

SHIPPING REVIEW

GHANA'S AUTHORITATIVE QUARTERLY MARITIME JOURNAL

VOLUME 22 NO. 1, JANUARY - MARCH, 2020

THE COVID-19 OUTBREAK: Implications for the Global Economy & the Shipping Industry

ALSO IN THIS ISSUE

- Incoterms® 2020 - New Rules for International Trade
- Benefits And Barriers to Coastal Shipping Development: A Ghanaian Perspective
- Ghana's Maritime Trade Review 2019
- Global Shippers' Forum AGM and Conference 2019 -Matters Arising

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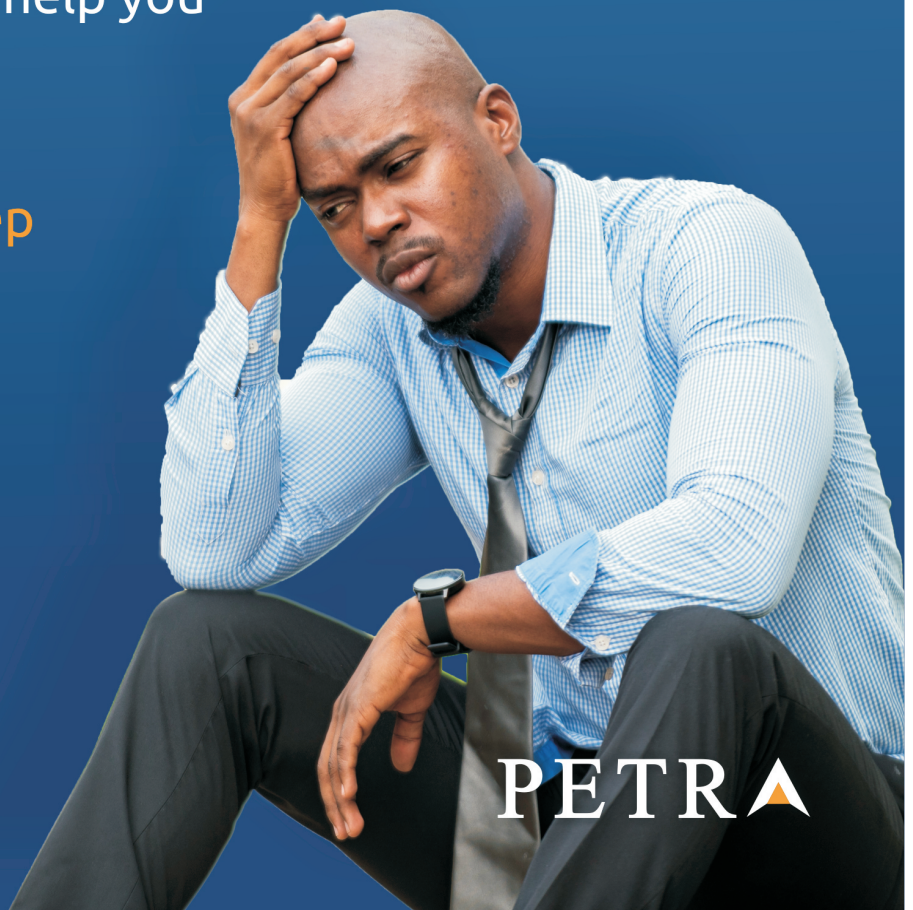
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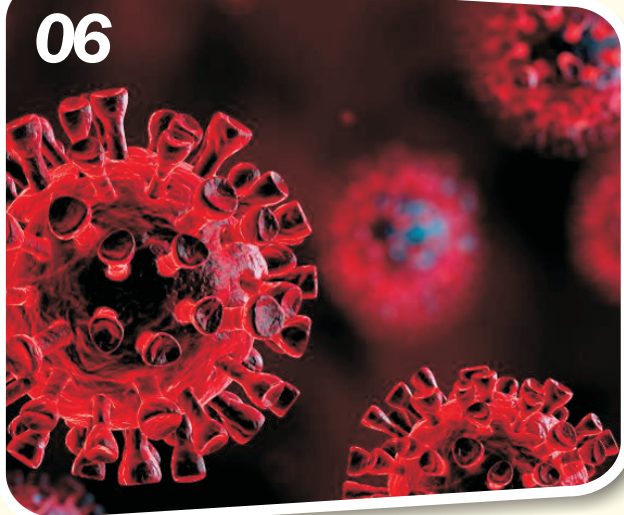
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In this Issue

06



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02



Incoterms® 2020 - New Rules for International Trade

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Also in this Issue

Savannah Fruits Company- Exporters of Shea Butter **11**

Benefits And Barriers to Coastal Shipping Development: A Ghanaian Perspective **13**

Macro Shipping Ltd - Providing Shipping and Logistics Services in Takoradi and Beyond **16**

Prudent Farms and Coconut Production - The Next 'Gold' **17**

Ghana's Maritime Trade Review 2019 **20**

Global Shippers' Forum AGM and Conference 2019 - Matters Arising **38**

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Incoterms® 2020 - New Rules for International Trade

By Raphael Brunner

The International Chamber of Commerce's (ICC's) Incoterms® Rules are the world's most important trade terms for the sale of goods. Whether trading internationally with suppliers or customers, organizing the internal exchange of goods within a group of companies, placing an order, packaging and labelling a shipment for freight, creating a certificate of origin in a port, the Incoterms® rules accompany trading partners and service providers throughout the entire process of an international trade transaction.

The rules define the obligations of the parties in the execution of the transaction, the transfer of risk relevant to the goods, the allocation of costs, the responsibility for customs declaration and payment as well as insurance.

The Incoterms® rules offer legal certainty and legal clarity on a

global level for parties and service providers who are involved daily in the import and export of goods within the framework of world trade.

On September 10, 2019, 10 years after the last version (Incoterms® 2010), the ICC published the Incoterms® 2020, a new set of rules that have been revised considering the change of various parameters of world trade over the last years.

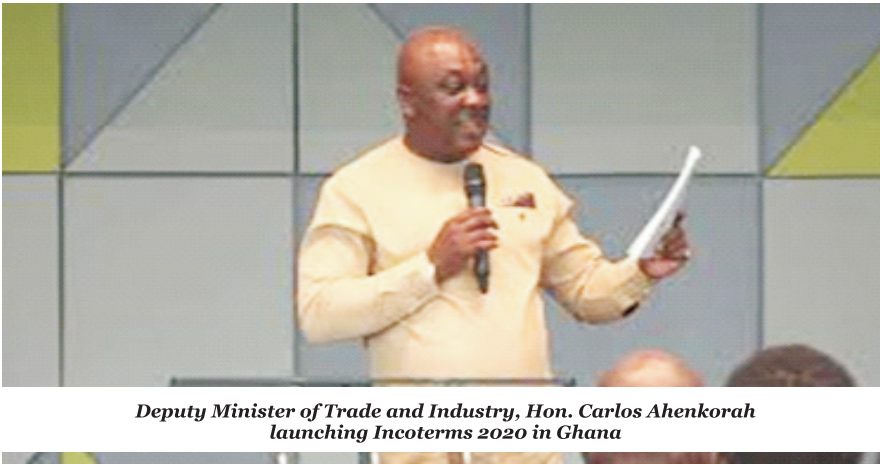
Most important changes of Incoterms® 2020

The latest revision of the Incoterms® 2010 did not result in a fundamental change of the system or structure of terms. Even though the amendments and adjustments may be qualified as minor at first glance, these adjustments may have a substantial effect on trade transactions for which respective terms are used.

What's new?

(1) ICC has retained the division into rules applicable to all modes of transport Ex Works (EXW), Free Carrier (FCA), Carriage Paid To (CPT), Carriage and Insurance Paid To (CIP), Delivered At Place (DAP), Delivered at Place Unloaded (DPU) and Delivered Duty Paid (DDP) and rules that should only be applied to maritime and inland waterway transport Free Alongside Ship (FAS), Free On Board (FOB), Cost and Freight (CFR) and Cost, Insurance and Freight (CIF). However, it has adapted the order within these groups.

The order is now mainly based on the time of delivery and the time of risk transfer. As a result, DPU ("Delivery at Place Unloaded", previously DAT) is now classified after DAP ("Delivery at Place"), since in DAP delivery and transfer of risk take place before unloading, whereas in DPU



*Deputy Minister of Trade and Industry, Hon. Carlos Ahenkorah
launching Incoterms 2020 in Ghana*

delivery and transfer of risk take place after unloading at the place of destination.

(2) According to Incoterms® FCA („Free Carrier (named place)“), the goods delivered loaded on board of the means of transport requires a differentiated examination of the named place: (a) If the loading is arranged by the buyer, the place of delivery is generally the premise of the seller. (b) If the named place is a terminal or a port or any other hub, the goods are delivered to the buyer as soon as the goods are at the disposal of the buyer on the seller's means of transport at the named place.

(3) Incoterms® FCA are frequently used for container shipments. If the buyer instructs the carrier to issue a transport document at FCA delivery (hence before the goods are loaded on the means of transport arranged for by the buyer), the seller is obliged to forward such transport document to the buyer. Such transport document is generally referred to as a Bill of Lading with on-board-notation. This new approach solves the following problem of the previous Incoterms® FCA 2010: In cases where a sale transaction is financed or performed by means of a letter of credit, such letter of credit generally depends on the issuance of a Bill of Lading. A Bill of Lading is only issued once loading on the means of transport

arranged for by the buyer is completed.

Consequently, under Incoterms® FCA 2010 the Bill of Lading was only issued by the carrier after delivery according to Incoterms® FAC 2020 took place and after the risk in the goods was transferred to the buyer. The risks of loss of the goods resulting from the gap between delivery according to Incoterms® FCA 2010 and payment by means of Letter of Credit based on a Bill of Lading was contrary to Incoterms® FCA 2010 factually the sole risk of the Seller. This issue is now solved by providing the buyer the possibility to instruct the carrier to issue a transport document such as a Bill of Lading before loading but already at the time of delivery according to Incoterms® FCA 2020.



(4) The allocation of all possible costs (transport costs, duties, security, insurance, etc.) are now summarized in clauses A9/B9 of all rules improving transparency.

(5) Incoterms® Cost, Insurance and Freight (CIF) 2020, frequently used in commodity trading involving maritime transport oblige the seller to obtain at its own expense cargo insurance complying with the minimum cover as provided by Institute Cargo Clauses (C), which cover explicitly listed risks. Incoterms® Carriage and Insurance Paid To (CIP) 2020, to be used with all modalities according to the new rules obliges the seller to obtain at his expense cargo insurance complying with the minimum cover as provided by Institute Cargo Clauses (A), which covers all risks.

(6) The Incoterms® 2020 FCA, DAP, DPU and DDP are now applicable both to transport carried out by a third party and new to transport carried out by sellers or buyers using their own means of transport.

(7) Obligations on the seller or the buyer respectively in relation to transport related security requirements have been included in A4 and A7 of all rules.



Applicability of Incoterms® 2020

The Incoterms® 2020 are only applicable if the parties of an international trade transaction explicitly agree so. It is still possible to continue to agree on the previous Incoterms® 2010.

In order to avoid any uncertainty about the applicable version of the Incoterms®, references to the Incoterms® in contracts should always include the year of the version of the applied Incoterms®. In case the year is not mentioned, the latest version, hence as of January 1, 2020 Incoterms® 2020 will apply.

Assessment and recommendations

The new rules are in line with current developments and increase legal clarity and certainty. The introduction of Incoterms® 2020 offers a good opportunity to review the trading rules used in commercial contracts, framework

agreements and contracts with service providers throughout the supply and distribution chains and to critically assess the following questions:

1. Which version of the Incoterms® rules apply to ongoing contractual relationships as of January 1, 2020?
2. Does the used Incoterms® rule:

a. (still) reflect current practice under the given circumstances?

b. correctly reflect the interfaces between risks and costs of the existing logistics organization?

c. correspond with the Incoterms® rules referred to in the agreements with logistics service providers (freight forwarders, carriers, warehouse keepers, customs agents, etc)?

d. make sense in relation to customs organization and procedures?

e. correspond with the used transport modality (e.g. no Free On Board (FOB) or CIF for multi modal container transport or air carriage)?

2. Is the current insurance solution in line with the risk allocation according to the concluded trade agreements and service contracts (double insurance or insurance gaps)?





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THE COVID-19 OUTBREAK: IMPLICATIONS FOR THE GLOBAL ECONOMY & THE SHIPPING INDUSTRY

By Romeo Adzah and Abdul Haki Bashiru-Dine (Ghana Shippers' Authority)

The global recession of 2007-2008 brought the world financial market crushing on its knees with telling effects on the economies of both developed and developing countries. Post the global recession in the last six years since the 2014 Ebola epidemic, the World Health Organisation (WHO) has announced five world public health emergencies with the Coronavirus (COVID-19) being the latest.

The COVID-19, which was discovered in the Chinese Hubei Province city of Wuhan in December 2019, has since spread to 199 countries and territories across the world as at 27th March, 2020 with 541,967 cases, 24,363 deaths, 125,303 recovered and 392,301 currently infected patients. The USA tops the list of the six most infected countries with 85,612 cases, 1,301 deaths, 1,868 recovered and 82,443 active cases. The five most affected countries in number of recorded cases following the USA, in descending order, are China, Italy, Spain, Germany and Iran with Italy registering the highest fatality figure of 8,215 (source: Worldometers.info)

Cause, Symptoms and Prevention

According to the WHO, Coronaviruses (CoV) are a large family of viruses that cause illness ranging from the common cold to more severe diseases such as Middle East Respiratory Syndrome (MERS-CoV) and Severe Acute Respiratory Syndrome (SARS-CoV). A novel coronavirus (nCoV) is a new strain that has not been previously identified in humans.

Coronaviruses are zoonotic, meaning they are transmitted between animals and people. Detailed investigations found that SARS-CoV was transmitted from civet cats to humans and MERS-CoV from dromedary camels to humans. Several known coronaviruses are circulating in animals that have not yet infected humans.

Some common signs of infection of the virus disclosed by the UN health body include respiratory symptoms, fever, cough, shortness of breath and breathing difficulties. In more severe cases, an infection can cause pneumonia, severe acute

respiratory syndrome, kidney failure and even death.

To prevent the spread of the infection, people are encouraged to regularly wash hands, covering of mouth and nose when coughing and sneezing, wholesome cooking of meat and eggs. Close contact with people showing symptoms of respiratory illness such as coughing and sneezing must also be avoided.

Impact on international trade

While the World Bank estimated that the Ebola epidemic caused \$2.2bn loss to the GDP of the three African countries of Guinea, Liberia and Sierra Leone, the Coronavirus (COVID-19) is projected to cost the global economy \$1 trillion in 2020 per a United Nations Conference on Trade and Development (UNCTAD) report. The UN trade agency further indicated that beyond the tragic human consequences and health threat that the virus is leaving in its wake, there was an estimated \$50 billion decrease in exports across global value chains in February 2020 due to the slowdown of manufacturing in China.



The UNCTAD report released on 9th March, 2020 noted the duration and depth of the crisis will depend on three variables: how far and fast the virus spreads, how long before a vaccine is found and how effective policy makers will be in mitigating the damage to our physical and economic health and well-being. It said the uncertainty surrounding each of these variables is adding to people's sense of anxiety, which is a fourth variable that will shape crisis outcomes.

The Paris-based group, the Organisation for Economic Cooperation and Development (OECD) which is a composition of 36 most advanced economies in the world, also warns that if the virus continues to spread, global GDP growth could nosedive this year to as low as 1.5 %, nearly half of the 2.9 per cent rate it projected before the outbreak of the epidemic.

Experts project that if China can quickly get the outbreak under control and the world's factory rumbles back to life in the second quarter, then the impact on the rest of the global economy could be contained. A survey by Made-in-China.com—one of the main platforms connecting Chinese suppliers and global buyers—found that by late February, 80% of manufacturing firms had resumed operations. By late April, says general

manager Li Lei, production capacity should be back to normal. If that happens, a severe shock in the first half would be followed by recovery in the second. For the world as a whole, and major economies like the U.S., the impact would then be hard to see in the full-year GDP data.

Transport of cargo by air and sea—the COVID-19 effect

One of the most affected means of transportation of cargo and people since the outbreak of the COVID-19 is the airline industry—an industry that has been in distress in recent years. Flybe, an airline which operates about 40 per cent of British domestic flights, collapsed due to a drop in air travel in the wake of the disease which had compounded its financial situation.

Major international airlines have suspended their flights to China and Italy and also reducing their traffic on the Asia route. The International Air Transport Association (IATA) warned in March that the airline industry stands to lose \$63 billion to \$113 billion in revenue for passenger traffic in 2020 if the epidemic continues. A lot of countries have also shut down their airports to avoid the import of the disease into their territories. Shippers, shipowners and other shipping service providers are equally reeling under the effect of COVID-19. Blank sailings have

been announced by many container lines operating liner services into ports in China. This has been occasioned by slow manufacturing, disruption of the logistics architecture in hinterland China and also as a measure to contain the further spread of the disease between ports. On the Asia-North Europe trade lane, 40 sailings have been blanked in the eight-week period after Chinese New Year, compared with the 15 sailings blanked last year.

The situation has affected the Expected Time of Arrivals or Departures (ETAs/Ds) of ships bound for China causing delays with some containers being transhipped to other neighbouring ports creating congestion. An official of the Busan Port Authority in South Korea told JOC.com that transshipment cargo increased about 6 per cent in January this year to more than 1 million TEUs as global carriers called at Busan port as an alternative to Chinese ports or due to blank sailings.

The second largest shipping line, in the world, MSC, which operates over 500 vessels with annual carriage of some 20 million TEUs, has revoked Clause 19 of its Bill of Lading terms and conditions in response to dealing with the threat of COVID-19. By this revocation, MSC reserves the right to discharge containers at alternative ports until it finds it appropriate and safe to discharge the cargo at the port of destination of the shipper. Per Clause 19.2, "If the Carrier (MSC) elects to revoke the terms of this clause 19, then notwithstanding the provisions of clause 9, the Carrier shall be entitled to such additional Freight and costs as the Carrier may determine."

Consequently, shippers have to be saddled with incurring unplanned additional costs on



demurrage, port storage, detention and other risks and costs associated with the uncertainty of sailing schedules.

Alphaliner, a shipping data service, reports that more tonnage of container ships are idle around the world now than during the global financial crisis in 2008-2009 and vessel calls have plummeted by over 20 per cent in major ports in China since 20th January, 2020 as a result of the impact of the virus.

The impact of the pandemic is also being felt in U.S. ports. The sneeze from Beijing has infected Washington, D.C. with a cold.

“The overall economic impact of these types of emergencies is often in tens of billions of dollars,” said Cary Davis, an official with the American Association of Port Authorities. “Due to the coronavirus outbreak, cargo volumes at U.S. ports might be down by 20 per cent or more on a year-on-year basis compared to 2019.”

Additionally, shipyards in China, many of which would otherwise be busy with IMO 2020 scrubber retrofitting, have remained closed and declared force majeure in many cases. An estimated 150 vessels are currently under retrofit at Chinese yards (source: Clarksons). The lockdown of newbuilding yards may prove to

be the only silver lining to the outbreak as inflow of more ships is temporarily stopped.

Reefer shipment suffer congestion surcharges

Reefer containers carrying perishable goods are the worst hit by the virus, particularly in Chinese ports on the back of a 7 per cent increase in demand for reefer containers in 2019 as the world's most populous country consumes more beef and other frozen foods. The world's largest shipping line, the A.P. Moller-Maersk Group based in Denmark has disclosed that reefer containers loaded with imported vegetables, fruit and frozen meat are choked in the ports of Shanghai, Ningbo and Xingang with limited electrical plug points to keep the containers refrigerated.

The situation has forced Maersk and other shipping lines like ONE, ZIM Lines to impose a congestion surcharge of \$1,000 with CMA CGM charging \$1,250 to power reefer containers to avoid goods from going bad before trucks can be found to move containers to their final destinations. The shutdown of commercial activities in most affected provinces in China to ward off the virus has almost crippled the logistics industry as trucks are locked down with warehouses choked with goods awaiting movement to ports for shipment. The impact of the

development would be more appreciated if one considers the important roles ports in China play in international trade with 7 out of the world's top 10 container ports located in that country.

Mounting pressure on the dry bulk market

In 2019, the Chinese economy alone controlled about 35 per cent of all seaborne dry bulk imports. It is expected that dry bulk trade will be most affected since China controls a huge percentage of the trade. Already, dry bulk shipping is affected by seasonality and implementation of the IMO 2020 Sulphur Cap regulation making the impact of COVID-19 more severe. The routine expectation of the dry bulk market rising after the end of celebrations of the Chinese Lunar New Year is also most likely to suffer due to the pandemic.

Slow demand for oil causes tanker freight rates to plummet

Tanker earnings were at the disease's mercy during February and March and will not necessarily exhibit a sharp rebound afterwards. Much of the oil demand associated with economic activity, Lunar New Year flight travels and ordinary oil product consumption is permanently destroyed, thus we should not expect a v-shaped recovery.

According to Peter Sand, BIMCO's Chief Shipping Analyst, COVID-19 has forced tanker freight rates under massive downward pressure causing Very Large Crude Carrier (VLCC) earnings from the Persian Gulf to China to drop from USD 103,052 per day on 2nd January to USD 18,326 per day on 18th January, 2020. The recent lifting of sanctions on a large Chinese tanker entity by the US has pushed many VLCCs back to business and this has also



influenced the oil tanker market over this period.

In the wake of the coronavirus, the global demand outlook for liquid fuels has been downward adjusted by 378,000 barrels per day (bpd) from January to February (source: EIA). The outbreak is set to drive down China's liquid fuels demand by 190,000 bpd on average in 2020. The adjustment relies on three components: slower economic growth, flight cancellations and reductions of other transportation fuels.

COVID-19: The Ghana situation

In Africa, countries such as South Africa, Nigeria, Togo, Burkina Faso, Algeria, Egypt, Tunisia, Cote d'Ivoire, Kenya, Rwanda, Senegal, Morocco, Cameroun among others have had their fair share of reported cases of coronavirus, with South Africa topping the list with 1,170 cases as at 28th March, 2020.

In Ghana, 161 people have tested positive of COVID-19 with five deaths by 31st March, 2020. As a preventive measure to stop the spread of the disease in Ghana, the President of the Republic, H.E. Nana Addo Dankwa Akufo-Addo issued a directive closing all borders and imposed a partial lockdown in certain parts of the country. The directive has since been lifted from 20th April, 2020. The Ministry of Health and the

Ghana Health Service (GHS) have put in quarantine facilities at the airports and other entry and exit points of the country. Awareness has also been created on the causes, symptoms and what to do to prevent the pandemic.

The Ghana Ports and Harbours Authority (GPHA) has collaborated with the Port Health Unit of the GHS to educate stakeholders in the port community such as shipping lines, importers and exporters, ship suppliers and other shipping service providers. The Ghana Maritime Authority has also directed that ships whose crew are suspected to be infested with the disease should not be allowed in Ghana's ports.

During the lock down, the Ports of Tema and Takoradi were still open to business but the impact of the pandemic has resulted in some shippers not being able to clear their goods on time, thus leading to demurrage and rent charges. The Ghana Shippers' Authority's engagement with shipping lines and the port authority to consider waiving off these extra costs on shippers has led to a directive by the Minister of Transport to the shipping lines and the GPHA to waive off demurrage and rent charges on all cargo which were not cleared since the lock down came into effect on 30th March, 2020, till it

was lifted on 19th April, 2020.

The global economic impact of the coronavirus pandemic will have implications for Ghana in its economic outlook. Major import and export trade of commodities will be affected in the short to medium term. China controls about 30 per cent of Ghana's international trade. Traders who import goods from China have expressed disquiet about the disruption of commercial activities in China and its adverse effects on their businesses. As a result, the Ghana Union of Traders' Association (GUTA) has appealed to banks to exercise restraint on their members with regards to the repayment of loans. The Association has also appealed to its members not to travel to China until the disease is brought under control.

Operations at the ports (Tema, Takoradi) are likely to suffer a decline in cargo throughput due to disruptions in ship operations in the liner, dry bulk and liquid bulk markets as analysed above. A number of Ghanaian importers are unable to travel to import their goods and export trade is also going to suffer because of the disruptions of ship sailings into Ghana and wider West Africa.

Conclusion

The dawn of COVID-19 on humanity leaving in its wake 10,000s of deaths, collapse of businesses, loss of capital and disruption of the international trade is the biggest uncertainty yet to have befallen the world in the 21st Century. Even as scientists are busy in their laboratories finding a cure to the disease, the world may have to contend with the debilitating effects of this pandemic for some time to come until the eureka moment arrives: a vaccine is found.



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SAVANNAH FRUITS COMPANY- Exporters of Shea Butter



Shea butter is one of the most important local products in Northern Ghana and some few other African countries. The shea butter comes from the nuts of the shea trees that grow in the

savannah region from West Africa to East Africa. In this part of the world, it has been mostly used as cooking oil and for skin care.

Today, shea butter is one of the most widely used organic ingredients in cosmetics in the Western world. It can be used without any other ingredients, as a lotion or moisturizer as well as raw butter. It can be used for every type of skin, from scalp to feet and for every part of the body.

It is particularly used for dry, itchy and troublesome skin and hair, for healing wounds and burns, for preventing stretch marks, for children's sensitive skin as an ultra violet radiation protector, for tanning, etc. It is filled with vitamins A, D, E and F. The value of this enigmatic butter in cosmetics is not surprising,

given that it has many healing properties.

Savannah Fruits Company is a registered Ghanaian company based in Tamale, in the middle of the northern savannah zone, which has been in business for 14 years. The firm believes that businesses can and should produce social good and contribute to the sustainability of our planet's ecosystem. The core business of The Savannah Fruits Company is the production of traditional hand-crafted shea butter.

Warehousing and Export market

The company manages its international supply chain and logistics right from the collection of nuts in the shea parklands of West Africa, all the way through state-of-the-art organic refining



Mr. Raphael Gonzalez, Managing Director of Savannah Fruits

helped to alleviate poverty.

The organic activities help preserve the Wechiau Hippo sanctuary, a number of game reserves, improve the shea value chain, enhance women's cooperatives and other staff skills and capacities.

Also, shea butter exports generate foreign income for the government, in addition to paying the export charges to the state.

communities with shea trees in order to increase their production and engage many women cooperatives. Support from Ministries, Departments and Agencies (MDAs) would definitely improve production and that will enable the government to generate high foreign income positively, as the export supply will be high.

Savannah Fruits Company engages in many initiatives in the communities where they operate. Some of which include; tree planting, building and improving shea butter processing centers, supporting groups with equipment to enhance their work.

in European facilities and onward to their clients. About 1,500 metric tons of Shea Butter is exported to Holland and the United States. However, the company does not export shea nuts but has leased warehouses where shea butter is stored before it is exported.

The Savannah Fruits Company practises a socially and environmentally responsible business and ensures maximization of value addition at source. In addition, it focuses on the sustainable production and export of high quality, community processed natural products to the international edible and cosmetic markets.

Support from MDAs and Economic Contribution

The Savannah Fruits Company is in partnership with 18,000 women from over 100 communities in Ghana and Burkina Faso. More than 10,000 more people are active in providing the communities with nuts and this has added to the economy by job creation and

Yet, unfortunately, Savannah Fruits Company has not received much support from Government in its effort to promote its business. The officials of the company say they could do with some support from the Ghana EXIM Bank.

Corporate Social Responsibility and Future Plans

One of the key objectives of the company is to expand its coverage to many more

Challenges and the way forward

Some of the key challenges that the company face include the high cost of freight, high cost of local transport, delay in the processing of export documents, Letters of Credit issues among others.

On the way forward, they appeal for reduction in bureaucracy and fast track document processing, extension of the remittance period from 90 days to 120 days.





The Writer

BENEFITS AND BARRIERS TO COASTAL SHIPPING DEVELOPMENT: A Ghanaian Perspective

By Ishmael Prah (Transport, Logistics & Supply Chain Management Expert)

Introduction

Coastal shipping is the transport of goods along the coast over relatively short distances, as opposed to intercontinental cross-ocean deep sea shipping. In recent years, coastal shipping has been increasingly recognized as a sustainable and efficient alternative to road transport.

It is more environmentally friendly as it produces far less greenhouse gas emissions and noise pollution. For medium- to long-distance freight transport, it offers substantial cost savings.

Furthermore, it can reduce traffic congestion and lower casualties due to accidents, which are common in road transport.

The term coastal shipping is often used interchangeably with short

sea shipping in the literature and practice. There is no worldwide consensus on their respective definitions, so it is difficult to clearly differentiate them.

There are two subtle differences between prevalent use of these two terms. One difference is that coastal shipping implicitly excludes freight movement at inland waterways, while short sea shipping has evolved to include the use of inland waterways. For example, the United States (US) Maritime Administration (MARAD) defines short sea shipping as an alternative form of shipping that uses both inland and coastal waterways to move freight from major domestic ports to its destination.

In Europe, a substantial amount of freight is moved along the

Rhine river and is regarded as short sea shipments. The other difference is that, strictly speaking, coastal shipping refers to a single mode of waterborne transport, but short sea shipment is a door-to-door intermodal movement in which transshipment at the road/sea interface is the strategic element. Therefore, coastal shipping does not include intermodal/multimodal components as short sea shipping does.

Given these two differences, it is safe to argue that the term short sea shipping covers more than just coastal shipping.

Nevertheless, it is mainly the coastal shipping journey that generates environmental and economic benefits in a door-to-door short sea shipment. This is



especially true in regions where there are few or no inland waterways for commercial navigation. To exploit the potential of coastal shipping, several economies have initiated some major programmes. Since 1992, the European Union (EU) has been actively funding short sea shipping projects to support the development of a more sustainable and efficient intermodal freight system.

In 2001, the EU launched the Marco Polo programme to develop “Motorways of the Sea (MoS)”. This large-scale programme aims at shifting freight from road to sea to relieve pressure on road transport by 20 billion tonne-kilometres (km). In fact, short sea shipping has become the backbone of the EU's transport policy.

Similarly, the US government has launched a project called Marine Highways to efficiently use its 29,000 nautical miles of navigable waterways. MARAD leads the way in promoting short sea shipping and its vision is to reduce freight congestion on road and on rail transportation networks by increasing intermodal capacity through the underutilized waterways. Many other countries, including Australia, Japan and South Korea have also showed great interest in

coastal shipping development.

Coastal Shipping in Ghana

Obviously, the Ghanaian coastline is underutilized for coastal shipping. There are a variety of reasons for this, including longer transit time needed to connect with only major ports, limited back haul opportunities, lack of awareness of its benefits and policy regulations pertaining to the coastal shipping industry.

The Ghana Port and Harbours Authority (GPHA) should establish the need for connecting coastal transport for domestic logistics. Coastal shipping should be identified as a new mode of transport through which the industry could reduce transportation costs yet enjoy better services.

The Ghanaian shipping industry should begin to acknowledge the potential of coastal shipping. Coastal shipping should be recognised in Ghana as an attractive alternative to other modes of transport because of its lower costs and also as a sustainable way to relieve the pressure on rail and road transport. Because of these benefits, the Ghana government should make efforts to boost its development. Coastal shipping should be a focus for long-term growth on Ghana's maritime agenda.

Coastal shipping has long been neglected in Ghana. Although there are avenues for coastal shipping to contribute to the Ghanaian economy, the industry had little focus on this sector in the past as there were many complexities involved in operating at the Ghanaian coastal points. The Ghana government and the industry must show keen interest in growing coastal shipping. However, little research has been conducted to develop understanding of the benefits and barriers to it, despite the great enthusiasm.

Recommendations

- Government should grant special status to coastal shipping so as to exempt it from Customs and other procedures that apply





to the bigger cargo-carrying vessels;

- Coastal shipping should be a focus for long-term growth on Ghana's maritime agenda;
- Coastal shipping should be a hot topic in almost all the leading forums of transport policy discussions;
- The development of coastal shipping is very important and it is recommended that some incentives are given to shippers and service providers to promote the industry;
- Government should look at the possibility of introducing subsidies for coastal shipping as opposed to road and rail transport.

Also, there should be a proposed 20-30 per cent reduction in Customs duty on fuels, and coastal shipping promotion will gain momentum in Ghana;

- Again, there should be an adjustment of 5 per cent cargo diversion to coastal shipping and this can result in annual savings of GH30million (equivalent to 5 million US dollars) and (assuming a cascading effect) a 6

percent reduction in pollutants and harmful chemicals. These prospects of sustainable long-term benefits must interest government to consider coastal shipping;

- Also, changes in the business environments of Sub-Saharan countries through regional trade agreements are going to be a catalyst of trade in the region, which will increase the coastal shipping trade exchanges.

Conclusions

Short sea shipping has been increasingly recognized as a sustainable and efficient alternative to road transport. It generates much less greenhouse gas emissions, saves freight costs over medium-to-long transport

distances and reduces noise pollution, road accidents and traffic congestion in urban areas. This article analyses the specific benefits and barriers and their impact on the coastal shipping development in Ghana.

In the Ghanaian context, the main barriers are in the areas of legislation, infrastructure and procedures at the ports. The article is an extract from a research study (Benefits and barriers to coastal shipping development: a Ghanaian perspective) and as a pioneering work, the present study has its limitations. With its Ghanaian perspective, its results and findings may be more relevant to developing countries that have similar issues in coastal shipping development than to developed economies.

As the coastal shipping environment differs from country to country, it is advisable for policy makers of other countries to conduct their own studies by adapting different methodologies. The study can also be extended to analyze the managerial implications for industry stakeholders such as shipping lines, port terminal operators and freight forwarders.



MACRO SHIPPING LTD - Providing Shipping and Logistics Services in Takoradi and beyond.



Managing Director of Macro Shipping, Mr. Roland Azalimah

Formed in 2016 and headquartered in the 'Oil City' of Takoradi, Macro Shipping is a holistic shipping service provider delivering cutting-edge services to shippers and other stakeholders in the shipping and logistics industry. The company provides services such as shipping agency, husbandry services crew manning, Customs clearance, freight forwarding and haulage/trucking, heavy duty haulage, laydown/storage area and boat service to anchorage.

Macro Shipping's Managing Director, Mr. Roland Azalimah has brought his over 30 years of experience in agency and husbandry practices to bear on his current role. He joined the

shipping and logistics industry in 1982 where he worked at Maritime Agencies Limited for 11 years and later moved to Maersk Line in 1993.

In 2005, Roland resigned from Maersk line and co-founded Macro Shipping Ltd. He occupied the position of General Manager until 2016 when he became the sole owner and Managing Director of the newly restructured Macro Shipping Ltd. The company has branches in Accra and the port city of Tema.

Staff and Clientele base

Working from the three offices of Macro Shipping across Ghana and delivering topnotch shipping services to clients are experienced,

dedicated and qualified staff working under various departments of the company.

The company has worked for clients in the oil and gas, logistics, manufacturing and mining industries. Some of its clients are Tullow Ghana, Kosmos Energy, Lukoil, Oceaneering Ghana, Subsea 7, Genser Energy, Ghana Rubber Estate, Ghana Cement, Wamco, Plot Enterprise, Ghana Bauxite Company among others. Macro Shipping is currently in partnership with a Norwegian shuttle tanker operator, Knutsen shuttle tankers among others.

Achievements and Recognitions

Macro Shipping is making significant contributions to the

Continued on page 18

Prudent Farms and coconut production - the next 'gold'



Incorporated as a limited liability company in 1989 primarily for the cultivation of fruits for exports mainly to the European Union, Prudent Exports has over the period to date, established presence in the production and export of fresh fruits especially pineapples, mangoes, yams and lately coconut.

The company has acquired a 1,400 acre of farmland near Bawjiase in the Central Region for the cultivation of the various products. In 1994, Prudent Exports commenced the production of mangoes for exports through the acquisition of an 140-acre of farmland at Ayikuma near Dodowa in the Eastern Region.

Run by a five-man management team headed by Mr. Yaw Antwi-Twum as the Executive Chairman and Managing Director, the company exports an average of 126 metric tonnes of fruits annually, mainly to Italy, Spain, Britain, Germany and Belgium.

Achievements and contributions

Prudent Exports commenced the export of pineapples in 1992 and rose to become a dominant player in the local industry. It exported

solely by air up to 1999 before commencing shipment by sea in 2000. The market share of exports of the company grew from 5 per cent in 1999 to about 7 per cent in 2006. The intervening period also saw its export volumes doubled.

In 2001, Prudent Exports was the 4th biggest exporter by sea in Ghana, accounting for 8.7 per cent of the total volumes going through the Sea-freight Pineapple Exporters of Ghana (SPEG).

The exports from the company also contribute significantly to Ghana's foreign exchange.

Challenges of growing fruits

Prudent Farms is not insulated from challenges affecting the growth of fruits and farming, in general, in Ghana. According the company's General Manager, Mr. Ofori Acquaye Esq, it has to contend with the high cost of agro-inputs like fertilisers, pesticides, machinery among others.

Additionally, the erratic pattern of rainfall also deals severely to the farming of fruits while procuring and maintaining an

irrigation system to farm all-year-round, as an alternative, is expensive. He mentioned the high cost of labour as another challenge facing the company in its efforts at boosting production.

Shipment challenges and wayforward

The freight rates charged on exports by shipping lines is on the high side. This, according to Mr. Ofori, is one of the challenges of Prudent Farms.

The above and other challenges, coupled with the occasional lack of space on vessels for exports have compounded the problems mitigating against the smooth commercial operation of the farm.

He appealed to shipping lines to reduce their freight charges to make their "exports competitive."

Support from government

Government, through its agencies, has come in handy, occasionally, to support the operations of Prudent Farms to help them stay in business. The General Manager of the company recounts the support it received from the Ghana Export Promotion Authority (GEPA) and the Ghana Exim Bank for the supply of seeds and financing, respectively.

What is the future like for Prudent Farms?

Due to problems currently plaguing the pineapple industry in Ghana, the company has diversified its production base by moving into the growing of coconuts.

As at November 2019, Prudent Farms has planted about 45,000 coconut seedlings. Mr. Ofori was



upbeat about the company's growth and future prospects for its new-found love 'coconut project'.

"We hope to plant about 150,000 coconut seedlings in the next 5

years.", he said.

Corporate Social Responsibility

As a socially responsible company guided by the value of giving back to society, Prudent Farms has undertaken a number

of projects and activities in its areas of operation.

It has constructed a 12-seater KVIP each for the villages of Adawukwa and Amotrum near Bawjiase and another 9-seater KVIP for Bawjiase Anglican Primary and Junior High School (JHS).

To give impetus to Information Communication Technology (ICT) education, Prudent Farms also donated computers to the Bawjiase Methodist JHS.

Beyond the quarterly donation of fruits, clothes among others to the Countryside Orphanage in Bawjiase, the company also supports the annual celebration of festivals by communities within its catchment areas of operation.

Continued from page 16

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economy of Ghana. Key on the list is the provision of direct and indirect employment opportunities. The company directly employs 70 Ghanaians.

Mr. Azalimah disclosed his company has also contributed significantly to the logistics space since the discovery of oil in Ghana by providing services to Tullow Ghana, Kosmos Energy among others.

Macro Shipping also provides logistical support in the export of Ghana's bauxite in the Port of Takoradi

In Takoradi, the Egyam School, School for the Deaf and the Catholic Special School have been blessed with the generous support of Macro Shipping as part of its Corporate Social Responsibility (CRS) to provide support for the less-privileged in society.

The company's hard work, excellent services and contribution to society over the years have been recognized both internationally and locally.

On 14th November, 2019, the company received a Certificate of Recognition from Tullow Ghana in acknowledgement of its dedication and commitment to partnering with the oil company to deliver tangible local content in Ghana's oil and gas industry.

The company was also honoured with a Gold Award at the 4th Western Regional Business and Finance Service Excellence Award in 2017

Relationship with MDAs and shipment concerns

On the presence and effectiveness of government agencies working in the port cities of Tema and Takoradi, Mr. Azalimah said his

company has had very good working relations with all the state agencies along the shipping and logistics chain.

"Our daily operations require us to work closely with stakeholders like the Ghana Immigration Service (GIS), GRA-Customs, Ghana Ports and Harbours Authority (GPHA), Ghana Maritime Authority (GMA) and the Ghana Shippers Authority (GSA). We have collaborated with all these agencies to implement the various shipping/port regulations and tariffs."

Macro Shipping's main challenge is the frequent review of stakeholders' tariffs which often affect its planning and operations. Mr. Azalimah called for the stability of tariffs to enable him and other shipping service providers plan well to prevent any negative impact on their businesses.



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GHANA'S MARITIME TRADE REVIEW 2019

1.0 OVERVIEW

The World Trade Organisation (WTO) estimated world merchandised trade volume to grow by 1.2% in 2019, having downgraded its earlier forecast of 2.6% due to a slowing global economy and increased economic uncertainty. It however forecasts world merchandised trade volume for the year 2020 to accelerate moderately to 2.7%. This forecast may have to be revised as a result of the global health threat posed by COVID-19, whose negative impact on global containerized trade is already visible.

The United Nations Conference on Trade and Development (UNCTAD) recorded a decline in the growth of world seaborne trade from 2.7% in 2018 to 2.6% in 2019. UNCTAD projects an annual average growth rate of 3.4% over a five-year period from 2019–2024 even though the target for 2019 was missed. The weakening multilateral trading systems and growing trade protectionism are largely responsible for the dip in seaborne trade growth.

The coming into force of the IMO Sulphur Cap Regulations in January 2020 was expected to have

dampened shipping tonnage in the short term and consequently strengthening freight rates. However, the advent of the Covid-19 pandemic is likely to slow down demand for shipping services. The overall effect of the inter-play of these compelling factors may take some time, perhaps after the second half of 2020, to fully manifest.

On the national front, Ghana's seaborne trade cargo throughput for 2019 amounted to 20.1 million metric tons, a 12.4% decline compared to 2018. Total exports for the review period (2019) however, increased by 17.7% whilst total imports declined by 26% compared to 2018 figures.

2.0 COMPARISON OF GHANA'S CARGO THROUGHPUT FOR Q4 2019 AND Q4 2018

Cargo throughput for the 4th quarter (Q4) 2019 decreased by 31.7% compared to the same period of 2018. Total import for the period decreased by 42.5%, total export decreased by 6%, whilst total transit/transshipment trade volume reduced by a whopping 80% compared to Q4 of 2018. See Table 1 for details.

Table 1. SUMMARY COMPARISON OF GHANA'S CARGO THROUGHPUT

OCT-DEC (Q4) 2019 AND 2018			
TRADE TYPE	OCT-DEC (Q4) 2019 (mt)	OCT-DEC (Q4) 2018 (mt)	CHANGE
TOTAL IMPORT	1,968,681	3,422,073	-42.5%
TOTAL EXPORT	1,866,862	1,986,080	-6.0%
TOTAL TRANSIT/TRANSH.	57,671	288,798	-80.0%
CARGO THROUGHPUT	3,893,214	5,696,951	-31.7%

3.0 PORTS SHARE OF CARGO THROUGHPUT FOR 2019

Cargo throughput for the Tema and Takoradi seaports of Ghana for 2019 was 20.88 million metric tons (mt). Cargo throughput for the Port of Tema was 12.18 million mt representing 58% of total volume whilst the Port of Takoradi recorded

8.71 million mt, representing 42% of total seaborne trade.

Transit/Transshipment imports amounted to 642,441 mt whilst transit/transshipment exports recorded 77,331 mt. Table 2 below shows the summary performance for the review period.

Table 2. SUMMARY OF GHANA'S SEABORNE TRADE PER PORT (in mt)
(2019)

PORT	IMPORT (mt)	TRANSIT/ TRANSHIP. IMPORT (mt)	*EXPORT (mt)	TRANSIT/ TRANSHIP. EXPORT (mt)	TOTAL (mt)	Share
TEMA	9,392,461	564,936	2,143,438	77,331	12,178,166	58%
TAKORADI	1,750,487	77,505	6,877,813	0	8,705,805	42%
TOTAL	11,142,948	642,441	9,021,251	77,331	20,883,971	100%

* Export figure excludes Ghana's crude oil exports

4.0 COMPARISON OF CARGO THROUGHPUTS - 2019 & 2018

Table 3 shows the summary of seaborne trade comparison between 2019 and 2018. Cargo throughput for the 2019 decreased by 12.4% compared to the same period of 2018. Total import

trade volume decreased by 26% while total export trade volume increased by 17.7% compared to the same period of 2018. Total transit/transshipment trade volume for 2019 decreased by 36.5% compared to 2018.

Table 3. SUMMARY COMPARISON OF GHANA'S CARGO THROUGHPUT

2019 & 2018			
TRADE TYPE	2019 (mt)	2018 (mt)	CHANGE
TOTAL IMPORT	11,142,948	15,051,475	-26.0%
TOTAL EXPORT	9,021,251	7,665,334	17.7%
TOTAL TRANSIT/TRANSH.	719,772	1,132,668	-36.5%
CARGO THROUGHPUT	20,883,971	23,849,477	-12.4%

5.0 COMPARISON OF GHANA'S SEABORNE TRADE 2019 & 2018 PER CARGO TYPE

Total import and export trade volume for the review

period January to December 2019 recorded a net effect of negative 11.2% compared to the same period in 2018 as per Table 4 below.

Table 4. COMPARISON OF GHANA'S SEABORNE TRADE PER CARGO TYPE

TRADE TYPE	2019 (mt)	2018 (mt)	Change
IMPORT:			
Liner	2,974,831	5,648,388	-47.3%
Break Bulk	888,566	1,913,813	-53.6%
Dry Bulk	4,633,673	4,764,702	-2.7%
Liquid Bulk	2,645,877	2,724,572	-2.9%
TOTAL IMPORT	11,142,947	15,051,475	-26.0%
EXPORT:			
Liner	1,762,303	2,009,364	-12.3%
Break Bulk	643,231	344,174	86.9%
Dry Bulk	6,490,674	5,147,748	26.1%
Liquid Bulk	125,043	164,048	-23.8%
TOTAL EXPORT	9,021,251	7,665,334	17.7%
TOTAL IMPORT & EXPORT	20,164,198	22,716,809	-11.2%

From Table 4 above, total imports for 2019 decreased by 26% compared to 2018. Total imports for the review period was 11.14 million mt. This comprised 2.97 million mt of Liner cargo, 888,566 mt of Breakbulk, 4.63 million mt of Dry bulk cargo and 2.64 million mt of Liquid bulk imports.

Total export trade volume for 2019 was 9.02 million mt. This represents a 17.7% increase over 2018. This was made up of 1.76 million mt of Liner items,

643,231 mt of Breakbulk items, 6.49 million mt of Dry Bulk and 125,043 mt of Liquid Bulk.

5.1 COMPARATIVE ANALYSIS OF IMPORT COMMODITIES THAT DECREASED SIGNIFICANTLY

The Table 5 below shows the import commodities that declined significantly in the review period (January-December 2019).

Table 5. Major declining Import Commodities for 2019/2018

COMMODITIES	2019 (mt)	2018 (mt)	Difference (mt)	%Change
IRON/STEEL/PLATE/PIPES	485,965	994,306	-508,341	-51.1%
GENERAL CARGO	370,029	842,032	-472,003	-56.1%
PROCESSED FOOD/BEVERAGES ETC	293,418	685,070	-391,652	-57.2%
BAGGED RICE	246,789	573,675	-326,886	-57.0%
FROZEN MEAT/FOODS	167,828	487,000	-319,172	-65.5%
BULK CEMENT	277,306	505,189	-227,883	-45.1%

The six import commodities listed in table 5 above, recorded significant decreases which cumulatively contributed to about 50% of the total decrease in import trade volume for the period January to December 2019.

5.2 COMPARATIVE ANALYSIS OF EXPORT COMMODITIES THAT INCREASED SIGNIFICANTLY

Table 6 below shows the major export commodities in 2019 that experienced an increase.

Table 6. Major Increasing Export Commodities for 2019/2018

COMMODITIES	2019 (mt)	2018 (mt)	Difference (mt)	%Change
MANGANESE	5,353,014	3,803,937	1,549,077	40.7%
TIMBER LOGS	487,238	262,410	224,828	85.7%
CASHEWNUTS	394,452	309,755	84,697	27.3%
BAGGED COCOA BEANS	155,993	81,764	74,229	90.8%

Table 6 above shows the export commodities that recorded major increases in the review period. Cumulatively, these commodities contributed to about 92% of the total volume of increases recorded in the export trade volume for the period January to December 2019.

6.0 PERFORMANCE IN LADEN CONTAINERS

Table 7 below shows the details of the performance

in Laden containers for the review period Jan. – Dec. 2019. Total Laden Containers for imports and exports for 2019 was 605,653 TEUs. This represents a decrease of 7.3% compared to 2018.

Total Import in Laden Containers for 2019 was 456,957 TEUs; a 13.4% decrease compared to 2018. Total Export in Laden Containers for 2019 was 148,696 TEUs; representing an increase of 18.1% compared to 2018.

Table 7. GHANA'S SEABORNE TRADE IN LADEN CONTAINERS (in TEUs) PER PORT

TRADE TYPE	PORT	2019 (in TEUs)	2018 (in TEUs)	CHANGE
IMPORT	TEMA	445,625	502,806	-11.4%
	TAKORADI	11,332	24,883	-54.5%
	TOTAL IMPORT	456,957	527,689	-13.4%
EXPORT	TEMA	123,491	109,583	12.7%
	TAKORADI	25,205	16,278	54.8%
	TOTAL EXPORT	148,696	125,861	18.1%
TOTAL	IMPORT/EXPORT	605,653	653,550	-7.3%

7.0 DIRECTION OF GHANA'S SEABORNE TRADE

7.1 Import Trade

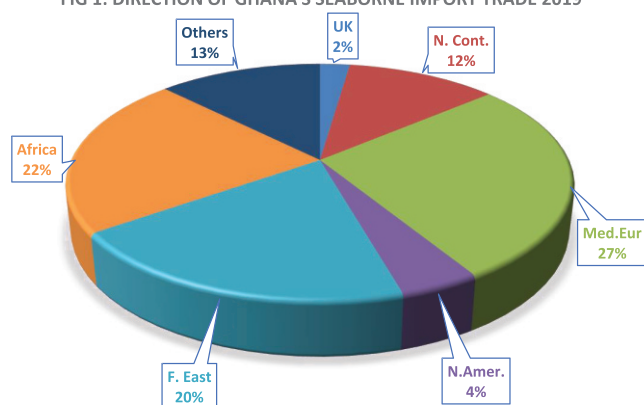
Figure 1 and Table 8 below show that the majority of Ghana's seaborne imports for 2019 came from the

Mediterranean Europe range, representing 27% of Ghana's total import trade. Africa was next with 22% share, followed by the Far East range with 20% share of Ghana's import trade. The major commodities imported from the Africa range were Chemicals, LPG, Petroleum Products and Clinker.

Table 8. DIRECTION OF GHANA'S SEABORNE IMPORT TRADE (in mt) 2019

Trade Type	UK	N. Cont.	Med.Eur	N.Amer.	F. East	Africa	Others	TOTAL
LINER	32,958	376,804	390,520	261,908	1,179,351	441,275	292,016	2,974,832
BREAK BULK	7,295	127,611	102,519	1,455	550,238	29,368	70,080	888,566
DRY BULK	0	317,330	2,492,258	213,976	332,461	281,597	996,051	4,633,673
LIQUID BULK	214,192	463,017	67,533	8,909	132,142	1,723,745	36,339	2,645,877
TOTAL	254,445	1,284,762	3,052,830	486,248	2,194,192	2,475,985	1,394,486	11,142,948
SHARE	2%	12%	27%	4%	20%	22%	13%	100%

FIG 1: DIRECTION OF GHANA'S SEABORNE IMPORT TRADE 2019



7.2 Export Trade

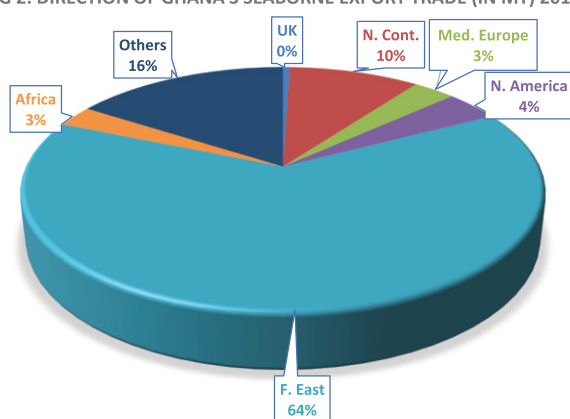
The over 9 million mt of seaborne exports for 2019 went to various destinations in the world. Majority of these exports were to the Far East accounting for a total of 5,770,072 mt representing 64% of the total seaborne exports. The major commodities exported were Manganese (4,502,862 mt) which represents 59% of the total export, followed by Bauxite, Timber Logs and Cashew nuts.

Table 9 and Fig 2 below gives more details about the direction of Ghana's seaborne export trade for 2019.

Table 9. DIRECTION OF GHANA'S SEABORNE EXPORT TRADE (in mt) 2019

Trade Type	UK	N. Cont.	Med. Europe	N. America	F. East	Africa	Others	TOTAL
LINER	39,425	338,336	206,391	84,350	713,430	225,467	154,904	1,762,303
BREAK BULK	8,176	20,996	12,992	33,526	498,232	5,510	63,799	643,231
DRY BULK	0	510,828	63,080	226,061	4,558,410	18,742	1,113,553	6,490,674
LIQUID BULK	0	0	0	18,111	0	3,657	103,275	125,043
TOTAL	47,601	870,160	282,463	362,048	5,770,072	253,376	1,435,531	9,021,251
SHARE	0%	10%	3%	4%	64%	3%	16%	100%

FIG 2: DIRECTION OF GHANA'S SEABORNE EXPORT TRADE (IN MT) 2019



8.o TRANSIT TRADE AND TRANSSHIPMENT THROUGH THE SEAPORTS OF GHANA

Total Transit/Transshipment trade volume for 2019 shows a decrease of 36.5% compared to 2018. The total volume of transit/transshipment for 2019 was 719,772 metric tons (mt).

Transit/Transshipment Imports for 2019 amounted to 642,441 mt, a decrease of 38.4% compared to 2018. Transshipment/Transit Exports for 2019 recorded 77,331 mt, a decrease of 13.7% compared to 2018. Table 10 below shows the details of the transit/transshipment trade volumes for the review period.

Table 10. SUMMARY COMPARISON OF TRANSIT TRADE AND TRANSHIPMENT THROUGH THE SEAPORTS OF GHANA 2019 AND 2018

TRADE TYPE	2019 (mt)	2018 (mt)	CHANGE
TRANSIT/TRANSH. IMPORT	642,441	1,043,043	-38.4%
TRANSIT/TRANSH. EXPORT	77,331	89,629	-13.7%
TOTAL	719,772	1,132,672	-36.5%

9.o TRANSIT TRADE PERFORMANCE FOR BURKINA FASO, MALI AND NIGER

Total transit volume for the three (3) landlocked countries: Burkina Faso, Mali and Niger amounted to 601,653 mt in 2019. This represents a decrease of 37.8% compared to 2018. The transit trade

comprises imports of 526,245 mt and exports of 75,408 mt.

Major transit trade commodities included Bagged Fertilizer, Processed Foods/ Beverages, Petroleum Products, General Cargo and Frozen Meat/Foods. Details are shown in Table 11.

**Table 11. SUMMARY COMPARISON OF TRANSIT TRADE for
BURKINA FASO, MALI & NIGER 2019 AND 2018**

TRADE TYPE	2019 (mt)	2018 (mt)	Change
TRANSIT IMPORT	526,245	879,935	-40.2%
TRANSIT EXPORT	75,408	87,034	-13.4%
TOTAL	601,653	966,969	-37.8%

10.0 PERFORMANCE IN GHANA'S CONTAINERIZED CARGO TRADE

10.1 Shipping Line Performance in the Containerized Trade

Twenty-nine (29) Shipping Lines were involved in the containerized cargo trade which amounted to 605,655 TEUs for 2019. The highest operators were Maersk Line, with 202,258 TEUs (33.4% of the container trade) and the Mediterranean Shipping Company (MSC), with 124,258 TEUs (20.5%). Details are shown in Table 12.

10.2 Shipping Agents' Performance in the Containerized Trade

Twenty-nine (29) Shipping Agents were involved in the containerized trade to and from Ghana. Together, they handled 605,655 TEUs for 2019. The highest performing agencies were Maersk Ghana Ltd, with 202,288 TEUs (33.4% of the containerized trade) and MSC, with 124,542 TEUs (20.5% of the containerized trade). Details are shown in Table 13.

11.0 PERFORMANCE OF SHIPPING LINES AND AGENTS PER VOLUME OF SHIPMENT

11.1 Performance of Shipping Lines per Volume of Shipment and Trade Type

A total of One hundred and nineteen (119) Shipping Lines and Charterers participated in transporting the over 20 million metric tons of Ghana's seaborne cargo (import & export) through the Ports of Tema and Takoradi in 2019. The performance of the

Shipping Lines and Charterers per trade type (i.e. Liner, Breakbulk, Dry bulk, and Liquid bulk) is shown in Table 14 below.

The high performers in Liner Trade were Maersk Line (21.1%) and Mediterranean Shipping Company (16.2%). In the Break Bulk Trade, Maersk Line moved the highest volume (19.5%), followed by Others with 15.7%. High performers for the Dry Bulk Trade were I.M.T (54.4%) and Others with 11.7%. In the Liquid Bulk Trade, BP Oil International Ltd lifted the highest volume of 45.7% followed by Other with 18.3%.

11.2 Performance of Shipping Agents per Volume of Shipment and Trade Type

Sixty-three (63) Shipping Agents handled the over 20 million mt of seaborne trade (import & export) through the Ports of Tema and Takoradi in 2019. Table 15 below shows the performance in the various trades namely, Liner, Break Bulk, Dry Bulk and Liquid Bulk trade for the review period.

High performers in the Liner Trade were Maersk Ghana Ltd. with 21.1% of the volume and MSCA Ghana Ltd. with 16.2%. The leading Shipping Agents in the Break Bulk Trade were Maersk Ghana Ltd. with 19.5% and GMT Shipping Ltd. with 13.3%. In the Dry Bulk Trade, the high performers were Supermaritime Ghana Ltd. with 49.4% of the share and Hull Blyth Ghana Ltd. with 22.0%. In the Liquid Bulk Trade, Inchcape Shipping Ltd handled 57.7% of the volume whilst Oil and Marine Agencies (OMA) handled 28.5%.

TABLE 12. PERFORMANCE OF SHIPPING LINES PER LADEN CONTAINERS (in TEUs)

TOTAL (TEMA & TAKORADI)				
2019				
SHIPPING LINE	IMPORT	EXPORT	TOTAL	% SHARE
AFRICA EXPRESS LINE	7,610	6,446	14,056	2.32%
ARKAS LINE	12,267	5,825	18,092	2.99%
BBC CHARTERING	4	20	24	0.00%
CHINA OCEAN SHIPPING	9,826	180	10,006	1.65%

GHANA SHIPPERS' HOUSE

CONFERENCE FACILITIES



- **540 SEATING CAPACITY CONFERENCE ROOM**
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- **UNDERGROUND & SURFACE PARKING FOR 320 VEHICLES**
- **2-600 KVA STANDBY GENERATOR**
- **HIGH SPEED INTERNET INFRASTRUCTURE**

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CMA CGM	21,254	14,533	35,787	5.91%
COSCO SHIPPING	27,177	11,499	38,676	6.39%
EARLY POWER LIMITED	10	-	10	0.00%
EUKOR CAR CARRIERS	2	-	2	0.00%
G.N.P.C	44	-	44	0.01%
GMT SHIPPING	8	-	8	0.00%
GOLD STAR LINE	13,050	6,147	19,197	3.17%
GRANDE FORTUNE INT SHIPP	5	-	5	0.00%
GRIMALDI LINES	16,203	5,799	22,002	3.63%
HAPAG – LLOYD	44,002	10,093	54,095	8.93%
HC TRADING	352	-	352	0.06%
HOEGH AUTOLINES	1	-	1	0.00%
I.M.T	27	-	27	0.00%
IMC SHIPPING CO	2	-	2	0.00%
MAERSK LINE	172,576	29,682	202,258	33.39%
MEDITERRANEAN SHIPP. CO	95,091	29,167	124,258	20.52%
MESSINA LINES	3,989	1,089	5,078	0.84%
NILEDUTCH	467	1,677	2,144	0.35%
OCEAN NETWORK EXPRESS	6,446	5,912	12,358	2.04%
ORIENT OVERSEAS CONT.	2,310	1,151	3,461	0.57%
OTHERS	2,211	6	2,217	0.37%
PACIFIC INTL. LINE	17,708	5,568	23,276	3.84%
SAFMARINE	-	12,177	12,177	2.01%
UNIVERSAL AFRICA LINE	19	10	29	0.00%
ZIM LINE	4,298	1,715	6,013	0.99%
TOTAL	456,959	148,696	605,655	100.00%

TABLE 13. PERFORMANCE OF SHIPPING AGENTS PER LADEN CONTAINERS (in TEUs)

TOTAL (TEMA & TAKORADI)				
2019				
SHIPPING AGENT	IMPORT	EXPORT	TOTAL	% of TOTAL
ANTRAK GHANA LTD	3,990	1,117	5,107	0.84%
ARKAS GHANA LTD	12,267	5,825	18,092	2.99%
CLASSIC AMODEL	65	0	65	0.01%
CMA CGM	-	14,533	14,533	2.40%
COMEXAS GHANA LTD TEMA	486	1,687	2,173	0.36%
COSCO SHIPPING GH. CO. LTD	29,607	11,499	41,106	6.79%
DAMCO LOGISTICS GH LTD	256	-	256	0.04%
DELMAS SHIPPING GH. CMA CGM	21,254	-	21,254	3.51%
DW CABLE NET SHIPPING GH LTD	1	-	1	0.00%
EOLIS GH	7,610	6,446	14,056	2.32%
GMT SHIPPING LTD	17	-	17	0.00%

GRIMALDI GHANA LTD	15,952	4,616	20,568	3.40%
HAFENAGENTUR GHANA LTD	2	-	2	0.00%
HAPAG LLOYD	44,002	10,093	54,095	8.93%
HASS LOGISTICS GH. LTD	5	-	5	0.00%
HULL BLYTH GHANA	70	-	70	0.01%
INTERMODAL SHIPPING AGENCY GH LTD	17,348	-	17,348	2.86%
ISAG LTD		7,862	7,862	1.30%
MAERSK GHANA LTD	172,606	29,682	202,288	33.40%
MARITIME AGENCIES	4	20	24	0.00%
MSCA GHANA	95,375	29,167	124,542	20.56%
OCEAN NETWORK EXPRESS GH LTD	6,446	5,912	12,358	2.04%
ORIENT OVERSEAS CONTAINER LTD	3,469	1,151	4,620	0.76%
PIL GAHANA LTD	17,708	5,568	23,276	3.84%
PORTS MARINE LTD	127	-	127	0.02%
SAFMARINE	-	12,177	12,177	2.01%
SCANSHIP GH. LTD	8,173	1,335	9,508	1.57%
SEVENLOG LIMITED	2	-	2	0.00%
SUPERMARITIME GHANA LIMITED	117	6	123	0.02%
TOTAL	456,959	148,696	605,655	100.00%

GHANA SHIPPERS' AUTHORITY

TABLE 14. PERFORMANCE OF SHIPPING LINES IN GHANA'S SEABORNE TRADE – JAN. – DEC. 2019

IMPORT AND EXPORT - TEMA - TAKORADI

SHIPPING LINES/CHARTERER	IMPORT	EXPORT	TOTAL	% SHARE / TRADE TYPE	%SHARE
LINER					
ADOM MBROSO COLDSTORES LTD	3,643	0	3,643	0.07	0.02
AFCOTT GHANA LTD	1,242	0	1,242	0.02	0.01
AFRICA EXPRESS LINE	44,700	88,664	133,364	2.55	0.66
AFRITRAMP	312	1,535	1,847	0.04	0.01
AFRICA FISH GH. LTD	710	0	710	0.01	0.00
AMISACHI LTD	2,883	0	2,883	0.06	0.01
ARKAS LINE	63,818	85,545	149,363	2.86	0.74
BAJFREIGHT & LOGISTICS	0	709	709	0.01	0.00
BBC CHARTERING	466	1,231	1,697	0.03	0.01
BOLLORE LINES	0	3,702	3,702	0.07	0.02
CARMEUS TRADING	85	0	85	0.00	0.00
C&G FISHES CO. LTD	1,717	0	1,717	0.03	0.01
CHINA OCEAN SHIPPING	70,652	2,351	73,003	1.40	0.36
CHINT ELECTRIC CO. LTD	575	0	575	0.01	0.00
CMA CGM	86,458	237,343	323,801	6.20	1.61
COSCO SHIPPING LINE	100,201	0	100,201	1.92	0.50
COSMO SEAFOODS CO.	466	158,347	158,813	3.04	0.79
DANGOTE CEMENT GH. LTD	49,700	0	49,700	0.95	0.25
DOLPHIN FROZEN FOODS	600	0	600	0.01	0.00
EARLY POWER LTD (EPL)	96	0	96	0.00	0.00
EUKOR CAR CARRIER	8,763	98	8,861	0.17	0.04

EURO AFRICA	39,205	1,151	40,356	0.77	0.20
FLOUR MILLS GH. LTD	2,500	0	2,500	0.05	0.01
GLOVIS	6,243	0	6,243	0.12	0.03
GMT SHIPPING	5,119	0	5,119	0.10	0.03
GOLD STAR LINE	76,516	100,847	177,363	3.40	0.88
GOLD STAR LINE FISH CO LTD	1,201	0	1,201	0.02	0.01
GRIMALDI LINES	91,684	80,055	171,739	3.29	0.85
GRANDE FORTUNE	674	0	674	0.01	0.00
HAPAG-LLOYD	215,657	153,980	369,637	7.08	1.83
HC TRADING	18,866	3,071	21,937	0.42	0.11
INCHCAPE SHIPPING SERVICES	1,503	0	1,503	0.03	0.01
I.M.T	73,360	802	74,162	1.42	0.37
HOEGH AUTHLINERS	1,194	0	1,194	0.02	0.01
IMC SHIPPING CO PTE	139	0	139	0.00	0.00
K'LINE	1,609	0	1,609	0.03	0.01
KAWASAKI KISEN KAISHA LTD	93	0	93	0.00	0.00
LEONE FISHING CO. LTD	3,153	0	3,153	0.06	0.02
LOULITA	2,522	0	2,522	0.05	0.01
MAERSK LINE	671,966	429,106	1,101,072	21.08	5.46
MEDITERRANEAN SHIPPING CO.	426,875	421,600	848,475	16.24	4.21
MARINE & ENERGY	0	2	2	0.00	0.00
MEDKON LINES	16	0	16	0.00	0.00
MESSINA LINES	22,627	16,091	38,718	0.74	0.19
NETSUI O.S.K. LINES	32	0	32	0.00	0.00
MOL ACE	1,696	0	1,696	0.03	0.01
NMT LINES	6,836	0	6,836	0.13	0.03
NILEDUTCH	18,652	22,035	40,687	0.78	0.20
OCEAN FARE CO. LTD	3,405	0	3,405	0.07	0.02
OCEAN NETWORK EXPRESS PTE	31,932	86,453	118,385	2.27	0.59
ORIENT OVERSEAS CONT LINE	3,717	14,657	18,374	0.35	0.09
OTHER	383,355	8,000	391,355	7.49	1.94
PACIFIC BASIN	10,305	0	10,305	0.20	0.05
PACIFIC INTL LINE	80,847	82,769	163,616	3.13	0.81
SAFMARINE	0	217,879	217,879	4.17	1.08
OLAM GHANA	717	0	717	0.01	0.00
PIONEER FOOD CANNERY LTD	3,689	0	3,689	0.07	0.02
PIONEER FOOD/ COSMO SEAFOODS	185	0	185	0.00	0.00
PRECIOUS COLDSTORE LTD	1,703	0	1,703	0.03	0.01
RAFFLES SHIPPING INT	27,897	0	27,897	0.53	0.14
SANTA FISHERIES GH. LTD	41,000	0	41,000	0.78	0.20
SEVENLOG LTD	167,030	137	167,167	3.20	0.83
SHELL INTERNATIONAL	12,748	0	12,748	0.24	0.06
SIKA KORABEA CO. LTD	475	0	475	0.01	0.00
SUCDEN MIDDLE EAST	1	0	1	0.00	0.00
TRUSTLINK VENTURES LTD	5,535	0	5,535	0.11	0.03
UNILEVER GH. LTD	2,202	0	2,202	0.04	0.01
UNITED ARAB SHIPP. CO	4	0	4	0.00	0.00
UNIVERSAL AFRICA LINES	1,505	2,223	3,728	0.07	0.02

UNSPECIFIC SHIPPING LINE	223	0	223	0.00	0.00
VITOL SA	698	0	698	0.01	0.00
VOLTA ALUMINIUM CO. LTD	10,502	0	10,502	0.20	0.05
WE 2 SEAFOODS CO. LTD	10,857	0	10,857	0.21	0.05
WILMAR AFRICAN LTD	7,015	0	7,015	0.13	0.03
YARA GH. LTD	14,300	0	14,300	0.27	0.07
YORK OVERSEAS	8,500	0	8,500	0.16	0.04
ZIM LINE	16,879	29,157	46,036	0.88	0.23
SUB-TOTAL	2,974,251	2,249,540	5,223,791	100.00	25.91
<u>BREAK BULK</u>					
AFRITRAMP	23	0	23	0.00	0.00
AFRICA EXPRESS LINE	86	0	86	0.01	0.00
ARKAS LINE	11,489	0	11,489	1.33	0.06
BBC CHARTERING	934	0	934	0.11	0.00
CHINA OCEAN SHIPPING	28,464	0	28,464	3.29	0.14
CMA CGM	13,842	0	13,842	1.60	0.07
COSCO SHIPPING	20,451	0	20,451	2.37	0.10
EUKOR CAR CARRIERS	126	0	126	0.01	0.00
GMT SHIPPING	100,745	0	100,745	11.66	0.50
GNPC	369	0	369	0.04	0.00
GOLD STAR LINE	17,832	0	17,832	2.06	0.09
GRANDE FORTUNE INTL SHIPPING	3,402	0	3,402	0.39	0.02
GRIMALDI LINES	9,820	0	9,820	1.14	0.05
HAPAG-LLOYD	36,437	0	36,437	4.22	0.18
HC TRADING LINES	752	0	752	0.09	0.00
MAERSK LINE	168,297	0	168,297	19.48	0.83
MANSELL GH. LTD	6,000	0	6,000	0.69	0.03
MEDITERRANEAN SHIPP. CO	91,779	0	91,779	10.62	0.46
MEDKON LINES	21	0	21	0.00	0.00
MESSINA LINES	1,085	0	1,085	0.13	0.01
NILEDUTCH	5,347	0	5,347	0.62	0.03
NMT LINES	5	0	5	0.00	0.00
OCEAN NETWORK EXPRESS PTE	7,527	0	7,527	0.87	0.04
ORIENT OVERSEAS CONTAINER LINES	78	0	78	0.01	0.00
OLAM GHANA	46,405	0	46,405	5.37	0.23
OTHER	136,073	0	136,073	15.75	0.67
PACIFIC INTL. LINES	19,189	0	19,189	2.22	0.10
SEVENLOG LTD	102,557	0	102,557	11.87	0.51
SIKA KORABEA CO. LTD	17,288	0	17,288	2.00	0.09
SUCDEN MIDDLE EAST	10,000	0	10,000	1.16	0.05
UNIVERSAL AFRICA LINE	2,715	0	2,715	0.31	0.01
ZIM LINE	4,810	0	4,810	0.56	0.02
SUB-TOTAL	863,948	0	863,948	100.00	4.28
<u>DRY BULK</u>					
AMPEROPA SA	7,630	0	7630	0.07	0.04
BALTNV SINGAPORE	31,266	0	31266	0.28	0.16

BUNGE	12,000	0	12000	0.11	0.06
COSCO SHIPPING	102	0	102	0.00	0.00
CARMEUS TRADING	38,957	0	38957	0.34	0.19
CMA CGM	146	6,477	6623	0.06	0.03
DANGOTE CEMENT	303,496	0	303496	2.69	1.51
DS NORDEN	80,724	0	80724	0.71	0.40
EAGLE SHIPPING	30,040	0	30040	0.27	0.15
ED&F MAN SHIPPING	28,000	0	28000	0.25	0.14
EMIRATES BULK CARRIERS	29,219	0	29219	0.26	0.14
GHANA NUTS CO.	0	2,006	2006	0.02	0.01
GMT SHIPPING	355	0	355	0.00	0.00
GRIMALDI LINES	1,014	8,283	9297	0.08	0.05
HAPAG LLOYD	0	352	352	0.00	0.00
HC TRADING	1,212,200	68,001	1280201	11.33	6.35
I.M.T	0	6,152,187	6152187	54.44	30.51
LH SHIPPING PTE LTD	30,433	0	30433	0.27	0.15
MAERSK LINE	981	69,262	70243	0.62	0.35
MEDITERRANEAN SHIPP. CO	3,774	109,641	113415	1.00	0.56
NORDEN AS	71,977	0	71977	0.64	0.36
NORDIC BULK CARRIERS	27,475	0	27475	0.24	0.14
OCEAN CRYSTAL SHIPPING	27,300	0	27300	0.24	0.14
OLAM GH LTD	195,101	0	195101	1.73	0.97
OLDENDORFF	111,502	0	111502	0.99	0.55
OLDENDORFF CARRIERS	296,196	0	296196	2.62	1.47
OTHER	1,128,503	200,959	1329462	11.76	6.59
PACIFIC BASIN	67,950	0	67950	0.60	0.34
PRISMA SHIPPING	23,702	0	23702	0.21	0.12
SANTA FISHERIES GH. LTD	7,500	0	7500	0.07	0.04
SIGMA SHIPPING	47,859	0	47859	0.42	0.24
SIEM SHIPPING	24,685	0	24685	0.22	0.12
ST SHIPPING	27,500	0	27500	0.24	0.14
SEVEN LOG LTD	254,551	0	254551	2.25	1.26
SPLIETHORFF	15,571	0	15571	0.14	0.08
THORESEN SHIPPING	68,051	0	68051	0.60	0.34
TRANSATLANTICA COMMODITIES PTE LTD	22,451	0	22451	0.20	0.11
TRITHORN BULK	7,625	0	7625	0.07	0.04
UNICARGO LINES	0	20,500	20500	0.18	0.10
UNIVERSAL AFRICA LINES	0	9,000	9000	0.08	0.04
VALE SHIPPING	38,630	0	38630	0.34	0.19
WESTERN BULK CARRIERS AS	267,766	0	267766	2.37	1.33
WIN SHIPPING	40,100	0	40100	0.35	0.20
YORK OVERSEAS	72,030	0	72030	0.64	0.36
SUB-TOTAL	4,654,362	6,646,668	11,301,030	100.00	56.05
LIQUID BULK					
ALPHA PETROLEUM	8,060	0	8,060	0.29	0.04
AI ENERGY	480	0	480	0.02	0.00
ALPHA PETRO	13,977	0	13,977	0.50	0.07



GHANA SHIPPERS' AUTHORITY



BACKGROUND

The Ghana Shippers' Authority (GSA) is a state agency operating under the auspices of the Ministry of Transport. It was established in 1974 by NRCD254 and has over the years collaborated with private and public organizations in the maritime industry to pursue its primary objective of protecting and promoting the interests of shippers in Ghana in relation to port, ship and inland transport problems in order to ensure safe, reliable and cost effective cargo handling.

SERVICES TO SHIPPERS

- Sensitising and empowering shippers and stakeholders in the shipping and logistics sector through programmes such as open fora for trade associations, annual seminars for journalists, biennial maritime law seminars for Judges, workshops for truck owners and drivers, etc.
- Establishment of Import/Export Shipper Committees across the country to enable shippers and shipping service providers interact regularly in order to resolve challenges confronting their businesses;
- Negotiation of freight and port charges of shipping service providers on behalf of shippers;
- Establishment of Shipper Complaints and Support Units at the country's entry points to provide real-time assistance to shippers engaged in cross-border trade.
- Negotiation and monitoring of service standards of shipping service providers;
- Conducting research on emerging issues in Ghana's maritime transport industry;
- Facilitation and promotion of the Transit Trade along Ghana's transit corridor;
- Advocacy in matters affecting shippers such as Implementation of IMO Sulphur Regulations 2020, Terminal Handling Charges, payment of VAT on transit services and levy on transit exports, etc;
- Intervening, investigating and finding solutions to recurrent shipment problems such as loss/damaged cargo, late arrival of shipping documents, cargo insurance claims, illegitimate charges, shortlanding of cargo, etc.
- Representation of the interests of shippers in the deliberations of international bodies such as IMO, WTO, UNCTAD, Global Shippers Forum, etc.
- Provision of infrastructure such as the Takoradi Logistics Platform project, Boankra Inland Port project, Akatakyiwa Freight Park project, Shippers Centres, etc to support the shipping and logistics sector.

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Website: www.shippers.org.gh

ARKAS LINE	113	0	113	0.00	0.00
BLUE OCEAN INVESTMENTS	239,721	0	239,721	8.64	1.19
BP OIL INTERNATIONAL LTD	1,269,387	0	1,269,387	45.74	6.30
BP SHIPPING	68,060	0	68,060	2.45	0.34
CHASE PETROLEUM	57,326	0	57,326	2.07	0.28
CIRRUS OIL SERVICES	34,959	0	34,959	1.26	0.17
EURO AFRCIA	3,827	0	3,827	0.14	0.02
FUELTRADE	89,407	0	89,407	3.22	0.44
GAC HUB	35,404	0	35,404	1.28	0.18
GLENCORE ENERGY	37,108	0	37,108	1.34	0.18
I.M.T	10,879	0	10,879	0.39	0.05
INCHCAPE SHIPPING SERV.	35,594	0	35,594	1.28	0.18
JUWEL ENERGY	31,700	0	31,700	1.14	0.16
LITASCO	15,010	0	15,010	0.54	0.07
MAERSK LINE	299	0	299	0.01	0.00
MEDITERRANEAN SHIPP. CO	467	0	467	0.02	0.00
P.W.S.L	5,571	0	5,571	0.20	0.03
RAFFLES SHIPPING INT	15,000	0	15,000	0.54	0.07
SHELL INTERNATIONAL	43,828	0	43,828	1.58	0.22
OTHER	383,154	125,043	508,197	18.31	2.52
TRAFIGURA PTE LTD	62,466	0	62,466	2.25	0.31
VITOL	181,562	0	181,562	6.54	0.90
UNIVERSAL AFRICA LINE	19	0	19	0.00	0.00
WILMAR AFRICAN LTD	7,009	0	7,009	0.25	0.03
SUB-TOTAL	2,650,387	125,043	2,775,430	100.00	13.76
GRAND TOTAL	11,142,948	9,021,251	20,164,199	100.00	100.00

GHANA SHIPPERS' AUTHORITY

TABLE 15. PERFORMANCE OF SHIPPING AGENTS IN GHANA'S SEABORNE TRADE - JAN - DEC. 2019

IMPORT AND EXPORT - TEMA & TAKORADI

	<u>IMPORT</u>	<u>EXPORT</u>	<u>TOTAL</u>	<u>% SHARE / TRADE TYPE</u>	<u>%SHARE</u>
<u>LINER</u>					
AFRICAN CARGO CENTRAL LTD	1,101	0	1,101	0.02	0.01
A&J SHIPPING SERVICES	23,896	0	23,896	0.46	0.12
ANDIPEX CO. LTD	10,832	0	10,832	0.21	0.05
ANTRAK GH. LTD	24,442	21,718	46,160	0.88	0.23
ARKAS GH. LTD	63,829	85,545	149,374	2.86	0.74
AR RAHMANI SHIPPING LTD	2,700	0	2,700	0.05	0.01
BAJ FREIGHT	8,247	709	8,956	0.17	0.04
CLASSIC AMODEL GH. LTD	1,275	0	1,275	0.02	0.01
CMA CGM GH. LTD	86,458	237,343	323,801	6.19	1.61
COMEXAS GH. LTD	20,157	24,258	44,415	0.85	0.22
CONSOLIDATED SHIPPING AGENCIES	107	0	107	0.00	0.00
COSCO SHIPPING LINE GHANA CO LTD	101,205	158,347	259,552	4.96	1.29
DAMCO	8,500	0	8,500	0.16	0.04
DOLPHIN SHIPPING SERVICES	1,703	0	1,703	0.03	0.01

EOLIS GH. LTD	42,471	88,664	131,135	2.51	0.65
FACULTY LOGISTICS LTD	1,760	0	1,760	0.03	0.01
GLOBAL CARGO & COMMODITIES	28,483	0	28,483	0.54	0.14
GMTSHIPPING LTD	9,926	0	9,926	0.19	0.05
GO MOVERS LOGISTICS GH. LTD	47,500	0	47,500	0.91	0.24
GRIMALDI GH. LTD	89,667	70,610	160,277	3.07	0.79
HAPAG-LLOYD GH. LTD	215,435	153,980	369,415	7.07	1.83
HAFENAGENTUR GH. LTD	10,246	0	10,246	0.20	0.05
HASS LOGISTICS GH. LTD	47,481	0	47,481	0.91	0.24
HULL BLYTH GH. LTD	38,259	3,170	41,429	0.79	0.21
INCHCAPE SHIPP. SERVICES GH. LTD	51,636	0	51,636	0.99	0.26
ISAG LTD	93,396	130,004	223,400	4.27	1.11
KHUDA SERVICE	7,827	0	7,827	0.15	0.04
KOYANKS COMPANY LIMITED	6,528	0	6,528	0.12	0.03
MACRO SHIPPING	18,788	0	18,788	0.36	0.09
MAERSK GH. LTD	671,980	429,106	1,101,086	21.06	5.46
MARITIME AGENCIES	465	1,231	1,696	0.03	0.01
MARINE AND ENERGY SERVICES	4,470	197	4,667	0.09	0.02
MAP SHIPPING LTD	12,000	0	12,000	0.23	0.06
MSCA GH. LTD	426,875	421,600	848,475	16.23	4.21
OIL & MARINE AGENCIES	22,496	0	22,496	0.43	0.11
ONE GH. LTD	31,932	86,454	118,386	2.26	0.59
OOCL GH. LTD	10,208	14,657	24,865	0.48	0.12
PIL GHANA LTD	80,847	82,769	163,616	3.13	0.81
PORTS MARINE LTD	18,215	2	18,217	0.35	0.09
SAFMARINE	0	217,879	217,879	4.17	1.08
SANTA SHIPPING AGENCY	41,000	0	41,000	0.78	0.20
SCANSHIP GHANA LIMITED	67,127	12,553	79,680	1.52	0.40
SEVENLOG LTD	177,932	385	178,317	3.41	0.88
SDV GHANA LTD	1,696	0	1,696	0.03	0.01
SHARAF SHIPPING AGENCY LIMITED	6,243	0	6,243	0.12	0.03
STARDEX MARINE CONSULT	11,268	0	11,268	0.22	0.06
SUPERMARITIME GHANA LIMITED	266,964	8,361	275,325	5.27	1.37
TRAMSCO SHIPPING TEMA	600	0	600	0.01	0.00
UMAL SHIPPING AGENCY GH. LTD	29,000	0	29,000	0.55	0.14
UNITED ARAB SHIPPING AGENCY GH LTD	4	0	4	0.00	0.00
WATER FRONT ALL SERVICES LIMITED	33,500	0	33,500	0.64	0.17
WESTERN FREIGHT & LOGISTICS	85	0	85	0.00	0.00
SUB-TOTAL	2,978,762	2,249,542	5,228,304	100	25.93
BREAK BULK					
AFRICA CARGO CENTRAL LTD	3	0	3	0.00	0.00
ANTRAK GH. LTD	1,990	0	1,990	0.23	0.01
ARKAS GHANA LTD TEMA	11,489	0	11,489	1.33	0.06
BAJ FREIGHT	457	0	457	0.05	0.00
COMEXAS GH. LTD	8,062	0	8,062	0.93	0.04
CONSOLIDATED SHIPPING AGENCIES LTD	311	0	311	0.04	0.00
COSCO SHIPPING LINE GHANA LTD	20,794	0	20,794	2.41	0.10

CMA CGM GH. LTD	13,842	0	13,842	1.60	0.07
EOLIS GHANA LIMITED	85	0	85	0.01	0.00
FACULTY LOGISTICS	18,022	0	18,022	2.09	0.09
GLOBAL CARGO & COMMODITIES	105,368	0	105,368	12.20	0.52
GMT SHIPPING LTD	114,669	0	114,669	13.27	0.57
GRIMALDI GHANA LTD.	9,690	0	9,690	1.12	0.05
HAPAG-LLOYD GH. LTD	36,336	0	36,336	4.21	0.18
HASS LOGISTICS	19,157	0	19,157	2.22	0.10
HAFENAGENTUR GH. LTD	1,073	0	1,073	0.12	0.01
HULL BLYTH GHANA	878	0	878	0.10	0.00
INTERMODAL SHIPP. AGENCY GH. LTD	22,642	0	22,642	2.62	0.11
MAERSK GH. LTD	168,297	0	168,297	19.48	0.83
MARINE AND ENERGY SERVICES GH. LTD	2,056	0	2,056	0.24	0.01
MARITIME AGENCIES	934	0	934	0.11	0.00
MSCA GH. LTD	91,779	0	91,779	10.62	0.46
MAP SHIPPING	23,949	0	23,949	2.77	0.12
OIL AND MARINE AGENCIES	101	0	101	0.01	0.00
ORIENT OVERSEAS CONTAINER LINES	1,087	0	1,087	0.13	0.01
OCEAN NETWORK EXPRESS GHANA LTD	7,527	0	7,527	0.87	0.04
PIL GHANA LTD	19,189	0	19,189	2.22	0.10
PORTS MARINE LTD	297	0	297	0.03	0.00
SCANSHIP GH LTD	14,326	0	14,326	1.66	0.07
SEVEN LOG LTD	102,557	0	102,557	11.87	0.51
SILVERMARITIME GH. LTD	31,425	0	31,425	3.64	0.16
SUPERMARITIME GH. LTD	401	0	401	0.05	0.00
WATER FRONT ALL SERVICES LIMITED	15,154	0	15,154	1.75	0.08
SUB-TOTAL	863,947	0	863,947	100.00	4.28
DRY BULK					
ANTRAK GH. LTD	1314	0	1,314	0.01	0.01
BLUESEA MARITIME GH. LTD	0	20500	20,500	0.18	0.10
CMA CGM GH. LTD	146	6477	6,623	0.06	0.03
COMEXAS GH. LTD	0	9000	9,000	0.08	0.04
COSCO SHIPPING	102	0	102	0.00	0.00
DAMCO LOGISTICS GHANA LTD	72030	0	72,030	0.64	0.36
GLOBAL CARGO AND COMMODITIES	368691	0	368,691	3.26	1.83
GO MOVERS	38200	0	38,200	0.34	0.19
GRIMALDI GH. LTD	1014	0	1,014	0.01	0.01
GETMA GHANA LTD	2489	0	2,489	0.02	0.01
GMT SHIPPING LIMITED	355	0	355	0.00	0.00
HAFENAGENTUR GHANA LTD TEMA	328197	0	328,197	2.90	1.63
HAPAG-LLOYD	0	352	352	0.00	0.00
HULL BLYTH GH. LTD	2333299	156001	2,489,300	22.03	12.35
INCHCAPE SHIPPING SERVICES	14826	0	14,826	0.13	0.07
MACRO SHIPPING GH. LTD	0	856282	856,282	7.58	4.25
MSCA GHANA TEMA	3774	109641	113,415	1.00	0.56
MAERSK GH. LTD	981	69262	70,243	0.62	0.35
OIL & MARINE GH. LTD	0	10000	10,000	0.09	0.05

SANTA SHIPPING	7500	0	7,500	0.07	0.04
SCANSHIP GHANA LIMITED	61799	8283	70,082	0.62	0.35
SEVENLOG LIMITED	1033453	0	1,033,453	9.14	5.13
SIFAX AGENCIES GHANA LTD	128406	0	128,406	1.14	0.64
STAR MARITIME GH. LTD	0	14500	14,500	0.13	0.07
SUPERMARITIME GH. LTD	197329	5384364	5,581,693	49.39	27.68
TIDE-SHIPS MARINE CONSULT LTD	0	2006	2,006	0.02	0.01
UMAL SHIPPING GHANA	21500	0	21,500	0.19	0.11
WESTERN FREIGHT AND LOGISTICS LTD	38957	0	38,957	0.34	0.19
SUB-TOTAL	4,654,362	6,646,668	11,301,030	100.00	56.05
LIQUID BULK					
AFRICA INTERGRATED SERVICES GHANA	79,923	75,102	155,025	5.59	0.77
ARKAS GHANA LTD	113	0	113	0.00	0.00
BLUE SEAS SHIPPING SERVICE LTD	5,571	0	5,571	0.20	0.03
BULKSHIP & TRADE LTD	163,131	0	163,131	5.89	0.81
COMEXAS GH LTD	19	0	19	0.00	0.00
GLOBAL CARGO AND COMMODITIES	4,791	0	4,791	0.17	0.02
HULL BLYTH	480	0	480	0.02	0.00
HASS LOGISTICS	3,827	0	3,827	0.14	0.02
INCHCAPE SHIPPING SERVICES	1,597,704	0	1,597,704	57.66	7.92
MAERSK GH. LTD	299	0	299	0.01	0.00
MSCA GHANA TEMA	467	0	467	0.02	0.00
OIL & MARINE AGENCIES	759,995	29,258	789,253	28.48	3.91
OMA GH LTD	0	17,025	17,025	0.61	0.08
SUPERMARITIME GHANA LIMITED	26,076	3,657	29,733	1.07	0.15
TIGER HAULAGE SHIPPING AGENCY LTD	3,480	0	3,480	0.13	0.02
SUB-TOTAL	2,645,876	125,042	2,770,918	100.00	13.74
GRAND TOTAL	11,142,947	9,021,252	20,164,199	100.00	100.00



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Global Shippers' Forum AGM and Conference 2019 -Matters Arising

Since its creation in 2006, the Global Shippers' Forum (GSF) has represented shippers' interests and those of their national and regional organisations in Asia, Europe, North and South America, Africa and Australia.

The GSF is the world's leading trade association for shippers (importers and exporters) engaged in international trade, organising the movement of goods in all modes of transport.

Its mission is to influence regulatory developments affecting international freight transport and the policy decisions of governments and international organisations as they affect shippers and receivers of freight.

At the heart of the GSF's activities is the congregation of its members at its annual general

meeting (AGM) and Conference to discuss issues dominating international trade and its impact on the businesses of shippers across the world. The 2019 AGM and conference came off in London, United Kingdom from 16th – 19th September, 2019.

Members of the Union of African Shippers' Councils' (UASC) including the Ghana Shippers' Authority (GSA), Nigeria Shippers' Council (NSC), representatives from the Australian Shippers' Association, the Asian Shippers Associations, the Freight Transporters Association (FTA) of the United Kingdom, the Canadian Shippers' Association and the Chairman and Secretary General of the GSF participated in the four-day event. Also, in attendance were representatives from the World Shipping Council (WSC), led by its President and the International Chamber of

Commerce (ICC), who made presentations on the INCOTERMS 2020.

Concerns of GSF's Chairman

In a welcome address, the Chairman of the GSF, Sean Van Dort noted that service providers were becoming more and more apparent in the logistics chain such that on occasions, shippers did not even meet or have any direct contractual relationship with the lines but the service providers did. He acknowledged the increasing importance of the role of forwarders in international trade.

The address also highlighted the important role the International Commercial Terms (INCOTERMS) plays in international trade and the need to take into consideration the growing importance of e-commerce. He said the GSF was gaining growing importance on



also look at the provisions in the International Maritime Dangerous Goods (IMDGs) Code with regards to hazardous goods and other products, e.g., coal.

Maritime Performance Indicators and GSA's advocacy for shippers

In deliberations on Maritime Performance Indicators as part of Key Performance Indicators (KPIs) being considered by the GSF, it was noted that the Organisation for Economic Co-operation and Development (OECD) had made several important interventions in the debate about the structure of the container shipping industry. Members of the GSF were requested to consider the practicality of such interventions.

In their contribution, the delegation from the NSC observed that asset optimisation, blank sailing should be discouraged as much as possible, noting that the lines were creating artificial shortages and jacking up their prices.

Commenting on the availability of containers, the delegation from the GSA stated that shipping lines should know which cargoes they were going to transport and provide adequate containers accordingly, since it was their duty to provide a seaworthy vessel and conveyance and not the responsibility of the shipper.

The GSA delegation strongly recommended that costs incurred for delays which were not occasioned by the shipper should not be transferred to them and they (shippers) should also not be made to pay for the added costs of unsolicited services.

The Ghana team requested for KPIs for terminals and terminal operators because they provide important services in the logistics supply chain. It also called for service standards to be included in the GSF campaign.

Conference and Other Matters

The Conference, which followed the AGM, received briefings on the Sri Lankan experience with regards to surcharges. It was explained that the Asian country had reached the stage where, based on the Incoterms, the contracting parties paid all charges. In the use of the Incoterms and Certificate of Compliance (CoCs), there were no Terminal Handling Charges (THCs), as the terms were explicit on the Bills of Lading, e.g., Container yard/Container yard (CY/CY). Additionally, there was also no fee for Delivery Orders (Dos). These had all been incorporated into legislation, so there was little risk of non-adherence.

Sharing the Ghanaian experience, the GSA delegation

explained that imports were on Cost, Insurance and Freight (CIF) basis and exports on Free On Board (FOB), thus giving the power to the trading partner, e.g., choice of line, terminal, etc.

The GSA further added that there have been some attempts at streamlining issues with the introduction of the paperless port system, less physical inspection of cargoes at the ports, scanning and the option of shippers choosing which terminal they wanted to pick their cargo from. Slot sharing was also available in Ghana, with some lines stopping to call Ghanaian ports instead of neighbouring ports due to profit considerations.

On the implementation of the IMO Sulphur Cap, it was noted that the lines may impose as much as 50 per cent of their cost (fuel, Bunker Adjustment Factor (BAF) costs) in addition to the freight, with an example of Hapag Lloyd which was quoting US\$ 448.00 per 40' container from Asia to Europe, representing a 50% increment in BAF.

Members of the GSF were encouraged to hedge the price of freight over a period of a year, as was the case for cocoa and negotiate the BAF on a quarterly basis.

On the THCs, members were encouraged to insist on the full implementation of the Billing of Lading (B/L) clauses, as they spelt out clearly the obligations and responsibilities of each party – including the lines. Members were also encouraged to incorporate the GSF campaign to end surcharges and push for legislation in their various jurisdictions and to also ensure they were consulted by the lines before the implementation of new charges.



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GHANA TAX STAMP AUTHENTICATOR (GTSA)



GRA



How to install

Step 1

Go to
Google Play Store
on phone menu

Step 2

Search for
Ghana Tax Stamp
Authenticator

Step 3

Click on image
and install

Step 4

Click to open the App
and allow it to access
your device's
location

Step 5

Allow App to
take pictures,
record videos
and manage calls

The Ghana Tax Stamp Authenticator

- It is an android based App which assists you to scan the Excise Tax Stamp on products to determine the genuineness of the Stamp.
- It can easily be accessed at any location
- You need an android phone with at least 5.0 android capacity, internet data and internet enabled

How to scan using the GTSA App

01

Tap the start button after installing the App to begin scanning

03

Click on the 'OK' button. You will receive the following ; Product Type, Origin, HR Code, Name of Organisation and Metric Name

02

Compare the scanned results and products to the nearest GRA office

04

Compare the phone information to the actual product in your hand

05

Report the difference in the scanned results and products to the nearest GRA office



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