points for agricultural trade when products cannot get through at all. Details of the priority actions are set out in Table E.1.

Addressing these constraints will require strong political leadership to overcome the inevitable political economy resistance from those who extract rents from the current system at the expense of the poor. Enacting the recommendations in this report requires engaging with multiple stakeholders and identifying champions for each priority area. In general, there is significant national opportunity to facilitate regional trade because most agricultural trade costs accumulate before products reach the border. While regional cooperation is needed in strategic areas, most of the opportunities to improve agricultural trade within CEMAC rest in the hands of national or subnational actors.

The report is structured around a set of "key messages" that elaborate the main points described earlier. Those messages are as follows:

Producing and sourcing agriculture commodities in CEMAC

1. Agricultural production has the potential to meet the staple food demand in the CEMAC area.
2. Insufficient commercial organization of producers limits their negotiating power.
3. Poor-quality transport infrastructure is impeding market access both within Cameroon and to CEMAC countries.
4. The high number of intermediaries increases the transaction costs for agricultural trade.
5. Higher than expected price volatility leads to unpredictable returns.
6. Poor market management and infrastructure hamper commercial links.
7. Throughout the CEMAC region, valid trade functions are currently not exercised and as such have, de facto, become *tracasseries*.

Trading agriculture commodities in CEMAC

8. Unrecorded and informal trade in agricultural products is widespread.
9. Unclear application of trade regulations and customs rules leads to a multitude of formal and informal border costs.
10. Traders' responses to informality and *tracasseries* lead to a vicious circle of further informal practices.
11. Security risks and political crises are altering trade patterns and flows.
12. Women account for most domestic traders along agricultural trade corridors in CEMAC.
13. Final consumer prices in CEMAC reflect the costly and burdensome trade processes.

Table E.1 Top five priorities to promote agricultural trade in CEMAC

Priorities and measures	PAYOFF Low/ Medium/ High	TIME FRAME Short/ Medium/ Long	COST Low/ Moderate/ High	SCALE National/ Regional	TYPE OF SUPPORT Policy focus/ Investment focus
Priority 1: Reduce intermediation costs by linking farmers to markets					
(a) Strengthen market links between rural producers and urban consumers by					
• Working with POs to aggregate production and organize constant grouped sales	High	Medium	Moderate	National	Investment
• Supporting cross-border productive alliances or other direct commercial links between CEMAC regional traders and POs	High	Medium/ Long	Moderate	Regional	Investment
(b) Increase access to motorized transport in rural areas by					
• Introduction of leasing arrangements and other new financing mechanisms for transport service providers	Medium	Short	Moderate	National	Investment
Priority 2: Improve the efficiency of agricultural markets					
(a) Physical investments in market infrastructure including					
• Market stalls, secure storage, cold storage, loading docks, lighting, sanitation, and rest areas at strategic points on regional trade corridors	High	Short/ Medium	Moderate	National	Investment
(b) Promote competitiveness through inclusive market management and oversight by					
• Involving trader associations and other private users in development and management of public market spaces	Medium	Medium	Low	National	Mixed
• Initiating dialogue on and promotion of a service charter for market management	Medium	Medium	Low	National/ Regional	Mixed
(c) Increased access to market and trade information to promote competitiveness by					
• Training and awareness raising for sellers on market and price dynamics to improve interpretation and decision-making capabilities	Low/ Medium	Short/ Medium	Low	National	Investment
• Introducing market information systems that reduce dependence on informal networks for price discovery	Medium	Short/ Medium	Moderate	National	Investment
• Developing regional market information system to aggregate national systems, using information and communication technology (ICT) where possible	Medium	Medium/ Long	Moderate	Regional	Investment

(continued)

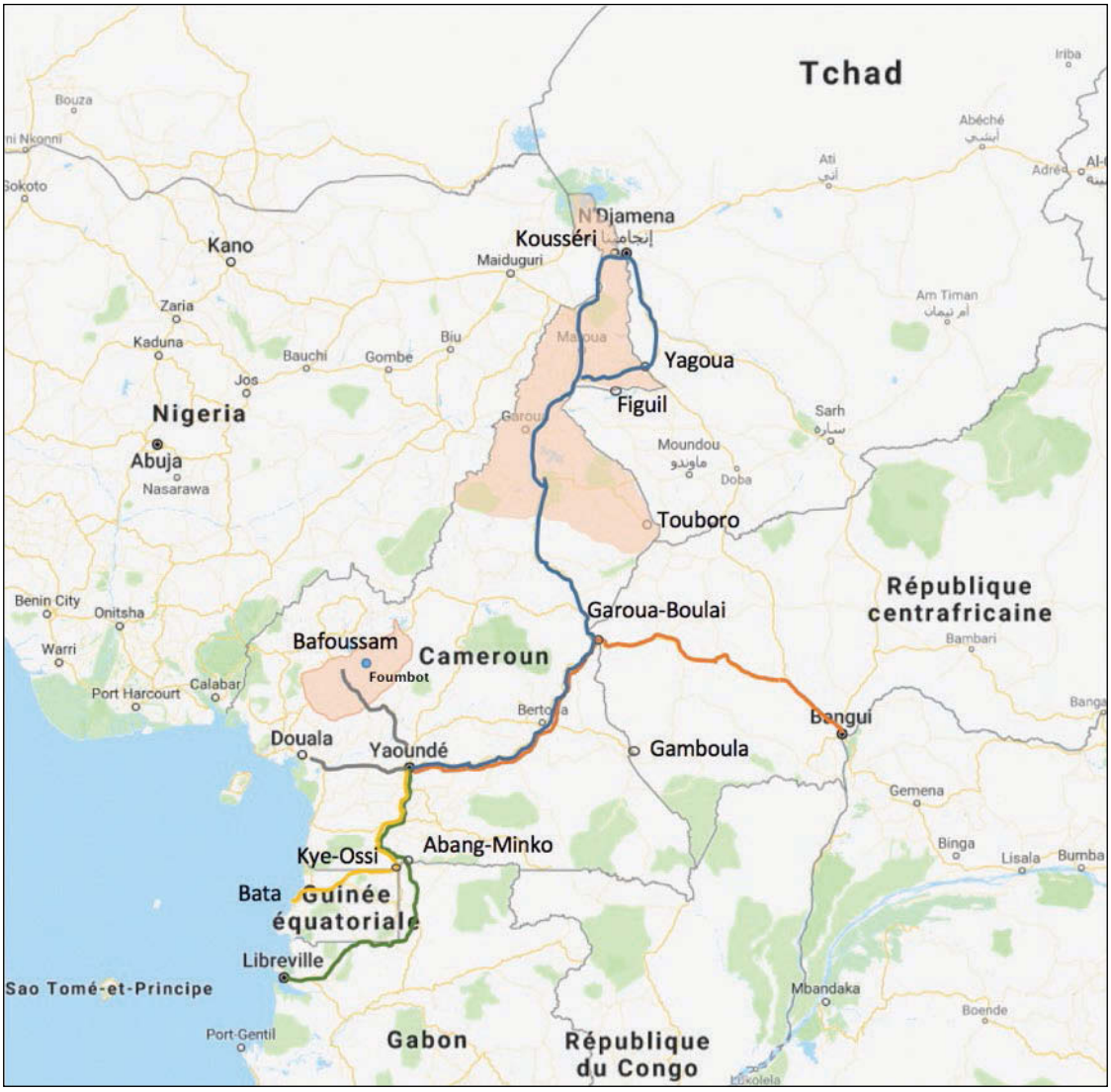
Priorities and measures	PAYOFF	TIME FRAME	COST	SCALE	TYPE OF SUPPORT
	Low/ Medium/ High	Short/ Medium/ Long	Low/ Moderate/ High	National/ Regional	Policy focus/ Investment focus
Priority 3: Professionalize behavior along the trade corridor					
(a) Build capacity of regulatory agencies to perform legitimate trade through					
• Functional review of key responsibilities and introduction of performance-based management systems	Medium	Short	Low	National	Investment
• Developing and implementing a training program for checkpoint officers around a code of conduct for professional behavior	Medium	Medium	Moderate	National/ Regional	Investment
• Reducing (rationalizing) the number of checkpoints along trade corridors	High	Medium	Moderate	National	Policy
• Upgrading legitimate checkpoints by building capacity to implement functions (such as SPS monitoring) and improving oversight using cameras or other modalities	High	Medium	Moderate	National	Investment
(b) Enlist corridor users to report abuse and corruption, by					
• Raising awareness of corridor users about legitimate checkpoints, fees, and functions	Medium	Short	Low	National/ Regional	Investment
• Reinforcing and/or introducing anticorruption hotlines *(numero vert)* by consistently addressing reports and rewarding good outcomes	Medium	Short	Low	National/ Regional	Investment
Priority 4: Strengthening regional transport links					
(a) Improve road maintenance and infrastructure by					
• Developing regional connectivity strategy for linking agriculture producers with demand centers	Medium	Short	Low	Regional	Investment
• Introducing performance-based management of weighbridges and other strategies for reliable and transparent enforcement of vehicle weight limits	High	Short/ Medium	Low	National	Investment
• Investing in road rehabilitation, construction, and maintenance planning	High	Short/ Medium	Moderate/ High	National	Investment
• Attracting investment in private truck parks (secure parking place, showers, and so on)	Medium	Short	Low	National	Investment
(b) Break up cartels and improve competitiveness of domestic and regional agriculture transport by					
• Developing a specific time-bound action plan for sector reform based on dialogue between transport operators and regional policy makers	Medium	Short	Low	National/ Regional	Investment
• Establishing a dedicated task force to implement the action plan and track progress toward agreed performance indicators	Medium/ High	Medium/ Long	Moderate	National/ Regional	Mixed
(c) Improve port access for regional traders by					
• Dredging of Quai Boscam and removal of shipwrecks blocking jetties	Medium	Short/ Medium	Moderate/ High	National	Investment
• Upgrading of other ports used by regional vessels as needed	Medium	Short/ Medium	Moderate/ High	National	Investment

(continued)

Table E.1 Continued

Priorities and measures	PAYOFF Low/ Medium/ High	TIME FRAME Short/ Medium/ Long	COST Low/ Moderate/ High	SCALE National/ Regional	TYPE OF SUPPORT Policy focus/ Investment focus
Priority 5: Improve border operations					
(a) Physical investments in border infrastructure such as					
• Lighting, paving, upgrading buildings, and digitizing records systems	Medium	Short	Moderate/ High	National	Investment
(b) Establish joint border committees including					
• National committees with a lead agency, such as customs, to improve coordination at each border post	Medium	Short	Low	National	Policy
• International committees to coordinate functions and regularize procedures between countries at shared border posts	Medium	Medium	Low	Regional	Policy
(c) Professionalize behavior of border officials and border users by					
• Introducing performance-based management systems around a service charter for border agencies	Medium	Short	Low	National	Mixed
• Training of border officials and border users in basic rights and obligations, including the benefits of regulatory compliance	High	Short	Low	National	Mixed
• Introducing toll-free hotlines for reporting corruption and abuse	Medium	Medium	Low	National	Investment
(d) Awareness raising of official regulations, fee structures, and border crossing requirements for border users through					
• Developing training materials and training programs for border officials and border users	Medium/ High	Short	Low	National/ Regional	Investment
• Producing publicity materials and user-friendly pamphlets with information on trade procedures and posting of all official charges in a conspicuous spot at every border post	Medium/ High	Short	Low	National/ Regional	Mixed
• Publicity campaign on the need for and benefits of regulatory compliance	Medium/ High	Short	Low/ Moderate	National/ Regional	Investment
(e) Rationalize trade requirements by					
• Adopting risk-based approaches to border inspection and compliance	High	Short	Low	National	Policy
• Reviewing SPS declaration requirements based on risk	Medium/ High	Medium	Moderate	National/ Regional	Mixed
• Eliminating mandatory border inspections and product certification requirements (including SPS certification) where import declaration conditions do not exist	Medium/ High	Medium	Low	National	Mixed
(f) Foster dialogue through the CEMAC Commission on the economic costs of unpredictable border closures. Review security controls with an eye to increasing trade opportunities	High	Ongoing	Low	Regional	Policy

Image E.1 CEMAC zone, including main production areas in Cameroon, selected trade corridors, and border posts covered by this study



Source: Map data © 2018 Google, ORION-ME.

1. Introduction

Despite the region's vast potential for agriculture production and trade, the agriculture sector in the Central African Economic and Monetary Community (*Communauté économique et monétaire d'Afrique centrale,* CEMAC) remains largely underdeveloped. Crude petroleum accounts for 86 percent of CEMAC's exports, making the economies in CEMAC vulnerable to commodity cycles and falling oil prices to the point where the region now faces a major fiscal crisis. Across the region, agricultural imports represent close to one-fifth of the total import bill with Cameroon and the Republic of Congo each importing over US$1 billion worth of agricultural products in 2015. Importantly for the people of CEMAC, the pattern of petroleum-dependent development has led to very unequal growth with high poverty rates in all countries, particularly in rural areas. Undernourishment affects a substantial proportion of the CEMAC population, which is made worse by political fragility and violence in several countries of the region.

Price volatility due to high trade costs and trade obstacles impedes the agri-food sector in CEMAC. World Bank research on regional trade in Africa shows that African countries are globally handicapped by disproportionately high trade costs, arising from poor connectivity, abundance of formal and informal barriers, and transport markets where competition is limited and productivity is very low. These barriers affect small farmers and agriculture traders particularly hard whereby sudden policy changes and regulations that are difficult to follow limit the movement of goods from surplus to deficit areas and impose unnecessary costs that result in lower prices for farmers and higher prices for consumers. For farmers and traders dealing in perishable goods, the costs can be particularly high.

This study supports CEMAC countries in their efforts to diversify their economies through increased agricultural trade. The report aims to answer three broad questions as follows: (a) what is the potential for increased regional agriculture trade; (b) what is holding back this potential; and (c) what kind of investments and policy reforms could help CEMAC countries realize this potential. The study focuses on regionally traded food staples such as maize, livestock, tomatoes, and plantain that are relevant to poor producers and poor consumers, so that the recommendations would be most relevant to poverty reduction and income growth for the bottom 40 percent.

Findings focus on the costs and constraints associated with large- and small-scale agriculture trade, including procedures faced at the border and in nearby assembly markets. Previous studies, such as those by Amin and Hoppe (2013), Nkendah (2013), and World Bank (2013), indicate that most regional agriculture trade in CEMAC takes place through informal channels and is not recorded in official trade statistics. Relatively little, however, is known about how these systems operate in the CEMAC region and specific challenges large and small traders face in accessing neighboring country markets in this part of Africa.

This analysis uses a "corridor approach" to understand current conditions at selected border crossings and in nearby assembly markets that are important to regional agriculture trade in CEMAC. The study focuses on understanding trade conditions for staple commodities that are most relevant to poor producers and poor consumers by following commodities through six points on the supply chain: farm, immediate market,

collection market, urban market, border market, and foreign market. By looking in detail at the performance of agriculture trade corridors in this way, it is possible to identify factors that either take away from the profits available to be paid to farmers and/or raise the prices paid by consumers. On the qualitative side, the report describes what happens at the border and types of constraints faced by large and small traders, men and women, who operate in the formal and informal economy. On the quantitative side, the study breaks down differences in commodity prices in buying and selling markets that are due to costs of licenses and trade permits, marketing fees, and other official and unofficial charges associated with buying and selling agriculture commodities in the CEMAC area. The report draws conclusions based on four trade corridors: Cameroon–Gabon, Cameroon–Equatorial Guinea, Cameroon–the Central African Republic, and Cameroon–Chad.

Cameroon is by far the largest producer and exporter of agricultural products at present. With the notable exception of Chad, other CEMAC countries export virtually no agricultural products to Cameroon while importing significant quantities from Cameroon. Therefore, the approach of the report has been to focus on agricultural trade corridors originating in Cameroon, which is not to disregard the other CEMAC countries that have the potential to benefit from increased trade integration. It is noteworthy to entertain the idea that in corridors studied by this report, were the flows to be reversed, the magnitude of the trade costs would be similar, as well as the nature of burdensome procedures. Therefore, the present analysis (particularly in terms of border crossing, transport, and petty harassment) can be extrapolated with a good degree of confidence to a future increase in CEMAC to Cameroon trade flows.

A significant part of the qualitative and quantitative information is derived from direct field observations during two field missions in Cameroon and the border areas of the neighboring countries. The first mission focused on data collection at the most important border crossing points between Cameroon and Gabon, Equatorial Guinea, and the Central African Republic. The second mission started in the production areas in Cameroon's western region and continued to the northern regions, tracing the main blocks of Cameroon–Chad trade corridors. Further information was collected in Yaoundé and Douala from public authorities and private actors involved in agricultural trade.

To collect primary data on the experience of traders and transporters engaged in agricultural trade in CEMAC, the study commissioned a data collection exercise in which university students joined truck rides from Cameroon to the neighboring CEMAC countries (Gabon and Equatorial Guinea). The purpose of the trips was to record the number of checkpoints, their delays, and costs (formal and informal), as well as the border crossing procedures. The students travelled on medium and large trucks with mixed agricultural goods, collecting information on both legs of the journey (though most often the trucks returned empty). A total of 10 trips were conducted in late 2017 and early 2018 and included the following routes: Foumbot-Douala, Foumbot-Kye-Ossi/Abang-Minko, Kye-Ossi-Bata, and Abang-Minko-Libreville. Selected insights are presented throughout the report.

To complement the field data collection efforts, the present report also commissioned a perception survey of the different actors engaged in agricultural trade in CEMAC: producers, traders, and border users at Cameroon–Equatorial Guinea, Cameroon–Gabon, and Cameroon–the Central African Republic main crossing points. The focus of the survey was on broad perceptions on agricultural marketing processes, with answer options on a scale of 1 to 5 from strongly agree to strongly disagree (plus "I don't know" and "not applicable" options) and one open-ended question for each tier on ideas for improving the commercialization

of agricultural products. The overall sample size of 463 randomly selected respondents allowed for all modules (except for the Cameroon–Equatorial Guinea pair, where the closed border made it difficult to identify respondents) to indicate interesting perceptions that matched well the findings from the field visits and truck rides. Selected insights are presented throughout the report.

The report is organized around 13 findings that cover production, sourcing, and trade. The final section lists recommendations and areas for potential investment and policy reform that can help the region achieve its trade integration ambitions in the service of food security, agricultural development, and economic diversification.

2. CEMAC and Regional Integration in Central Africa

Upon gaining their independence from France, the nations of Central Africa embarked on a journey of economic integration that culminated with the signing of the CEMAC Treaty in 1994. This process began in 1959, when four members of the former Federation of French Equatorial Africa *(Federation de l'Afrique Equatoriale Française),* the Central African Republic, Chad, the Republic of Congo, and Gabon, signed a convention establishing the Equatorial African Customs Union (*Union Douanière Equatorial*, UDE). In 1964, the customs union was expanded when Cameroon and the UDE joined the Customs and Economic Union of Central Africa (*Communauté économique et monétaire de l'Afrique centrale,* UDEAC), eventually joined by Equatorial Guinea in 1983. Economic crises in the 1980s created momentum for furthering economic integration, leading to the establishment of CEMAC in 1994, which called for the creation of a common market and monetary union. However, it is only in 1999 that CEMAC became effective and replaced the UDEAC.

The new treaty established two unions, the *Economic Union of Central Africa* (*Union Économique de l'Afrique Centrale*, UEAC) and the *Monetary Union of Central Africa* (*Union Monétaire de l'Afrique Central*, UMAC), to fulfil the objectives of CEMAC. Together, these two unions aim to (a) set up a multilateral device for monitoring economic and financial policies in their member states; (b) manage the common currency; (c) create a safe environment for economic activity; (d) harmonize the regulations of sectoral policies; and (e) create a common market for goods, services, capital, and people.

In 2008 CEMAC was reformed to move from interstate cooperation to supranationalism. While the revised treaty maintained the institutions in place, it furthered the power of the institutions and converted the secretariat into a commission, echoing a similar move by the West African Economic and Monetary Union (*Union économique et monétaire ouest-africaine,* UEMOA) in 2006. It further established a Community Parliament and Community Court of Justice for CEMAC.

Today the members of CEMAC comprise Cameroon, the Central African Republic, Chad, the Republic of Congo, Equatorial Guinea, and Gabon, representing a market of 48.5 million people (Table 1). The region represents more than 3 million km^2 and is rich in natural resources. The abundance of water and grazing land makes the region particularly suitable for agropastoral activities. Nevertheless, the region's potential has materialized in uneven rates of growth in recent years. The availability of hydrocarbon resources has contributed to uneven levels of development within the bloc. Although all CEMAC countries apart from the Central Africa Republic and Chad are classified as middle income, gross domestic product (GDP) per capita figures mask a high degree of income inequality with poverty still being a widespread problem in rural and urban areas.

Despite CEMAC's agricultural potential, oil remains the main source of revenue for most of its member states. Besides Cameroon, all the economies in the region are highly dependent on oil, which accounts for 18 percent of CEMAC's

Table 1 CEMAC at a glance, 2017

Country	GDP (US$ billion, current prices)	Population (millions)	GDP per capita (US$, current prices)	2017 GDP growth (% change)	Average GDP growth 2012–2016 (%)
Cameroon	30.7	24.3	1,263	4.0	5.3
Central African Republic	2.0	5.0	400	4.7	−4.4
Chad	9.7	12.2	799	0.6	3.4
Congo, Rep.	7.8	4.3	1,794	−3.6	2.7
Equatorial Guinea	10.1	0.8	11,948	−7.4	−3.1
Gabon	14.5	1.9	7,584	1.0	4.2
CEMAC	**74.7**	**48.5**	**1,539**	**2.2**	**3.4**

Source: International Monetary Fund, World Economic Outlook Database, October 2017.

GDP and 66 percent of its export revenues (see Table 2).

The region has been strongly affected by the fall in oil prices. Growth in the region fell from 1.6 percent in 2015 to 0.2 percent in 2016, before rebounding to 2.2 percent in 2017. Still, these growth figures hide strong disparities in the region: in 2017, Equatorial Guinea and the Republic of Congo faced recessions, while the Central African Republic and Cameroon experienced strong economic growth of 4.7 percent and 4.0 percent, respectively. In addition, the low oil prices affect the trade balance of the community, with a deficit of 15 percent in both 2015 and 2016 (Banque de France 2016).

Agricultural value added as a share of GDP varies widely in the region, from a mere 2.6 percent of GDP value added in Equatorial Guinea to 50 percent in Chad. Only two countries derive a significant share of their value added from agriculture, Chad (50 percent) and the Central African Republic (43 percent). In the other countries, the shares of agriculture in GDP are below 20 percent, with Cameroon at 17 percent (2016 data, World Bank World Development Indicators).

Agriculture employs a large share of the population in most CEMAC countries. More than half of the population is employed in agriculture in Cameroon, the Central African Republic, and Chad (62 percent, 72 percent, and 77 percent, respectively), and 41 percent of people work in agriculture in the Republic of Congo. Agriculture represents a smaller share of employment in Equatorial Guinea (19 percent of employment) and Gabon (16 percent of employment) (2017 data, World Bank World Development Indicators).

The region exports a wide variety of agricultural products, with cash crops exported outside CEMAC playing an important role. Cameroon is

Table 2 The oil sector in the CEMAC region, 2016

Country	Production (million tons)	Growth of production	Oil sector, % of GDP	Oil sector, % of exports
Cameroon	4.7	−4.3	4.0	28.0
Chad	6.5	−10.8	10.7	88.1
Congo, Rep.	11.4	−1.8	36.5	79.9
Equatorial Guinea	10.2	−18.6	44.7	97.2
Gabon	11.5	−3.5	25.2	58.7
Total	**44.3**	**–7.7***	**18.0***	**66.2***

Source: Banque de France 2016.

*Denotes regional average.

a strong exporter of cocoa, fruits (pineapples and guavas), and chicken. The Central African Republic mostly exports vegetables to non-CEMAC countries in Africa. The Republic of Congo exports tea and coffee (although with a large yearly fluctuation in coffee exports) (UN Comtrade).

Trade in agriculture in the region is governed by the instruments establishing the UEAC, which provide for a common market for agricultural products through several measures:

- The removal of domestic customs duty and nontariff barriers
- The establishment of a common policy toward third-party countries
- The establishment of competition policies, notably regarding state aid
- The implementation of the principle of the free movement of people, services, and capital
- The harmonization and recognition of technical standards and certification procedures

2.1 Trade integration in CEMAC

While the monetary component of regional integration has succeeded in stabilizing inflation and exchange rates, the free movement of goods, people, and services remains problematic in CEMAC (WTO 2013). It was initially planned that the free trade area envisaged in the 1994 treaty would materialize by 1998, with the introduction of zero-rated preferential tariff on intra-community trade. In practice, the free movement of goods is still not applied universally and uniformly, particularly as "*libre pratique*" (the free circulation once officially introduced into the community) provisions are not implemented by the member states. Goods imported from noncommunity countries and cleared by a CEMAC member country are taxed again when they are introduced into other CEMAC countries. For the moment, there are no provisions in the CEMAC Treaty to avoid double taxation of trade, a seeming step back from the UDEAC provisions. In relation to noncommunity trading partners, a Common External Tariff (with five rates: 0 percent, 5 percent, 10 percent, 20 percent, and 30 percent) has been adopted, but the member countries often adopt unilateral exceptions and suspension measures.

The transit regime complicates trade integration policies in CEMAC. Two members (the Central African Republic and Chad) are landlocked and significantly dependent on transit from the port of Douala in Cameroon, while the other members' national systems are not harmonized to provide a redistribution of import levies when goods are introduced in the community. The importance of customs levies to national budgets is significant in each of the CEMAC countries, creating pressure to tax at each border until a compensatory or revenue distribution system is effectively in place. Efforts to streamline community transit and compensatory mechanisms have been tried on paper; the systems that work in practice have often been introduced and implemented bilaterally (for example, between Cameroon and the Central African Republic on checkpoints along priority corridors).

Thus, the provisions for intra-community trade (mostly in agricultural products) are unclear and the application of the free circulation principles is uneven. As the rest of the report details, border crossing processes for intra-community agricultural goods vary significantly from one border post to another, both in terms of procedures and costs. Even if tariff measures have been difficult to pinpoint in the available legislation and throughout the sample of border posts included in this analysis, there are many nontariff costs, often levied by customs authorities themselves, which play a similar trade-limiting role as a tariff. In addition, intra-community trade is also negatively affected by the insufficient application of the free movement of persons in CEMAC, which has so far been fully effective only in Cameroon, the Republic of Congo, the Central African Republic, and Chad. Gabon and Equatorial Guinea are limiting access to CEMAC citizens on grounds of security issues (the most recent example being the closure of the

Cameroon–Equatorial Guinea border in January–February 2018, following a failed coup d'état in the latter country). Still, some limited duration and distance access for foreign traders is available at the border crossing points visited in the southern part of Cameroon.

2.2 Regional trade in agriculture

Despite the political drive for regional integration, intra-regional trade remains low. For CEMAC member states, exports within CEMAC account for only 2.1 percent of total exports, and imports for only 3.9 percent of total imports, according to official statistics. This compares to 15 percent of exports and 11.5 percent of imports in 2010 for the UEMOA trade community. Explanations for this low regional trade integration include the preponderance of oil in the region's export basket, the weakness of manufacturing sectors in these countries, and the more informal nature of intra-regional trade, which means that inter-CEMAC trade is less likely to be recorded in official statistics.

CEMAC demand for agricultural products is increasingly being met from outside the region (Table 3). In all the member states of the community, more than 95 percent of agricultural exports went to the third countries (rest of the world [ROW]) in 2015 and more than 75 percent of agricultural imports came from the ROW. According to official statistics, agricultural exports remained rather constant between 2004 and 2015, ranging between US$1,395 million in 2006 and US$2,324 million in 2009, before decreasing to US$2,047 million in 2015, while imports increased by 174 percent from 2004 (US$1,471 million) to 2015 (US$4,033 million). This suggests that the increase in demand for agricultural products was met mostly by the ROW. Indeed, agricultural imports from the ROW increased by 179 percent between 2004 and 2015, compared to an increase of imports from CEMAC countries of only 41 percent.

According to formal trade data, Cameroon is the leading exporter of agricultural goods within CEMAC (US$13 million in 2015). The main exports according to these data are milled rice, soups and broths, mineral water, and other preparations. The

Table 3 Agricultural exports by destination (percentage)

Country	Region	% Agricultural Exports											
		2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
CAF	CEMAC	0.2	n/a	n/a	4.6	3.0	6.2	2.4	3.8	n/a	0.1	n/a	1.7
CAF	ROW	99.8	100.0	100.0	95.4	97.0	93.8	97.6	96.2	100.0	99.9	100.0	98.3
CMR	CEMAC	1.9	2.8	1.9	3.2	3.3	1.8	1.0	0.7	0.7	0.5	0.8	0.7
CMR	ROW	98.1	97.2	98.1	96.8	96.7	98.2	99.0	99.3	99.3	99.5	99.2	99.3
COG	CEMAC	16.7	28.4	28.0	14.2	28.3	22.0	0.7	1.0	n/a	0.2	2.9	3.9
COG	ROW	83.3	71.6	72.0	85.8	71.7	78.0	99.3	99.0	100.0	99.8	97.1	96.1
GAB	CEMAC	8.6	8.8	12.4	39.5	64.7	79.4	90.5	69.2	68.8	58.1	9.6	4.4
GAB	ROW	91.4	91.2	87.6	60.5	35.3	20.6	9.5	30.8	31.2	41.9	90.4	95.6
GNQ	CEMAC	0.7	0.0	0.1	0.8	0.9	0.7	0.1	0.0	0.0	8.3	9.9	0.3
GNQ	ROW	99.3	100.0	99.9	99.2	99.1	99.3	99.9	100.0	100.0	91.7	90.1	99.7
TCD	CEMAC	1.3	0.0	0.1	0.2	0.1	0.1	1.9	1.1	0.7	0.5	0.0	1.4
TCD	ROW	98.7	100.0	99.9	99.8	99.9	99.9	98.1	98.9	99.3	99.5	100.0	98.6

Source: UN Comtrade.

Note: CAF = Central African Republic; CME = Cameroon; COG = Republic of Congo; GAB = Gabon; GNQ = Equatorial Guinea; TCD = Chad; ROW = Rest of World; n/a = no recorded trade; 0.0 = less than 0.1 percent.

Republic of Congo exported US$2 million worth of agricultural products to CEMAC in 2015, mostly sugarcane and its derivatives. The other countries of the CEMAC region, the Central African Republic, Chad, Equatorial Guinea, and Gabon, exported less than US$1 million worth of agricultural products to their CEMAC partners.

However, these data need to be interpreted cautiously, as official statistics do a poor job of recording regional trade in agriculture. For various reasons discussed throughout this report, regional agriculture trade takes place mostly through informal channels and is not systematically recorded in national data systems. According to one study of informal trade (Nkendah 2013), just over 155,000 tons of otherwise unrecorded agricultural and horticultural commodities were shipped from Cameroon to its CEMAC neighbors in 2008, with an estimated value of almost Central African CFA Franc (CFAF) 38 billion (around US$85 million using an average 2008 exchange rate) representing 0.4 percent of Cameroon's recorded GDP. The underreporting of agriculture trade is also reflected in official data on imported goods. For instance, the top 10 recorded food imports for Equatorial Guinea include chewing gum, sweets, and chocolate, which surely reflects the more systematic recording of imports that arrive from outside the region through major air and sea ports than a local diet based largely on sweets.

2.3 Regional food security situation

About 45 percent of CEMAC's population suffers from undernourishment, and of these, 10 percent suffer from an extreme food deficit[1] (CEMAC 2009) (see Table 4 and Figure 1). Insufficient trade integration reduces the overall accessibility of food in the region, leading to even higher imports from the ROW. Undernourishment is most prevalent in the Central African Republic and Chad, where 58.6 percent and 32.5 percent of people, respectively, are malnourished, but it is rather low in Gabon and Cameroon. Child stunting is more homogenously prevalent across the community, ranging from 17.5 percent of stunting in Gabon to 40.7 percent of stunting in the Central African

Table 4 Key food security and nutrition indicators in CEMAC

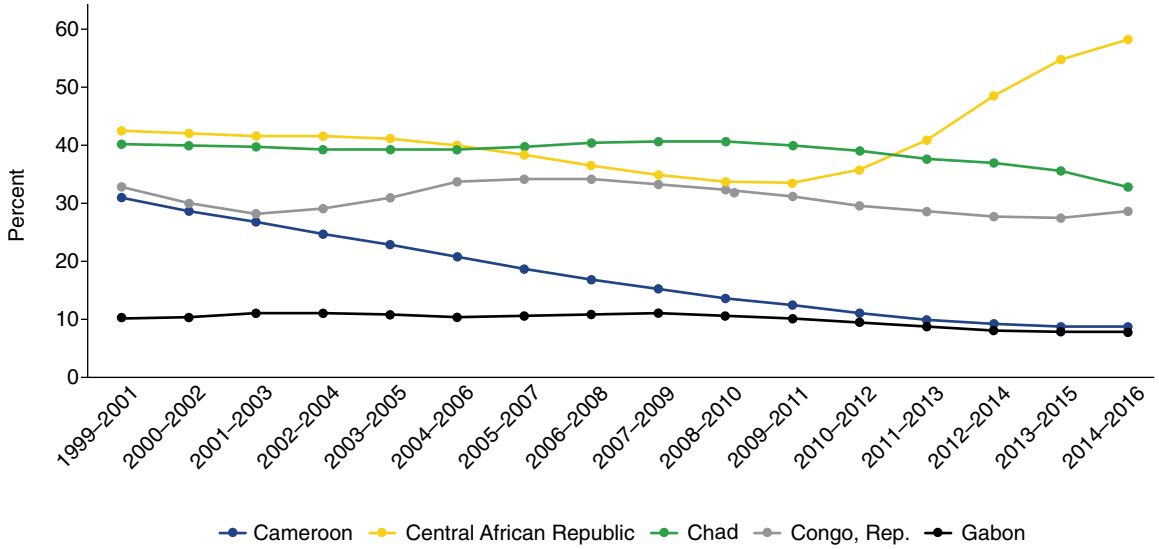
Country	Prevalence of undernourishment in the total population (%)		Prevalence of severe food insecurity in the total population (%)	Prevalence of wasting in children (< 5 years, %)	Prevalence of stunting in children (< 5 years, %)		Prevalence of overweight in children (< 5 years, %)		Prevalence of obesity in the adult population (> 18 years, %)		Prevalence of anemia among women of reproductive age (15–49 years, %)		Prevalence of exclusive breastfeeding among infants (0–5 months, %)	
	2004–06	2014–16	2014–16	2016	2005	2016	2005	2016	2005	2014	2005	2016	2005	2015
Equatorial Guinea	n/a	n/a	n/a	3.1	35	26.2	8.3	9.7	8.2	13.3	48.0	43.7	n/a	7.4
Gabon	9.7	7.0	n/a	3.4	n/a	17.5	n/a	7.7	10.5	13.6	57.8	59.1	n/a	6.0
Cameroon	20.2	7.9	27.6	5.2	35.4	31.7	8.7	6.7	5.6	8.6	45.3	41.4	23.5	28.2
Central African Republic	39.9	58.6	n/a	7.1	45.1	40.7	8.5	1.8	2.6	4.1	49.0	46.0	23.1	34.3
Chad	39.2	32.5	n/a	13.0	44.8	39.9	4.4	2.5	3.2	5.5	51.1	47.7	2.0	0.3
Congo, Rep.	33.4	28.2	n/a	8.2	31.2	21.2	8.5	5.9	5.4	8.2	57.9	51.9	19.1	32.9

Source: FAO 2017.

Note: n/a = not applicable.

[1]Less than 300 calories per person per day.

Figure 1 Prevalence of undernourishment (percentage) (three-year average)



Source: FAOSTAT.

Republic. Obesity affects only small proportions of the population in CEMAC, with the exceptions of Equatorial Guinea and Gabon, where the reliance on imported processed food leads to obesity rates higher than 13 percent.

Food insecurity in Cameroon is mostly contained to rural areas and, more specifically, the north of the country (WFP 2017a). Around 16 percent of households are estimated to be food insecure (3.9 million people), of which 1 percent are severely food insecure (around 211,000 people). Food insecurity is mostly concentrated in rural areas, with more than 22 percent of rural households being food insecure, compared to 10.5 percent of urban households. The regions of the Great North have historically been most exposed to food insecurity. At a national level, 30 percent of people spend more than 75 percent of their expenditure on food, but this figure is driven upward by the northern regions, where the share of people spending more than 75 percent of their expenditure on food are 54.2 percent for the Far North, 41.8 percent for Adamawa, and 43.5 percent for the North.

The Central African Republic is slowly rebuilding its economy and reestablishing stability following a conflict that had disastrous consequences for the population (WFP 2015). The country has the second to lowest level of human development in the world (UNECA 2017), notably because of the conflict. Poverty is widespread in the country; it has the lowest Human Development Index (HDI) in the world, and about half of the population are facing food insecurity, 2.5 million people. Central African authorities and the United Nations estimate that 70 percent of the population live below the poverty line in 2015. Nearly half of the poor live in urban areas, while in rural areas, 7 out of about 10 live below the poverty line, especially in households headed by small farmers and artisans. In addition, women are more affected by the phenomenon, with approximately 77 percent of them experiencing poverty (UNECA 2017). The level of violence is still high, and rebel groups control parts of the country, which continues to experience sporadic surges of violence; around 600,000 people were forced to move to other parts of the country to escape conflict.

Chad suffers from widespread poverty and food insecurity (WFP 2017b). Chad is ranked 185 out of 188 countries, according to the 2015 United Nations Development Programme (UNDP) HDI. Many Chadians still face severe deprivation, with most of the Millennium Development Goals not

met by 2015. Between 2003 and 2011, the national poverty rate fell from 55 percent to 47 percent. However, with this current economic and financial crisis, poverty could increase. The absolute number of poor is projected to rise from 4.7 million to 6.3 million between 2012 and 2019 (World Bank 2017a). People depend on farming and livestock, but agriculture is challenging as the El Niño weather phenomenon is making rainy seasons unpredictable. The rural population is vulnerable, with 87 percent of the rural population living below the poverty line. In addition, 40 percent of children under five are stunted, according to the FAO (2017), with low height for their age caused by chronic malnutrition. The level of maternal health is poor, with high mortality rates due to inadequate access to health services.

An influx of hundreds of thousands of refugees fleeing conflict in neighboring countries has put additional pressure on Chad's already limited resources. Refugees, displaced people, and other poor communities in the Lake Chad basin are dependent on humanitarian assistance for survival.

The Republic of Congo's Human Development Index (HDI) rating is high by regional standards, but it masks unequal wealth distribution and high poverty rates (UNDP, 2014). Nearly half the population lives below the poverty line and 14 percent of families are food insecure. In addition, 24 percent of children under five are chronically malnourished, and malnutrition has remained the fifth leading cause of premature death for a decade. Food production is based on subsistence farming of tubers and cassava, and while they are calorific, these crops have limited nutritional value. The Republic of Congo's food supplies are highly dependent on imports, with more than 75 percent of total food requirements being imported. In the past 25 years, the proportion of land used for farming has risen only minimally, notably because of the lack of infrastructure, while the population has almost doubled. As a result, the country is unable to keep up with the increased demand for food. Poverty is predominantly a rural phenomenon, the depth and severity of poverty has increased, and the number of poor grew to 951,000 in 2011 from 795,000 in 2005. In addition, urban poverty remains important, especially in Brazzaville. In rural areas, 7 out of 10 (69.4 percent) people are poor; 57.4 percent of poor people live in rural areas. Nationally, despite population growth between the two years, the number of poor decreased to 1,658,000 in 2011, down from 1,801,000 in 2005 (World Bank 2017b).

This dependence on expensive imported products, often in processed forms, has negative implications on food security and nutritional quality in Equatorial Guinea and Gabon. Gabon is 109 in terms of the HDI out of 188 countries. Gabon's performance in terms of human development is still far from its economic potential, with a poverty rate in 2014 estimated at 30 percent of the population (UNDP 2014). In Equatorial Guinea, because imported products sold in supermarkets are expensive, only 20 percent of the population can cover 100 percent of their daily nutritional needs in terms of calories and protein. According to the national authorities, in 2006, 76 percent of the population were living in poor conditions (less than CFAF 1,000 per day) (República de Guinea Ecuatorial and FAO 2012). Both Equatorial Guinea and Gabon are dependent on food imports, enabled by high revenues from oil production, that mostly come from Spain and France, the formal colonial powers. Consequently, these countries are affected by both undernutrition (malnutrition deficiency) and hyper nutrition (malnutrition by excess).

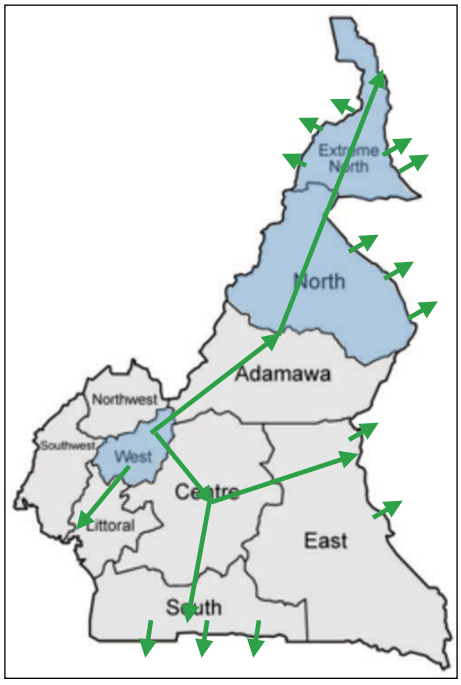
3. Producing and Sourcing Agricultural Commodities in CEMAC

This section focuses on the production, marketing, and sourcing of agricultural commodities from Cameroon to the other CEMAC countries. The focus is mostly up to the border to understand the production aspects, immediate marketing, and the intermediaries along the main channels and corridors through which agricultural products are sourced from Cameroon, as well as the main bottlenecks and costs that play a role before commodities reach the border.

The main production and marketing insights are derived from two geographic regions of Cameroon (see Image 1). The Western Administrative Region represents an important and dynamic production area for commodities traded in the CEMAC area and Nigeria, such as plantain (which is also produced in abundance in Southwest, Central, and Littoral Administrative Regions), avocado, tomato, maize, poultry meat, and eggs. The northern part of Cameroon (consisting of the North and Far North Administrative Regions) is another focus area because of its importance in producing dry cereals, groundnuts, and pulses and its geographical position for agricultural trade and livestock transit between Chad, the Central African Republic, and Nigeria.

The main messages are developed from the field observations, the perception survey, and the truck rides along the main corridors, as well as secondary literature and data. The findings relate to CEMAC's agricultural performance and potential, the shortcomings of producer organizations (POs) in trading, transport issues, the main marketing channels (including actors and institutions),

Image 1 Cameroon's regions and main selected agricultural trade flows



Source: Atlas of Cameroon.

price volatility, market management, and petty harassment (*tracasseries*) within Cameroon, as well as other factors that affect the prices paid to farmers and the way farmers access different markets.

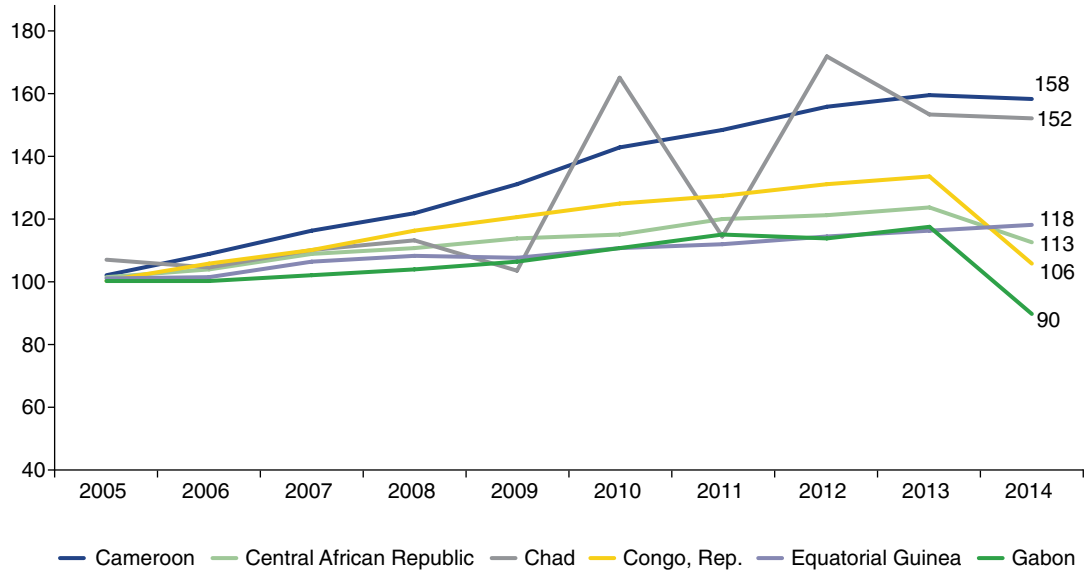
3.1 Agricultural production in CEMAC has the potential to meet regional staple food demand

With population growth and rising urbanization in most countries, food demand in CEMAC is growing rapidly. Financial constraints imposed by lower hydrocarbon prices, as described in the previous section, are impeding countries' ability to meet this increasing food demand. The CEMAC countries have made good progress in the recent decade in terms of increasing their domestic food production, as exemplified in Figure 2, including both crops and livestock.

In per capita terms, historical gains in agricultural production are insufficient to meet CEMAC's demand. As Figure 3 illustrates, over the last decade, food production has increased significantly in Cameroon, even when accounting for population growth. Chad, the Central African Republic, and the Republic of Congo have also expanded their production relative to their population, while Gabon and Equatorial Guinea's agricultural growth rates have not sufficiently matched their population increases. Cameroon's progress is largely due to the increase in cereals production through the expansion of the area under cultivation (more than doubling between 2005 and 2014, while yields have mostly stagnated). The net per capita production in the other food sectors has improved as well, apart from livestock for which growth has kept the pace with population increase.

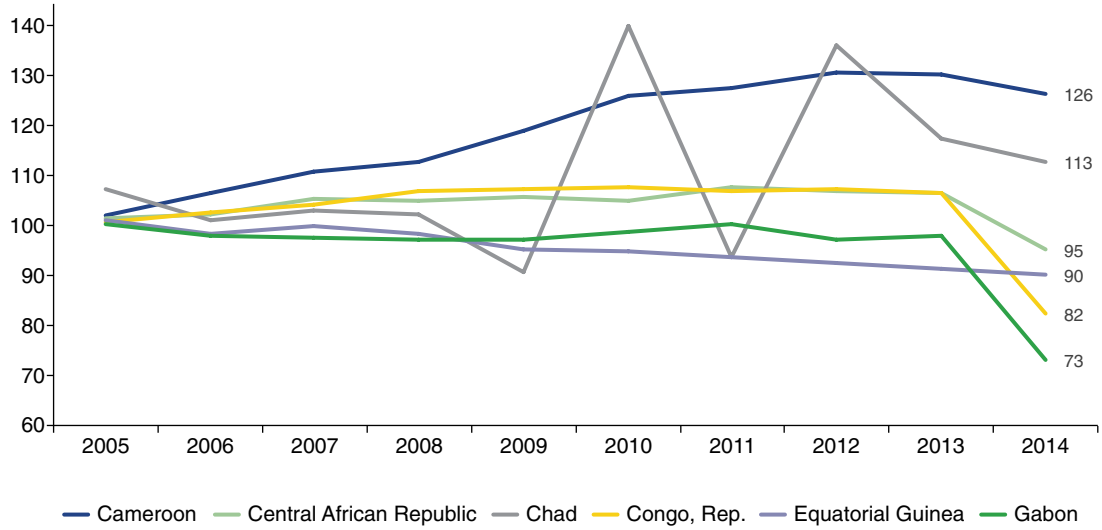
Thus, Cameroon's agroecological endowment, gains in productivity, and importance of the agricultural sector in the overall economy explain its current role as the food supplier of the CEMAC region, as well as demonstrate the potential for further expansion. Cameroon's importance for food production in CEMAC has also increased in terms of value and share in the region. In correlation with the production gains, Cameroon has also constantly increased the value of its net food production, which accounts for almost two-thirds of CEMAC's total, as shown in Figure 4. Apart from livestock, Cameroon has the highest production

Figure 2 Net food production index (2004–2006 = 100)



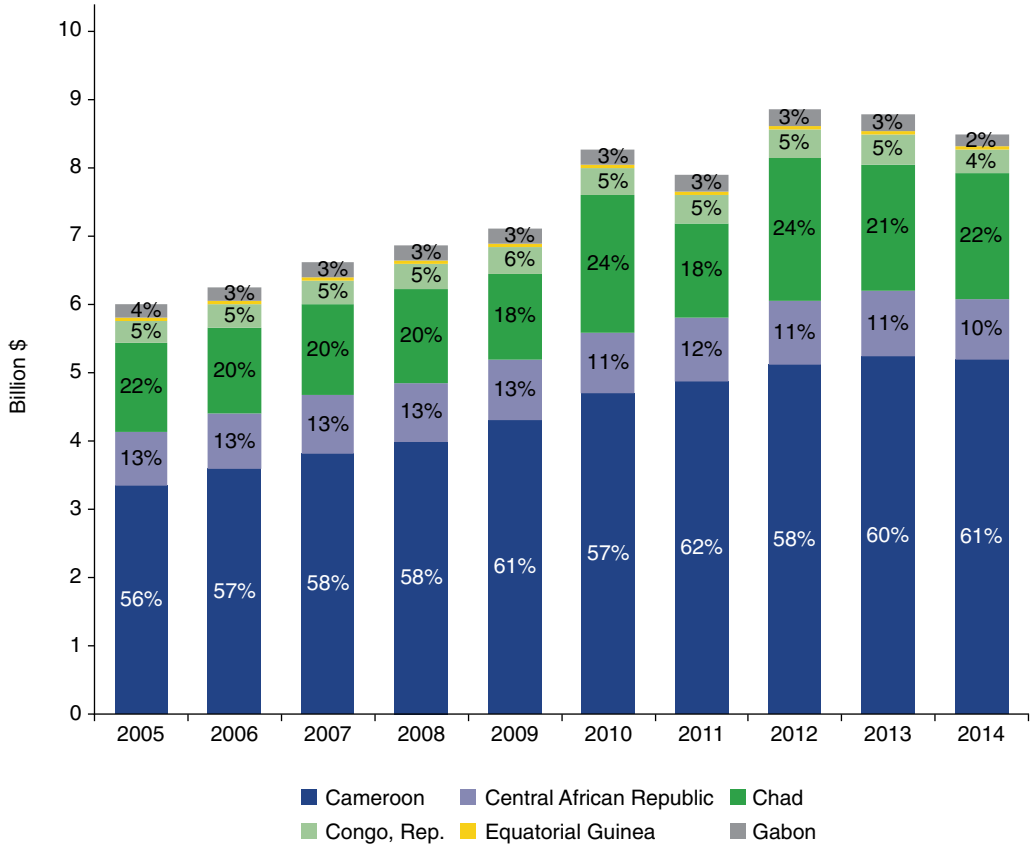
Source: FAOSTAT.

Figure 3 Net per capita food production index (2004–2006 = 100)



Source: FAOSTAT.

Figure 4 Net production value (constant 2004–2006 US$)



Source: FAOSTAT.

value levels per capita for all the different food subsectors, including for cereals, on par with Chad.

Cameroon's agricultural production patterns are explained by a wide range of agroecological zones, allowing the cultivation of 14 major crops, the highest in CEMAC. Cameroon has five major agroecological zones: the inland equatorial forest, the maritime equatorial forest, the highland tropical, Guinea-savannah, and Sudan-savannah. This subset of zones represents most of the agroecological zones within which small-scale food production is done in Sub-Saharan Africa. In comparison, the climate conditions in the other CEMAC countries make it difficult to cultivate a wide range of food crops: in the more humid countries in the south (Gabon, Equatorial Guinea, and the Republic of Congo), dry cereals production is limited (the Central African Republic is in a similar situation), while for Chad in the north fruit and vegetable production is difficult.

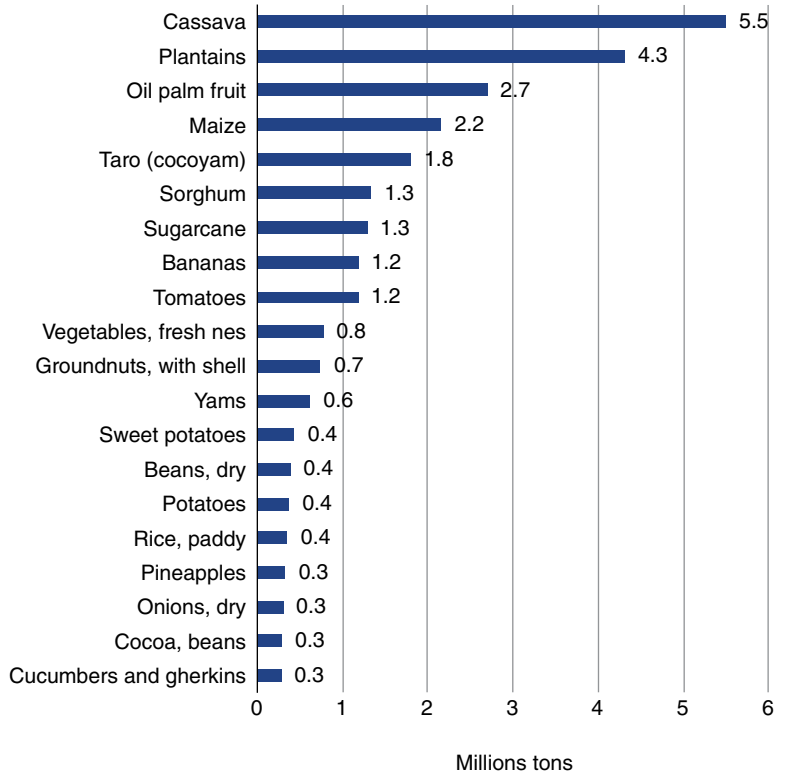
Cameroon's agroecological potential reflects some of the diversity in the CEMAC region, allowing the country to produce a wide range of crop and livestock products (see Figure 5). In value terms, cassava, plantains, oil palm fruit, maize, and taro are the most important. In value terms, plantains, bananas, cassava, tomatoes, and beef account for almost half of total agriculture value.

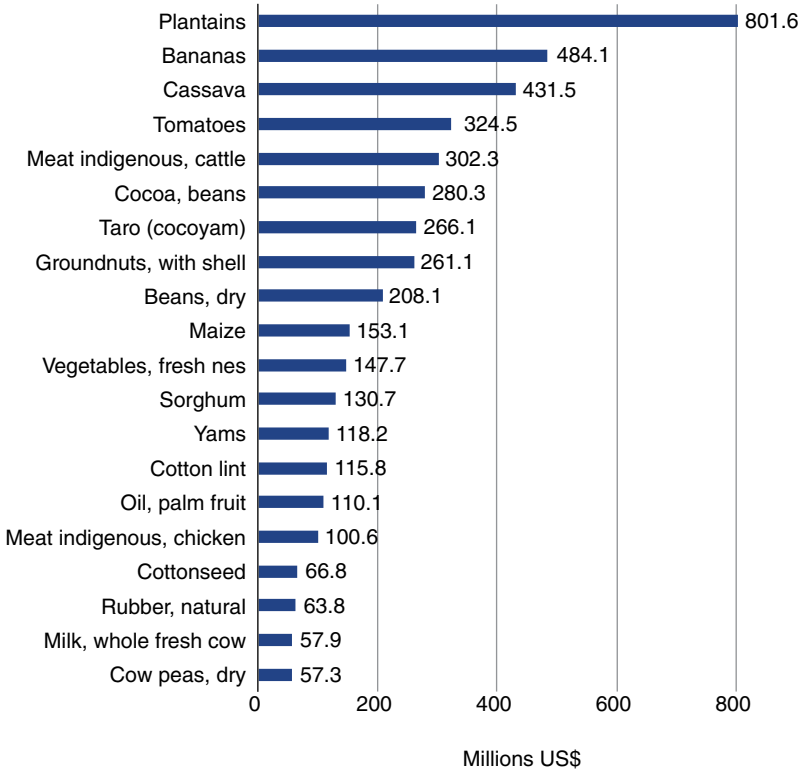
Despite the recent gains, the agricultural sector in Cameroon remains characterized predominantly by traditional family farming, 63 percent of which are smallholders of less than 2 hectares (ha). Smallholder family farming households (about 2 million) contribute 60 percent of food production, operate in the informal sector, and represent 75 percent of the agricultural labor force. While more than half of Cameroonian households practice agriculture, poor households are more dependent on this activity than nonpoor ones (88 percent compared to 42 percent) (INS 2015). The main farming systems are (a) cotton production combined with groundnuts, millet, sorghum, irrigated rice, and livestock in the northern semiarid plain; (b) cocoa production combined with cassava, plantain, and cocoyam in the southern part of the rainforest area and the western and coastal lowlands; (c) Arabica coffee production combined with maize, cocoyam, plantain, beans, yams, Irish potatoes, and livestock in the western highlands; (d) robusta coffee production combined with cassava, plantain, and cocoyam in the northern part of the rainforest area and the western and coastal lowlands; and (e) ruminant production combined with maize, cassava, and beans in the Adamaoua plateau, a central savannah with tree savannah and grassland.

Most agricultural households are engaged in the production of staple crops, in line with the decreasing importance of cash crops in Cameroon. As Figure 6 indicates, close to 40 percent of households grow maize, and between a fifth and a quarter of producers grow groundnuts, bananas, beans, gombo (okra), plantain, cassava, and sweet potatoes. The most important cash crop cultivated is cacao, grown by 8 percent of households, followed by cotton (7 percent) and coffee (3 percent). Rice, one of the most consumed products in North Cameroon, is grown by only 4.4 percent of households. Interestingly, the vegetable production (such as tomatoes, onions, and garlic), part of the daily menu of many households, is concentrated with a small number of agricultural households. Apart from chickens, one in four (26.5 percent) agricultural households raises cattle and other livestock.

Production and trade dynamics are also influenced by Cameroon's ethnic diversity, with about 250 groups widespread beyond national borders into other CEMAC countries and Nigeria. These ethnic groups mainly fall under the Bantu, Semitic, and Nilotic language groups and have traditionally engaged in agricultural specificities. The Bamileke, a Bantu community, has a strong focus on agriculture, mainly handled by women. The Beti-Pahuin are another Bantu ethnic community, occupying the southern rainforest regions of Cameroon and mostly engaged in cocoa farming. The Fulani are

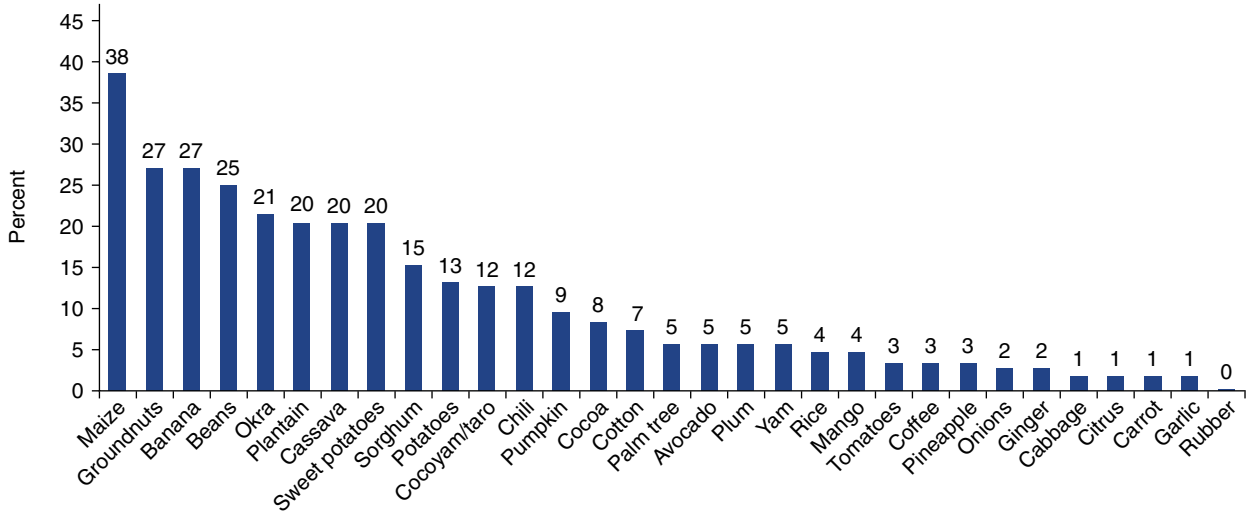
Figure 5 Main agricultural commodities produced in Cameroon (by volume in million tons, 2016 [left] and by value in million constant 2004–2006 US$, 2014 [right])





Source: FAOSTAT.

Figure 6 Agricultural households by crops produced (percent, 2014)



Source: ECAM 4, Institut National de la Statistique (INS), Cameroun 2014.

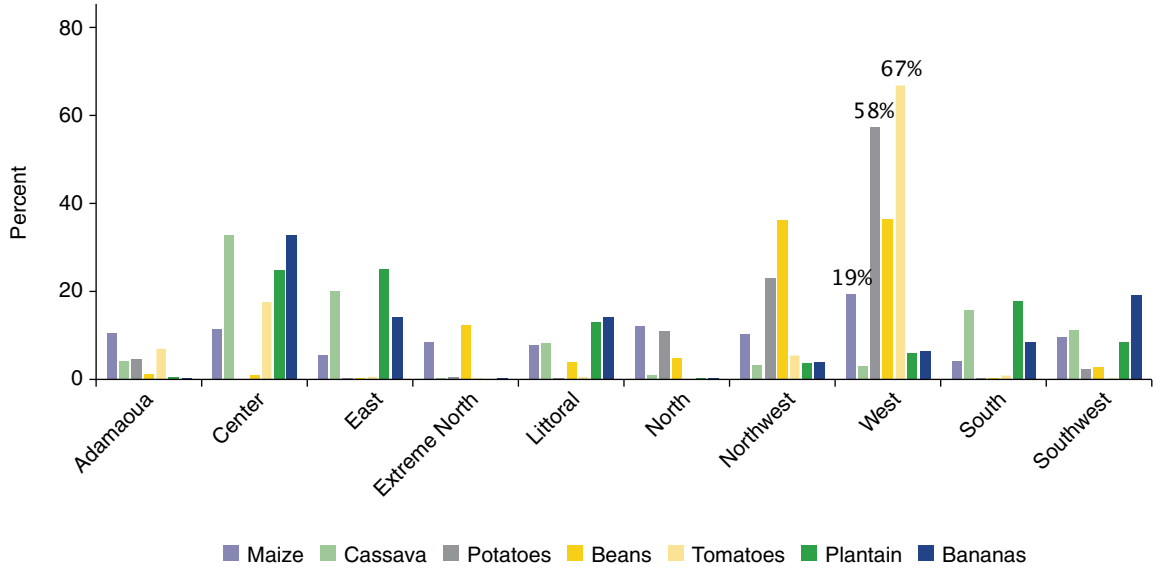
nomadic tribes who are mostly travelling with livestock in the northern part of the country. As further detailed in the report, this ethnic diversity plays a key role in informal trade in the CEMAC region, as often small-scale trade is carried out by members of the same group from both sides of the border.

Agricultural producers in Cameroon continue to face the same interlinked issues limiting their production as in most Sub-Saharan countries. Both field visits and discussions with public authorities indicate that access to inputs is limited, with the average fertilizer use below 7 kg per ha and fewer than 5 percent of farmers using improved seeds. In addition, seed control and certification services by the Ministry of Agriculture and Rural Development (MINADER) are weak, and constant project support to the seed system remains necessary. Similarly, the quality of the fertilizers and phytosanitary products available on the market is fluctuating, often leading to informal and uncertified imports. Extension service coverage is also insufficient and often unable to advise on new diseases (for example, recent occurrences of fall armyworm, as observed during field visits). POs (as detailed in the next section) have weak institutional capacity and sustainability, particularly for storage, processing, and marketing. Mechanization is very limited as Cameroon has a ratio of 0.1 tractor per 1,000 ha and access to finance is problematic, since agricultural producers are unable to produce bankable proposals for the already limited number of financial products in the sector.

Cameroon's agroecological differences across its regions, combined with regional particularities in agricultural production and marketing, result in uneven output distribution (as indicated in Figure 7 and Figure 8). Three regions particularly stand out and were included in this analysis as case studies: the western region and the northern part, comprising the North and Far North regions.

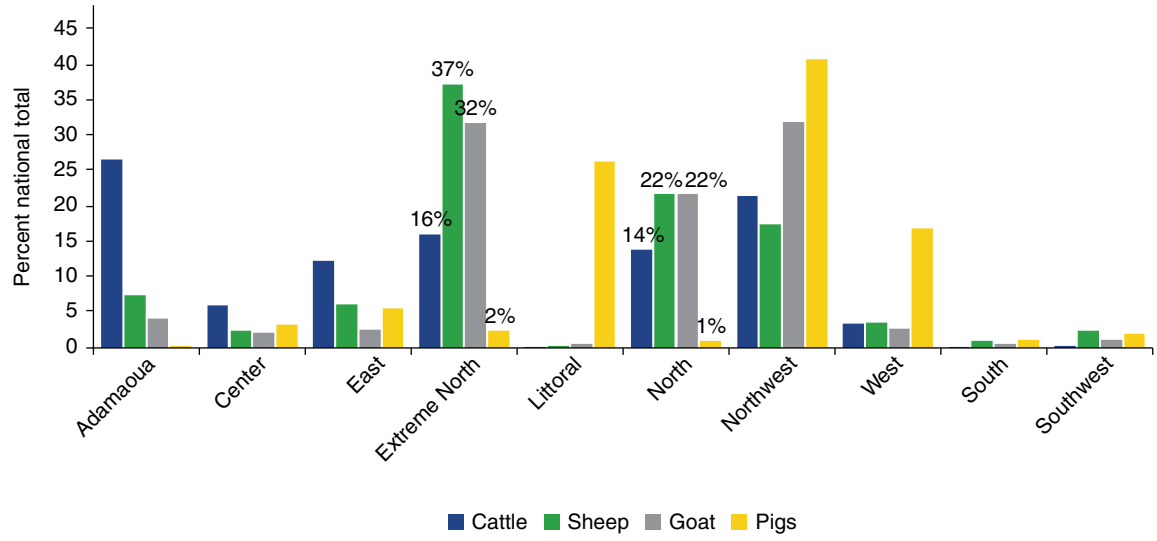
The biophysical conditions make the western region of Cameroon one of the most productive parts of the country and an important sourcing area for agricultural trade in CEMAC. The western region is the country's smallest in terms of area (around 14,000 km^2) and the most densely populated (128.5 people per km^2 against a national average of 41.6 people per km^2) (MINADER 2017). The region is characterized by high plateaus surrounded by plains and a chain of mountains. The climate is humid tropical with bimodal rainy seasons that sometimes overlap. The vegetation is generally dominated by a grassy savannah at the top

Figure 7 Production of main crops in Cameroon, by region, 2011 (percent)



Source: National Institute of Statistics, Cameroon, 2015.

Figure 8 Headcount of main livestock species in Cameroon, by region, 2013 (percent of total)



Source: National Institute of Statistics, Cameroon, 2015.

of the hills and forests in the valleys. The natural conditions of the mountains (abundance of water, fertile volcanic soils) as well as the hydromorphic soils of the lowlands are well suited to agricultural production, especially for market gardening. Moreover, vegetable production in the shallows allows a third harvest during the dry season, intercropped with maize or beans (Fongang 2009). The most recent available data indicate (as in Figure 5) that the western region is leading in the production of tomatoes, maize, potatoes, and beans, with important quantities of plantains and bananas as well.

Part of this performance is explained by the region's transition from an intensive coffee production area to a complex fragmented territory

with diverse production. The intensive system of coffee production implemented by the settlers around 1940 had remained stable for half a century. With the oil crisis of 1973, however, the areas devoted to coffee trees were gradually reduced in favor of other crops and livestock. Few coffee plantations remain now, while the production of vegetables created a new spatial dynamic with new flows of people and goods. The growth of food crops has profoundly changed the organization of space by increasing the area devoted to vegetable, fruits, and staple crops that occupy most of the fields (Uwizeyimana 2009). The Foumbot urban center near Bafoussam is no longer depending on coffee trade and has instead become one of the largest agricultural markets in the country.

In terms of livestock, the western region specializes in poultry production. While the region's population of cattle, small ruminants, and pigs is relatively small compared with the northern and eastern parts of Cameron, the west is by far the most important poultry meat and egg producing area. In 2013 (most recent available comparable data), the western region produced 56,000 tons of eggs, a staggering 87 percent of the national total, and production has since continued to increase, reaching 85,000 tons in 2016. Similarly, poultry meat is an important output, accounting for about 20 percent of the national production in 2013. In addition to eggs and meat, live animals are exported from the western region to the southern CEMAC countries and to Nigeria. The recent expansion of the poultry sector has nevertheless been slowed down by an avian flu outbreak in recent years, particularly in 2017 when a significant portion of farms were affected, and public authorities had to prohibit the sale and movement of animals and slaughter an important part of the poultry population.

Northern Cameroon is also an important production area, particularly for livestock and dry cereals. The two regions of North and Far North account for almost 30 percent of Cameroon's population and are the poorest and most food insecure parts of the country (poverty rates being 74.3 percent in Far North and 67.9 percent in North). The climate is Sudano-Sahelian and increasingly arid as one moves north, with an average annual rainfall of 400–500 mm in Maroua against 800 mm per year in Garoua, just 170 km to the south. The concentration of activities during the few months of the rainy season results in significant labor shortages and is one of the main handicaps of agriculture at this latitude. Still, almost all (95 percent) of the millet, 75 percent of the sorghum, two-thirds of the rice, and a quarter of the maize productions are grown in these two northern regions, along with groundnuts, onions, and cotton.

Northern Cameroon is also a major livestock producing area, along with the significant livestock transit that crosses from Chad into Nigeria and the CEMAC countries. The two northern regions have more than half of the small ruminant headcount (sheep and goats) and almost a third of the cattle population.

Nonetheless, the two northern regions are the most exposed to environmental degradation, droughts, floods, and locust incidents, significantly affecting harvests and increasing food insecurity. Despite the production potential, which is more than sufficient for the local population, the poverty situation often requires producers to sell their crops immediately at harvest time, at minimum prices, for urgent income needs. The vulnerability to climate-related shocks is exacerbated by frequent and continuous political crises (in the Lake Chad basin, the Central African Republic, and Chad to a certain degree). Consequentially, the northern part has been and remains Cameroon's main food insecure food area, with constant need for the government's (see Box 1) and international partners' support.

Box 1 The Cereals Office in northern Cameroon

The Cereals Office (*Office céréalier*) is a public institution created in 1975 to act as a cereal bank and price stabilization mechanism in the northern part of Cameroon by acquiring, stocking, and reselling the main staple foods consumed in the area. With headquarters in Garoua, northern region, and five centers in the three northern regions (North, Far North, and Adamaoua), the office is under the supervision of the Ministry of Agriculture.

The office's storage capacity has increased significantly over the recent years, particularly with the support of international partners who invested in its storage infrastructure. Yet, the limited financial resources allow the office to use only a quarter of its 40,000-ton storage capacity. The cereals bought are sorghum, millet, maize, and rice, from the farmers in the proximity of the warehouses (located mostly in the cities of Garoua, Maroua, and Ngaoundéré). Since 2013, the office has increased its acquisitions from around 5,300 tons to 12,300 tons in 2017, less than 1 percent of the region's production.

The stocking is done at harvest time at market prices and resold during the lean season at preferential prices (up to 20 percent lower than market prices, but still higher than at harvest time). Selling to the most in need is not usually checked and some of the more vulnerable rural populations have no access to its warehouses. Yet, the reselling is done in small quantities to a diverse client base to prevent traders from acquiring a large quantity. The price stabilization part of the office's mandate has never materialized as the office had limited financial resources since its creation, making it impossible to buy, store, and redistribute sufficient quantities to have an impact on the market. Overall, the office's financial position is degrading, despite modest gains made from the price difference, because of its high running costs and decreasing support from the government.

Source: Field visit and interview, February 2018.

3.2 Insufficient commercial organization of producers limits their negotiating power

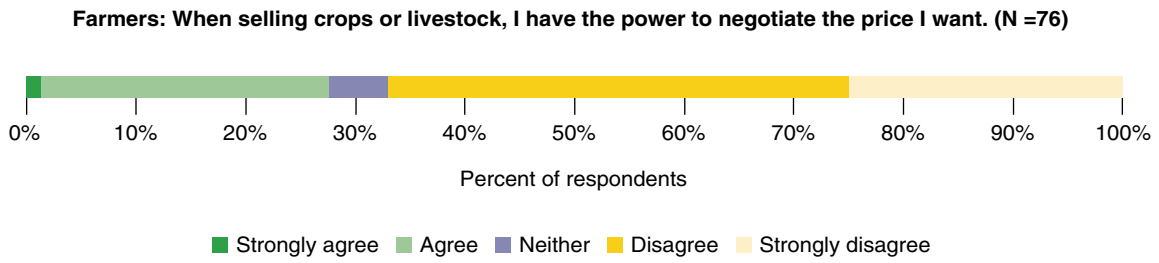
While the PO landscape in Cameroon is quite developed, very few producers are organized for grouped sales and commercial links, particularly with foreign value chain actors. The most recent data indicate that in 2012 there were more than 120,000 grassroots POs: 115,581 Common Initiative Groups (CIGs with 10 members on average), 3,647 unions of CIGs, 59 federations of CIG unions, 1,853 production cooperatives, 1,575 credit unions, 67 unions of cooperatives, and 11 federations of cooperatives. This distribution between CIGs and cooperatives is partly explained by the more binding requirements for cooperatives set in the legislation, as well as by the underdeveloped understanding of associative benefits. In general, most POs are created to access external funding, in most cases from projects, and their sustainability is limited. New interventions by the government and its partners are usually uncoordinated and targeting the creation of further POs and the consolidation of some of the existing ones in unions and federations, while efforts at strengthening existing POs are occurring only in more recent projects.

Field observations indicate very few POs go beyond grouping interests regarding production to engage in organized commercial activities (see Box 2). While producers often used their POs for accessing project and non-project funding, for bulk buying inputs and in some instances for engaging technical and advisory services for production, there are very few instances of grouped sales, commercial links, or processing activities, unless as an immediate outcome of an ongoing project. For the smaller individual producers in the POs, the immediate income needs (as a result of external shocks and reliance on agricultural incomes) make it difficult to synchronize the sale of agricultural products and organize the larger quantities demanded by the buyers. In addition, asynchronous harvests for members of a PO (particularly for perishable goods such as the tomatoes produced in the western region) add to the difficulty of organizing a large and constant supply. The costs of field access and transport and lacking storage facilities are also leading to insufficient grouping of production, as large buyers prefer dealing with larger producers instead of having their trucks visiting multiple fields.

As a result, producers have limited negotiating power while selling their production—a fact confirmed both by the survey and field observations. Almost three-quarters of the producers surveyed perceive that they do not have the power to negotiate prices (Figure 9), in sharp contrast with the perceived negotiating power of intermediary traders, who report sufficient leeway both when buying and selling (90 percent of respondents). The producers encountered during field visits constantly identified prices as their main concern, particularly in the western region where production has increased faster than the marketing opportunities and the supporting transport and processing infrastructure. Producers also expressed a clear preference for foreign buyers (or their representatives), who usually offer better prices than local value chain actors or intermediaries.

Nonetheless, recent interventions are starting to support the commercial links between producers and other value chain actors, but generally only within Cameroon. For example, the two ongoing World Bank projects (Agriculture Investment and Market Development Project (*Projet d'Investissement et de Développement des Marchés Agricoles* [PIDMA]) and Livestock Development Project (*Projet de Développement de l'Élevage* [PRODEL]) have components dedicated to supporting POs to engage in value chains, including in 'productive alliances'. Field visits in the western region identified a medium-scale maize producer, part of a cooperative supported by PIDMA, who explained the successful link between their PO and a large poultry producer, which is buying all their production in a predictable manner with a premium over market prices. In the northern regions, producers also mentioned PIDMA support to organizing cooperatives to have their own storage units and group their sales. Nevertheless, while recognizing the market opportunities in the larger CEMAC area, POs and their members are not yet exploring commercial links directly with large buyers from the neighboring countries, nor are they yet supported by public initiatives.

Figure 9 Perceived negotiating power of agricultural producers



Source: Perceptions survey, January–February 2018.

Note: N = Number of respondents.

Box 2 Producers organizations and market links: the case of NOWEFOR

NOWEFOR is a federation of 12 CIGs founded in 1995 in four provinces (Mezam, Momo, Bui, and Donga-Mantung) of North-West region of Cameroon. Its 2,500 members are organized into unions based on their primary agricultural production activity: maize, rice, cassava, yam, potatoes, tomatoes, ginger, palm oil, poultry, and pork. Its core technical team includes a salaried coordinator, three thematic employees (production, marketing, and microfinance), 36 sales representatives, and 25 technical animators. Its sources of funding come from external grants, membership fees, interest payments, and sales levies.

Initially, the poultry producers used to sell at the Bamenda market, but they had little negotiating power. NOWEFOR contacted the restaurants in the city to arrange regular supply, and the producers are now collaborating with seven restaurants, each buying 50 chickens per week. While prices are not higher than at the market, the producers are benefitting from a constant outlet for their production, resulting in faster sales and limited animal losses.

For the tomato producers, at the end of 2005, NOWEFOR reached an agreement with a supermarket chain in Douala for regular weekly delivery for an initial six months. Between December 2005 and September 2006, a total of 25.2 tons of tomatoes were delivered to the buyer. To meet the demand for quality products, NOWEFOR had to organize technical training for its members (for example, on integrated pest management). The contractual arrangement lasted only a year: according to NOWEFOR, the main reasons for termination were the long delay in payment by the buyer (on average three months after delivery) and the difficulties in ensuring the balance between the quantity and quality requirements of the buyer.

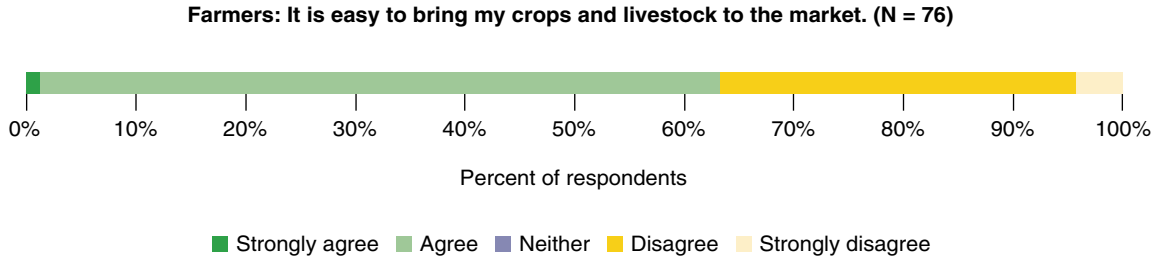
Source: Fongang 2012.

3.3 Poor-quality transport infrastructure is impeding market access both within Cameroon and to CEMAC countries

Poor-quality transport infrastructure and the associated costs are an important bottleneck for producers and traders of agricultural produce. Despite gains in productivity and exports to the CEMAC region, transport costs have increased in recent years, both for short- and long-distance legs. Farmers typically hire transporters to carry their goods, as even large producers do not usually own their own trucks. Depending on the size of the production and the marketing mechanism, farmers can choose transport by motorcycle, small car, larger car (pickup), or small- and medium-size trucks. Road access to the field is often too difficult for big trucks larger than 10–12 tons, which would represent the typical load for export and for larger producers or smaller producers organized for grouped sales. In the perception survey, a third of respondents complained about the difficulties in bringing their agricultural products to the immediate market (see Figure 10).

The cost of evacuating agricultural commodities from the field to the nearest market often accounts for most of the production cost. For example, data collected in the production areas around Bafoussam in the western region indicate that short-distance transport costs up to 25 km from field to immediate market or buyer can range from US$0.51 per ton per km for a 10-ton truck

Figure 10 Perceived ease of market access for agricultural producers



Source: Perceptions survey, January–February 2018.
Note: N = Number of respondents.

to US$0.63 per ton per km for a 3-ton pickup to US$0.91 per ton per km for a car transporting a mixed load. This range of short-distance costs is four to eight times more expensive/higher than long-distance transport (as detailed below), a difference in line with evidence from the literature on transport costs in Sub-Saharan Africa (Teravaninthorn and Raballand 2009). Compared with production costs, short-distance transport represents between 15 percent and 25 percent of the total, depending on load size and perishable nature. In addition, producers are also increasingly complaining about the insufficient number of available vehicles, which has increased costs in recent years.

Similarly, transporting agricultural products from production area markets to consumption centers within Cameroon and in CEMAC is costly. Long-distance transport of agricultural products is done with larger trucks of 12 tons or more, depending on the destination. For the western region agricultural production, the transport on the first leg of transboundary corridors or the shortest trips from Foumbot to Yaoundé (270 km) and Douala (300 km) usually cost between CFAF 150,000 (US$283) and CFAF 250,000 (US$471.7) and trips take seven to eight hours. The 260 km trip from Yaoundé (itself the center of an important agricultural producing region) to the southern

Image 2 Tomatoes being loaded in a pickup in the field, western region, Cameroon

Source: Photo by team during fieldwork.

border markets such as Abang Minko costs on average CFAF 210,000 (US$377.40), with a similar duration of seven hours. Within Cameroon on this route, the resulting average cost per ton per km for long-distance transport is US$0.12, in line with other estimates in the literature (for example, along the Douala–N'Djamena corridor, the transport cost per ton per km is also estimated at US$0.12, while for Douala–Bangui, it is US$0.17 ton per km [Nathan Associates Inc. 2013]). Interestingly, the data from the truck trips indicate that the cost from the Cameroon–Gabon border to Libreville (475 km) for a 20-ton truck is roughly CFAF 697,500 (US$1,316), resulting in a significantly lower cost per ton per km of only US$0.08. This result is lower than most estimations for transport costs in West and Central African corridors, but it can be partly explained by lower fuel prices and better infrastructure in Gabon. High long-distance transport costs are partly due to infrastructure limitations and partly due to governance challenges, such as trucking cartels, that limit market entry.

Both short- and long-distance transport result in important losses due to the poor condition of the infrastructure. Particularly for perishable goods such as tomatoes and other vegetables, poor road conditions, coupled with overloading of trucks, lead to important losses or product damage. In addition, over fragmentation of transport from production to consumption increases these risks, as products are shifted from various means of transportation and in different configurations. For example, a typical basket of tomatoes or bag of avocadoes would first be transported from the field to the immediate market by motorcycle or small pickup, unloaded, and then loaded into a 12 to 20 ton truck that could possibly stop for unloading in Yaoundé or Douala before continuing to one of the border markets in the south, where the load would be broken down into smaller loads to be carried in a car by small and medium Gabonese traders, who would wholesale in Libreville to retailers who might then repack and transport the cargo again for final sale. Data on the losses along the entire chain are not available, given the multitude of actors involved, but information from one of the urban markets in Douala indicates that for the Foumbot-Douala leg only, losses for a truck of tomatoes would be roughly 8 percent (20 baskets from a total load of 250 baskets). In addition, another 20 percent of the load (50 out of 250 baskets) would be damaged and would sell for a lower price. Similarly, for livestock, transporters indicated that between one and four animals die on a regular trip from production area to an urban market.

For long-distance traffic, the agricultural cargo losses are exacerbated by theft. Transporters report constant theft issues, particularly in the case of smaller trucks on the Foumbot to Douala, and Yaoundé routes. In areas where poor road conditions and congestion slow traffic, thieves climb the trucks and remove bags or baskets to be thrown on the side of the road and collected by the rest of the team. Usually, truck drivers do not take the risk to stop and continue the trip, even if losses are often absorbed from their fees. Data collected during the field visits indicate that 3 out of 10 trucks are subject to theft on a typical domestic trip from production area to an urban center (a 250 km leg), with losses estimated at 8–10 baskets for perishable goods such as tomatoes or one to two bags for dry goods. Based on the typical volume, theft losses are approximately 1 percent, a conservative estimate given that transporters also report that products are removed from their cargo at the various checkpoints along the trip and during technical stops for urgent truck maintenance.

In addition to road toll payments, transporters also pay several types of access fees along the corridors. In the production areas in the western region, most local authorities charge access fees (*droit de circulation)* for trucks coming to load agricultural products, regardless of whether they pick up the goods from the field or from a market. For example, at the Foumbot market, the fee range is as follows: CFAF 550 (US$1.00) for a 7-ton truck, CAFAF 1,000 (US$1.90) for a 10-ton truck, CFAF 1,500 (US$2.80) for a 15-ton truck, CFAF 3,000 (US$5.70) for a 20-ton truck, and CFAF 5,000 (US$9.40) for a 26-ton truck.

Image 3 Vegetables being transferred from a car to a truck at Foumbot market, Cameroon

Source: Photo by team during fieldwork.

Besides the quality of the road infrastructure, transport in Cameroon is also impeded by insufficient loading/parking/waiting areas for large trucks. From smaller, rural markets to Douala and Yaoundé and vice versa, the available facilities to load and park trucks are insufficient, particularly in Douala where the port serves as a gateway for trade in Central Africa. Transporters often complain about the lack of any sanitary facilities and resting places and often choose gas stations and urban periphery neighborhoods as pit stops, thereby overcrowding these places and increasing the risks of theft and harassment. As recently as March 2018, transporter organizations in Cameroon organized a nationwide strike to draw the government's attention to the implications of the closing of the Bépanda truck parking in Douala.

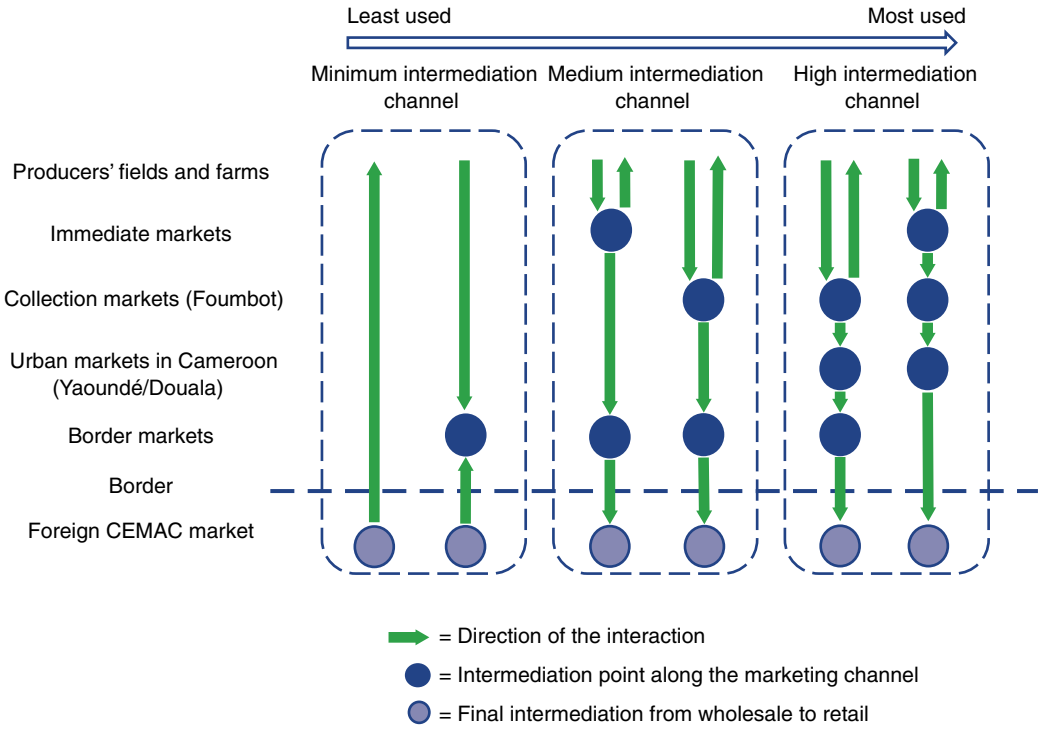
Image 4 Ad hoc truck waiting areas in the outskirts of Douala

Source: Photos by team during fieldwork.

3.4 The high number of intermediaries increases the cost of agricultural trade

The large number of intermediaries along the main channels are a response to insufficient commercial links and marketing bottlenecks. As Figure 11 summarizes, there are six major blocks in a typical agricultural trade corridor (farm/field, immediate market, collection market, urban markets, border market, and finally the foreign market) and various degrees of intermediation, depending on available commercial links and information, market infrastructure, size of actors, power of negotiation, and availability of buyers. At the producing end, farmers sometimes have the option of directly selling their output to large urban and foreign buyers and local intermediaries (*buyam sellam)* or transporting the goods themselves to a larger market (urban or border). Otherwise, the immediate outlets for agricultural products are the rural market, mostly held weekly, at the intersection of multiple villages and production basins, usually no further than 25 km from the farm. In these immediate markets, the producers can sell their goods directly (retail for localized consumption) or sell to an intermediary (*buyam sellam*), who group production for large, mostly Cameroonian buyers that pass with their trucks through the small rural markets. The next level, the collection market (for example, the one in Foumbot), is used for greater transactions: larger producers sell their goods—through intermediaries—to the foreign and Cameroonian buyers, who continue from this market directly to the border or Yaoundé/Douala. Border markets are often used as an intermediary point to fragment large consignments of agricultural goods for medium-size buyers, who cross the border as intermediaries between the wholesale and retail phases (for more details, see Box 3). For goods that do not pass through border markets, the end point is the wholesale-to-retail urban markets in the capitals and large cities of neighboring CEMAC countries.

Figure 11 Main marketing channels for agricultural trade in CEMAC



Source: Elaboration based on field visits.

Box 3 Border markets in CEMAC

At the Cameroon–Gabon frontier, **Abang-Minko** hosts the renowned *Marché Mondial*, a large market held on the Cameroonian side of the border on Saturdays. The *Mondial* has historically been an important weekly appointment for regional traders, especially those of Gabonese nationality crossing into Cameroon to buy agricultural commodities. However, interactions with traders and officials at the border revealed that the event has been progressively losing part of its importance over the past few years, due to, among other reasons, lower Gabonese demand for Cameroonian goods—this, in turn, would be possibly a result of recent economic downturn in Gabon, where both national GDP and per capita income shrank by over 20 percent between 2014 and 2016.

The *Mondial* hosts a total of about 1,500–2,000 vendors. Market operators are mostly traders of Cameroonian nationality, namely, retailers and wholesalers, who typically purchase goods from the Abang-Minko area or other regions of Cameroon and resell them at the *Mondial*—only in rare occasions they would be producers too. Some traders, including those operating out of permanent shops, would work at the market on a daily basis, yet others, including many smaller-scale ones, would typically only come on Saturdays. Trucks preparing for market day can be seen starting from Thursday afternoon or Friday morning.

Also in southern Cameroon, the **Kye-Ossi** market, held daily, hosts several retail and wholesale traders selling a variety of agricultural products. Among others, the most commonly traded items include tomato, onion, potato, beans, ginger, and palm oil. Many originate from other areas of Cameroon, such as Foumbot (tomato, potato), Maroua/Garoua (onion), or Bamenda (potato), and they would be typically transported to Kye-Ossi on Cameroonian trucks between 6 and 12 tons, with loading taking place either on the production site or at larger markets such as Yaoundé.

Market vendors are almost exclusively Cameroonians. Wholesalers would typically make their orders from the market via phone, calling Cameroonian intermediaries in source locations such as Foumbot, Maroua/Garoua, or Bamenda, while smaller-scale traders and retailers would buy from them on the market site. Payments would typically be made via mobile money by a unique buyer if this is large enough to be able to afford a full truck of goods (or even more than one truck)—instead, smaller traders who are still buying at a wholesale level but cannot pay for an entire load would typically pool their resources and make a joint order. Finally, retailers buying small amounts from wholesalers on-site would generally pay cash. Customers buying at the market would be primarily Gabonese (typically proceeding from Bitam but also from further away locations such as Oyem or Libreville) and Equatorial Guineans; albeit Cameroonians coming from villages around Kye-Ossi are also found. In most cases, market operators would be traders rather than producers.

The **Ambam market** is held daily in the city center of Ambam, southern Cameroon. It hosts about 300–350 vendors, all Cameroonians, selling a variety of agricultural goods mostly purchased from other (bigger) markets, albeit a few commodities are sourced locally. Vendors are predominantly female, while men are mostly involved in wholesaling, that is, supplying retailers, and operate bars, shops, and other commercial activities in the market area. Most commonly traded items include potatoes, tomatoes, beans, peanuts, and herbs, among others. Market vendors are almost exclusively Cameroonian traders, who sell goods coming

primarily from Yaoundé (on a fortnightly or monthly basis) or, to a lesser extent, from the *Marché Mondial* held weekly in Abang-Minko—on the other hand, tomato and plantain appear to be locally sourced commodities.

Vendors at the market include two main categories: retailers operating street stalls (for the most part, they would buy their goods from market wholesalers and sell them to local customers in small amounts) and wholesalers generally working in concrete rooms with proper roofing of 6–9 m^2. They buy their merchandise from Yaoundé or Abang-Minko (although its original provenance would typically be western or northern Cameroon) and have it transported to Ambam, where they would sell it mostly to market vendors (in 100 kg bags) or to local customers (in retail amounts). Orders to suppliers are typically made via phone, and Western Union or mobile money is used for payment purposes—suppliers are responsible for arranging transportation, which normally takes place through big trucks (for example, around 30 tons) that may leave from Yaoundé three to four times per week on average.

At the Central African Republic–Cameroon border, **Garoua-Boulai** hosts a large market featuring a broad range of items, including a variety of agricultural products such as onion, garlic, tomatoes, and cassava, as well as beverages, clothing, and shoes. Market vendors are almost exclusively Cameroonians, with the exception of small-scale (female) Central African traders selling cassava—of these, some would live across the border in the Central African Republic and make multiple trips to the market every day, while some others have resettled on the Cameroon side following the refugee crisis. Central African traders who come for the day may either cross by foot (if carrying small amounts, for example, 1 cassava bag) or use carts when trading up to 7–10 bags. The provenance of agricultural commodities at the market is varied, with Cameroonian products such as onion from Garoua and Maroua in the north, groundnut from Touboro, and potato from Bamenda.

At the intersection of Cameroon, Chad, and the Central African Republic's frontiers, the Mbaiboum region is a historic meeting point between people from the west (Fulani, Peul), south, and north. The **border market of Mbaiboum** is in North Cameroon, in the department of Mayo-Rey, and part of the city of Touboro (35 km away from the city center). Owing to recent public and private investment by Sodecoton, the area benefits from the necessary road and bridge infrastructure, allowing the regional border market to flourish.

The market takes place three times per week and attracts trades from the entire region and beyond, including Nigeria and Sudan. The livestock market, taking place once per week, hosts the sale of around 800–900 heads during the dry season and around 2,000 heads during the rainy season. The livestock comes mostly from Cameroon and Chad and the clients are Cameroonians, Sudanese, Nigerians, Central African, and Gabonese. A special market place allows trucks to load large quantities of livestock before leaving for the main consumption centers in the region (Yaoundé, Douala, Bangui, and so on). Recently, security became a major concern and traders are benefitting from military escort from Touboro to the market in the early morning and on the way back at the end of the trading day. Without the escort, the risks of attacks are very high. The taxes at the Mbaiboum market are CFAF 1,500 (US$2.80) per head of livestock originating from Cameroon and CFAF 4,700 (US$8.90) for livestock from outside the country. These fees are distributed between the municipality, the customs, and the Ministry of Livestock.

At the northern frontier between Cameroon and Chad, right across the Logone River from N'Djamena, **Kousséri** is the main border market in the Far North region of Cameroon. Taking place every day, the market allows direct exchanges with the Chadian capital on the other side of the border. There are three main types of flows: (a) transit, from Chad to Nigeria (mainly livestock and sesame) and vice versa (mostly processed product, such as oil); (b) export from Cameroon to Chad (and to a small degree to Nigeria) of maize, sorghum, rice, yams, fruit, onion, sugarcane from northern Cameroon, or plantain and vegetables from central and southern Cameroon; and (c) import from Chad to Cameroon, mostly livestock, sesame, groundnut, and some vegetables. In terms of infrastructure, the commune of Kousseri has a vaccination park, a slaughterhouse, a cattle market, a sty, rangeland, a forage field, and rearing facilities. The market has around 250 vendors.

Source: Field visits and interviews.

In Figure 11, the agricultural trade channels with fewest intermediaries are the least used, given the difficulties in forming commercial links, transporting, and organizing large quantities. Only few and generally large producers encountered during field visits are able to sell their products directly to a foreign buyer, although the practice is becoming more common, particularly with traders or buyers coming from Nigeria. As already highlighted, it is difficult for small producers to organize the large quantities that foreign buyers are interested in, and direct access of large trucks to the field is impeded by poor road conditions.

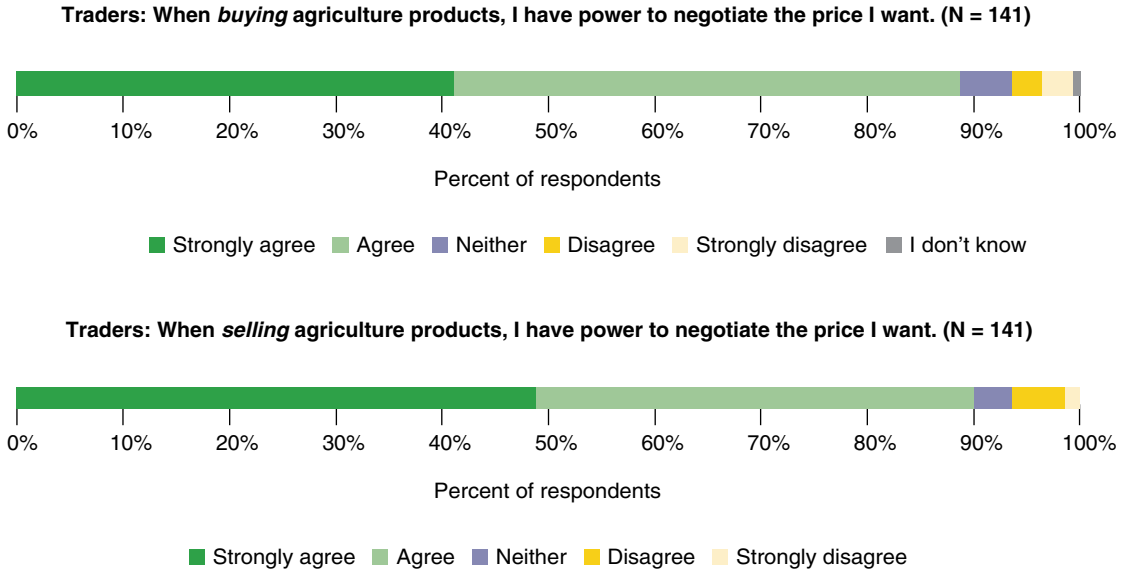
On the other hand, producers have a strong preference for dealing directly with the large buyers, as usually they obtain better prices. Foreign buyers from Nigeria or Gabon (or their representatives) are perceived as better commercial partners than the local intermediaries.

Beyond direct commercial links with foreign buyers, some large producers also transport their goods directly to Yaoundé and Douala or to a border market. Using hired transport, these producers send medium quantities (3–10 tons) directly to these markets, where they pay for access and for intermediaries to sell their products. For example, the market access fee in Douala ranges from CFAF 3,500 (US$6.60) to CFAF 6,500 (US$12.30), depending on load, while the selling fees range from CFAF 100 (US$0.20) per basket sold (tomatoes and other vegetable sold by 20 kg baskets) to up to 25 percent of the value of the load, in instances where the producer has insufficient connections at the market and has to use a larger intermediary.

Agricultural trade channels with multiple intermediaries are the most common. The intermediate example is when producers cannot directly sell to large buyers, mostly because of insufficient quantities and lack of access. In this case, producers transport their goods to an immediate rural market or to a collection market (such as the one in Foumbot), where they sell their goods to intermediaries. Alternatively, some of the intermediaries come directly to the villages and buy from producers. In both instances, the intermediaries are obtaining significant and constant margins, given their negotiation power and knowledge of the production areas and potential buyers. For example, at the Foumbot market the intermediaries' margins range from 16 percent (CFAF 150 or US$0.28) for a plantain fruit bunch to 23 percent (CFAF 75 or US$0.14) for a melon to 35 percent (CFAF 1,250 or US$2.35) for a basket of tomatoes.

In general, intermediaries are reluctant to discuss their business model, given that the wider public is generally aware of the significant margins being charged. The survey results indicate that in general most traders perceive that they enjoy sufficient power to negotiate prices both when buying (88 percent) and selling (90 percent) agricultural products (Figure 12). Similar high levels of traders agree that it is generally easy to find agricultural products to trade (80 percent) and their quality is satisfactory (88 percent) (Figure 13). Following this

Figure 12 Perceived power of negotiation for traders



Source: Perceptions survey, January–February 2018.
Note: N = Number of respondents.

intermediary point in the production areas, the agricultural goods are bought by larger, mostly foreign buyers who continue past the border or by Cameroonian traders who continue to one of the border markets. These latter markets also have their own intermediaries, whose role is to defragment the larger consignments for trading with the small and medium foreign buyers.

Most instances of agricultural trade are fragmented even further, with additional intermediation costs at each step. Insufficient market information, asynchronous production and marketing, and fluctuating domestic and foreign demand lead to further transaction costs. For example, it is quite common for agricultural products to reach a collection market (after being directly sold by

Figure 13 Perceived availability and quality of agricultural products for traders

Source: Perceptions survey, January–February 2018.
Note: N = Number of respondents.

producers or bought at the field by *buyam sellam's*), from where they are transported to Douala and Yaoundé by Cameroonian traders, from where they continue to a border market. Once again, surprisingly high and constant margins are charged by intermediaries, resulting in costs three times higher than described earlier. Similarly, as farmers sell their products in rural markets, intermediaries acting as market aggregators transfer the commodities to a collection market, where they collect more products, before continuing to an urban market, and sell to a foreign buyer, directly bound past the border.

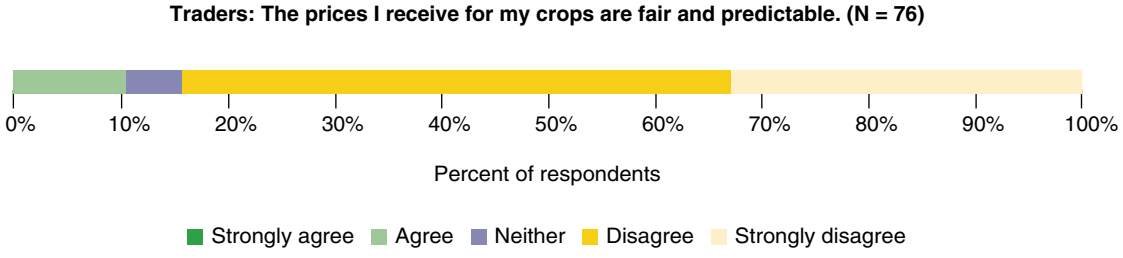
It is worth noting the distinction between intermediaries that act as market aggregators (*buyam sellam*) and the ones who execute the wholesale-to-retail function (*detaillants*). The latter add another level of cost (15–20 percent) in the markets where they operate (at all levels), but their function fits well into market dynamics. The former are perceived by other market actors as taking advantage of their cash liquidity and market connections to buy and store agricultural commodities in larger quantities for short periods, until a large buyer arrives at the market, thus abusing their commercial power. In addition, producers and small traders complain that *buyam sellam* monopolize the few existing storage facilities in their respective markets, as well as the limited parking and loading areas.

3.5 Higher-than-expected price volatility leads to unpredictable returns

More than price levels, all the producers and a significant number of other market actors have identified price volatility as a major impediment to agricultural production and trade. Particularly for the perishable commodities, but even for some nonperishable ones, prices are perceived to fluctuate significantly with only limited correlation to seasonality. Field observations are complemented by the survey results (Figure 14) that indicate that 85 percent of farmers believe that the prices they receive for their agricultural products are neither fair nor predictable. Several producers met on the field described their agricultural activity as a 'lottery'. Price volatility is problematic not only because of the unpredictable returns but also because producers often do not break even when prices reach minimal levels. For example, calculations done together with several producers indicated how farm gate prices under CFAF 3,000 (US$5.70) for a 20 kg basket of tomatoes are resulting in losses for producers. While official statistics are not available, the same producers indicated that as recently as January 2018 farm gate prices have been below the break-even point. The price buildup analysis and the field discussions indicate that halving the intermediaries' (*buyam sellam*) margins would at a minimum always result in breaking even.

Unfortunately, there are no regular price collection mechanisms or market information systems in place to collect information on prices at farm gate or in rural markets to fully verify these observations. The closest proxy is the data obtained from the National Institute of Statistics, which collects consumer prices in each of the regional capitals' urban markets for a very broad range of agricultural products. Nevertheless, given the proximity of these markets to production areas and the assumed correlation between farm gate and

Figure 14 Perceived price fairness and predictability for agricultural producers



Source: Perceptions survey, January–February 2018.

Note: N = Number of respondents.

consumer prices, the monthly series ranging from 2012 to 2017 can give an indication of trends in price volatility. The price fluctuations of key products produced in the areas covered by the markets of Bafoussam (western region) and Garoua (northern region) are presented in Figure 15 and Figure 16.

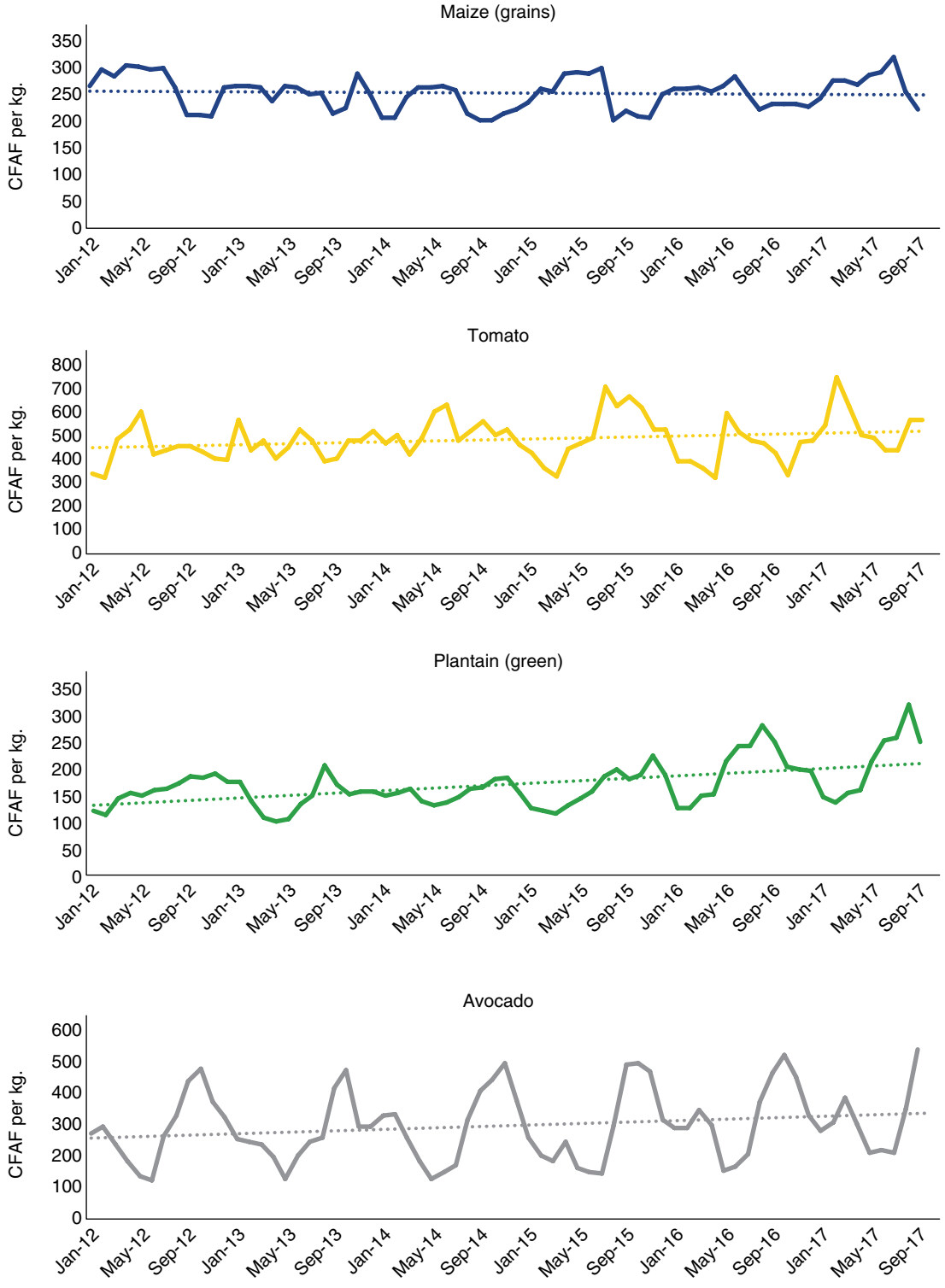
Increasing price volatility is confirmed for certain crops, particularly in the western region, while for others the results are inconclusive (as shown in Figure 15). Tomatoes in the Bafoussam market are the prime example, with prices having increased over the last years despite the growth in production. Price volatility has also increased, particularly since the beginning of 2015; prices in February 2017 were 2.25 times higher than prices four months before in October 2016. Plantain follows a similar trend of increasing prices and increasing volatility; the peak price of CFAF 322 (US$0.63) per kg in August 2017 was 2.3 times higher than that six months before in February 2017. It is interesting to note that both these products are exported to neighboring CEMAC countries and to Nigeria. Data for other fruits (particularly watermelon) and vegetables—not included in the figures—indicate similar trends. On the other hand, the price volatility for maize and avocado claimed by producers is not supported by the consumer price data; avocado maintains its yearly fluctuations due to seasonality, while maize prices are slowly decreasing over time with similar price volatility within a season. In the northern region (as shown in Figure 16), the price volatility at the Garoua market is also mixed; for onion, price fluctuations have decreased in intensity over the last years, as a result of increased production (prices are slowly decreasing) and improved storage options. Millet and maize prices had higher fluctuations in 2012 and 2013, followed by a reduction in volatility in 2014 and 2015, before again increasingly fluctuating. Groundnut prices had a steady high volatility over the considered period. While these results are mixed, as a note of caution it is worth stressing that some producers have argued that intermediaries force lower prices even in the absence of price volatility, given the limited negotiating power and insufficient access to information that producers have.

On the supply side, one major determinant of price is overproduction at certain times, due to producers' reactions to past price peaks in a certain month and to relatively high demand in recent years, including from other CEMAC countries. Tomato is again the most telling example, as producers and traders met during the field visits indicated that the domestic and regional appetite for it has increased in recent years and producers have responded accordingly. Similarly, the demand for eggs is partly explaining the large expansion in commercial poultry farms in the western region. Nevertheless, external shocks (such as the avian flu crisis in 2016–2017 or border closures) are having an increasingly disproportionate impact on prices.

The presence of foreign buyers in the market also has a significant bearing on price. Producers met during field visits almost universally praised the presence of foreign buyers and the CEMAC plus Nigeria agricultural trade as adding dynamics to the market. Nevertheless, the presence of foreign buyers is not constant and not predictable, and while prices increase significantly when Cameroonian traders compete with external ones, the opposite situation often leads to price crashes. Producers have indicated even high daily price fluctuations, depending on the arrival time of a foreign buyer or its representative to a specific market.

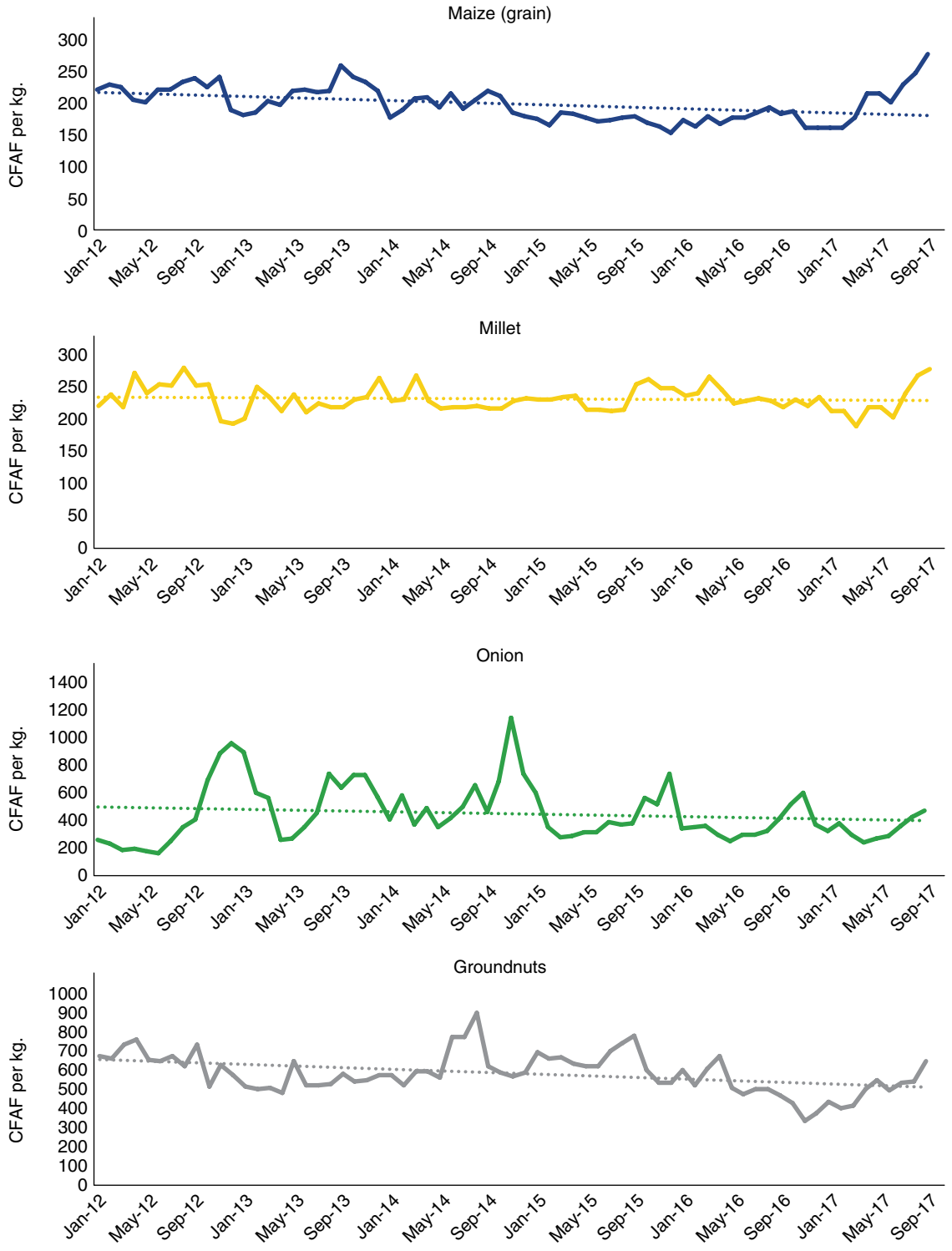
The lack of a market information system for disseminating prices, coupled with insufficient price awareness, puts producers at an additional disadvantage when it comes to negotiating prices for their production. Field visits and discussions with public authorities highlighted the difficulty in obtaining any clear information on current prices at different points of the agricultural supply chains and their evolution. Some larger producers have contacts in the immediate markets and in urban areas and can telephone for price information, but most producers rely on the information provided by their buyer, and no actor has a clear understanding of the final consumer prices in Douala and Yaoundé and the neighboring CEMAC capitals. In addition, the limited available price information often turns out to be

Figure 15 Consumer prices' fluctuations in Bafoussam, western region, Cameroon, January 2012 to September 2017 (CFAF per kg)



Source: Data from National Institute of Statistics, Cameroon.

Figure 16 Consumer prices' fluctuations in Garoua, northern region, Cameroon, January 2012 to September 2017 (CFAF per kg)



Source: National Institute of Statistics, Cameroon.

counterproductive for producers; responding to past price peaks in a certain month, they end up overproducing and pushing the prices lower. For example, tomato prices reached very low levels in January 2018 (and slowly picking up in February during the field mission) despite having peaked in January–February 2017. As main reasons, the producers indicated the oversupply on the market and the closed border between Cameroon and Equatorial Guinea.

3.6 Poor market management and infrastructure hamper commercial links

Given the estimated traded volumes, the markets in the production areas in the western and northern regions are generally poorly organized and have limited market infrastructure. The main problems are the generalized absence of market stalls, with traders selling directly from the ground; the immediate proximity to the major roads, leading to traffic jams and dust pollution; the lack of dedicated or specialized places by crop; the lack of or insufficient access to water and sanitary facilities; the absence of parking and loading spots for trucks; the uncollected garbage and waste; and the unorganized flow of people and goods impeding further access. In addition, very limited general market (covered areas, loading and unloading spaces) and storage facilities were observed, which is particularly problematic during the rainy season when market participants and their goods enjoy no cover. As a result, the limited access for trucks and

Image 5 Foumbot market in the western region, Cameroon

Source: Photos by team during fieldwork.

the general lack of organization are slowing down exchanges and encouraging the proliferation of intermediaries with better commercial connections. This situation is typical for both immediate rural markets and for the larger collection markets, such as Foumbot.

Particularly in the important production basin around Bafoussam in the western region, the market facilities are insufficient for the size and type of agricultural trade currently practiced. The Foumbot market is a major point in linking the production areas in the western region with the consumption centers in Cameroon and in the neighboring CEMAC countries. Taking place three times a week (Tuesdays, Fridays, and Sundays), the market experiences significant traffic for local consumption and transport to other places in Cameroon and to Gabon, Equatorial Guinea, and Chad. According to market officials, about 45–50 trucks (7 tons) depart per week to Yaoundé and Douala (315–350 tons per week) and 10–15 trucks (15 tons) to Gabon and Equatorial Guinea (150–225 tons per week). A smaller number of trucks are bound for Kousséri, to be traded with Chad, but on the other hand, Foumbot experiences an increase in volumes in July–August when Nigerian buyers arrive in large numbers. Yet, the market area is totally unpaved, is situated on the side of the major road, and barely has any covered areas and concrete buildings, and most of the traders sell directly on the ground or in small wooden shacks, as Image 5 highlights.

Image 5 Continued

Source: Photos by team during fieldwork.

Larger, urban markets are in no better position when it comes to infrastructure and management (Image 6). The Sandanga market in Douala, centrally located and only 1 km from the port, runs every day both as a retail market and a connecting point from production areas in Cameroon to foreign markets. Market access for trucks is limited, with space for about six trucks at a time, while others must wait, further congesting the already heavy traffic around the market. While water and sanitary facilities are generally available, traders continue selling their products on the ground, with few tables and stalls for the sellers closest to the market entrance. Overall cleanliness of the market is poor, as garbage collection and cleaning happens once a day, and there are no clearly demarcated places for waste. Market space segmentation by product is in place, but overall mobility in the market is very difficult, given the proximity of sellers to the main access ways. In addition, the market is developed on a terrain with two levels, only one currently linked to the road and allowing access of vehicles.

Market fee collection does not seem to be systematic and the collected funds are not earmarked for market maintenance and development. All markets visited in the production areas, at the urban centers, and at the border had a fee system in place, with representatives of the local authority or auxiliaries collecting the charges from the market users. For example, at the livestock market in Bafoussam, fees are collected based on the number of animals brought to the market (not necessarily all sold): CFAF 100 (US$0.20) per head of cattle, small ruminant, or pig and CFAF 50 (US$0.10) for poultry. At the Foumbot market and several other smaller rural markets in the western region, the fees for crops are CFAF 100 (US$0.20) per 100 kg bag or 20–25 kg basket of vegetables. In the north, markets such as the Yagoua cereal market charge CFAF 200 (US$0.40) per 100 kg bag of cereals. For regular traders or retailers (*detaillants*), monthly fee options are available, with examples ranging from CFAF 5,000 (US$9.40) to CFAF 10,000 (US$18.80).

Except for the Foumbot market, no receipts seemed to be issued for the paid fees, which were collected on behalf of the local public authority (town hall, municipality, or local chieftain). In none of the discussions did market managers or representative indicate that the collected fees are used for the cleaning, running, and development of their markets. Improvements and investments in infrastructure are usually the result of the central government's, nongovernmental organizations', or international partner's initiatives. In addition, the collection of the fees is rarely systematic, partly because sellers self-declare and underdeclare the quantities brought to the market and partly because collectors misplace some of the money, in the absence of a ticketing or receipt system. For example, at Foumbot, the market collector indicated that 500 tickets of CFAF 100 (US$0.20) would be issued to sellers on a Sunday and 1,000 tickets each Tuesday and Friday, for a total of 2,000 tickets for sellers on a typical week. This estimate is significantly lower than the volume of agricultural goods traded at Foumbot (at least 500 tons are departing for Yaoundé, Douala, Gabon, and Equatorial Guinea) and the number of people observed at the market during the field visits.

In the absence of an organized market management, traders organize themselves into collective interest groups to ensure that basic functions such as cleaning and security are set up, at a separate cost to the market participants. For example, the Sandanga market in Douala has a public market management team, whose role is unclear beyond fee collection on behalf of the municipality, and traders' association, which charges CFAF 100 (US$0.20) per day per trader, organizes the cleaning of the market every night and regulates relations between market participants. Other markets use a similar but less institutionalized system by paying third parties to clean, guard, and organize the market premises.

The scarce market infrastructure, especially storage facilities, seems to be captured by local

Image 6 Sandanga market in Douala, Cameroon

Source: Photos by team during fieldwork.

elites and intermediaries. In the few instances where project or governmental interventions have built warehouses for storing goods at the market, smaller market participants are complaining about the lack of access. Instead, these facilities are often used by the *buyam sellam* intermediaries to store the collected goods while waiting for the arrival of large buyers.

3.7 Some valid trade functions have become de facto *tracasseries* due to weak execution

Petty harassments, known as *tracasseries,* are widespread in the CEMAC region and are a significant driver of regional trade costs. *Tracasseries* are a generalized form of corruption consisting of many small payments without receipt, or cause, to public officials, particularly to the police, army/*gendarmerie,* weighbridge officials, road traffic officers, town council officials, and other authorities. Field investigations found a universal perception along the corridors that regardless of whether all the paperwork is in order, payments are still required. Without these payments, public agents simply delay the shipment until payment is made. One of the most frequently cited examples, which was also a cause of the March 2018 transporter's strike, is that weigh stations are not calibrated, so they produce very different results at each stop, thus requiring multiple 'corrective' payments without receipt.

More than just taking money out of people's pockets, *tracasseries* undermine regional agriculture competitiveness and impose a large cost on the broader economy. By failing to control vehicle weight limits, for example, roads deteriorate more quickly leading to higher maintenance costs for governments and vehicle owners alike. Many of the drivers interviewed even said that *tracasseries* encourage overloading since they know they must pay a bribe regardless of actual vehicle weight. Other legitimate functions related to national and regional security, vehicle and driver fitness, and market maintenance needed to support regional commerce have also been taken over by the culture of paying small fines and bribes.

Sanitary and phytosanitary (SPS) certification is another example of a legitimate trade function that, as currently practiced, is more about collecting revenue than protecting from genuine food safety or plant and animal health risks. Although field investigations found that phytosanitary police and veterinary officers in Cameroon are more likely to issue official receipts for their services than other agencies along the corridor, the practice of charging mandatory inspection fees serves little purpose since neighboring CEMAC countries have not set any SPS declaration conditions. In this regard, it is not clear what the SPS officers are certifying for other than general appearance. Managing SPS risks effectively requires well-functioning, professional systems and cannot be achieved simply through the collection of fees or selling of SPS permits. Presently, due to a lack of test materials, prescribed protocols, and training, all SPS inspections are visual only, and low- and high-risk commodities are treated alike.

While there are many dimensions to the impact of *tracasseries*, the estimates of direct costs along the corridor focus on nontechnical checkpoint stops. These costs occur for all actors, from the producers stopped between the village and their immediate market to the transboundary trader whose truck is stopped tens of times before reaching its destination. While each such payment may seem small, *tracasseries* quickly add up. As detailed below, petty harassments increase the cost of transporting agriculture commodities between Foumbot and Douala by 25 percent (US$0.03 per ton per km). In other countries, transporters say the cost is even greater. In Equatorial Guinea, field observations and transporter reports suggest that *tracasseries* add US$0.06 per ton per km (US$15 per ton from the Cameroon border to Bata), while in

Gabon the cost is even higher at US$0.30 per ton per km (US$135 per ton from the Cameroon border to Libreville).

Between Foumbot and Douala, petty harassment is increasing transport costs by US$0.03 per ton per km (a 25 percent increase) excluding the value of the driver's time and opportunity cost of the vehicle standing idle. As Table 5 details, an average 7-ton truck trip from the production area to the market in Douala would be stopped 22 times, with a delay of 47 minutes (against a 6–7 hour trip) for a total direct cost of CFAF 44,500 (US$84) on average. Sixteen of these stops could qualify as *tracasseries*, for a delay of 34 minutes and a cost of CFAF 41,000 (US$77).

Between Foumbot and Kye-Ossi in southern Cameroon, petty harassment is increasing direct costs by US$0.02 per ton per km (a 15 percent increase). As Table 6 details, an average 12-ton truck trip from the production area to the border market in Kye-Ossi would be stopped 52 times, with a delay of 130 minutes (against a 10–11 hour trip) for a total average cost of CFAF 65,000 (US$123). Of these stops, 44 could qualify as *tracasseries*, for a delay of 114 minutes and a cost of CFAF 61,000 (US$115). The results indicate that the longer the trip and the larger the truck, the lower the cost per ton per km that petty harassments generate.

Across the border in Equatorial Guinea, petty harassment is also common and is increasing transport costs by US$0.06 per ton per km. As Table 7 details, after crossing the border, an average 7-ton truck trip to the urban market in Bata would be stopped 32 times, with a delay of 3 hours 55 minutes for a total cost of CFAF 124,500 (US$235). Of these stops, 28 could qualify as *tracasseries*, for a delay of 3 hours 20 minutes and a cost of CFAF

Table 5 Checkpoints between Foumbot and Douala (7-ton truck)

Type of checkpoint	Number	Total delays caused (min.)	*Tracasserie* (yes/no, depending on the level for formality)	Average cost (CFAF)	Total average cost for the one-way trip (CFAF)
Road toll	5	10	No	500	2,500
Gendarmerie	7	14	Yes	2,000	14,000
Mixed control	7	14	Yes	500	3,500
Trade office	1	3	Yes	13,500	13,500
Phytosanitary police	1	3	Yes	10,000	10,000
Municipality	1	3	No	1,000	1,000
Total	**22**	**47**			**44,500**

Source: Truck rides.

Table 6 Checkpoints between Foumbot and Kye-Ossi (12-ton truck)

Type of checkpoint	Number	Total delays caused (min.)	*Tracasserie* (yes/no, depending on the level for formality)	Average cost (CFAF)	Total average cost for the one-way trip (CFAF)
Road toll	8	16	No	500	4,000
Gendarmerie	18	36	Yes	2,000	36,000
Mixed control	20	60	Yes	500	10,000
Road prevention	6	18	Yes	2,500	15,000
Total	**52**	**130**			**65,000**

Source: Truck rides.

66,000 (US$125). These higher results are partly explained by the additional stop by the paramilitary force present on the routes in Equatorial Guinea, following the failed coup d'état.

In Gabon, petty harassment seems to have a particularly high impact, as it is increasing transport costs by US$0.30 per ton per km. As Table 8 shows, an average 20-ton truck trip from crossing the border to the urban market in Libreville can expect to be stopped 44 times, with a delay of 15 hours 34 minutes for a total cost of CFAF 1,980,000 (US$3,736). Of these stops, 33 could qualify as *tracasseries*, for a delay of 11 hours 7 minutes and a cost of CFAF 1,510,000 (US$2,850).

Table 7 Checkpoints between Kye-Ossi and Bata (7-ton truck)

Type of checkpoint	Number	Total delays caused (min.)	*Tracasserie* (yes/no, depending on the level for formality)	Average cost (CFAF)	Total average cost for the one-way trip (CFAF)
Police	7	31	Yes	1,300	9,100
Gendarmerie	7	39	Yes	1,471	10,300
Army	7	60	Yes	5,214	36,500
Paramilitary	7	70	Yes	1,443	10,100
Customs	4	35	No	14,625	58,500
Total	**32**	**3 hours 55 minutes**			**124,500**

Source: Truck rides.

Table 8 Checkpoints between Abang Minko and Libreville (20-ton truck)

Type of checkpoint	Number	Total delays caused	*Tracasserie* (yes/no, depending on the level for formality)	Average cost (CFAF)	Total average cost for the one-way trip (CFAF)
Police	7	2 hours 27 minutes	Yes	47,143	330,000
Phytosanitary police	4	1 hour 44 minutes	Yes	45,000	180,000
Gendarmerie	18	6 hours 18 minutes	Yes	45,000	810,000
Municipality	4	1 hour 10 minutes	Yes	47,500	190,000
Customs	4	1 hour 38 minutes	No	42,500	170,000
Others	7	2 hours 27 minutes	No	42,857	300,000
Total	**44**	**15 hours 34 minutes**			**1,980,000**

Source: Truck rides.

4. Trading Agricultural Commodities in CEMAC

This section focuses on the formal and informal agricultural trade, border crossing processes and costs, and how traders respond to or bypass formal procedures and informal practices from the public sector. The focus is mostly on the activity at and around Cameroon's borders with Gabon, Equatorial Guinea, the Central African Republic, and Chad to understand how current practices differ from the official CEMAC regulations, how official trade statistics differ from the reality, what the real border crossing costs are, and how agricultural commodities reach their final destination (and at what prices).

The main agricultural trade insights at CEMAC's frontiers are derived from the Abang-Minko–Eboro border post (Cameroon/Gabon), Kye-Ossi–Meyo Kye border post (Cameroon/Gabon), Kye-Ossi–Ebebiyín border post (Cameroon/Equatorial Guinea) in the south; Garoua-Boulai border post (Cameroon/the Central African Republic) in the east; and the Kousséri/N'Djamena, Yagoua/Bongor, and Figuil border posts (Cameroon/Chad) in the north (see Image E.1 for details). It is worth noting that the northern and western parts of Cameroon also trade extensively with Nigeria, which, though not a CEMAC member, is an important trading partner (not covered by this analysis).

Findings in the previous section were developed from field observations, the perception survey, and the truck rides at these selected border posts, in addition to official statistics and secondary literature. The focus areas are the comparison between formal and informal, recorded and unrecorded trade flows, the experience of formally crossing the border with agricultural products and the associated costs, the behavioral responses of actors facing trade costs, petty harassment and inefficient processes, and the impact of the regional security situation and political crises on trade patterns and flows.

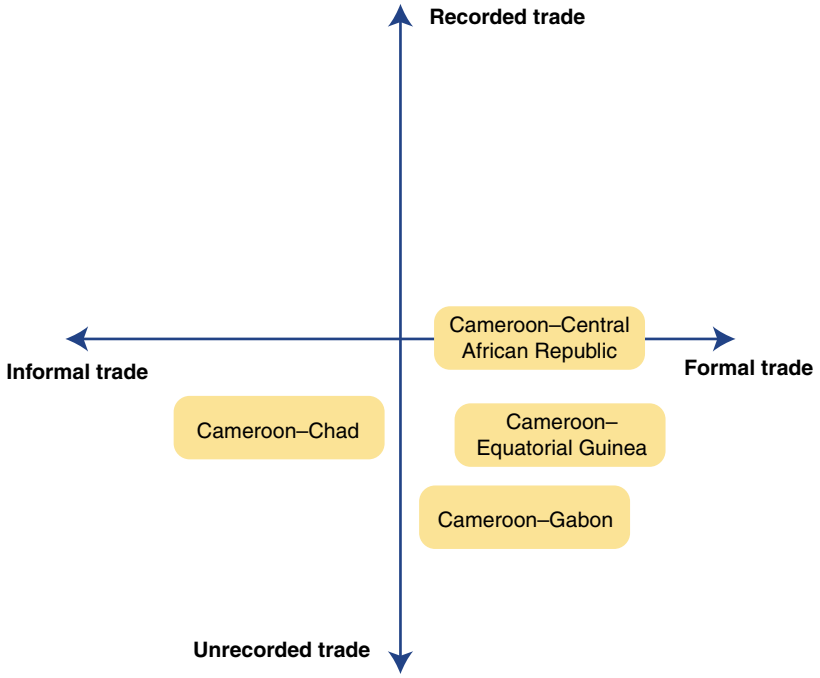
4.1 Unrecorded and informal trade in agricultural products is widespread

Understanding, regulating, and improving agricultural trade in the CEMAC area is complicated by the inaccurate trade statistics that miss the large portion of unrecorded and informal flows. For this report, formal trade refers to flows that pass through an official border post, while informal trade denotes the crossing of a frontier through non-designated areas. Recorded trade represents trade that is captured by the official statistics (either by the customs authorities or by the ministries of trade). Unrecorded trade is not captured in official statistics, although in some instances it passes through formal border crossing points (and fortunately some of the details are recorded by the phytosanitary authorities, as described in the following pages).

The trade between Cameroon and its CEMAC neighbors can be summarized as follows (see Figure 17):

- Between Cameroon and Gabon and Equatorial Guinea, the actual border crossing appeared to take place through the designated crossing point rather than an unchartered route. This may be for at least two reasons: first, the trade patterns make it more convenient for trucks and other vehicles to opt for formal crossing and second,

Figure 17 Typology of Cameroon's agricultural trade with selected CEMAC countries



some site-specific factors might be involved. At Abang-Minko–Eboro and Kye-Ossi–Meyo Kye, for instance, the geographic layout of the border, which includes a vast buffer zone and a natural demarcation line provided by a river, discourages the use of unchartered routes, which would involve river-crossing by pirogue. According to border officials, some small-scale traders occasionally do venture into informal crossing, which includes crossing of the Ntem river by pirogues, especially when carrying prohibited or banned items. However, anecdotal evidence gathered during fieldwork suggests that such (informal) trade represents only a small fraction of overall trade flows passing through the border posts. Yet, regardless of the use of the formal crossing points, the official trade data are not matching some of the realities on the ground, indicating a large quantity of unrecorded trade, as described in detail later in this section.

- Between Cameroon and the Central African Republic, at Garoua-Boulai, growing insecurity and instability in the Central African Republic have recently led to the introduction of a mandatory military convoy for all trucks in transit, thus eliminating any possibility of diversion from the formal crossing channel. Also, the border layout features only one main paved road making it difficult for trucks to use unchartered paths. Fragmentation and reconsolidation of truck consignments do not appear very popular either. The use of large trucks, large official presence at the border, and the Central African Republic's revenue needs lead to a more complete recording of trade flows.
- Between Cameroon and Chad, the length of the border and the geography of the region (clear landscapes with minimal vegetation and the easily passable Logone River) make it easy to cross the border through non-designated areas, particularly in the dry season when even medium-size trucks can cross through the bush. Field observations and discussions with officials indicated that informal crossing is widespread in the northern region. The insufficient capacity of border control and patrol along its entire length reduces the risks of illicit border crossing for individuals, who even if caught can escape with an informal

payment. Even at Kousseri, Figuil, and Yagoua border posts, the nature of small consignments passing the border results in under- and nonrecording of trade flows. The official statistics are at odds with the data collected in the field.

According to official data,[2] Gabon's main imports from CEMAC are palm oil (US$3.3 million); soups, broths, and preparations (US$3.1 million); chocolate (US$2.8 million); milk and cream in solid forms (US$2.4 million); and chewing gum (US$1 million). The reality, as recorded at the main borders posts between the two countries, is indicating significant unreported trade. For example, just the estimated value of plantain imported in 2017 at the Abang-Minko–Eboro border post is US$6.5 million.

In more detail, the actual trade at Abang-Minko is predominantly unidirectional and mostly features agricultural goods crossing southward from Cameroon into Gabon. The most commonly traded item appears to be plantain (sourced locally or from the Littoral province), followed by potatoes (from West province), onions (North/Far North provinces), tomatoes (West province), and beans, among others. Beyond Cameroonian exports, a few imports from Gabon into Cameroon are recorded, such as garlic (locally produced) and spaghetti (from third countries)—frozen chicken is also imported, although usually in an illicit manner, passing through informal routes as the item is currently banned in Cameroon. Table 9 provides an overview of agricultural goods most commonly traded at the border.

Trade flows at Kye-Ossi–Meyo Kye are similarly unidirectional such as at Abang-Minko. Trade mostly features agricultural exports from Cameroon to Gabon, including plantain, tomato, onion, maize, potatoes, and cassava, among others. Cameroonian imports are instead only occasional, featuring a small amount of smoked fish (tuna, sardines, and so on) and commercially made cooking oil. Traders are predominantly of Gabonese nationality, entering Cameroon on small trucks (3.5 tons) or smaller vehicles. Consignments are typically transported to Kye-Ossi on Cameroonian trucks, for example, arriving from production areas such as Foumbot (tomatoes) or Garoua/Maroua (onions), and subsequently transferred onto Gabonese trucks headed to Libreville—the only exception is probably

Table 9 Cameroon's yearly trade with Gabon at Abang-Minko–Eboro border, 2017

Exports			Imports		
	Volume (tons)	Value (US$/CFAF)		Volume (tons)	Value (US$/CFAF)
Plantain	10,408.00	US$6,513,730 CFAF 3,446,418,519	**Garlic**	38.45	US$67,774 CFAF 35,859,259
Beans	1,968.33	US$308,077 CFAF 163,003,704			
Onions	1,218.83	US$1,230,461 CFAF 651,037,566	**Spaghetti**	31.07	US$63,046 CFAF 33,357,672
Tomatoes	1,116.96	US$735,591 CFAF 389,201,587			
Potatoes	1,082.34	US$474,855 CFAF 251,246,031			

Source: Data provided by Cameroon's Phytosanitary Police.

[2]2015 UN Comtrade data.

plantain, which is produced locally and thus often purchased by Gabonese traders at the Kye-Ossi market. Instead, Gabonese pickups and cars would generally transport smaller loads to be traded at the Bitam market or to be consumed locally. In the case of (occasional) imports from Cameroon into Gabon, it would be Cameroonians crossing at Meyo Kye to buy at the market in Bitam.

According to official data,[3] Equatorial Guinea's main imports from CEMAC are soups, broths, and preparations (US$2.4 million); chocolate (US$1 million); beer (US$0.9 million); milk and cream in solid forms (US$0.6 million); and mineral water (US$0.4 million). Despite the border being closed during the field visit, indicative data highlight that the main traded agricultural products are Cameroonian exports of plantain, cassava, and tomato as well as livestock. In addition to long-distance trucking from production areas, Yaoundé and Douala, Equatorial Guineans would also reach the Kye-Ossi–Ebebiyín by pickup or small car, leave their vehicle at the border, and cross into Cameroon by foot to buy at the Kye-Ossi market.

Official trade data[4] for the Central African Republic indicate that the main imports from the other CEMAC countries are frozen sardines (US$1.9 million); soups, broths, and preparations (US$1.6 million); mineral waters (US$1.5 million); milk and cream in solid forms (US$0.6 million); and chewing gum (US$0.3 million). In reality, the trade flows at Garoua-Boulai appear to mostly feature long-distance, heavy trucks (25–40 tons) transporting a variety of commodities from Cameroon and other third countries to the Central African Republic. These include CEMAC-originated items from Cameroon such as onion (from Garoua/Maroua), garlic, and groundnuts, as well as goods arriving from third countries including rice (from Asia), flour (from Europe), and sugar (from Brazil), along with beverages, biscuits, and other processed items. Information on volumes was not available during the field visit.

According to official data,[5] Chad's main imports from CEMAC are sauces and sauce preparations (US$8.1 million); semi-milled or wholly milled rice (US$4.6 million); sweet biscuits (US$2.7 million); sugar confectionery (US$2.4 million); and soups, broths, and preparations (US$2.1 million). Data on volumes[6] (see Table 10) obtained for agricultural goods traded at the Kousseri/N'Djamena border crossing indicate that most common products are maize, plantain, potato, onion, avocado, and tomatoes (as exports from Cameroon) and cattle (as imports to Cameroon).

4.2 Unclear application of trade regulations and customs rules leads to a multitude of formal and informal border costs

Border clearance requirements and formalities lack clarity, consistency, and transparency. Tariffs and procedural requirements are typically established on paper, yet are not readily available at the border level for traders and travelers who wish to consult them—formalities (and related costs) can also vary from one site to another and frequently involve a margin of discretion related to the individual judgment (and mood) of the official on duty. The enforcement of CEMAC provisions also appears to be irregular at best, despite users (including both border officials and traders) being often aware of them. The following case studies show how differences in the degree of enforcement

[3] 2015 UN Comtrade data.

[4] 2015 UN Comtrade data.

[5] 2015 UN Comtrade data.

[6] In the absence of reliable price data, these volumes could not be converted into values.

Table 10 Cameroon's exports to and imports from Chad through the Kousseri market, 2017

Export products	Frequency	Volumes	Annual total
Exported products			
Onion	4 months per year (October–January)	24 trucks per month with 100 bags each	960 tons
Plantain	All year round	8 trucks (7 tons) per week on average	2,800 tons
Avocado	3 months per year (December–February)	7 trucks (7 tons) per week on average	588 tons
Potato	All year round	5 trucks (7 tons) per week on average	1,750 tons
Maize	All year round	5–6 large (45 tons) trucks per month	2,970 tons
Tomato	All year round	3–4 trucks per month	294 tons
Imported products			
Cattle	Peak of 6 weeks during September–December	10 trucks per day, each with 30 animals	12,600 animals
	Rest of the year	2–3 days a week (Monday, Wednesday, and Saturday) for a total of 10–15 trucks	41,250 animals
	Total cattle		53,850 animals
Sheep	6 weeks during September–December	7 trucks per day, all days, 100–110 animals	30,870 animals

Source: Data from the Phytosanitary Police, Mora, Far North region.

can be observed across countries. Among other factors, including some that are site specific, the likelihood that CEMAC provisions be enforced at the various locations is correlated with trading/security conditions and governance levels.

Actual trading costs at the surveyed locations are correlated with the limited clarity, consistency, and transparency of border procedures. Real costs are often not aligned with official tariff lists and frequently include unofficial cost items such as mandatory informal payments extorted by certain authorities, both at border level and along the roads leading to main consumption areas. For some fees, such as those owed to customs, SPS, and land freight authorities, payments are generally made against the issue of an official receipt. Nevertheless, the actual amount paid is not always aligned with the amount on the receipt, suggesting that rent-seeking behavior is present even when official procedures are seemingly followed. Finally, actual trade costs are often regressive on smaller traders/vehicles, as some fees, especially those extorted informally, tend to be imposed at a rate irrespective of the consignment size.

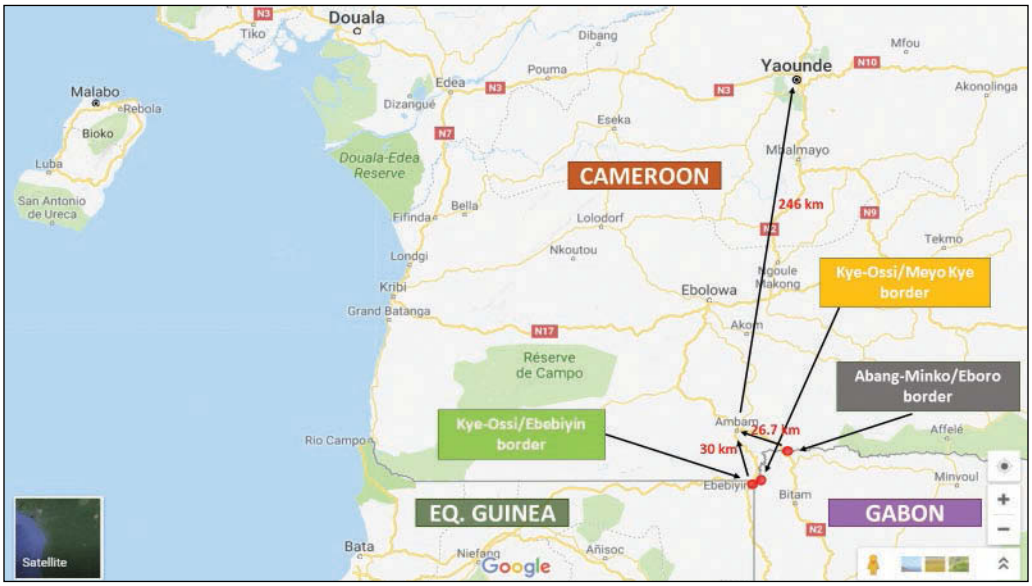
4.2.1 Abang-Minko–Eboro border crossing (Cameroon–Gabon)

The Abang-Minko–Eboro border, dividing Cameroon's southern region from Gabon, lies on a large, composite area crossed by the Ntem river. The border is open from 6 a.m. to 6 p.m. with the Ntem river providing for a clear, natural demarcation between the two countries. At the actual border point, a large paved area is found where small offices of all main border agencies are located, staffed with one to two officials on average—these only are responsible for checking documentation related to border formalities on all transiting individuals and vehicles. The area is known as 'advanced checkpoint' or *poste avancé*. Other border formalities are completed in areas away from the river crossing line. On the Cameroonian side, such a zone is found about 3.5 km from the *poste avancé*: it hosts the main offices of all border agencies, a warehouse facility, and a large area where the market is held, with a few small shops in addition to stalls used by market vendors. Similarly, on the Gabon side, most border agencies are deployed on an area located about 1 km from the *poste avancé*, where checks are conducted and

formalities are completed. Passport formalities in Gabon are conducted at the departmental office of the Police Immigration/Emigration in Bitam,[7] which is 29 km from the border area. The map (Image 7) and Images 8 and 9 offer an overview of the border area.

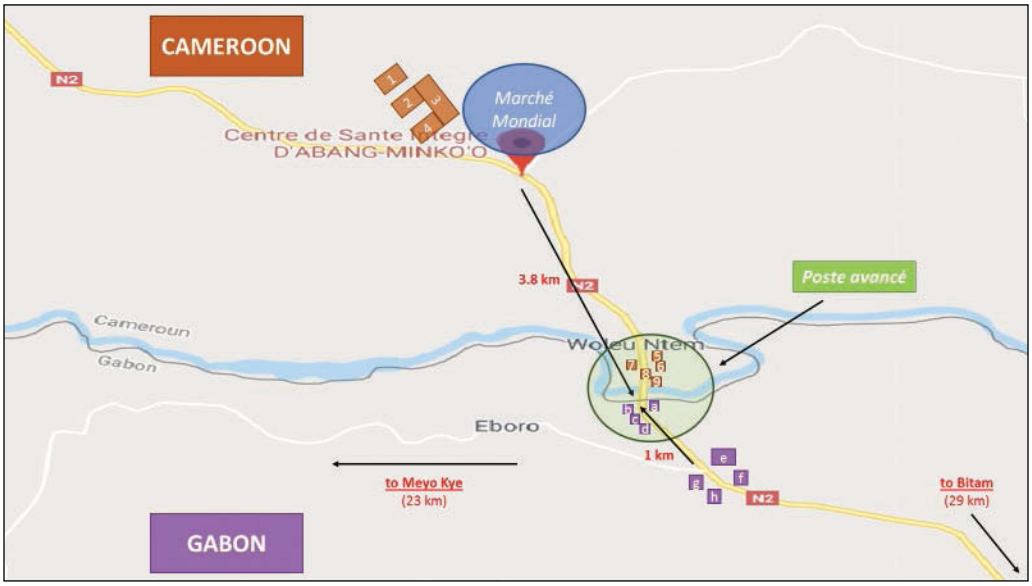
According to official statistics of Cameroon's immigration authorities, approximately 2,500 individuals enter from Gabon through Abang-Minko every month. Of these, about 2,000 are Gabonese crossing to buy at the *Mondiale*

Image 7 Border crossing between Cameroon and Gabon and Equatorial Guinea



Source: Based on information gathered during fieldwork in January 2018. Map data © 2018 Google.

Image 8 Abang-Minko–Eboro border area



Source: Data and images gathered during fieldwork in January 2018. Map data © 2018 Google.

Note: Numbers (Cameroon side) and letters (Gabon side) in the image correspond to the list of border agencies in Table 11.

[7]Bitam is the departmental capital of the Ntem department, which is part of the Woleu-Ntem province. The provincial capital of Woleu-Ntem is Oyem.

market on Saturdays. Border crossing takes place mostly via small- to mid-size trucks (3.5 to 8–10 tons on average), both from Cameroon (any part of the country) and Gabon. Border officials estimate that an average of 130–150 vehicles cross at Abang-Minko every month.

Image 9 The Abang-Minko–Eboro border crossing (left—Cameroon, right—Gabon)

Source: Photos by team during fieldwork.

Border formalities

Table 11 Border agencies at Abang-Minko–Eboro

Border agencies	
Cameroon	**Gabon**
1. Customs—main office	a. Immigration/Emigration Police—*poste avancé*
2. Phytosanitary Police and Veterinary Service—main office	b. Ministry of Health—*poste avancé*
3. Cameroon Land Freight Management Office (*Bureau de Gestion du Fret Terrestre,* BGFT)—main office	c. Army—*poste avancé*
4. Immigration/Emigration Police—main office	d. Conseil Departmental—*poste avancé*
5. Army (*Gendarmerie* in French)—*poste avancé*	e Customs—*poste avancé*
6. Intelligence Agency—*poste avancé*	f. Gabonese Food Safety Agency (Agence *Gabonaise de Sécurité Alimentaire,* AGASA)—*poste avancé*
7. Phytosanitary Police—*poste avancé*	g. Conseil Departmental—*poste avancé*
8. Customs—*poste avancé*	h. Ministry of Commerce—*poste avancé*
9. Phytosanitary Police—*poste avancé*	

Note: Numbers (Cameroon side) and letters (Gabon side) in the table are used to indicate the location of each border agency in Image 8.

Cameroonian side

The following agencies are found on the Cameroonian side of the Abang-Minko–Eboro border:

- Customs
- Police Immigration/Emigration (specialized police branch with responsibility for overseeing migration fluxes)
- Phytosanitary Police
- Ministry of Livestock, Fisheries, and Animal Industries (*Ministère de l'élevage, de la pêche et des industries animales,* MINEPIA) (responsible for veterinary checks)
- *BGFT*
- Ministry of Commerce
- Secret Service (known as *Direction Générale de la Recherche Extérieure*, DGRE)

Officials from regular police and the Army (known as *Gendarmerie* in French) are also present at the border. Phytosanitary and veterinary inspections are conducted by two separate agencies, one reporting to the MINADER (that is, Phytosanitary Police) and the other reporting to the MINEPIA (that is, Veterinary Service). However, the two agencies are typically located in the same office, not only at Abang-Minko but also at all other borders visited during field work. Border formalities are often completed by the consignment owner or truck driver. In some cases, facilitators/intermediaries may also be used—these would generally take responsibility for undertaking clearance formalities on behalf of the buyer, against the payment of a fee.

Police Immigration/Emigration. Entry into Cameroon is officially visa free (and cost free) for up to 90 days for nationals of CEMAC countries travelling on their passports, as mandated by the principle of free movement of people. CEMAC travelers are also allowed into Cameroonian territory on their national IDs, yet they can only move within a 30 km radius from the border point—that is, for instance, the case of Gabonese traders crossing on Saturdays to buy at Abang-Minko's *Marché Mondial.* However, immigration authorities recognize that, once travelers are admitted on their national IDs (that is, without stamps indicating their date of entry) as opposed to passports, enforcing the 90-day rule becomes difficult.

Customs fees. At Abang-Minko, customs officials explained that the agency normally charges an 'exit fee' (*droit de sortie*) on all Cameroonian exports, amounting to 2 percent of the consignment value. As invoices accompanying consignments may be missing and/or inaccurate, the calculation of the exit fee can sometimes be based on an estimation made at a border level, left to the discretion of the officer on duty. Customs also charge an 'overtime fee' (against the issue of a receipt) on consignments cleared outside of the 7:30 A.M.–3:30 P.M. window on weekdays and at any time on weekends—the fee amounts to CFAF 5,000 (US$9.45) for small vehicles such as pickups and minibuses and CFAF 10,000 (US$18.90) for small-size trucks (3–4 tons). On the other hand, customs do not appear to be charging import duties, as established by CEMAC provisions.[8]

Technical review. Customs representatives indicated that, according to a decree issued in January 2018, all consignments of agricultural products such as plants, grains, legumes, and fruit, as well as livestock, would now officially require technical review (*visa technique*) of the Ministry of Forests and Fauna before being allowed for exportation. Since the ministry is not represented at the border level, customs would be in principle tasked with enforcing the decree of their behalf—while they indicated that they are currently not doing so in order not to limit export flows, it is not unrealistic to presume that the newly approved provision could provide room for abuse and/or offer opportunities to extract rents.

Phytosanitary controls. Phytosanitary Police are responsible for phytosanitary controls on agricultural products. These controls did not appear to be based on any formal SPS declaration conditions, but rather based on each inspector's interpretation of cleanness and safety. Inspections are visual only as authorities lack proper sampling equipment or lab facilities. No risk management approach was apparent; instead, officials indicated that they aim to check 100 percent of consignments passing through the border. In Cameroon, checks are conducted at a warehouse facility located in the market area before goods are loaded onto trucks. The process includes the following steps: filling in an application form; having the goods visually analyzed by a Phytosanitary Police official; and paying a fee to obtain a phytosanitary certificate issued at the border. The actual cost of the phytosanitary certificate is CFAF 2,000 (US$3.80), as indicated on the top-left section of the certificate.

[8]At Abang-Minko and elsewhere, Cameroon Customs was arguably the least cooperative border agency with most officials declining to share information on the grounds that a formal approval had not been sent by their headquarters in Yaoundé.

However, officials indicated that the total cost of the procedure ranges from CFAF 3,500 to CFAF 7,000 (US$6.60 to US$13.20), depending on the 'amount of work' required of the official and/or on the size of the vehicle/consignment inspected. An official list of charges was not available at the border level, and, contrary to the figures reported by officials, traders and truck drivers claim that fees paid range from CFAF 5,000 for small vehicles (cars, pickups, minivans, and so on) to 10,000 (US$9.45 to US$18.90) for any type of truck. Receipts are normally issued but usually only for part of the total paid, suggesting the official on duty is pocketing the difference.

According to officials, the phytosanitary requirements described earlier only apply to commercial consignments, not to smaller ones aimed for personal consumption. Yet, no formal legislation, regulatory text, or other relevant provision exempting smaller loads from phytosanitary documentary requirements seems to exist. Also, no precise threshold appears to be set for commercial consignments to be distinguished from personal ones—officials indicated that they would be able to tell those apart 'based on experience'. The issue does not seem to be relevant to Abang-Minko since, as explained, trade appears to mostly feature large consignments transported via trucks.

BGFT. The Land Freight Management Office is a government agency reporting to Cameroon's Ministry of Transport, responsible for traffic and freight management at the country's land borders. At Abang-Minko, the BGFT conducts inspections on vehicles crossing the border and their loads and issues a document called *Lettre de voiture internationale pour le transport routiere de marchandise* (literally translated as 'International Vehicle Letter for Road Transportation of Goods'), usually abbreviated as *Lettre de voiture internationale* (LVO), certifying that the vehicle is authorized to transport merchandise internationally. The cost of issuing an LVO ranges from CFAF 5,000 (US$9.45) for pickups and minibuses to, respectively, CFAF 10,000 (US$18.90) and CFAF 15,000 (US$28.35) for small (3–4 ton) and mid-size (8–10 ton) trucks.

Gabonese side

The following agencies are represented at Eboro border:

- Customs
- Police Immigration/Emigration (specialized police branch with responsibility for overseeing migration fluxes)
- AGASA
- Gabonese Council of Loaders (*Conseil Gabonais de Chargeurs*, CGC)
- Directorate General for Competition and General Consumption (*Direction Générale de la Concurrence et de la Consummation*, DGCC)
- Ministry of Commerce

Most border formalities appear to be centralized in Bitam, except for customs checks that are still performed at the border level. While it was not possible to meet with customs representatives at Eboro or Bitam, information gathered from border users suggests that Gabonese Customs authorities are no longer charging import duties on agricultural consignments entering Gabon, with respect to CEMAC provisions. Customs also conducts visual phytosanitary inspections on imported consignments on behalf of AGASA.

Immigration/Emigration Police. In October 2017, Gabon officially ratified the CEMAC agreement providing for the free movement of persons within the region. As a result, at least in principle, all CEMAC citizens travelling on a biometric passport are now allowed to enter Gabonese territory visa free for stays up to 90 days. However, the reality on the ground appears to be somewhat different. According to Gabon's immigration authorities, an average of 15 CEMAC citizens (mostly Cameroonians) enter Gabon visa free every day—this may be because most of those crossing at Abang-Minko do not possess a passport and generally travel on their national IDs. For the latter ones, Gabon's immigration authorities may ask to leave IDs at the border and return within one day. Overall, anecdotal evidence collected during fieldwork suggests

that the enforcement of the free movement principle is often left to the discretion of the individual officer on duty.

AGASA. Similar to what is observed on the Cameroonian side of the border, phytosanitary inspections at Eboro are conducted visually due to the lack of laboratory facilities and testing equipment. Checks also did not appear to be based on formal SPS declarations but rather focused on general appearance. Importers are required to present AGASA with the phytosanitary certificate issued by Cameroon's Phytosanitary Police and to pay an inspection fee based on the vehicle size and on the type of merchandise transported. Table 12 summarizes official fees based on information provided by AGASA officials in Bitam. Fees are apparently charged only on commercial consignments, not personal ones—though again this distinction does not seem to rely on official information or classification but is rather left to the discretion of the officer on duty.

AGASA is also responsible for animal health inspections. Traders importing livestock into Gabon are required to present a Veterinary Import Certificate and to leave their livestock in a quarantine zone at the border while inspections are completed—these can take up to one week at a cost of CFAF 3,500 per head (US$6.62) and are typically conducted only visually due to the lack of laboratory facilities and testing equipment. Upon successful completion of the inspection, livestock traders are required to pay a flat fee of CFAF 10,000 (US$18.90) to AGASA to obtain an authorization for their livestock to circulate within Gabon.

DGCC. It is mandated with performing quality checks on items imported into Gabon, both agricultural and nonagricultural. As in the case of AGASA, inspections are conducted visually: importers are required to pay a fee of CFAF 5.30 per kg (US$0.01 per kg) of load transported (of any kind), amounting to approximately CFAF 16,800 (US$31.75) or CFAF 48,000 (US$90.72) for, respectively, a 3.5-ton and a 10-ton truck and are issued a 'certificate of authorization for consumption'(*autorisation de mise á la consommation*)—the latter is only available in Bitam.

CGC. It is a public entity established under the technical supervision of Gabon's Ministry of Transport, responsible for freight and traffic management among other things. Agricultural importers entering Gabon are required to pay CFAF 10,000 (US$18.90) for their consignments (irrespectively of the size), against which an 'identification note of multi-modal freight' (*bordereau d'identification de fret multimodale*) is issued—the document is only available in Bitam.

Ministry of Commerce. All consignments entering/exiting Gabon need to be accompanied by an import/export declaration. This is issued free of charge, yet apparently is only available at the Ministry of Commerce in Libreville—traders unable to produce a declaration at the border are subject

Table 12 Official Gabonese Food Safety Agency (AGASA) fees

Vehicle size (ton)	Plantain load				Non-plantain load			
	Total fees		Fees per ton		Total fees		Fees per ton	
	US$	CFAF	US$	CFAF	US$	CFAF	US$	CFAF
>1	18.90	10,000	18.90 (1 ton)	10,000 (1 ton)	18.90	10,000	18.90 (1 ton)	10,000 (1 ton)
3.5	37.80	20,000	10.80	5,714	56.70	30,000	16.20	8,571
10	56.70	30,000	5.67	3,000	75.60	40,000	7.56	4,000
>12	75.60	40,000	6.30 (12 ton)	3,333 (12 ton)	189.00–302.40	100,000–160,000	15.75–25.20 (12 ton)	8,333–13,333 (12 ton)

Source: Based on data provided by AGASA

Table 13 Gabon's official import/export declaration fines

Vehicle size (tons)	Fee (US$/CFAF)			
	Plantain only	Plantain + fresh items	Fresh items (no plantain)	Fresh items + onion
>1	US$18.90 (CFAF 10,000)	US$18.90 (CFAF 10,000)	US$18.90 (CFAF 10,000)	?
3.5	?	US$28.35 (CFAF 15,000)	US$47.25 (CFAF 25,000)	?
10	US$28.35 (CFAF 15,000)	US$56.70 (CFAF 30,000)	US$94.50 (CFAF 50,000)	?
>12	US$37.80 (CFAF 20,000)	US$75.60 (CFAF 40,000)	US$170.10 (CFAF 90,000)	US$198.45 (CFAF 105,000)

Source: Based on information provided by Gabon's Ministry of Commerce.

Note: ? = information on official costs not available from responsible agency.

to a fine at the border, which varies depending on the amount and nature of goods transported (see Table 13). As usual, fines are in principle, only imposed on commercial loads, yet the distinction between the latter ones and those for personal consumption is generally left to the discretion of the official on duty.

Actual trade costs

Actual trade costs and procedures at Abang-Minko may be (significantly) different from official ones. The previous two subsections provided an overview of supposedly official requirements, procedures, and fees in Cameroon and Gabon based on information shared by border agencies in each country. However, interviews conducted with traders and transporters at the market revealed that actual fees differ quite substantially, as summarized in Table 14. For detailed information on each official fee level, reference should be made to the various agency-specific tables presented throughout this report. As shown, trade costs are highly regressive whereby small traders using a 1-ton minibus pay three times more per ton than larger traders using a 10-ton truck. Receipts are generally issued, albeit sometimes for amounts different from (and generally lower than) those paid to officials. Police (regular branch) and the army are known for systematically extorting informal payments on all vehicles transiting through the border area, with no receipt issued.

As already highlighted in the second part of the report, payments made along the way contribute to increasing the overall cost of trade. Besides clearance costs at the border, traders and transporters indicated that several informal payments must be made at checkpoints set up along the road by police (regular branch) and/or the army. Payments typically range between CFAF 2,000 and CFAF 5,000 (US$3.78 and US$9.45), irrespective of the vehicle size or nature of the consignment, with the actual amount frequently determined by the mood of the officer on duty—for instance, an officer working on a Sunday is likely to be in a worse mood and thus to potentially ask for a larger payment. A truck driver headed to Oyem (100 km from Abang-Minko) indicated that at least eight checkpoints can be found along the road—assuming an average of CFAF 3,500 (US$6.62) per payment, that amounts to an extra cost of CFAF 28,000 (US$52.96) per trip. Similarly, a truck driving to Libreville can be stopped by the police and/or the army up to thirty times along the way—that amounts to about CFAF 105,000 (US$198.60) per ride. Due to the unpredictable and informal nature of such payments, computing averages can be misleading—yet, it does suggest that bribes may account for an important portion of total transport costs.

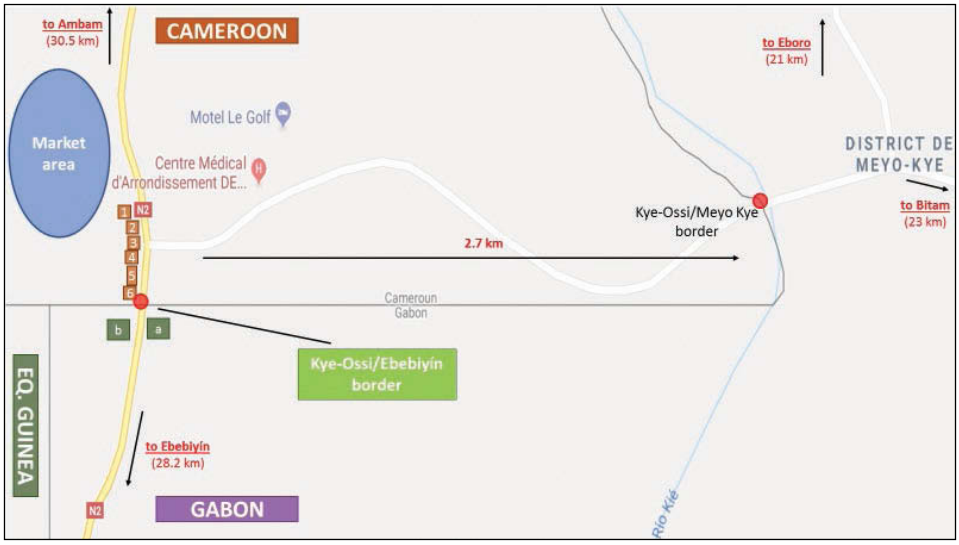
Table 14 Actual cost of clearing a truck at Abang-Minko–Eboro border (CFAF unless indicated)

Fee name	Responsible agency	Minibus (1 ton)			Small truck (4 tons)			Large truck (10 tons)		
		Official cost	Actual cost	Variance	Official cost	Actual cost	Variance	Official cost	Actual cost	Variance
Costs to exit Cameroon										
Entry fee *Paid to enter the market for loading purposes*	Police*	0	5,000	5,000	0	5,000	5,000	0	5,000	5,000
	Army*	0	2,000	2,000	0	2,000	2,000	0	2,000	2,000
	Immigration	0	2,000	2,000	0	2,000	2,000	0	2,000	2,000
	Town hall	?	2,000	?	?	2,000	?	?	2,000	?
	Assembly	?	1,000	?	?	2,000	?	?	2,000	?
Loading fee	Town hall	?	1,000	?	?	2,000	?	?	5,000	?
Customs exit fee	Customs	2%	10,000	n/a	2%	15,000	n/a	2%	15,000	n/a
Phytosanitary	Phyto Police	2,000	5,000	3,000	2,000	10,000	8,000	2,000	10,000	8,000
LVO fee	BGFT	5,000	5,000	0	10,000	10,000	0	15,000	10,000	(5,000)
Exit fee *Paid at the* poste avancé. *Information only available for large trucks*	Police*	?	?	?	?	?	?	0	2,000	2,000
	Army*	?	?	?	?	?	?	0	2,000	2,000
Costs to enter Gabon										
Overtime fee	Customs	5,000	5,000	0	10,000	10,000	0	10,000	10,000	0
Phyto inspection	AGASA	10,000	5,000	(5,000)	20,000	25,000	5,000	30,000	50,000	20,000
Identification note fee	CGC	10,000	5,000	(5,000)	10,000	10,000	0	10,000	25,000	15,000
Certificate of authorization for consumption (issue fee)	DGCC	?	5,000	?	16,800	25,000	8,200	48,000	48,000	0
Unspecified fees	Town hall	?	2,500	?	?	5,000	?	?	10,000	?
	Assembly	?	5,000	?	?	5,000	?	?	15,000	?
	Army*	0	5,000	5,000	0	5,000	5,000	0	5,000	5,000
	Police*	0	5,000	5,000	0	5,000	5,000	0	10,000	10,000
Total costs at border										
Total per vehicle (CFAF) Cost per ton (CFAF)		**32,000** 32,000	**70,500** 70,500	**12,000** 12,000	**68,800** 17,200	**140,000** 35,000	**40,200** 10,050	**115,000** 11,500	**230,000** 23,000	**66,000** 6,600
Total per vehicle (US$) Cost per ton (US$)		**60.49** 60.49	**133.27** 133.27	**22.68** 22.68	**130.06** 32.51	**264.65** 66.16	**75.99** 19.00	**217.39** 21.74	**434.78** 43.48	**124.76** 12.48

Source: Based on data collected during fieldwork in January 2018.

Note: n/a = not applicable. * = Informal fee without receipt (official cost shown as zero). ? = information on official costs not available from responsible authority.

Image 10 Kye-Ossi—Ebebyín border area



Source: Based on information gathered during fieldwork in February 2018. Map data © 2018 Google.

Note: Numbers (Cameroon side) and letters (Eq. Guinea side) in the image correspond to the list of border agencies in Table 15.

4.2.2 Kye-Ossi–Ebebiyín border crossing (Cameroon–Equatorial Guinea)

Kye-Ossi–Ebebiyín presents a very different layout compared to Abang-Minko–Eboro and Kye-Ossi–Meyo Kye. The border lies on a small, paved-ground zone with no natural demarcation line between Cameroon and Equatorial Guinea. The area on the Cameroonian side, located in proximity of the Kye-Ossi market, includes a roundabout from which a road heading to Meyo Kye also departs—on the Equatoguinean side; however, a road departing from the border point heads to Ebebiyín (about 27 km away). Images 10 and 11 provide an overview of the border area.[9]

The border was closed during the field visits and since late December 2017. The area was apparently closed following a failed coup attempt that took place in Equatorial Guinea on December 24, 2017—trade between the two countries has since almost completely stopped. The border is currently militarized with Equatoguinean soldiers and police officers deployed, and the entire area is marked by an overall atmosphere of tension: no crossing could be observed, albeit Equatoguinean authorities indicated that a few individuals and trucks were occasionally let into Equatorial Guinea. As a result, only limited information could be collected through short, informal conversations held in proximity of the border with officials and traders from Cameroon.

Image 11 Kye-Ossi–Ebebyín border (Cameroon side)

Source: Photo by team during fieldwork.

[9]Based on Google Maps data, it appears that the Kye-Ossi–Ebebiyín border is located at a point along the Cameroon–Gabon border line and not the Cameroon–Equatorial Guinea border line. While no official explanation for this could be obtained during fieldwork, one possible justification could be that, since the only main road that apparently connects Cameroon with Equatorial Guinea (known as N2) passes through Gabon first, the three countries might have negotiated some sort of arrangement whereby the Cameroon–Equatorial Guinea crossing point lies on the N2 along what is, in fact, the Cameroon–Gabon border line.

Border Formalities

Table 15 Border agencies at Kye-Ossi–Ebebiyín

Border agencies	
Cameroon	Equatorial Guinea
1. Town hall	a. Police
2. Ministry of Commerce	b. Customs
3. Phytosanitary Police and Veterinary Service	
4. BGFT	
5. Customs	
6. Immigration/Emigration Police	

Note: Numbers (Cameroon side) and letters (Eq. Guinea side) in the table are used to indicate the location of each border agency in Image 10.

Cameroonian side

On the Cameroonian side, small offices of all main border agencies are found including Customs, Immigration/Emigration Police, BGFT, Phytosanitary Police, Ministry of Commerce, and a representation of the town hall. On the Equatorial Guinea side, however, only two big offices could be observed for police and customs, albeit no visits were permitted on that side of the border. Equatoguinean authorities declined to provide information on the number of agencies represented.

Border activity appears to be closely linked to market dynamics in Kye-Ossi. According to Cameroon's Immigration/Emigration Police, 'thousands' cross at Kye-Ossi–Ebebiyín on the busiest market days, which are apparently Mondays, Wednesdays, and Saturdays. During the rest of week, an average of 100 crossings is observed. Equatorial Guineans can enter Cameroon visa free on their national IDs and move freely within the country for up to 90 days. The same should apply to Cameroonians crossing into Equatorial Guinea, as the latter officially adopted the CEMAC principle of free movement of people in October 2017; however, conversations held with Cameroonian traders indicated that the actual enforcement of the principle varies and is often left to the discretion of the official in charge, while the border itself used would be occasionally closed with no notice or justification, even before the December 24 closure.

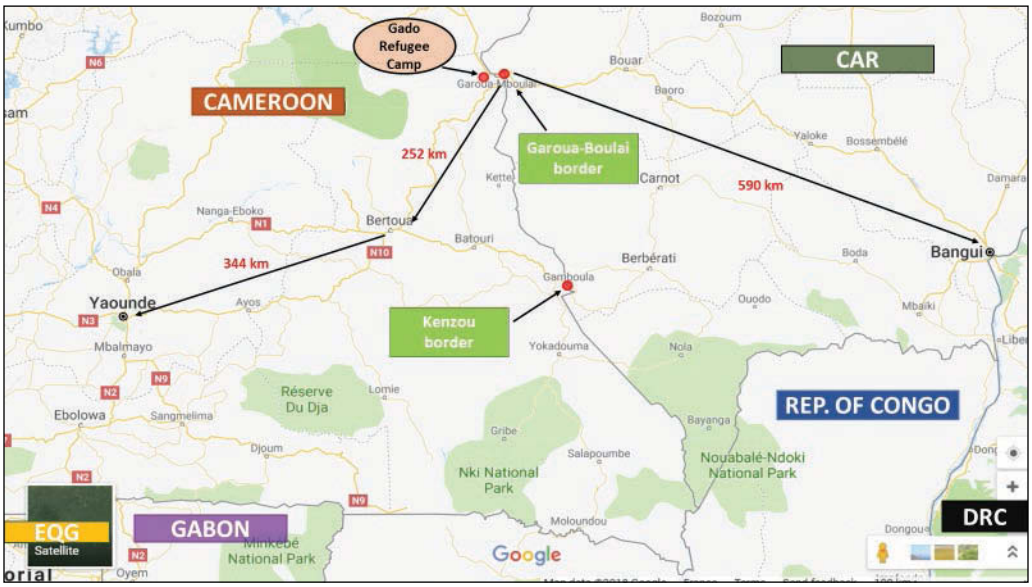
4.2.3 Garoua-Boulai border crossing (Cameroon–the Central African Republic)

Garoua-Boulai is one of the two main borders of Cameroon's eastern region, Kentzou being the other one. Located along the main corridor that runs from the port of Douala to Bangui (via Yaoundé), the town has traditionally played an important role as a gateway for trade between Cameroon and the Central African Republic. As a result, border activity in the area has historically been quite intense—however, trade flows appear to have recently slowed down due to the deterioration of security conditions on the Central African side. Since 2013/14, insecurity and violence in the Central African Republic have also generated a major influx of refugees, many of whom eventually settled in Cameroon's eastern region—as a result, two major refugee camps are now found in the Garoua-Boulai area, one of which (Gado) currently hosts about 25,000 residents.[10]

The border area has no natural demarcation line and mainly consists of a paved road measuring approximately 200 meters, currently shared by trucks, cars, carts, and pedestrians. On the Cameroonian side, juxtaposed to a portion of the Garoua-Boulai market, a large area is also found where the loading and unloading of trucks take place. A few unchartered roads are known to run parallel to the formal border crossing; however, traders, who for the most part would be small-scale ones travelling by foot, would generally deem them as insecure and/or patrolled by officials extorting bribes and would hence apparently use them only occasionally. Images 12 and 13 provide an overview of the Garoua-Boulai border area.

[10]https://www.voanews.com/a/many-more-refugees-flee-central-african-republic-violence-to-cameroon/4060632.html.

Image 12 Border crossing between Cameroon and the Central African Republic

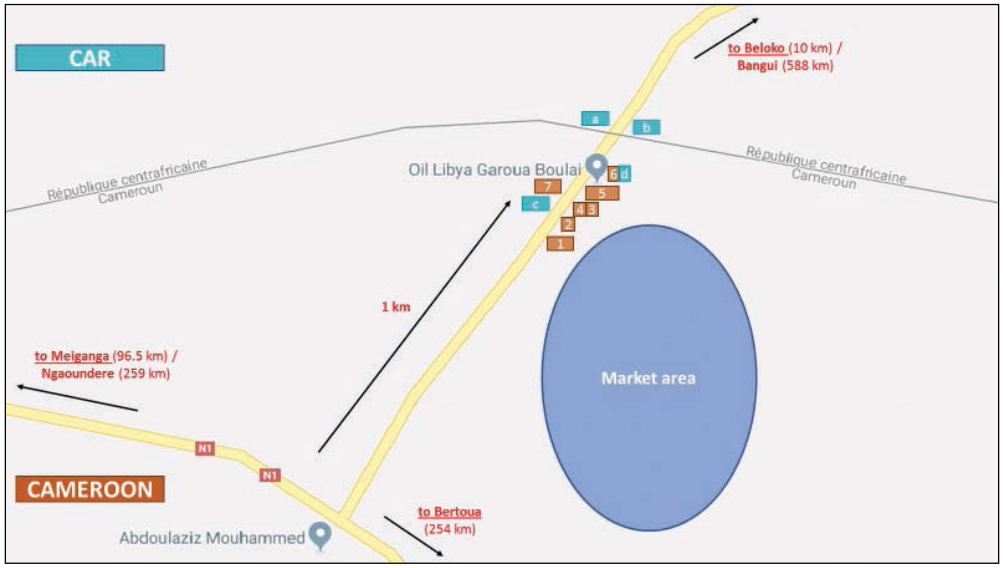


Source: Map data © 2018 Google.

Compared to the past, trade volumes passing through Garoua-Boulai have decreased following the 2013/14 crisis in the Central African Republic. Increased insecurity on the Central African side of the border, massive refugee influxes into Cameroon, and occasional raids by Central African militias have negatively affected overall trade volumes. However, the situation seems to have improved recently owing to the introduction of military convoys. All vehicles headed to the Central African Republic are now required to join a convoy, organized by the Central African army jointly with the association of transporters, and typically departing to Bangui twice a week on Tuesdays and Saturdays. Trucks returning empty from the Central African Republic travel in a weekly convoy arriving at Garoua-Boulai on Thursdays. Convoys typically comprise an average of 80–100 trucks, most of which are heavy ones, each paying CFAF 25,000 (US$47.30) to the Central African transporters' association as 'convoy right fee'.[11] It is not clear to what extent the introduction of convoys may have changed the nature of trade in the area, as local sources indicated that Garoua-Boulai has historically been an important gateway to the Central African Republic on the Douala–Bangui corridor and has traditionally featured long-distance, heavy trucks. The convoy may have contributed to enhancing overall security and thus reviving trade flows, which apparently had slowed down due to frequent militia attacks against trucks in Central African territory, along the way to Bangui. Apparently, such attacks have ceased since convoys were introduced. On non-convoy days, the border is typically used by some small-scale traders crossing by foot to buy and sell at the market and a moderate number of cars and pickups. It also appears that Central Africans living on the Central African side of the border rely almost exclusively on hospitals, schools, and similar public services on the Cameroonian side of Garoua-Boulai. Thus, the border remains open on non-convoy days to cater to such traffic.

[11]A convoy generally includes both long-distance trucks coming from Douala and trucks completing Garoua-Boulai–Bangui trips only—the latter typically takes 2.5 days with two overnight stops. While official information on when convoys were introduced could not be gathered, it would appear that the measure has been in place since 2016 at least, and possibly earlier.

Image 13 Garoua-Boulai border area



Source: Based on data and images gathered during fieldwork in February 2018. Map data © 2018 Google.

Note: Numbers (Cameroon side) and letters (CAR side) in the image correspond to the list of border agencies in Table 16.

Image 14 Garoua-Boulai border (left—Cameroon side, right—Central African side)

Source: Photos by team during fieldwork.

Border formalities

Table 16 Border agencies at Garoua-Boulai

Border agencies	
Cameroon	**Central African Republic**
1. Immigration/Emigration Police	a. Police
2. Ministry of Health	b. Army
3. Ministry of Commerce	c. Single Window
4. Phytosanitary Police and Veterinary Service	d. Central Africa Republic Bureau of Road Chartering (*Bureau d'Affrètement Routier Centrafricain*, BARC)
5. Army (*Gendarmerie* in French)	
6. BGFT	
7. Customs	

Note: Numbers (Cameroon side) and letters (CAR side) in the table are used to indicate the location of each border agency in Image 13.

Cameroonian side

The following agencies are found on the Cameroonian side of the Garoua-Boulai border:

- Customs
- Police Immigration/Emigration
- Phytosanitary Police
- MINEPIA (responsible for veterinary checks)
- *BGFT*
- Ministry of Commerce
- Ministry of Health
- Intelligence Agency (DGRE)

Officials from Cameroon's regular police and the army are also present. Thus, agencies at Garoua-Boulai are almost the same as those seen at borders visited in the southern region, the only notable exceptions being the Ministry of Health and the Ministry of Commerce (the latter is not found at Abang-Minko but is present at Kye-Ossi–Meyo Kye). In addition, a small desk of BARC is present, along with a single window facility reporting to Central African customs. The border is open from 6 A.M. through 6 P.M.

Police Immigration/Emigration. On average, approximately 1,000 individuals per month are estimated to enter Cameroon through Garoua-Boulai, over 90 percent of whom are of Central African nationality. These individuals include both vehicle drivers and small-scale traders travelling by foot. The latter are said to be well known to Cameroonian authorities and thus are not expected to produce a passport or even a national ID. Truck drivers, on the other hand, can enter Cameroon visa free on their passports and are allowed in the country for up to 90 days. It appears that most drivers do not in fact own a passport and thus travel on a laissez-passer issued by Immigration authorities at the cost of CFAF 5,000 (US$9.45).

Phytosanitary Police. All products exiting Cameroon are required to be accompanied by a phytosanitary certificate. Trucks arriving from Douala would have normally obtained the certificate at the port; instead, all other vehicles can have it issued at the border for a standard fee of CFAF 2,000 (US$3.78), irrespective of the nature and the amount of the consignment transported. The fee is in line with what is being charged for certificate printing at other borders visited during the mission; however, additional fees are also charged for a total ranging between CFAF 5,000 (US$9.45) and CFAF 20,000 (US$37.80) depending on the size of the vehicle and on the nature of the consignment inspected. Small-scale cross-border traders at Garoua-Boulai are apparently exempted from such requirement, albeit the decision seems to be ultimately left to the discretion of the official on duty. Due to the lack of lab facilities and testing equipment, all phytosanitary inspections are conducted only visually.

BGFT. As at border points in the southern region, the BGFT is responsible for performing checks on vehicles in transit, for collecting freight declarations, and for issuing the LVO.[12] The latter is available at a fee of CFAF 751 per ton (US$1.42) plus CFAF 4,500 (US$8.51) for commissions, of which CFAF 2,000 (US$3.78) is for 'information commission' and CFAF 2,500 (US$4.73) for 'road assistance commission'. Small-scale traders crossing by foot are exempted from BGFT formalities.

BARC. The BGFT office in Garoua-Boulai hosts a small desk of the Central African Republic BARC, a public agency reporting to the Ministry of Transport in Bangui that is tasked with conducting checks on all long-distance vehicles in transit toward the Central African Republic. BARC issues a separate LVO different from the one issued by the Cameroon BGFT. Small-scale traders are exempted from BARC formalities.

[12]Fees charged by the BGFT appeared to be more of a plain (unnecessary) tax rather than the cost of an actual service rendered to traders (for example, insurance).

Ministry of Health. Health officials are mainly responsible for checking that long-distance travelers in transit possess a yellow fever certificate—small-scale cross-border traders crossing for the day are however apparently exempted from this, albeit the decision is presumably left to the discretion of the official on duty. Inspections are conducted at no cost, yet travelers unable to produce a certificate are charged a fee of CFAF 4,500 (US$8.51), which includes the actual vaccination cost and the cost of issuing a certificate.

Central African Customs Single Window. A single window office is found on the Cameroonian side of the border. Established in 2016, it reports to the Central African Republic customs, is staffed with Central African customs officials, and mainly serves as a final checkpoint for trucks in transit toward Bangui. Its customers are mostly drivers arriving from Douala, transporting manufactured or processed items—they typically complete clearance formalities at the Port of Douala and then present the single window officer with documentation, including a *titre de transit,* an export declaration, and an invoice, along with proof of payment of customs duties for goods originated outside CEMAC. If all documents are in order, trucks are allowed to proceed into the Central African Republic, else they are required to complete formalities while their load is stored at a warehouse facility located on the Central African Republic side of the border. No fee is charged for the services rendered by the single window. Vehicles carrying agricultural goods would be typically not expected to stop at the window.[13]

Central African Republic side

On the Central African Republic side of the border, all clearance formalities are conducted at Beloko, a small town located some 10 km away from the border where offices of border agencies are located. Among others, those agencies include Customs, BARC, Phytosanitary Police, Veterinary Service, Ministry of Water and Forestry, Ministry of Transport, and Ministry of Commerce, as well as an Internal Revenue Service commonly known as *impôts*. While it was unfortunately not possible to enter the Central African Republic and meet with border officials due to security concerns, information gathered from traders suggests that border agencies charge various formal and informal fees as summarized in Table 17. These payments include import duties that are charged in an apparent contravention of CEMAC free trade provisions. Duties also appear to be subject to duplication, as the Central African Republic customs charge them not only at the border level (actual import duties, paid in Beloko) but also upon arrival in Bangui (so-called *récuperation*). Additionally, Central African phytosanitary authorities do not recognize SPS certificates issued by their Cameroonian counterparts and require traders to have a new one issued against the payment of a fee.

Actual trade costs

Actual trade costs reported by traders and transporters may differ quite substantially from those provided by border agencies as supposedly official ones. Table 17 provides an overview of total costs incurred by a truck completing a Garoua-Boulai–Bangui return trip. The table also compares actual trade costs as reported by traders with official fees based on information provided by border authorities. Such comparison, however, is only available for Cameroon as security conditions prevented the team from crossing into the Central African Republic and gathering information from

[13]One possible explanation could be that the single window appeared to be primarily concerned with preclearance of long-distance trucks coming from Douala and headed straight to Bangui, that is, the ones that typically transport manufactured and processed items originating in third countries and travelling in containers. However, agricultural commodities would generally originate from various regions of Cameroon, be transported to and cleared at Garoua-Boulai, and then loaded onto trucks leaving for Bangui. Thus, it is possible that agricultural trucks complete clearance formalities at the border (through intermediaries) rather than using preclearance through the single window.

Table 17 Actual cost of trade for a truck completing a Garoua-Boulai–Bangui return trip (CFAF unless indicated)

Fee name	Responsibile agency	Large truck (25 tons)			Very large truck (40 tons)		
		Official cost	Actual cost	Variance	Official cost	Actual cost	Variance
Costs to exit Cameroon							
Parking fee	Town hall	?	1,500	?	?	2,000	?
Laissez-passer	Immigration Police	5,000	5,000	0	5,000	5,000	0
Exit fees*	Army	0	2,000	2,000	0	2,000	2,000
	Police (regular)	0	2,000	2,000	0	2,000	2,000
Customs fees	Customs	?	50,000	?	?	10,000	?
Phytosanitary certificate	Phyto police	2,000	5,000	3,000	2,000	20,000	18,000
LVO issue fee	BGFT	23,250	23,250	0	34,500	34,500	0
Export declaration fee	Min. of Commerce	?	10,000	?	?	15,000	?
Costs to enter CAR–Garoua-Boulai border post							
Entry fee*	Police (regular)	0	2,000	2,000	0	2,000	2,000
	Army	0	2,000	2,000	0	2,000	2,000
	Town hall	?	1,000	?	?	1,000	?
LVO issue fee	BARC	?	5,000	?	?	10,000	?
Weighbridge fee	Min. of Public Works	?	15,000	?	?	20,000	?
Military convoy fee	BARC	?	25,000	?	?	25,000	?
Beloko checkpoint (8 km from Garoua-Boulai border)							
Unspecified fees*	Police (regular)	0	2,000	2,000	0	2,000	2,000
	Army	0	2,000	2,000	0	2,000	2,000
Stamping of customs receipt	Min. of Water and Forest	?	20,000	?	?	25,000	?
Weighbridge*	Min. of Public Works	0	75,000	75,000	0	150,000	150,000
Import duties	Customs	0	1,000,000	1,000,000	0	1,500,000	1,500,000
Revenue tax	Internal Revenue	?	50,000	?	?	50,000	?
Phytosanitary certificate	Phyto police	?	5,000	?	?	5,000	?
Import declaration fee	Min. of Commerce	?	25,000	?	?	50,000	?
Stops en route							
Weighbridge fee (Baboua)*	Min. of Public Works	0	40,000	40,000	0	50,000	50,000
Weighbridge fee (Bouar)*	Min. of Public Works	0	40,000	40,000	0	50,000	50,000
Parking (Bouar)—overnight	Security guards	?	1,000	?	?	1,000	?
Parking (Bossembélé)—overnight	Security guards	?	1,000	?	?	1,000	?
Arrive Bangui							
Unspecified fees*	Police	0	2,000	2,000	0	2,000	2,000
	Army	0	2,000	2,000	0	2,000	2,000
Customs recovery fee*	Customs	0	500,000	500,000	0	750,000	750,000
Toll fee	BARC	?	5,000	?	?	5,000	?
Stamping fee*	Phyto police	0	2,500	2,500	0	5,000	5,000
Escort fee	Customs	?	10,000	?	?	10,000	?
Exit Bangui							
Military convoy fee	BARC	?	25,000	?	?	25,000	?
Unspecified fees*	Police	0	2,000	2,000	0	2,000	2,000
	Army	0	2,000	2,000	0	2,000	2,000
Re-enter Cameroon							
Entry fees*	Army	0	2,000	2,000	0	2,000	2,000
	Police	0	2,000	2,000	0	2,000	2,000
Unspecified fee	BGFT	?	5,000	?	?	10,000	?
Total journey							
Total per vehicle (CFAF)		**30,250**	**1,969,250**	**1,684,500**	**41,500**	**2,853,500**	**2,547,000**
Cost per ton (CFAF)		1,210	78,770	67,380	1,038	71,338	63,675
Total per vehicle (US$)		**57.18**	**3,722.59**	**3,184.31**	**78.45**	**5,394.14**	**4,814.74**
Cost per ton (US$)		2.29	148.90	127.37	1.96	134.85	120.37

Source: Based on information collected during fieldwork in February 2018.

Note: * = Informal fee without receipt (official cost shown as zero). ? = information on official costs not available from responsible authority.

authorities there. Image 15 shows the various stops made during a Garoua-Boulai–Bangui trip.

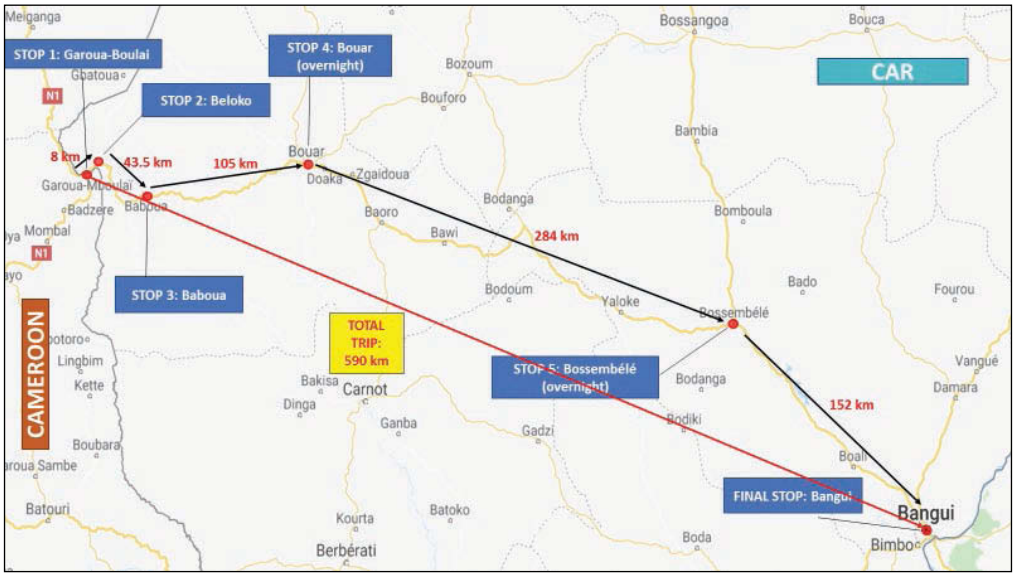
As demonstrated, costs along the route are very expensive. At an estimated CFAF 78,770 (US$148.90) per ton on a 25-ton truck and CFAF 71,338 (US$134.85) per ton on a 40-ton truck, the amounts collected by border officials and other agencies along the route add significantly to the cost of landing staple foods in Bangui. As a share of the maize price paid to growers at the farm gate, for instance (that is, around CFAF 145,000 or US$274 per ton), the cost of crossing the border at Garoua-Boulai and traversing the road to Bangui adds almost 49–54 percent to the commodity's landed shipment value.

Table 17 shows costs are highly regressive on smaller vehicles in that the amounts paid to various authorities do not vary significantly according to vehicle size. Thus, the cost of transporting 1 ton of goods to Bangui on a 25-ton truck is approximately 9.4 percent higher than when using a 40-ton vehicle. This at least partly explains why trucks transiting at Garoua-Boulai are mostly large ones that allow for economies of scale.

It is also notable that Central African weighbridge fees account for an estimated 8.6 percent and 9.5 percent of the total costs paid by 25- and 40-ton trucks on the entire route, respectively (that is, CFAF 170,000 or US$320 for a 25-ton truck and CFAF 270,000 or US$510 for a 40-ton truck). Drivers say that weighbridge officials justify these high charges as fines for vehicle overloading but claim they do not receive receipts for the amounts paid and that all trucks are systematically deemed overweight regardless of the load size. Such practices, therefore, not only deny the Central African government revenue that it needs for road maintenance but also encourage overloading since drivers know they will be made to pay regardless of vehicle weight.

Clearance formalities and costs appear to be less institutionalized for small-scale traders. As shown in Table 18, a small-scale cross-border trader crossing by foot from the Central African Republic (generally

Image 15 The Garoua-Boulai–Bangui journey



Source: Based on information gathered during fieldwork in February 2018. Map data © 2018 Google.

Table 18 Actual cost of trade for a small-scale cross-border trader carrying one cassava bag (about 25 kg)

Responsible agency	Amount paid	
	CFAF	US$
	Exit from Central African Republic	
Phytosanitary Police	100	0.19
	Entry into Cameroon	
Town hall	300	0.57
Phytosanitary Police	100	0.19
Market manager	400	0.76
Army	500	0.95
Total	**1,400**	**2.66**
Estimated trade costs per ton[a]	**51.07**	**96.52**
Trade costs as % of bag value[b]	**35.47%**	

Source: Based on information gathered during fieldwork.

Note: a. Computed based on the following equivalence US ton 1 = kg 907.185.

b. Computed based on a purchase price of US$0.30 per bag, implying a bag value of US$7.5.

to sell cassava at the Garoua-Boulai market) would be charged a variety of small fees that do not necessarily have a proper name or official justification and that are charged informally without issue of receipt. Also, it seems that most documentary requirements applying to larger traders are waived on smaller consignments, albeit not necessarily in a systematic way and/or as result of a formal exemption granted by the competent border agency. Overall trade costs remain high: the total of fees paid to transport a 25 kg bag of cassava across the border correspond up to over 35 percent of the bag value.

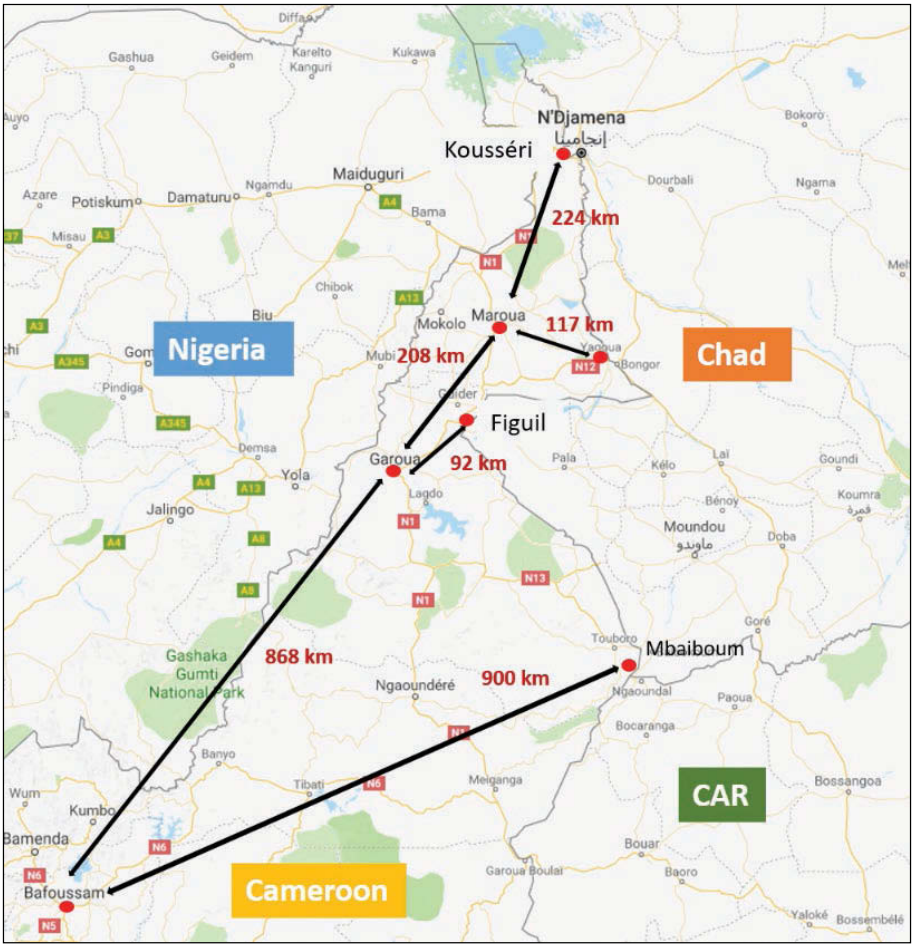
4.2.4 Kousséri–N'Djamena border crossing (Cameroon–Chad)

The Kousséri–N'Djamena border crossing is still the most important post between Cameroon and Chad and the final point of the 1,650 km corridor starting in Douala.[14] The border is formed by the Logone River and the two parts are linked by a bridge. The border authorities have their offices on each of their respective sides. Most goods for agricultural trade are sourced from the Kousseri market, where Cameroonian trucks usually stop and Chadians buy and transport across agricultural commodities. Alongside these small traders, several larger trucks coming from Douala cross the border and overall Kousseri–N'Djamena, together with Touboro/Mbaiboum, is the more formal border crossing between Cameroon and Chad. Unfortunately, the security situation did not allow the same in-depth visits and data collection as at the other frontiers.

Visits to the secondary border crossing of Figuil and Yagoua-Bongor highlighted a lax and informal border crossing regime. For example, interviews with various public and private actors at these border posts revealed that tariff levels are applied differently depending on border post and officials, on truck size and load, on timing, and so on. Often, guidance notes from the customs authority are having a wide margin of interpretation, leaving a lot of room for informal payments. Border users who

[14]See the section on the security situation in the Lake Chad Basin for more details.

Image 16 Main border crossings between Cameroon and Chad



Source: Map data © 2018 Google.

try to comply with the requirements and demand a receipt for payments are usually delayed significantly by border authorities. In addition, the roles of the public authorities at the border are not defined clearly enough, generating duplications of controls and additional payments, particularly as checkpoints are not concentrated in one single point. For example, at the Figuil border crossing point, the 12 inspections stretch along several kilometers on both sides.

Image 17 Tomatoes and plantain being traded at Kousseri

Source: Photos by team during fieldwork.

Border formalities

Table 19 Border agencies at Kousseri–N'Djamena

Border agencies	
Cameroon	**Chad**
Departmental Delegation of the Ministry of Agriculture	Police (immigration service)
Customs Office (management)	Customs Authority
Customs Post (at the Ngueli bridge)	Army (*Direction Surveillance Territoire*)
Phytosanitary Police	Phytosanitary control
Veterinary Control	Other secondary technical agencies
Police (immigration service)	
Gendarmerie	
Rapid Response Force (*Bataillon d'Intervention Rapide*)	
Ministry of Trade	

On the Cameroonian side, the same agencies as at the border posts are present, with the addition of the rapid response force (*Bataillon d'Intervention Rapide*), given the Boko Haram–induced security situation and a duplication of the presence of the customs (one large office in Kousseri and a smaller post at the bridge crossing). The reticence of the Chadian side to discuss border agencies did not allow a full counting of the agencies present at the border, but discussions with other actors indicate that the immigration and regular police, the customs, a separate army branch responsible for border control (*Direction Surveillance Territoire*), the phytosanitary authorities, and other secondary technical agencies are present. See Table 19.

Similarly, given the generally tense climate at Kouserri, a full data collection and analysis on border crossing costs was not possible. Indicative information suggests that customs levies are charged (but it is not clear whether as tariffs or other types of taxes) and that *tracasseries* by the police and the army are common at a standard cost of CFAF 5,500 (US$10) per truck.

4.3 Traders' responses to informality and *tracasseries* lead to a vicious circle of further informal practices

Traders and border users have responded creatively to the increasing number of and value of informal payments, as well as to the legal, formal requirements. As formal and informal payments are often determined by the size of consignment, which in turn is estimated by the number of bags, traders are overloading bags. Moreover, the type of commodities being carried is often disguised, with higher taxed commodities hidden at the center and surrounded by lower value commodities. Additionally, because smaller consignments in cars or on motorcycles are rarely checked and are taxed—formally and informally—proportionally less, it is common to 'decompose' a large truck's load into small batches of two to three bags per motorcycle, which then crosses the border with less hassle, only to 'recompose' the cargo into a different truck on the other side.

One type of response to formally crossing a border is higher risk taking. Particularly in the northern part of Cameroon, traders often engage in risky behavior to avoid dealing with authorities. For instance, livestock traders often choose to cross the Logone River with their animals swimming, while they lead the herd from a pirogue, to avoid crossing bridges manned by public authorities or use the equally supervised ferries. In the dry season, the losses due to drowning are minimal, but traders continue this practice in the rainy season as well, when livestock prices peak. On land, when crossing through unmarked, undesignated territories, traders often encounter local thieves, have their vehicles damaged, but generally successfully escape the mobile brigades of the police and customs authorities.

Ethnic ties can play a key role in informal trade, creating unequal access to markets. As described earlier in the report, the ethnic distribution in the region overlooks the national border, and populations close to the border use this fact to their advantage. Informal cross-border networks, particularly in the northern part of Cameroon, take advantage of shared ethnolinguistic ties and operate as market intermediaries. Often a group of villages or a larger family resides on both sides of the border and uses their family ties to transport small batches of agricultural goods (one to two bags of cereals on a motorcycle, a couple more in a small car) across the frontier. When caught or questioned, they often declare that the goods have been bought at the market and are intended for domestic consumption at the destination. Then, once a sufficient quantity is gathered, a truck comes and picks up the cargo. In this setup, wholesalers rarely deal with border authorities and little trade is recorded, checked, and taxed at the official border posts.

Linked to the two coping strategies above, fragmentation and consolidation of consignments of agricultural goods are a widespread practice. Again, particularly in northern Cameroon, but to some degree at other border points, it is common to use intermediaries to fragment (a couple of kilometers before the first border checkpoint, sometimes at the nearest market) the cargo of a truck into smaller quantities of one to two bags that are then transported across the border by car or motorcycle (and sometimes even by bike or cart). In general, trucks pass through all the border checkpoints with payments required at each stage, while a motorcycle is stopped at less than half of checkpoints (particularly, the phytosanitary police and ministry of trade seem to be unconcerned with small transports). On the other side of the border, a partner truck is waiting for the arrival of the small consignments to consolidate the load. This practice is widespread at the Kousseri–N'Djamena border crossing, where virtually all trucks stop and unload on the Cameroonian side at the border. From there, a thriving business (apparently conducted by Chadian war veterans, who enjoy a tax-free status) transports small quantities across the bridge into N'Djamena for delivery to traders or directly to the market.

When formal channels are used, the usual strategy is to overcharge a truck by either overloading individual bags or by exceeding the maximum weight allowed (or both). The practice of overloading a bag—as witnessed firsthand at the Yagoua market (see Image 18)—is an example of how traders start with the individual unit—the bag—to manipulate the many payments that are levied per bag. Overloading 'specialists' at the cereal market charge of CFAF 1,000 (US$1.90) per bag to compress 200 kg of grains into a 100 kg bag. Following this, sometimes transporters are disguising their loads by having lighter goods on the outside of the truck and heavier (bags of cereals, for example) ones hidden inside. This tactic is particularly useful in the less trafficked, more rural areas, where weighing stations are missing along the main roads and at the border posts. Similarly, in the cases where different agricultural commodities are charged distinct fees by public authorities, more valuable items are hidden inside and the overall cargo composition is misdeclared.

Image 18 Informal practices to deal with rising costs (left—rice bag being overloaded, right—pickup being overloaded)

4.4 Security risks and political crises are altering trade patterns and flows

Adding to the high trade costs and cumbersome procedures, poor security and frequent political crises are affecting agricultural trade by increasing losses, risks taken by traders, and informality. In the northern parts of Cameroon (and to some degree in the Adamaoua region), the Boko Haram–induced security situation has reduced trade flows between Cameroon and Nigeria, as well as decreasing livestock transit from Chad into Nigeria. In addition, the Douala–N'Djamena corridor has also been disrupted because of the risk of attacks on the last segment (Mora–Kousseri). The traffic has been redirected to cross through Touboro into southern Chad and continue through Moundou up to N'Djamena. The number of cross-border livestock theft incidents in Cameroon has also increased on both the Nigerian and Chadian sides, limiting the usual cross-border transactions and momentarily fluctuating livestock prices. Finally, the closure of the Cameroon–Equatorial Guinea border resulted in the rechanneling of trade through unofficial rural routes.

Since May 2014, Cameroon has officially participated in the offensive against Boko Haram, and this involvement has deeply affected the security situation in its northern regions.[15] While the conflict has slowly decreased in intensity since 2014–2015, continued violence and suicide attacks took place in 2017, and the threat level remains high in the Far North, North, and Adamaoua regions. On Cameroonian territory and at the border, Boko Haram succeeded in disrupting both productive activities and trade. The group engaged in financing its activities by providing loans to traders, and expecting a percentage of their profits in return. In markets near the borders—Amchidé, Fotokol, Makary, Hile Alifa, and Kousseri—Boko Haram has extorted money from traders whom it has not helped with financing. In the Mayo Sava and Mayo Tsanaga departments, hundreds of kidnappings have been reported, as the group took the people for

[15]International Crisis Group. (2017). Cameroon's Far North: Reconstruction amid Ongoing Conflict. Crisis Group Africa Briefing N°133. Nairobi/Brussels, October 25, 2017.

forced agricultural labor, later selling the harvest in Cameroonian and Nigerian markets. In the lake area (Kofia, Hile Alifa, Darak), Boko Haram threated farmers to extort a contribution of 10 percent of their harvests (the Mayo Sava and Mayo Tsanaga districts have also been subject to this extortion). As some of the border regions are inaccessible, cereal production (millet and maize) has been prohibited by the army, even in certain non-border areas, for security reasons, leading to a significant decrease in regional agricultural production and displaced farmers.

Livestock trade and transit are equally affected, as traders or livestock breeders travelling to Nigeria have had to pay for safe passage. Sales of stolen livestock on the markets in Nigeria and Cameroon are another revenue source for Boko Haram. Estimates indicate that since 2013, the group has stolen at least 17,000 heads of cattle and thousands of sheep and goats in Cameroon, worth around US$6 million. In addition, data collected from the customs authority in Yagoua, an important livestock crossing point from Chad to Cameroon and Nigeria, clearly indicate the reduction in transit flows. For example, the transit of cattle to Nigeria, passing through Yagoua, decreased from 53,662 animals in 2015 to around 33,000 animals in 2016 and 2017 (a reduction of 39 percent). The transit of sheep also reduced from 2,482 animals in 2015 to 1,373 in 2016, before rebounding slightly to 1,944. In comparison, cattle imports from Chad to Cameroon through the same border crossing have stagnated at around 6,000 animals.

Trade in northern Cameroon and the Lake Chad basin has reduced significantly, and the local trading networks have had to find alternative income sources or redirect their activities to other parts of Cameroon. Traders with larger operations have moved to N'Djamena, Bertoua, Douala, or Yaoundé, while the smaller scale traders have been the hardest hit. Merchants now have to engage in significant detours of more than 100 km on worse roads and often by motorcycle and bicycle to reach their Nigerian destinations. Transport within Cameroon has also been affected by the conflict, in particular the important Maroua-Kousseri segment of the Douala–N'Djamena corridor, which was closed for several months in 2014. On other critical routes in the region, such as Amchidé-Mora, Maroua-Kousseri, and Fotokol-Kousseri, traffic was only possible under military escort until 2016. According to data from Camrail, the freight of commodities produced in northern Cameroon (onions, millet, sorghum, maize, peanuts, and live pigs) has dropped by half since 2014. As a result, a significant part of the Douala–N'Djamena traffic has shifted to the border crossing at Touboro, reducing the distance travelled in Cameroon in favor of entering southern Chad.

Nevertheless, the security situation is deteriorating in Chad as well, and the crisis in the Central African Republic continues. Particularly important are the increasing recent incidents of livestock theft and associated violence, which is displacing many livestock farmers. For example, the kidnapping of Mbororo children, part of an ethnic group specialized in livestock rearing, has increased in frequency since 2007 (Kossoumna Liba'a, Dugué, and Torquebiau 2011). Children are used as bargaining chips to force livestock sales. The perpetrators are Nigerians and Cameroonians but mostly Chadians and Central Africans. Because of the increasing risks, livestock producers adjusted their trading practices: while they previously exhibited their livestock proudly, now they are forced to split large herds into subunits of 20 to 30 heads to limit the risk of theft and to reduce the visibility of their capital. In turn, the costs of guarding livestock have increased, and many urban cattle owners stopped contracting the Mbororo to take care of their animals because of the risks involved.

More recently, economic activity and trade with Nigeria are also affected by the crisis in the English-speaking part of Cameroon. Two regions (North-West and South-West) form the English-speaking part of the country, accounting for 4 percent of the national area and 20 percent of the total population (International Crisis Group 2017). The regions' economy is based on the oil sector (9 percent of GDP), timber (4.5 percent), intensive agriculture, including large plantations

owned by the Cameroon Development Corporation, and other smaller plantations that supply Douala and the CEMAC countries. The crisis affects both domestic trade and trade with Nigeria: the Nigerian traders must pass through those regions to reach the production basins in the western region and beyond, while domestic traders are often put off by the increased police and military presence in the two regions, as well as the general climate of instability (for example, Internet connectivity is frequently cut). For the moment, no studies or estimates are available on the impact of the crisis, but anecdotal evidence during the field mission indicates that if the crisis escalates, Cameroon's economy (20 percent of GDP is generated by the Anglophone regions) as a whole will be significantly affected.

Border closures, such as the recent one between Cameroon and Equatorial Guinea, are another example of how political crises affect agricultural trade. The border post at Kye-Ossi–Ebebiyín, an important crossing point and source of foodstuffs for Guinea, was closed in late December 2017, and the traffic was redirected to the close-by village of Olamze, where large trucks were fragmented into small batches that were transported by 'pushers' along clandestine tracks through forest across the border. Indicative information obtained during these trips (the students crossed as well through this channel) shows that an additional cost of CFAF 20,000 (US$18) was necessary to cross the border through the thick of the forest.

4.5 Women account for most domestic traders along agricultural trade corridors in CEMAC

Women agricultural producers and traders are disproportionately affected by trade barriers. In line with findings in the literature on gender in agriculture in Sub-Saharan Africa (for example, Mukasa and Salami 2016), field observation confirmed that female producers have difficulty in accessing land, generally cultivate smaller plots, and have lower access to inputs and advisory services. Moreover, women contribute disproportionately more to agricultural work, despite men taking over the heavier work (clearing and plowing). Also, few POs are led by women, one of the notable exceptions being CROPSEC, an agropastoral association active in the North and Far North regions, that counts more than 3,000 women members (representing 59 percent of members) (Fongang 2012).

Women play an important role in trade at all surveyed locations but mainly as traders within their own countries, while men predominate in cross-border trade. The fieldwork and the survey confirmed that most retailers and intermediaries (*buyam sellam*) in immediate rural markets and collection markets, as well as a large number in urban markets, are women. Generally, women are involved in short-distance trade (for example, Central African small-scale cross-border traders crossing by foot are predominantly female). In general, they appear to dominate among small-scale retail vendors and customers at the market, albeit their participation in wholesale trading is not infrequent either, as observed at Abang-Minko or Kye-Ossi markets. In some cases, women also feature among more established traders buying larger amounts of agricultural goods (for example, through pickups, minibuses, or small trucks). The drivers of those vehicles, on the other hand, would generally be men. Finally, Garoua-Boulai presents a peculiar flow of small-scale cross-border trade in cassava featuring predominantly Central African women. These women generally cross the border in the Central African Republic and may complete multiple trips in a day to buy and sell at the local market on the Cameroonian side. In some areas, the low participation of women could be explained by their central role in the family and especially the weight of Islam in North Cameroon, where Islamic culture does not accept exhibition of women from the Peul ethnic group in public places.

Compared with other border locations in Africa, women at the visited sites did not report major

constraints related to abuse, including sexual harassment and physical violence. Instead, they would generally complain about the 'financial' harassment by authorities both at the border and at the market, referring to the fact that their generally limited volume of business can be inadequate to meet the costs associated with border crossing or market vending. Similarly, women would often list access to finance as their top priority to expand their trading activity, followed by access to skills, machinery, distribution, and marketing. Gender-specific infrastructural deficiencies could be observed at the various locations visited during the mission, including the complete lack of toilets and childcare facilities. In general, moving from small-scale to larger-scale trade usually depends on factors such as access to credit, education level, and entrepreneurial attitude. For women, personal variables such as marital status and number of children, as well as sociocultural variables such as discrimination and decision-making power and control over resources within the household, can affect their ability to trade at a large scale.

4.6 Final consumer prices in CEMAC reflect the costly and burdensome trade processes

The fragmented nature of agricultural trade and the lack of systematic consumer price data in the CEMAC capitals make it difficult to develop a full price formation analysis across the large number of traded agricultural products. Nevertheless, the collected data from field visits and truck rides, along with some of the official statistics from Cameroon, allow an indicative analysis of price evolution at the major points along the corridors to Gabon and Equatorial Guinea, as well as a price buildup analysis along the Cameroon–Gabon corridor for tomato, plantain, maize, and onion.

Consumer prices in Libreville are significantly higher than in Cameroon, and compared with farm gate prices, they are four to six times higher. As Table 20 indicates, the difference is smallest for maize but still 3.8 times the farm gate prices and highest for plantain (5.8 higher). No clear pattern emerges regarding trends in the main steps of price formation, except that differences between the farm gate and immediate market represent between a fifth and a quarter of the total (in line with previous observations in the report about the difficulties and cost to evacuate and market one's production).

The results are similar for consumer prices in Bata, Equatorial Guinea's largest mainland city. Yet, costs in Malabo, the country's capital and largest city, are probably even higher given the additional boat trip. As Table 21 indicates, the smallest difference between farm gate and consumer prices is for maize (three times higher), while the largest is for plantain (7.5 times higher).

Table 20 Indicative price formation for selected commodities between Cameroon and Gabon (CFAF per kg)

Cameroon and Gabon	Tomato	Plantain	Maize	Onion
Farm gate	175	120	145	150
Foumbot/Garoua	275	150	190	350
Yaoundé	475	290	275	400
Abang-Minko	700	400	310	480
Bitam	750	470	320	495
Libreville	825	700	550	635
Consumption/farm gate price ratio	4.7	5.8	3.8	4.2

Source: Calculations based on field visits, truck ride trips, and official data.

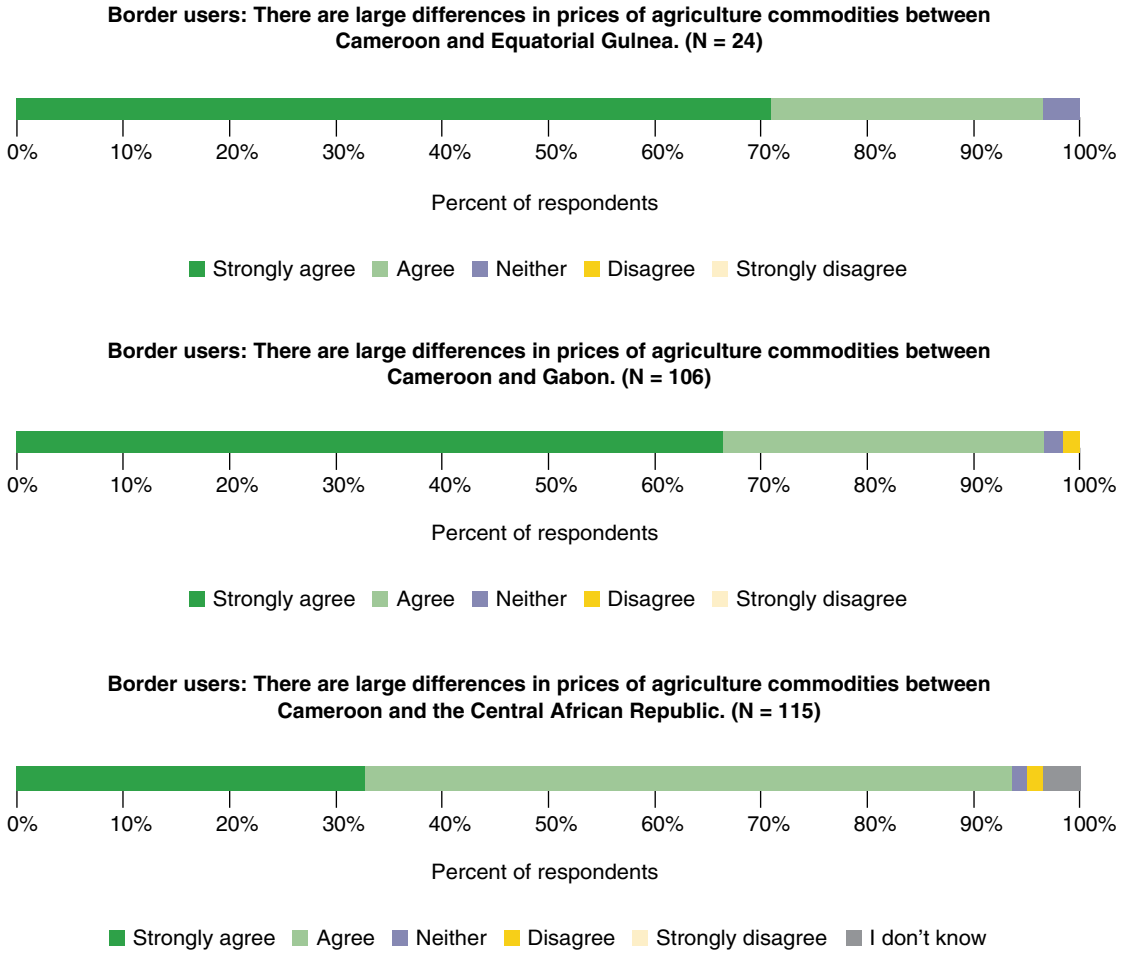
Table 21 Indicative price formation for selected commodities between Cameroon and Equatorial Guinea (CFAF per kg)

Cameroon and Equatorial Guinea	Tomato	Plantain	Maize	Onion
Farm gate	175	120	145	150
Foumbot/Garoua	275	150	190	350
Yaoundé	475	290	275	400
Kye-Ossi	500	410	340	460
Ebebiyin	925	740	395	545
Bata	1,075	900	440	605
Consumption/farm gate price ratio	6.1	7.5	3.0	4.0

Source: Calculations based on field visits, truck ride trips, and official data.

Overall, the report has identified a multitude of domestic, border, and foreign factors that contribute to increased costs of trading agricultural products, which in turn result in higher final consumer prices while squeezing the margins of producers. The survey results confirm that the large price differences between the countries are widely recognized by border users, as detailed in Figure 18.

Figure 18 Perceptions on price differences in CEMAC countries



Source: Perceptions survey, January–February 2018.

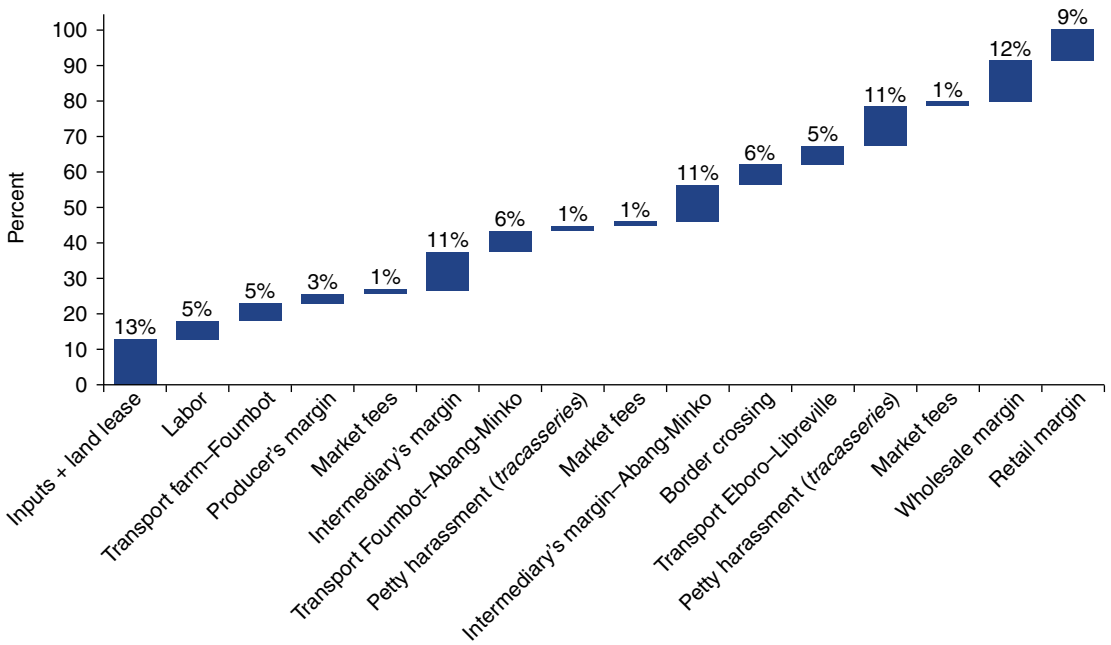
Note: N = Number of respondents.

A more detailed price buildup analysis has been prepared using the various information collected throughout the fieldwork for four important agricultural commodities traded within CEMAC: tomato, maize, plantain, and onion. The availability of information allowed the full analysis to be conducted only for the Cameroon to Gabon corridor (from western or northern production areas to Libreville). The analysis focused on the more typical marketing mechanism (as described previously in the report) in which the producer takes his/her commodities to a collection market, where through intermediaries the goods reach a large trader who in turn transports the goods to a border market (in this case Abang-Minko), from where the goods cross the border and continue to Libreville. The cost of petty harassments, the losses along the way, and the intermediaries' margins (wholesale and retail) at the destination market have been also been considered. While the trucks carry mixed goods, the analysis focused on a single commodity at a time, given the unavailable information on the actual mix of products.

The price buildup analysis for tomato along the Foumbot (Cameroon) to Libreville (Gabon) corridor indicates that production costs (including the producer's margin) account for only 20 percent of the final consumer price (Figure 19). On the other hand, the costs of intermediation along the corridor (22 percent) and at the final destination (21 percent) are significant cost drivers. The cost of petty harassments (12 percent) is an important addition to price formation and is about 75 percent of the total transport cost from the farm to table (16 percent). Border crossing costs account for about 6 percent.

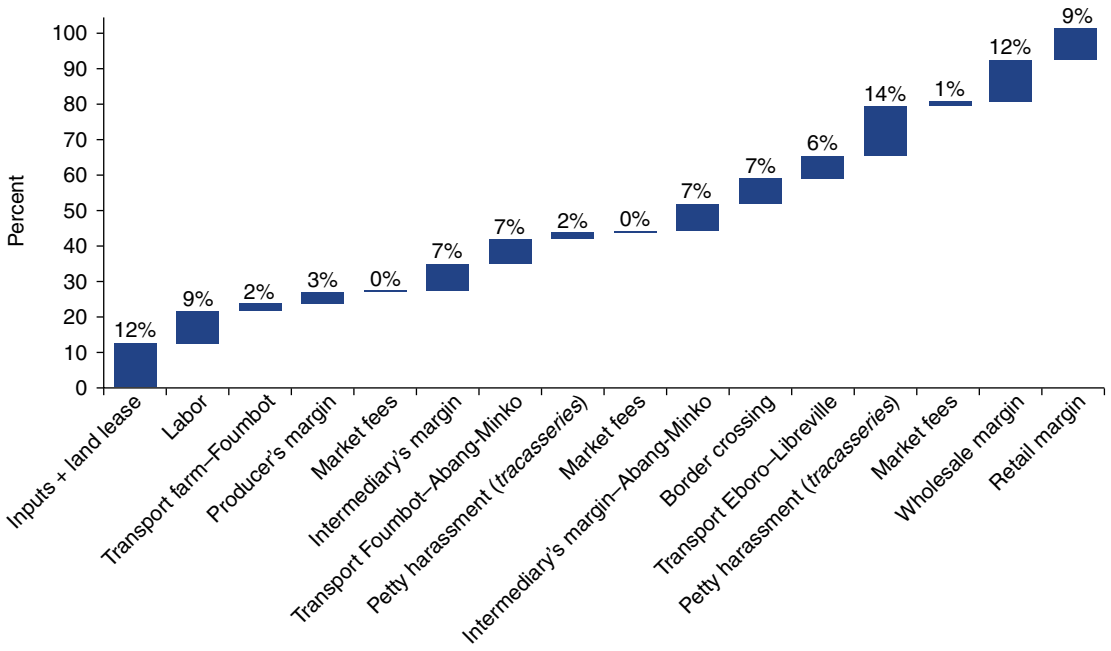
The price buildup for maize from Cameroon to Gabon is also dominated by the costs of intermediation along the corridor (22 percent) and at the final destination (21 percent) (Figure 20). Production costs account for less than a fifth of the total, while the producer's margin is a mere 3 percent. Transport costs account for 16 percent and the associated *tracasseries* for 12 percent.

Figure 19 Price buildup for tomato on the Foumbot (Cameroon) to Libreville (Gabon) corridor (percentage of final consumer prices)



Source: Estimated from data collected for this report.

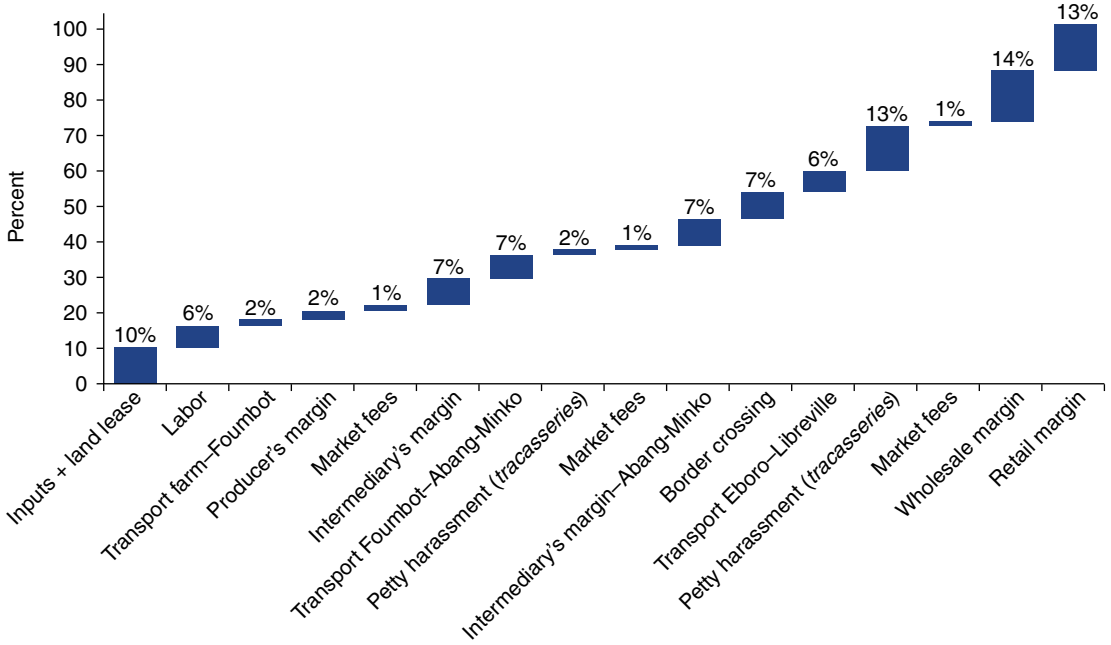
Figure 20 Price buildup for maize on the Foumbot (Cameroon) to Libreville (Gabon) corridor (percentage of final consumer prices)



Source: Estimated from data collected for this report.

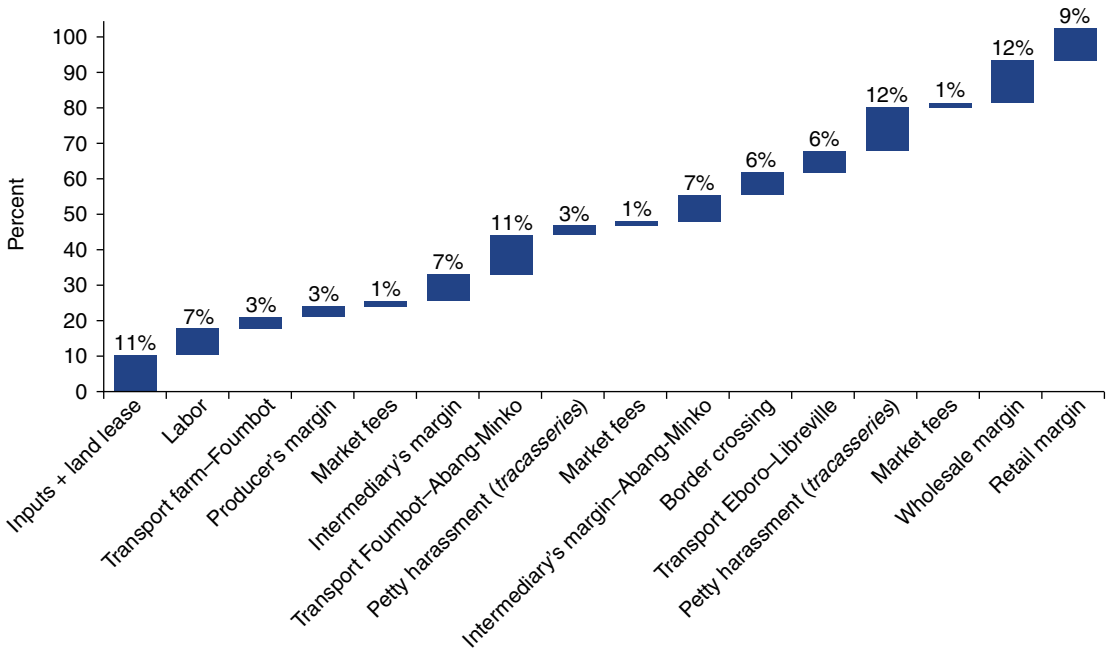
Similarly, the price buildup for plantain from Foumbot to Libreville demonstrates that intermediation costs (along the corridor 14 percent and at the final destination 27 percent) explain a significant proportion of the final prices (Figure 21). The other building blocks maintain similar proportions, with production costs (including the producer's gains) accounting for 18 percent, transport costs for 15 percent, petty harassment for 15 percent, and border crossing for 7 percent.

Figure 21 Price buildup for plantain on the Foumbot (Cameroon) to Libreville (Gabon) corridor (percentage of final consumer prices)



Source: Estimated from data collected for this report.

Figure 22 Price buildup for onion on the Ngaoundere (Cameroon) to Libreville (Gabon) corridor (percentage of final consumer prices)

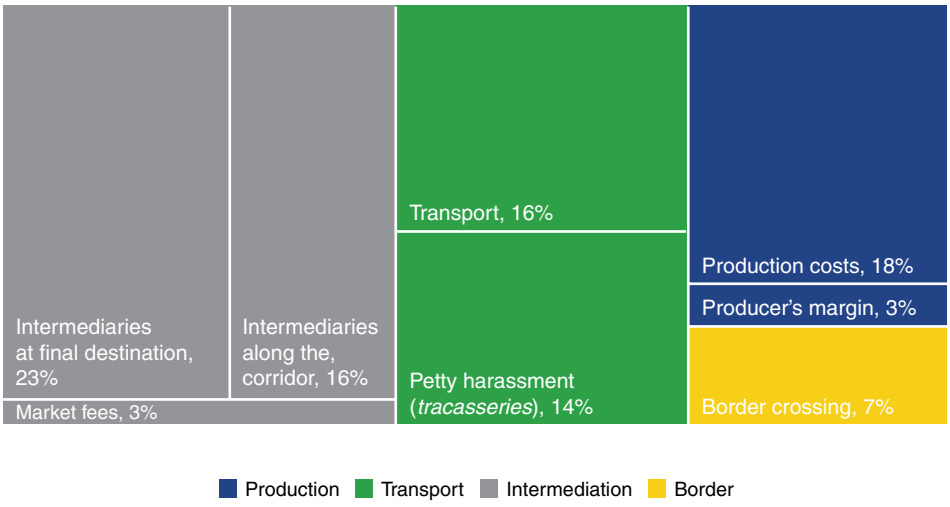


Source: Estimated from data collected for this report.

The price for onion, produced more in the northern regions of Cameroon, follows a similar buildup pattern as the other three commodities (Figure 22). The longer distance of the overall corridor results in higher costs of transport (20 percent) and associated *tracasseries* (15 percent). Intermediation costs along the corridor again account for over 40 percent of the final prices, while border crossing explains 6 percent of the cost.

Given the similar patterns of price formation for these four selected commodities, the overall price buildup analysis indicates that intermediation costs (along the corridor, at the final destination, and including market access costs) are the most important cost driver, accounting for 42 percent of the total (Figure 23). Transport costs and petty harassment account for about a third of the total, while production costs are almost

Figure 23 Price buildup for selected commodities on the Cameroon to Gabon corridor (percentage of final consumer prices)



Source: Estimated from data collected for this report.

20 percent. Border crossing costs on their own are roughly 7 percent, while the producer's margin is only 3 percent.

It is surprising that the overland transport of agricultural goods is gaining in popularity despite the large number of obstacles and costs. Gabon and especially Equatorial Guinea could be better served through maritime routes from Douala and other smaller ports in Cameroon, both in terms of official and unofficial costs. Nevertheless, the sea route seems to be slowly disappearing (see Box 4).

The implications of these trading costs, from a macroeconomic point of view, are potentially large. According to ENVISAGE, a dynamic global CGE model developed by the World Bank, eliminating the cost of petty harassments in Cameroon would increase Cameroon's exports to CEMAC countries by about 23 percent. A CEMAC-wide removal of *tracasseries* costs would increase intra-regional exports by about 25 percent by 2030 (Djiofack 2018). While these modeling results are only indicative, they confirm the fact that trading costs undermine export competitiveness, and their removal can have multiplier effects for the economy. Lowering trade frictions would facilitate not only food exports, but also imports of agricultural inputs such as seed and fertilizer. Lower prices for farm inputs would promote agricultural intensification and, combined with increased access to export markets for food, would spur the region toward economic diversification.

Box 4 Maritime trade in agricultural products

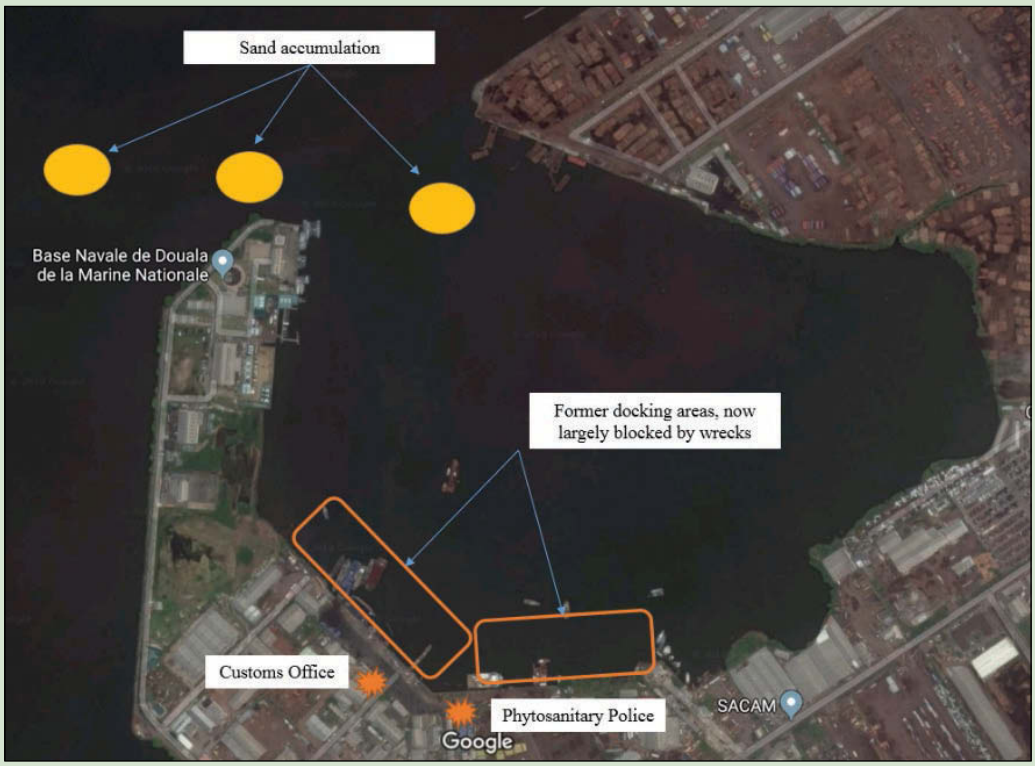
Many older studies describe the maritime route for trading agricultural commodities between Cameroon's Port of Douala and Gabon's Libreville and Port-Gentil and Equatorial Guinea's Malabo and Bata. Estimated volumes in this literature indicate that this channel was widely used and that large volumes were traded by sea with these neighboring CEMAC countries.

Nevertheless, visits and interviews for this study (February 2018) found that very few traders use this sea channel anymore and that maritime trade has slowed almost to a halt. Port Gabon/Quai Boscam, part of the Port of Douala, used to be the main loading place for agricultural products bound for CEMAC countries and Nigeria, but recent infrastructure and access problems have redirected traders to using trucks overland.

According to the few authorities still present at the site, trade volumes began steadily decreasing in 2014 due to sand accumulations and remaining shipwrecks in the quay and its immediate proximity. Capacity went down from 20–30 boats along the quay in two or three parallel lines to just 3–5 boats at present with ships having to undergo complicated 'parking' moves to be able to load. As a result, very few traders use the quay. At the time of the visit, one boat bound for Libreville had been waiting for six weeks for sufficient cargo to justify the trip, compared with the almost daily departures in the past.

The obvious solution (removal of sand and wrecks) has been present to the management of the Port of Douala, but no progress has been made to date.

Image B.4.1 Port Gabon/Quai Boscam in the Port of Douala

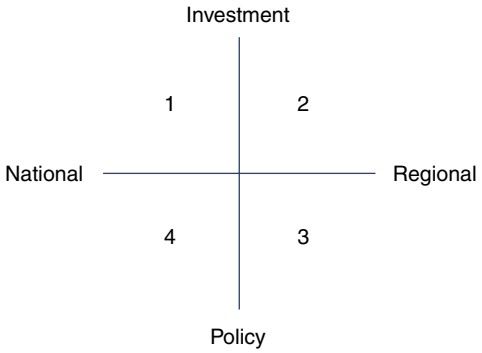


Source: Imagery © 2018 DigitalGlobe, map data © 2018 Google.

5. Recommendations and Areas for Action

As the report has highlighted, the factors restricting agricultural trade in the CEMAC area are multiple, interrelated, and costly. These bottlenecks can be national or regional (international) in nature, reflecting gaps in policy or investment. Some national-level solutions could be scaled up to the level of CEMAC through well-designed interventions. The recommendations in this section fall into four categories according to the targeted scale (national versus regional) and the likely instrument (policy reform versus investment). These four categories are numbered according to the quadrants in Figure 24. Recommendations can be further classified according to the stage along the trade corridor (farm, market, border, and so on) where they are targeted.

Figure 24 Categorizing interventions to promote agricultural trade in CEMAC



The research emphasis in this study on 'corridor approaches' also applies to investments and policy reforms. Efforts to improve regional agricultural trade are likely to be most successful when they consider the full path of goods from the farm to the end consumer. Unblocking one constraint, such as an individual farmers' access to immediate markets, would have a negligible impact on regional trade if downstream blockages remain unaddressed. As a general approach, improving conditions along the length of a selected trade corridor is likely to be more effective than targeting a single problem for many trade corridors.

Investment opportunities to reduce the costs of regional agricultural trade start with producers. Helping producers organize to achieve commercial links with large buyers will allow them to graduate from farmers to *agropreneurs*. Physical access to markets, through road maintenance and motorized transport, is also critical. Promising investments to support producers include the following in which the numbers in parentheses refer to quadrants in Figure 24.

- Increase in the capacity of POs to aggregate production and organize constant grouped sales (1);
- Support for the establishment of stronger market links between rural producers and end consumers possibly through productive alliances (following the model used in the World Bank-financed PIDMA and PRODEL) and/or other approaches (1);
- Rural road rehabilitation, construction, and maintenance planning to improve physical access from the field to the immediate market (1);
- Innovative financing mechanisms to increase the availability of motorized transport (1); and
- Support for cross-border productive alliances or other forms of commercial links between networks of large traders from the CEMAC region and POs or networks (2).

Reducing trade inefficiencies at the market level requires infrastructure investments, policy/governance reforms, and better information systems. The analysis has highlighted that public access to markets is often hindered and that, despite the almost universal collection of market fees by public authorities, little maintenance or long-term

development work is being done. In addition, regular price collection and dissemination through a trade information system could add transparency to transactions, reduce the margins of intermediaries, and mitigate price volatility. Recommended market-level interventions include:

- Construction of market infrastructure such as covered spaces, market stalls, warehouse facilities, water points, and sanitary facilities (1);
- Support for inclusive management and oversight structures. The existing trader associations could be a good starting point for involving the private sector in the management and development of such public spaces (3);
- A sustainable trade information system to reduce dependence on informal networks for gathering information and making business decisions and to enable transparent price discovery (1) (2);
- Training and awareness raising for producers/sellers on market and price dynamics, so that producers can more accurately interpret price data (1);
- A regional market information system to aggregate national systems (2), (4); and
- Support for wholesale market development, following lessons learned from China and India on the importance of enabling competition and providing unrestricted entry for licensed traders (1).

Solutions to eliminate petty harassment along transport corridors could reduce food prices by as much as 14 percent. Actors surveyed for this study universally recognized that *tracasseries* are generalized and costly. Eliminating such a generalized practice would not be easy, but possible actions include:

- Awareness raising about what are legitimate checkpoints/fees/functions and what are not (1);
- Engaging agencies found at checkpoints in a dialogue on the cost of *tracasseries* to their nation, supporting capacity improvements needed for these agencies to perform legitimate trade functions, and developing a training program for officers found at checkpoints around a code of conduct for professional behavior (1), (4);
- Reducing the number of checkpoints along the corridors and, in the process, upgrading the remaining ones with cameras or other modalities that add a sense of oversight (1);
- Reinforcing an anti-corruption hotline (*numero vert*) and consistently addressing reports (1); and
- Incentivizing traders to adhere to existing regulations, that is, not overcharging vehicles, ensuring necessary paperwork is in order, refusing to turn a fine into a bribe. This could be achieved through the creating of a "traders" charter' detailing the rights and obligations of trade corridor users (3), (4).

At the border, there are opportunities to facilitate agricultural trade by improving management, collecting better information, and investing in infrastructure. The current artificial proliferation of border agencies significantly increases the delays, costs, and corruption without adding much value to the trading process. There is scope to consolidate agencies (some agencies could in theory form joint units or be present only on the more concerned side of the border) and enhance interagency coordination. During fieldwork, officials appeared to know each other at the various sites and to communicate in a friendly manner through informal phone calls, but there were no established, institutionalized coordination mechanisms/platforms through which they could meet regularly (for example, once a quarter), have rotating chairmanship arrangements, discuss and solve common issues, and so on.[16] Similarly, there did not seem to exist any internal hierarchy among the various agencies, which could enhance interagency coordination on each side of the border.[17] Suggested policies and investments to reduce agricultural trading costs at the border include:

[16]Interesting experiences on interagency coordination through Joint Border Committees (JBCs) are available from various East African Community borders.

[17]In Zambia, the new border management bill designates the Zambia Revenue Authority as a lead agency at all borders in the country.

- Establishing national border committees with a lead agency, such as customs, to improve coordination (3);
- Streamlining border agencies by using single window systems. Multiple layers of police, *gendarmerie,* and other army units could be consolidated; similarly, technical agencies such as Phytosanitary Police and veterinary control could also be consolidated (3);
- Establishing joint, international border committees to coordinate functions and regularize procedures across countries (4);
- Investing in infrastructure and facilities such as lighting (for security), paving, upgrading buildings, and digitizing records systems (1);
- Revisiting existing performance-based management systems to ensure adequate salaries and timely payments for border agencies staff and upgrading training for border agencies staff (1); and
- Disseminating regulations, fee structures, and border crossing requirements for border users (1).

At a general policy level, regional agricultural trade in CEMAC suffers from a lack of standard practices and a lack of harmonization between national policies and CEMAC policies. Within Cameroon, there is no single set of regulations governing agricultural trade with the CEMAC neighbors. This study found that official regulations often clashed with the border practices, which in turn varied widely by region. Recommendations to address this finding include:

- Providing advisory and policy support for national governments, particularly the Customs Authority and the Ministry of Trade, to establish a single and coherent set of regulations and to develop capacity and oversight necessary to consistently apply these (3);
- Reducing border taxes that act as nontariff barriers, even if export tariffs are or will soon be removed (3);
- Establishing a regional dialogue on SPS declaration requirements. There is little/no purpose in charging for certification when the importer has no declaration requirements and little purpose in certifying that a product is free from pests or disease when both countries have the same pest or disease. Further research on SPS measures that reflect genuine plant and animal health and food safety risks would help generate value from current SPS stops (4); and
- At the CEMAC level, establishing a trade regime for agricultural products that all governments can adhere to. The primary political economy obstacle is revenue generation or redistribution from border activities. Advisory and policy support could help the countries find alternative solutions, learning from the experience of other trade blocs, on how to decrease their dependency on border taxes (4).

Moving from coordination to cooperation, managing political crises at a high level between CEMAC governments could minimize border closures. As the often-repeated example of Equatorial Guinea indicates, a closed border between Cameroon and a net food importer immediately affects both producer prices and the food availability in the other country.

- The CEMAC Commission, together with the respective governments, reviews security considerations to ensure they are not disproportionate and that trade—even with additional controls—can continue unhindered (4).

This report's findings about marginal cost accumulations along the selected trade corridors provide a mechanism to rank interventions. Top priorities for intervention are areas that account for a significant portion of trading costs and where there is a high potential to reduce these costs. Table 22 lists the top five recommended priorities for action to improve agricultural trade in CEMAC. Market intermediation costs, which represent the bulk (42 percent) of trade costs in CEMAC, are the focus of the top two recommendations. Reducing pervasive petty harassments (*tracasseries*) is the third priority, reducing other transport costs is the fourth priority, and improving conditions at the border (which accounts for 7 percent of final consumer

prices) is the fifth priority. Although border costs appear relatively modest in the total price composition, border posts serve multiple corridors and can be choke points for agricultural trade when products cannot get through at all. It is also worth noting that there is significant national opportunity to facilitate regional trade because most agricultural trade costs accumulate before products reach the border. Indeed, most of the opportunities to improve agricultural trade within CEMAC rest in the hands of national or subnational actors.

Successful implementation of these recommendations will require strong political leadership to overcome political economy resistance from those who extract rents from the current system at the expense of the poor. Complicating the task, improved corridor performance requires engaging with multiple stakeholders and government ministries at the local, national, and regional levels. The identification of public and private sector champions for the necessary reforms and investments in each priority area will therefore be critical to success.

The findings in this report suggest several avenues for future research. A first question is who will benefit from efforts to reduce the costs of agriculture trade. Removing price wedges offers major opportunities to improve farmer incomes and reduce urban food prices, but demand and supply elasticities would affect which actors in the system are able to capture any rents that ultimately result from policy changes or investments. The incidence of these gains from increased trade is a key political economy question and an important area for future research. A second research question relates to the SPS risks posed by agricultural trade. While the benefits of increased agricultural trade for economic diversification and food security are undeniable, there is an associated risk of contamination. Understanding the current scope of animal and plant diseases in CEMAC is necessary to identify appropriate, targeted risk-based mitigation measures. Finally, as noted at the outset, this study focused on trade corridors that originate in Cameroon. A useful area for additional research would be to look at corridors beginning in other countries, to confirm whether the structure of trading costs and the primary barriers to agricultural trade are indeed similar. Agricultural trade corridors originating outside of Cameroon will be especially important as these other CEMAC countries develop agricultural exports to diversify their economies.

Table 22 Top five priorities to promote agricultural trade in CEMAC

Priorities and measures	PAYOFF	TIME FRAME	COST	SCALE	TYPE OF SUPPORT
	Low/ Medium/ High	Short/ Medium/ Long	Low/ Moderate/ High	National/ Regional	Policy focus/ Investment focus
Priority 1: Reduce intermediation costs by linking farmers to markets					
(a) Strengthen market links between rural producers and urban consumers by					
• Working with POs to aggregate production and organize constant grouped sales	High	Medium	Moderate	National	Investment
• Supporting cross-border productive alliances or other direct commercial links between CEMAC regional traders and POs	High	Medium/ Long	Moderate	Regional	Investment
(b) Increase access to motorized transport in rural areas by					
• Introduction of leasing arrangements and other new financing mechanisms for transport service providers	Medium	Short	Moderate	National	Investment

(continued)

Priorities and measures	PAYOFF	TIME FRAME	COST	SCALE	TYPE OF SUPPORT
	Low/ Medium/ High	Short/ Medium/ Long	Low/ Moderate/ High	National/ Regional	Policy focus/ Investment focus
Priority 2: Improve the efficiency of agricultural markets					
(a) Physical investments in market infrastructure including					
• Market stalls, secure storage, cold storage, loading docks, lighting, sanitation, and rest area at strategic points on regional trade corridors	High	Short/ Medium	Moderate	National	Investment
(b) Promote competitiveness through inclusive market management and oversight by					
• Involving trader associations and other private users in development and management of public market spaces	Medium	Medium	Low	National	Mixed
• Initiating dialogue on and promotion of a service charter for market management	Medium	Medium	Low	National/ Regional	Mixed
(c) Increased access to market and trade information to promote competitiveness by					
• Training and awareness raising for sellers on market and price dynamics to improve interpretation and decision-making capabilities	Low/ Medium	Short/ Medium	Low	National	Investment
• Introducing market information systems that reduce dependence on informal networks for price discovery	Medium	Short/ Medium	Moderate	National	Investment
• Developing regional market information system to aggregate national systems, using information and communication technology (ICT) where possible	Medium	Medium/ Long	Moderate	Regional	Investment
Priority 3: Professionalize behavior along the trade corridor					
(a) Build capacity of regulatory agencies to perform legitimate trade through					
• Functional review of key responsibilities and introduction of performance-based management systems	Medium	Short	Low	National	Investment
• Developing and implementing a training program for checkpoint officers around a code of conduct for professional behavior	Medium	Medium	Moderate	National/ Regional	Investment
• Reducing (rationalizing) the number of checkpoints along trade corridors	High	Medium	Moderate	National	Policy
• Upgrading legitimate checkpoints by building capacity to implement functions (such as SPS monitoring) and improving oversight using cameras or other modalities	High	Medium	Moderate	National	Investment
(b) Enlist corridor users to report abuse and corruption, by					
• Raising awareness of corridor users about legitimate checkpoints, fees, and functions	Medium	Short	Low	National/ Regional	Investment
• Reinforcing and/or introducing anticorruption hotlines *(numero vert)* by consistently addressing reports and rewarding good outcomes	Medium	Short	Low	National/ Regional	Investment

(continued)

Table 22 Continued

Priorities and measures	PAYOFF	TIME FRAME	COST	SCALE	TYPE OF SUPPORT
	Low/ Medium/ High	Short/ Medium/ Long	Low/ Moderate/ High	National/ Regional	Policy focus/ Investment focus
Priority 4: Strengthening regional transport links					
(a) Improve road maintenance and infrastructure by					
• Developing regional connectivity strategy for linking agriculture producers with demand centers	Medium	Short	Low	Regional	Investment
• Introducing performance-based management of weighbridges and other strategies for reliable and transparent enforcement of vehicle weight limits	High	Short/ Medium	Low	National	Investment
• Investing in road rehabilitation, construction, and maintenance planning	High	Short/ Medium	Moderate/ High	National	Investment
• Attracting investment in private truck parks (secure parking place, showers, and so on)	Medium	Short	Low	National	Investment
(b) Break up cartels and improve competitiveness of domestic and regional agriculture transport by					
• Developing a specific time-bound action plan for sector reform based on dialogue between transport operators and regional policy makers	Medium	Short	Low	National/ Regional	Investment
• Establishing a dedicated task force to implement the action plan and track progress toward agreed performance indicators	Medium/ High	Medium/ Long	Moderate	National/ Regional	Mixed
(c) Improve port access for regional traders by					
• Dredging of Quai Boscam and removal of shipwrecks blocking jetties	Medium	Short/ Medium	Moderate/ High	National	Investment
• Upgrading of other ports used by regional vessels as needed	Medium	Short/ Medium	Moderate/ High	National	Investment

(continued)

Priorities and measures	PAYOFF	TIME FRAME	COST	SCALE	TYPE OF SUPPORT
	Low/ Medium/ High	Short/ Medium/ Long	Low/ Moderate/ High	National/ Regional	Policy focus/ Investment focus
Priority 5: Improve border operations					
(a) Physical investments in border infrastructure such as					
• Lighting, paving, upgrading buildings, and digitizing records systems	Medium	Short	Moderate/ High	National	Investment
(b) Establish joint border committees including					
• National committees with a lead agency, such as customs, to improve coordination at each border post	Medium	Short	Low	National	Policy
• International committees to coordinate functions and regularize procedures across countries at shared border posts	Medium	Medium	Low	Regional	Policy
(c) Professionalize behavior of border officials and border users by					
• Introducing performance-based management systems around a service charter for border agencies	Medium	Short	Low	National	Mixed
• Training of border officials and border users in basic rights and obligations, including the benefits of regulatory compliance	High	Short	Low	National	Mixed
• Introducing toll-free hotlines for reporting corruption and abuse	Medium	Medium	Low	National	Investment
(d) Awareness raising of official regulations, fee structures, and border crossing requirements for border users through					
• Developing training materials and training programs for border officials and border users	Medium/ High	Short	Low	National/ Regional	Investment
• Producing publicity materials and user-friendly pamphlets with information on trade procedures and posting of all official charges in a conspicuous spot at every border post	Medium/ High	Short	Low	National/ Regional	Mixed
• Publicity campaign on the need for and benefits of regulatory compliance	Medium/ High	Short	Low/ Moderate	National/ Regional	Investment
(e) Rationalize trade requirements by					
• Adopting risk-based approaches to border inspection and compliance	High	Short	Low	National	Policy
• Reviewing SPS declaration requirements based on risk	Medium/ High	Medium	Moderate	National/ Regional	Mixed
• Eliminating mandatory border inspections and product certification requirements (including SPS certification) where import declaration conditions do not exist	Medium/ High	Medium	Low	National	Mixed
(f) Foster dialogue through the CEMAC Commission on the economic costs of unpredictable border closures. Review security controls with an eye to increasing trade opportunities	High	Ongoing	Low	Regional	Policy

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