



Ministry of Foreign Affairs

# Sector Scan

## *The Logistics Sector in Liberia*

*Commissioned by the Netherlands Enterprise Agency*

>> *Sustainable. Agricultural. Innovative.  
International.*

**Sector Scan**

**The Logistics Sector in Liberia**

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Liberia Netherlands Business and Culture Council (LNBCC)



## **Liberia Netherlands Business and Culture Council**

The Liberia Netherlands Business and Culture Council (LNBCC) is an organization that represents the business interests of both Liberian and Dutch companies. The LNBCC has been active in the capital - Monrovia - since 2016, and is an extension of the Ghana Netherlands Business and Culture Council (GNBCC). Both organizations work closely together with the Embassy of the Kingdom of the Netherlands in Ghana.

The LNBCC's core business is the promotion and fostering of trade relations between Liberia and the Netherlands, under the mantra of 'growing together'. Currently two employees - Theo Dennis and Eline Terneusen - are working together in developing a membership base, producing sector scans on subsections of the economy and organizing networking events.

Besides those core activities, the LNBCC offers services to both members and non-members in the following areas:

- Business development services: the LNBCC executes market studies for businesses wanting to extend their services to Liberia. Company profiling and company visits can be set with possible local partners. The LNBCC can also represent organizations locally. With researchers on board with extensive experience in qualitative research methods, the LNBCC can provide local and context specific information on a wide variety of topics.
- Business support services: The LNBCC provides advice on financial constructions, accounting, bookkeeping, registering processes in Liberia, manners to get subsidies for business models and trainings for accountants.
- Travel support services: LNBCC can negotiate prices for / provide car rentals, hotel bookings, visa and immigration requirements.
- Trade mission & event services: Through our network we bring together authorities, experts and entrepreneurs. The LNBCC organizes events such as plenary sessions, workshops, trainings and meet & greets by taking on the event planning and management.

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## Chapter 1 | EXECUTIVE SUMMARY

Liberia is a nation with a wealth of natural resources, conveniently located to become a port for trade throughout the West African region and internationally. After over a decade of post-conflict growth and relative peace and stability since the end of the 1989-2003 conflict, Liberia's transport infrastructure and logistics sector have the potential for enormous growth and development. Under the current Agenda for Transformation (AfT) for 2012-2017 energy and transportation have been identified as bottlenecks inhibiting inclusive private sector development, diversification and productivity. There are concerted efforts from development partners and international organizations to support Liberia's transformation towards a stable, inclusive economy.

Sector	Ch. 6: Transportation	Ch. 7: Ports & Shipping	Ch. 7: Supply Chain
<b>Opportunities</b>	<ul style="list-style-type: none"> <li>- Lorries</li> <li>- Distribution logistics</li> <li>- Procurement logistics</li> <li>- IT solutions</li> </ul>	<ul style="list-style-type: none"> <li>- Vessels (fuel, consumables, passengers)</li> <li>- Vessels inland</li> <li>- Cooling facilities</li> <li>- Green logistics</li> <li>- Risk-based inspection regimes</li> <li>- Central port facility development</li> <li>- Digital logistics</li> </ul>	<ul style="list-style-type: none"> <li>- Value addition production logistics</li> <li>- Disposal logistics</li> <li>- Distribution logistics</li> <li>- Transportation</li> <li>- Green logistics</li> <li>- RAM logistics</li> </ul>
<b>Relevant Programs</b>	GIZ, IFC, Government of China, ECOWAS	APM Terminals, RVO, US Government, Ports Master Plan, Liberia Maritime Training Institute	LATA, World Bank

After a country overview and statistics, a comprehensive description of Liberia's logistics sector will be provided, touching on energy, airports, railroads, fuel and telecommunications. Key opportunities for Dutch companies looking to enter the logistics sector in Liberia lie predominantly in transport, ports & shipping and supply chain logistics. Dutch companies desirous of capitalizing on the logistics sector have a broad range of sub-sector functions to focus upon. Opportunities within these subsections of the logistics sector are explored in separate chapters.

The Liberian government, in collaboration with China, Japan, Senegal and several EU countries, has been strongly focussing on improving the country's road network. Opportunities lie in the transportation sector with reliable transportation services remaining far below the estimated increasing demand. Transportation companies, specifically engaging lorries, distribution logistics, procurement logistics and IT solutions are increasingly in demand. Projects by GIZ, the IFC, the Government of China and ECOWAS engaging in projects to make the transport sector more feasible.

With the privatization of Monrovia's Freeport under APM Terminal's 25 year concession, in addition to a port logistics and customs improvement program by the RVO bound to start in 2018, Liberia's main port is rapidly being upgraded to become regional hub. Opportunities for Dutch companies lie in vessels transporting fuel, consumables and passengers, cooling facilities, vessels transporting inland, green logistics, creating a preliminary risk-based inspections regime, the development of a central facility at the Freeport and digital logistics. The US Government, APM Terminals, the Ports Master Plan and Liberia Maritime Training Institute are all making a concerted effort to improve the efficiency and safety of shipping in Liberia.

Under the Liberia Agriculture Transformation Agenda (LATA), the government is aiming to increase value added and reduce post harvest losses by improving the supply chain of local products. Opportunities for Dutch companies can be

found in value addition production logistics, disposal logistics, distribution logistics, transportation, green logistics, Reliability, Availability and Maintainability (RAM Logistics, related to Logistic engineering).

An overview of the policy and institutional framework will provide the reader with an insight into the rules and networks that govern the logistics sector in Liberia.

## Chapter 2 | ACRONYMS

AfT	Agenda for Transformation
AGOA	African Growth and Opportunity Act
AMPT	AMP Terminals
CICO	Chongqing International Construction Corporation
DfID	Department for International Development
EBA	Everything But Arms
ECOWAS	Economic Community of West African States
EU	European Union
EVD	Ebola Virus Disease
GOL	Government of Liberia
LATA	Liberia Agriculture Transformation Agenda
LBR	Liberia Business Registry
LEC	Liberia Electricity Corporation
LNTP	Liberia National Trade Policy
LPI	Logistics Performance Index
LPRC	Liberia Petroleum Refining Company
LRA	Liberia Revenue Authority
LRAMP	Liberia Road Asset Management Project
LRTF	Liberia Reconstruction Trust Fund
MIGA	Multilateral Guarantee Agency
MoA	Ministry of Agriculture
MoCI	Ministry of Commerce and Industry
MOTC	Monrovia Oil Trading Corporation
MRU	Mano River Union
MVTC	Monrovia Vocational Training Center
NEPAD	New Partnership for Africa's Development
NIC	National Investment Commission
NPA	National Port Authority
RVO	Netherlands Enterprise Agency
WAPP	West African Power Pool

### Chapter 3 | THE LIBERIAN CONTEXT

Liberia, as Africa's oldest republic is scenic, diverse and naturally resource rich. This entails the potential for significant natural resource exports, including large iron ore deposits and the potential for oil production. Her renewable resources include rubber, timber, hydro and marine resources, and recent investments in palm oil. The concessions sector is expected to provide significant revenues for the Government in the coming years. Managing this natural resource base potential in a sustainable way and increasing employment and value addition will be key for the inclusive green growth of the country.

With 16 languages spoken across 15 counties, Liberia was declared a nation in 1847 by freed and freeborn black Americans who had arrived at its shores 26 years earlier. Between the 50s and 70s Liberia was a pillar of strength as many African nations were moving away from colonialism and in 1959 hosted the inception meeting of what is now called the African Union. With strong ties to the United States, the biggest rubber plantation in the world, and an abundance of minerals Liberia was wealthy and stable for decades.

Since peace ensued in Liberia in 2003, the Liberian economy has again been viewed with optimism as aid-driven recovery and growth started shifting into private sector driven growth. In 2005, Liberia had \$82 million in Foreign Direct Investments, and by 2013 this figure had risen significantly to \$700m, peaking in 2011 to \$1.3 billion. Most of these investments were from mining, oil palm and forestry, where \$16 billion worth of agreements were signed. Harnessing this private sector potential has become a priority for the Liberian government, which was aiming to narrow the gap of growth and revenue between large (foreign) corporations and small local businesses.

The 2014 outbreak of the Ebola Virus Disease (EVD) slowed down the economic recovery significantly. The World Bank estimated a decrease of 11.7% of the country's GDP in 2014. Interrupted crop cycles and market shutdown led to weak agricultural outputs. In 2014 the production of the key staples rice and cassava declined, but returned to normal levels in 2015. Research showed 10% of businesses closed in relation to the crisis and overall employment decreased by 33%. However, the same research also showed businesses' optimism that employment and revenues would increase within the next 6 months.

EVD posed the most daunting threat to the momentum Liberia's economic growth since the civil wars. However, the growth of the marketplace in both diversity and capability in the preceding ten years provides a solid ground for the economy to - with the right support - bounce back. Liberia's current Agenda for Transformation (AFT) strategy holds as priority broad-based economic growth and employment creation.

Liberia's geographic position presents opportunities for increased regional trade and co-operation to accelerate growth and increase economies of scale. Liberia's trade with ECOWAS is below the average for the sub-region due to infrastructure deficits and barriers to trade. Regional infrastructure projects are increasing in importance with the potential to import power through the West African Power Pool (WAPP), and develop regional transportation corridors in the MRU.



## Chapter 4 | COUNTRY OVERVIEW

Bordering countries:	Sierra Leone, Guinea, Cote d'Ivoire
Land size:	111,369 km
Population:	4.4 million
Literacy rate:	42.9%
Life expectancy	60.2
Poverty rate:	96.9%
Urban population:	48%
GINI Index	38.2
GDP	2.10 billion US Dollars
GDP growth 2016	2.5%
Inflation rate	11.50%
Unemployment rate	3.80%
National budget	526.6 million US Dollars
Aid per Capita	149.80 US Dollars
Road Network	6.2%
Access to Electricity	2%
Mobile penetration	75%
Internet penetration	21%
Trade and Economic Memberships	ECOWAS Mano River Union African Growth and Opportunity Act (AGOA) EU - Everything but Arms (EBA) China Preferential Trade Agreement with Developing Countries Multilateral Guarantee Agency (MIGA) New Partnership for Africa's Development (NEPAD)

## Chapter 5 | THE LOGISTICS SECTOR

The logistics sector has been growing steadily since the end of the civil war with a multitude of companies coming into the country. These companies bump into specific limitations caused by underdeveloped infrastructure and complicated customs procedures. However, the landscape has been changing with the government aiming to develop the port and unlock Liberia's potential for becoming a strong partner in trade.

Liberia's infrastructure has gradually been growing since the end of the civil war, and its development is closely intertwined with economic development. The infrastructure growth has been led by two main actors: the Government of Liberia and through national mining, forestry and agricultural concessions. Multinationals have built/augmented their own ports, railways and energy infrastructures, but these are not directly accessible for use by other enterprises and mainly link concession sites to ports.

In 2012 Liberia was rated through the Logistics Performance Index (LPI), which is a weighted average of a country's performance along six indicators. The scores range from 0-5 (0 meaning low performance and 5 high performance):

- Efficiency of the clearance process; this includes the speed, simplicity and predictability of formalities by border control agencies and customs **(2.00)**
- Quality of trade- and transport-related infrastructure; meaning ports, railroads and information technology **(2.41)**
- The ease of arranging competitively priced shipments **(2.54)**
- Competence and quality of logistics services; for example transport operators and customs brokers **(2.46)**
- The ability to track and trace consignments **(2.42)**
- The timeliness of shipments in reaching destination within the schedules or expected delivery time **(2.84)**

This LPI resulted in a 2.45 average, which is approximately the same as the Sub-Saharan regional average.

### Energy

It has been estimated that in 2015, 216MW of power was produced by the Liberia Electricity Corporation (LEC). In December of 2016 LEC started supplementing their energy production - which had up to that point been fueled 100% by diesel generators - with the Mount Coffee hydro plant. With an annual rainfall of 5 meters per year, Liberia has an enormous hydroelectric potential. The installation of hydroelectric turbines by LEC has allowed for a drop in tariffs. President Ellen Johnson announced on September 5, 2017, a 10% reduction in electricity tariff for customers connected to the Liberia Electricity Corporation (LEC) energy grid. Since August, 2016, the tariff has seen gradual reduction from 54 cents to 35 cents per Kw/hr. Supply is confined mainly to the capital city. Costs are still more than twice the average of Africa as a whole

Source: [http://www.tlcafrica.com/news\\_10\\_percent\\_reduction\\_in\\_electricity\\_sept\\_2017.htm](http://www.tlcafrica.com/news_10_percent_reduction_in_electricity_sept_2017.htm)

Liberia is to benefit from the AfDB's Mano River Union Initiative, proposed to promote regional integration in the four Mano River Union (MRU) countries: Liberia, Côte d'Ivoire, Sierra Leone, and Guinea. The initiative aims to unlock major constraints on private sector development and trade in the MRU, mostly through the financing of transportation

and energy infrastructure backbones and related projects. This would support the region's transition out of fragility and instability. By grouping major and costly infrastructure activities into a well-focused and targeted program, it will also allow country level assistance to focus more on capacity development, institution building, and distribution interventions that are better addressed at a national level.

Source: <https://www.afdb.org/fileadmin/uploads/afdb/Documents/Project-and-Operations/Liberia%20-%202013-2017%20-%20Country%20Strategy%20Paper.pdf>

## **Airports**

Liberia's main airport is Roberts International Airport (ROB), 56 km from Monrovia, which operates flights to Freetown (Sierra Leone), Conakry (Guinea), Abidjan (Cote d'Ivoire), Accra (Ghana), Brussels (Belgium) and since the beginning of 2017 also to Amsterdam (The Netherlands). Global Logistics Services Inc. (GLS) has secured a 25-year concession for air cargo operations. The concession includes the design, building and operations of a new modern air cargo facility at ROB, due to open by July 2019, capable of handling over three times the current annual throughput, with improvements in operating systems and standards. Total average annual throughput at the airport is currently about 4,000 tonnes, growing at an average of 6%-10% per annum.

Source: <http://www.aircargonews.net/news/airports/ground-handlers/single-view/news/gls-wins-25-year-cargo-concession-in-liberia.html>

## **Railroads**

The Liberian railroads have been out of operation between 1988 and 2008. As of 2009 the network comprised of 480 km of track and is mostly in use by the country's mining companies. Two track systems link the port of Monrovia and that of Buchanan with the Guinean border. The railroad infrastructure is owned by the government of Liberia, but can grant rights to develop them to concessionaires.

## **Fuel**

Through an Act of the Legislature in 1989, exclusive rights for the importation, sale and distribution of petroleum and petroleum products within the Republic of Liberia was granted to the Liberia Petroleum Refining Company (LPRC). The LPRC has encouraged, however, Liberian and foreign investors to invest in the importation of petroleum distributors as a means to create a middle-class society. Currently there are nine registered distributors that ensure the availability of petroleum products in the country (West Oil, Total Liberia Ltd., Aminata & Sons, National Petroleum, Super Petroleum, Liberty Petroleum, Srimex Enterprise, Conex Petroleum, Lib-Afric, Monrovia Oil Trading Corporation).

All fuel is imported from Abidjan and only Total Liberia is authorized to import JET A1 into the country through 2 tanks allocated by LPRC. These hold the capacity of 4,000,000 gallons each. THE price of fuel is monitored by the Ministry of Commerce which fixes the price on a monthly basis based on international prices and consultation with LPRC and distributors.

As of May 30th 2017 a new petroleum price took effect based on the Central Bank's approved exchange rate of \$1USD to LRD\$111.59. A gallon of gasoline and diesel fuel is currently at US\$3.14 and US\$3.11, respectively. There are no national priorities in the availability of fuel, and there is no rationing system in effect. Fuel to lower income and vulnerable groups is subsidized and the local industry has the capacity to expand. Transportation into the mainland remains challenging through the limited road network. Total currently stands at 29 selling points in the country and local needs are being met.

### **Telecommunications**

Fixed lines have not recovered from the civil conflict, but the mobile telecommunications sector is competitive and dominated by two main companies Lonestar MTN and Orange (formerly Cellcom). Between 2003 and 2009 the mobile penetration in the country grew from 18 percent to 32 percent and currently stands at 75 percent.

## Chapter 6 | TRANSPORTATION

With a total road system of 10,600 km of road of which 657 km are paved, the road network is a bottleneck for economic development in Liberia. Due to climatic conditions it is only possible to work on the roads for an average of 6 months per year, with a mile of paved road costing approximately one million USD. Despite these challenges over 425 kilometers of roads are in the process of being completed. The Government of Liberia (GOL) and its development partners have committed about US\$323 million to transform Liberia's roads and reduce transport costs. The GOL and the multi-donor Liberia Reconstruction Trust Fund have committed an additional US\$182 million to the rehabilitation of Liberia's roads.

Senegal, Japan and China are currently involved in developing Liberia's road network. The China Chongqing International Construction Corporation (CICO) is currently rehabilitating Lot 1 of the Monrovia-Gbarnga-Ganta-Guinea border road corridor. An estimated 300,000 people will directly benefit from increased mobility and access to markets. Japan's focus centers on reducing the traffic congestion and secure safe transportation in Somalia Drive, which is the main artery linking to Monrovia's Freeport.

With the completion of a paved highway running from Monrovia, through Ganta to the Guinean border, Liberia's main horticulture areas (Lofa, Bong and Nimba) have been linked up to the ports of Monrovia (Freeport) and Bassa. Travel time between Ganta and Monrovia has thereby been reduced to three hours.

The Liberia Road Asset Management Project (LRAMP) rehabilitated 250 kilometers of roads. The project was financed by the World Bank and the Liberia Reconstruction Trust Fund (LRTF), which is a multi-donor trust fund for infrastructure supported by the European Union, and the governments of Great Britain (DfID), Sweden (Sida), Ireland (Irish Aid), Norway and Germany (KfW). The project cost a total of US\$300 million. Besides rehabilitation, objective of the project is to reduce transport costs along the road corridor from Monrovia to Guinea border and to maintain the roads condition over a 10-year period. Side specifically aims to increase rural transport and market access to promote economic and social development in Bong, Lofa and Nimba Counties

To properly service the needs of exporting enterprises, it is estimated that Liberia requires 800 km of roads to meet regional connectivity standards (linking Monrovia to international frontiers); 1,500 km to meet national connectivity standards (linking provincial capitals to the regional network); and 5,700 km to meet rural connectivity standards (to link the land responsible for 80% of agricultural production to the national network).

### Opportunities

As roads are being developed, opportunities for Dutch companies can be found in the transport sector. Liberia's trucking sector has significant room to grow given the size of the economy. Transport services (of goods and persons) account for 22% of Dutch service exports and 4.2% of the total value of exports. Needless to say this expertise is of great value in the Liberian transport sector.

Based on Liberia's agriculture and industry GDP level we can estimate that there is need for at least 19,289 lorries compared with current estimates of about 3,000. The growing number of concessions in the country shows that they all re-

quire access to transportation services to ensure a smooth running of their operations. Concession agreements negotiated since 2006 between the Government and various multinational companies have an announced value of more than US\$20 billion. Incorporating both domestic and foreign transportation companies into the supply chains of these corporations presents a major investment opportunity.

Although the poor road condition makes journey times between Monrovia and the county capitals long and costly, as roads improve, increased journey times and accessibility to the hinterland will further increase demand for reliable transportation services.

The abundance of rivers in Liberia make transport companies that operate fleets of mixed trucks and heavy-duty equipment (e.g. refrigerated, tippers, tankers) that meet international safety standards, a strong business opportunity in the country. Potential customers include NGOs, government agencies, concessions and private companies. Additional opportunities are to form partnerships with coastal marine transport vessels to convey their cargo to and from the ports to Liberia's interior.

Dutch transport companies account for 13% of all cross-border road transportation of goods (tons) within the EU, giving Dutch companies the experience and professionalism to set up regional transport services in Liberia. Especially with knowledge in optimized IT solutions for time-critical supply chain for perishables

### **Additional interventions improving the transportation sector**

#### GIZ:

GIZ is working with the Ministry of Transport and Ministry of Public Works to provide technical support in policy development for the sector.

More information: <https://www.giz.de/en/worldwide/20010.html>

#### IFC:

IFC is working with the NIC and MOF to develop the required regulatory framework for provision of leasing services. The IFC projected a market opportunity of more than US\$200 million 'based on GDP, population and the needs in development of certain sectors such as oil and gas and infrastructure'<sup>1</sup>. For this reason a regulatory framework was put in place.

More information: [http://www.ifc.org/wps/wcm/connect/bf30df004b6bd9c69564d7bbd578891b/ALF\\_Conference\\_FinalBrochure.pdf?MOD=AJPERES](http://www.ifc.org/wps/wcm/connect/bf30df004b6bd9c69564d7bbd578891b/ALF_Conference_FinalBrochure.pdf?MOD=AJPERES)

#### The Government of China:

The Government of China is providing funds to improve the infrastructure of the Monrovia Vocational Training Center (MVTC) and will support mechanical/engineering vocational training.

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<sup>1</sup> [http://www.ifc.org/wps/wcm/connect/bf30df004b6bd9c69564d7bbd578891b/ALF\\_Conference\\_FinalBrochure.pdf?MOD=AJPERES](http://www.ifc.org/wps/wcm/connect/bf30df004b6bd9c69564d7bbd578891b/ALF_Conference_FinalBrochure.pdf?MOD=AJPERES)

More information: [http://www.mofa.gov.lr/public2/2press.php?news\\_id=1857&related=7&pg=sp](http://www.mofa.gov.lr/public2/2press.php?news_id=1857&related=7&pg=sp)

ECOWAS:

Within ECOWAS, Liberia has competitive import duties on trucks, fuel costs, and labor rates for a transport company to operate profitably.

More information: <https://www.export.gov/article?id=Liberia-Import-Tariffs>

## Chapter 7 | PORTS AND SHIPPING

Liberia has a significant relative advantage within Africa due to its presence on the continent's western seaboard, allowing access to markets in the USA, EU and Latin America. Marine transport is relied upon through three mediums: transporting fish to shore, export of general merchandise outside of the port and transport along the coast from coastland countries to ports and harbors.

Liberia has a coastline of 579 kilometers, and four ports: Monrovia, Buchanan, Greenville and Harper. The Monrovia and Buchanan ports are International Ship and Port Facility Security (ISPS) compliant. APM Terminals - with its headquarters in The Hague, The Netherlands - has been contracted to handle Monrovia port operations. With the government's goal of improving the efficiency of the port, China Union and Western Cluster will undertake further rehabilitation of Monrovia port under their concession agreements. Currently a Ports Master Plan is being developed that should cover the coming 25 years.

According to Liberia's National Investment Commission (NIC) it takes 15 days to complete export procedures, compared to 30 days on average in Sub-Saharan Africa. Also it costs US\$1,300 per container instead of the Sub-Saharan average of US\$2,200.

The port of Monrovia is a gateway to Liberia and it is an area where 90% of the country's economic activity takes place. There is a customs office at the port outside the terminal where all relevant documents concerning any shipment should be finalized by the Customs before the ship arrives to port (for more details refer to Appendix A).

Since its signing of a 25 year contract in 2010, the company has invested some \$108 million USD of the planned \$120 million USD investments to upgrade the port's infrastructure. These improvements, necessary to facilitate increasing imports and exports, mainly took place in the port's initial years of privatization and included construction of the quay, establishment of yard handling procedures and installation of modern cargo handling equipment.

Since APM Terminals took over the Freeport, a new quay has been constructed, structures to facilitate refrigerated containers. The port can currently facilitate three medium sized ships at once. The main storage is the yard for the containers which is approximately 10 hectares. By dredging, the depth of the port has increased to 13.5-14.5 meters, eliminating the need for draft restriction. By improving tugboat services the reliability of supply chains has been supported. There are forklifts but no cranes present, meaning ships have to handle their own.

There are no storage facilities in the Terminal for general cargo, bagged or bulk if not containerized. APMT subcontracts companies for stevedoring to do the handling of the vessel, lashing and unlashings of the containers. There are 250 AMPT staff and 300 subcontractors' laborers available at any given time. The capacity of the Freeport holds significant room for improvement, it can currently handle 50,000 containers per year and has an annual general cargo handling capacity of 700,000 tons per year.



## Opportunities

Liberia's limited road networks and demand from oil rigs and concessions across the country present a strong market opportunity for coastal transport. Dutch companies have vast experience and knowledge that may allow them to benefit from the growth and development of Liberia's port network. The Netherlands has a coastal location at the heart of Europe and contains the world's fourth-largest port at Rotterdam. Liberia is striving to become a hub for trade as regional networks continue growing. Over 1,000 American and Asian companies have centralized their European distribution activities via the Netherlands. As Monrovia's Freeport continues to grow and professionalize, the high tech methods of logistics coordination will become increasingly relevant in the Liberian context.

- Concessions in the south of Liberia will require transport to both receive fuel and consumables as well as transport their produce to Monrovia's Freeport.
- Oil exploration activities are underway off Liberia's coast providing additional demand for transportation services to and from Monrovia
- Passengers and freight traffic along the Liberian coast is set to increase significantly over the next 15 years. Coastal transport presents a preferable alternative to roads given its more efficient journey times and cost. Liberia has four (4) main ports strategically located down the country's Atlantic Coast.
- In addition to domestic demand, opportunities also exist in the region, thereby exploiting intra-West African trade. Most of the principal carriers serving West Africa only stop at the major ports of Dakar, Abidjan, Lagos and Tema. There are currently no shipping services between Liberia and its neighboring West African countries. Liberia imports approximately \$300m of goods from its neighbors on an annual basis by air/road which is both costly and time consuming.
- The country performs well within ECOWAS on key indicators for a coastal transport company to operate competitively. It shows a strong competitive positioning (cost/quality trade-off) for coastal transport comparison to its neighboring countries.
- An investment in a coastal transport vessel would cost approximately US\$2 million and create about 100 jobs in addition to having a broader economic impact. This could provide regular transportation services from Monrovia to the ports of Greenville, Harper as well as out to the oil rigs. The main customers would include concessions and private entrepreneurs. Additional opportunity would be to form partnerships with transportation companies to convey cargo to and from the ports to Liberia's inland ports.
- The Netherlands has the second-largest cooling and freezing storage capacity in Europe. Keeping imported products frozen or providing the capacity to keep local products frozen is in high demand and will benefit the improvement of supply chains which the Liberian government is aiming to foster through the Liberian Agricultural Transformation Agenda (LATA). More information: <https://agronigeria.com.ng/tag/liberian-agricultural-transformation-agenda/>. More information on opportunities in the LATA program in — —
- The Netherlands took 4th place in the 2010 World Bank Global Logistics Performance Index (based on terms of efficiency and effectiveness of its customs, quality of transport, IT infrastructure for logistics and ease and affordability of shipping). The RVO project bound to start in 2018 is aimed at transferring some of these qualities held high by Dutch ports to Monrovia's Freeport.

- Liberia is geographically a delta area, similar to the Netherlands in its abundance of rivers throughout the country. The Dutch inland navigation sector attracts worldwide attention. With Europe's largest, innovative and differentiated fleet it offers a reliable, cost efficient and sustainable extension of maritime transport chains to the European hinterland (in- & export). A deeper exploration of vessels traveling inland, are a viable option as limited road networks cut rural areas off from Monrovia during the rainy season.
- The National Investment Commission is calling for investments in preliminary risk-based inspections regimes to reduce physical inspections. They are also calling for investments to develop a central facility at the Freeport. To support this equipment, machinery, specialized vehicles, raw materials, capital spare parts, and other specialized capital goods to be used in the project are exempted from import duty up to 100 % of their dutiable value and from goods and services tax (GST).

### **Additional projects improving the shipping sector**

There are several on-going interventions seeking to enhance the attractiveness of the coastal transport sector:

#### US Government:

The US Government is providing support to Liberia Coast Guard Services. This included US\$2.2 million in equipment and facilities, including two pursuit boats.

More information: <https://lr.usembassy.gov/u-s-government-donates-us2-2-million-in-equipment-and-facilities-to-the-liberian-coast-guard/>

#### APM Terminals:

APM Terminals is managing the Monrovia Freeport, increasing efficiency at the port. The agreement for the ports privatization will result in a total of US\$120 million invested over the 25 year contract term.

More information: <http://www.apmterminals.com/en/operations/africa-middle-east/monrovia>

#### Ports Master Plan:

The Ports Master Plan, developed by Niras for the National Port Authority, focuses on further developing the port facilities in the large coastal cities (Monrovia, Buchanan, Greenville and Harper).

More information: [http://emansion.gov.lr/2press.php?news\\_id=2214&related=7&pg=sp](http://emansion.gov.lr/2press.php?news_id=2214&related=7&pg=sp)

#### Liberia Maritime Training Institute:

The Liberia Maritime Training Institute began training maritime professionals in 2013

#### The Netherlands Enterprise Agency:

The Dutch Ministry of Economic Affairs and the Netherlands Enterprise Agency (RVO) are starting a program in 2018 for training and capacity building of the logistics sector in Sierra Leone, Liberia and Guinea.

More information: <https://www.tenderned.nl/tenderned-web/aankondiging/detail/samenvatting/akid/a359f27d-d164f44edcca2a81af78510b/cid/22811>

## Chapter 8 | SUPPLY CHAIN LOGISTICS

Dutch logistics companies are highly successful globally. Given that fact, there are possibilities for Dutch companies to capitalize on the huge logistical potentials in Liberia, and apply their vast expertise and support system of world-class service providers. Highlighted below are some areas of acute capacity gaps which Dutch logistical companies could consider for investment purposes.

Due to the recent devastating slump in prices of its major traditional export commodities, the Government of Liberia has begun efforts aimed at diversifying productive sectors. For example, the Liberia Agriculture Transformation Agenda (LATA) seeks to broaden the Vision for Economic Diversification and Industrialization as illustrated in <sup>2</sup> and narrative below.



**Op-  
tunities**

**por-**

Besides expanding production, the agenda aims to promote agro-processing and value addition in the country, this demands logistics services, transportation, storage, etc. Expanding the manufacturing sector would entail increased packaging services, demanding power, transportation, etc. By aiming to make effective the supply chain, great improvements have to be made in transportation of goods from farms to markets. Whether by lorry or vessel en whether fresh, processed or frozen, services need to be rendered for this.

Multiple Packaging and Supply Chain opportunities are expected to emerge as Manufacturing is boosted through the Government of Liberia value addition interventions related to the following:

<sup>2</sup>

Source: [https://www.afdb.org/fileadmin/uploads/afdb/Documents/Generic-Documents/Liberia\\_Agriculture\\_Transformation\\_Agenda\\_by\\_Moses\\_Zinnah.pdf](https://www.afdb.org/fileadmin/uploads/afdb/Documents/Generic-Documents/Liberia_Agriculture_Transformation_Agenda_by_Moses_Zinnah.pdf)

Enormous supply chain opportunities also exist for the large silos required for storage of post-harvest agricultural produce, general warehousing, and both upstream and downstream transport logistics necessary for efficiently moving huge quantities of inputs and finished products.

### Additional projects linking to LATA

#### World Bank:

Rubber	Oil Palm	Cocoa	Fish	Cassava	Rice	Poultry/ Livestock
Rubberwood	Cooking oil	Grade A	Fresh/dried/ smoked	High quality flour	Rice	Fresh/dried/ smoked
Ribbed Smoked Sheets (RSS)	Soaps	Feed	Filleting	Chips	Cereals	Filleting
Household Utensils	Biomass fuel	Butter	Canning	Gari/Farina	Feed	Canning
Fan belts	Animal Feed	Powder	Blast freezing	Fufu	Snacks	Blast Freezing
Shoes		Chocolate	Fish Sauce	Glue	Crackers	Bacon
Boots		Cosmetics	Fish powder	Starch	Rice Oil	Sausage
Mats				Alcohol	Noodle	
					Rice wine	

The Liberian government, in partnership with the Africa Catalytic Growth Fund (ACGF) of the World Bank, plans to dedicate the newly rehabilitated Mesurado Industrial Fishery Terminal at the Freeport of Monrovia<sup>3</sup>. At the cost of US\$7million, the rehabilitation project lasted two years. The Mesurado Complex covers support to improve berthing and unloading facilities for industrial fishing vessels, office space, space for the development of a fish processing unit, and a pier for loading exported fisheries products through construction of a dedicated load-out pier.

The logistics possibilities associated with the multiplier effect of a multi-million-dollar fisheries expansion program are vast. Significant increase in demand can be anticipated for chilled (cold) facilities for value-addition processing and storage. Climate-controlled warehousing and refrigerated trucks for transportation of seafood are mandatory to prevent spoilage in this industry.

<sup>3</sup> <https://stopillegalfishing.com/press-links/world-bank-provides-us40m-grant-liberia/>  
<http://gnnliberia.com/2015/10/15/liberian-government-world-bank-to-rehabilitate-mesurado-fishery-terminal/>

## Chapter 9 | POLICY FRAMEWORK

### Liberia National Trade Policy (LNTP)

Liberia's overall approach to trade is detailed in the Liberia National Trade Policy, which lists as their main objectives, to promote:

- Export competitiveness of Liberian products by addressing supply side constraints;
- Domestic trade and broaden the pool of export-ready companies;
- Efficiency of import and export administration;
- Regional trade and integration;
- Global market access for Liberian goods and services
- Efficiency of Liberia's trade enhancing institutions;
- Legal framework and good governance for trade

The objectives show a pro-growth and pro-development approach with an emphasis on demand-side opportunities both within the region as well as internationally.

View full policy document at: <http://www.moci.gov.lr/doc/>

[Liberia%20National%20Trade%20Policy-11.compressed\(2\).pdf](http://www.moci.gov.lr/doc/Liberia%20National%20Trade%20Policy-11.compressed(2).pdf)

### Port Improvement

The government aims to improve efficiency of trade logistics systems and services through the following strategies:

- Creating a central facility at the Freeport of Monrovia. This is the country's main port and the facility would provide a single location for the clearance of cargo.
- Installing a preliminary risk-based inspections regime to reduce physical inspections
- Working with ASYCUDA World, an automated customs clearance/ data system

To realize these plans the government is soliciting private sector actors to invest in these improvements. To motivate businesses to do so they are setting up a policy where all equipment, machinery, specialized vehicles, raw materials, capital spare parts, and other specialized capital goods to be used in the project will be exempted from import duty up to 100% of their dutiable value and from goods and service tax (GST).

### Taxes

Policies around tax deductions are relevant for businesses coming into Liberia:

- The cost of equipment and machinery used in the year the asset is placed into service is eligible for a tax deduction of up to 30%
- The buildings and fixtures used to manufacture finished products with at least 60% local raw materials are eligible for a tax deduction of up to 10%.
- The above are eligible for further tax deductions of between 5 to 12.5 percent if the investment is placed in an economically depressed region. Additional deductions are available if the investment created more than 100 jobs.

The legal basis of taxation in Liberia is currently the Revenue Code 2010, a New Revenue Code has been developed with the following highlights:

Tax on company income:

- Maximum annual taxes on net profits received by companies on income derived from their operations within Liberia reduced to 25% (down from 35% with the maximum for mining remaining at 30%)
- Income derived from sources outside Liberia is exempt if the majority of the voting power of a domestic company is held by foreigners or nonresidents
- Earnings from the operation of maritime vessels carrying the Liberian flag are exempt, unless derived exclusively from coast-wide operations by resident corporations

Trade Taxes:

- Most import duties are levied as ad valorem duties on the C.I.F (Cost, Insurance and Freight) value of imports and range from 2.5% to 25%. Some items are subject to specific, rather than ad valorem, duties.
- Liberia is migrating to the ECOWAS common external tariff. Exemptions from import duties apply, amongst other things, to intermediate goods used in agriculture and some medical and fire-fighting supplies; imports granted by special contracts to the large concessionaires operating in Liberia; and imports granted to investors with an investment incentive contract.
- Export duties are levied on forestry products. There is a customs user fee of 2.5% on unprocessed exported goods.
- Royalty fees are levied on mineral exports. The fee varies from 3% to 4.5%.
- An excise tax is levied on select products. The excise rate varies from 5% to 30%.
- A goods and services tax of 7% also applies to select products.

**Petroleum law**

Through an Act of Legislature in 1989, exclusive rights for the importation, sale and distribution of petroleum and petroleum products within the Republic of Liberia was granted to the Liberia Petroleum Refining Company (LPRC).

## **Chapter 10 | INSTITUTIONAL FRAMEWORK**

### **Liberia Business Registry (LBR)**

All businesses are required by law to first register before operating as a formal entity. In 2011 the government launched the Liberia Business Registry as a semi-autonomous government agency that operates as a one-stop shop to formalize or register enterprises and provide information to the public. This means only one interface with the Liberian government is needed for business registration and it takes approximately 48 hours for self- or assisted registration. Through self-registration a business applicant can submit their dossier with all required documents electronically. Assisted registration allows the applicant to prepare and submit a paper-based dossier with all required supporting documents to the LBR which then handles its registration.

### **The National Port Authority (NPA)**

The NPA manages all four of Liberia's ports and is the landowner for all these locations.

### **The Liberia Petroleum Refining Company (LPRC)**

The LPRC has all the rights to importing and selling petroleum products in Liberia, gained through an Act of Legislature in 1989. It outsources the internal distribution of petroleum products to nine corporations and the import of gasoline is done solely by Total, which imports from Abidjan, Cote d'Ivoire.

### **The Ministry of Commerce and Industry (MoCI)**

The MoCI leads the national efforts on private sector and trade development. It formulates policies in pursuance of the government's economic transformation agenda, focussing attention on priority sectors, overall MSME development, industrial development and coordination with other ministries that have a significant role in economic development (Ministries of Finance, Planning, Public Works, Agriculture, Youth and Sports, Gender and Labour).

The MoCI sets the diesel and gasoline prices on a monthly basis based on consultations with the LPRC and the Central Bank's approved exchange rate.

### **Ministry of Agriculture (MoA)**

The MoA creates policies in the sector aimed at helping stakeholders develop self-sufficiency in food production, increase the country's ability to earn and generate foreign exchange, and increase farmer's incomes and purchasing power.

### **APM Terminals**

APM Terminals is a global port and cargo inland services provider hired by the NPA to handle all the operations in the Monrovia Freeport.

For an extended trade services network as developed by the MoCI refer to Appendix C.

## Appendix A: Customs Guidance

### **STEP A:**

1. Arrange shipment of cargo through a reputable shipping company or freight forwarder.
2. Obtain and transmit the original Bill of Lading and invoice to the consignee before the cargo arrives.
3. Contact BIVAC at the port of origin to arrange for pre-inspection. The consignee will be given a CRF (Clean Report of Finding) certificate.

### **STEP B1: CARGO WITH PRE-SHIPMENT INSPECTION (PI)**

1. Take a copy of the pre-inspection report (or CRF), the Bill of Lading and the invoices to the Ministry of Commerce counter for IPD (Import Permit Declaration) processing and to BIVAC for inspection approval. (For Freeport of Monrovia customers, visit the One-Stop-Shop in the Freeport of Monrovia).
2. Proceed to the Bank Section for Payment Slip and make a payment at the Central Bank for government duties, and the private bank for terminal and port charges.
3. Proceed to the In-Gate office for logging of documents, to the Collector's Office for approval and sealing, and the Wharfing Section for manifest closure.
4. Proceed to the cargo yard, where your container or non-containerized cargo can be inspected by the clearing agent/broker and loaded for inland transport to final destination.

### **STEP B2: CARGO WITHOUT PRE-SHIPMENT INSPECTION / OR DESIGNATION INSPECTION (DI)**

1. Follow Step B1, 1 through 3.
2. Cargo is transported from the cargo yard to the BIVAC yard for scanning and x-ray for verification against the items declaration list; Cargo or container is then relocated to cargo yard.
3. Proceed to the cargo yard, where your container or non-containerized cargo can be inspected.

Moreover, to send and clear goods through the NPA, customers work in tandem with their shipping line and the One Stop Shop in the Freeport of Monrovia to obtain documents needed for clearance and to pay duties and port charges. The One-Stop-Shop is a clearing house with the mandate to assist all importing and exporting customers with cargo clearing in a central location. It consists of the BIVAC, Central Bank, two commercial banks, Customs and APM Terminals. The One-Stop-Shop was launched in 2009 in collaboration with the NPA, the Government of Liberia and international development partners in an effort to reduce barriers to trade. With the strategic location of all relevant agents in one place, the steps to clear goods from the Freeport of Monrovia have reduced dramatically.



**Appendix B: Development Activity Scheme Logistics (Liberia National Export Strategy 2014-2018)**

**RELEVANT DEVELOPMENT ACTIVITY  
RELATED TO THE FUNCTION**

Project name	Description	Primary financier	Status
<b>Rural Infrastructure to Strengthen Enterprises Programme</b>	This project will support the Food and Enterprise Development Program by funding construction of specific infrastructure (feeder roads, training facilities and storage units) identified as missing in the value chain approach of the Food and Enterprise Development Program. It will be closely coordinated with the Food and Enterprise Development Program.	United States Agency for International Development (USAID)	Implementation to be determined. Currently in procurement stage
<b>Liberian Agricultural Sector Rehabilitation Project</b>	This project aims at: <ul style="list-style-type: none"> <li>• Rehabilitation of water management infrastructure covering an estimated 1,620 ha for swamp rice cultivation in Grand Kru, Grand Gedeh, River Gee and Maryland counties;</li> <li>• Conducting detailed technical studies in preparation for future investments in irrigated rice farming (7,000 ha);</li> <li>• Rehabilitation of 100 km of feeder roads; and</li> <li>• Development of community infrastructure such as storage and agro-processing facilities, including 2,400 square metres of multifunctional post-harvest/marketing facilities and 40 mechanized well sanitation facilities.</li> </ul>	African Development Bank, International Fund for Agricultural Development (fund); in partnership with the International Labour Organization, MoPW, the Ministry of Agriculture (MoA) (implementation)	Currently active
<b>German Agency for International Development (GIZ) Phase II of Transport and Infrastructure Project</b>	In its second phase the project will aim to support the implementation of the National Transport Policy; support the implementation of road maintenance by MoPW; and increase the capacity of local construction contractors in partnership with the Liberian Chamber of Commerce.	The German Government (fund); GIZ (implementer), in partnership with MoPW, Ministry of Transport (MoT), Liberian Chamber of Commerce and InWEnt	In preparation
<b>Labour Based Public Works Project</b>	This project aims to improve capacities for infrastructure maintenance and local development. The activities of the project are threefold: <ul style="list-style-type: none"> <li>• To rehabilitate certain road and social infrastructure in the underserved regions of Maryland and River Gee;</li> <li>• To build capacity inside MoPW and the local contractors' community to undertake infrastructure maintenance; and</li> <li>• To staff a capable Special Implementation Unit under MoPW to manage projects.</li> </ul>	African Development Bank (95%), Government of Liberia (5%) (fund); PIU inside MoPW, International Labour Organization, Liberia Agency for Community Empowerment (implementation)	Currently active
<b>International Finance Corporation (IFC) West Africa Venture Fund project</b>	This IFC-supported fund is seeking to channel investments (equity and debt) and human capital into the SME sector, with approximately 12–16 investments per year at US\$ 100,000–US\$ 500,000 per investment. Each investment is evaluated in a way that seeks to maximize the social and environmental contributions to the country as well as to grow the capacity of the sector overall. Interested in all sectors except oil palm, mining and logging. Currently identifying opportunities in: real estate, commodities export, food production, information and communications technology, transport and construction.	IFC (fund); West African Venture Fund LLC, Liberia (implementation)	Currently active

Project name	Description	Primary financier	Status
<b>Liberia Road Asset Management Project (LIBRAMP)</b>	<p>The objective of LIBRAMP is to support the recipient's efforts to reduce transport costs along the road corridor from Monrovia to the Guinea border and to maintain the road in good condition over a ten year period.</p> <p>There are two components to the project. The first component is design, rehabilitation and maintenance of the Monrovia (Red Light) – Ganta/Guinea border road. This component will finance a ten year Output and Performance-Based Roads Contracts contract for two road lots: Monrovia (Red Light) – Gbarnga (approximately 180 km) and Gbarnga/Ganta to the Guinea border (approximately 69 km).</p> <p>The second component is consultant services, operating costs and training: this component will finance a consultancy services firm to perform as monitoring consultants for the Output and Performance-Based Roads Contracts, and it will also finance the needed technical assistance for preparatory road feasibility studies and the development of sector institutions through hiring of skilled staff and firms, and staff training programmes including operating costs.*</p>	International Development Agency and Liberia Reconstruction Trust Fund	Currently active
<b>Liberia Agricultural Strategic Investment Programme</b>	<ul style="list-style-type: none"> <li>▪ Links Liberian farmers and SMEs to input and output markets by roads and access to rural finance. These activities will lead a step-by-step approach to farming as a business.</li> <li>▪ Facilitates service delivery (for farmers) by efficient and diverse extension services provided by MoA, non-governmental organizations (NGOs), the private sector and others, with a focus on transfer of improved production, value addition and marketing technologies.</li> <li>▪ Provides a framework for moving smallholders from upland cropping systems to the lowlands for improvement in crop productivity and creating investment opportunities in agriculture for medium- to large-scale private sector investors.</li> </ul>	MoA	Currently active

## Appendix C: Trade Services Network

Trade services network	
Name	Function/role
National Bureau of Employment	<ul style="list-style-type: none"> <li>Provides short-term employment for individuals pursuing specialized trades in vocational schools and universities.</li> </ul>
Bureau of Customs and Excise	<ul style="list-style-type: none"> <li>Offers efficient services through a streamlined documentation process for clearing and forwarding goods into and out of the country.</li> </ul>
Liberia Industrial Property Office	<ul style="list-style-type: none"> <li>Registers trademarks or service marks.</li> <li>Grants patent rights to inventors.</li> </ul>
Omega Insurance Company	<ul style="list-style-type: none"> <li>Issues insurance policies for individuals and enterprises.</li> </ul>
Enigma Shipping Company	<ul style="list-style-type: none"> <li>Shipping services.</li> <li>Stevedoring.</li> <li>Clearing/forwarding services</li> </ul>
Secure Risk Insurance Company	<ul style="list-style-type: none"> <li>Provides services to clients in both accident and shipping insurance.</li> </ul>
International Insurance Company, Ltd	<ul style="list-style-type: none"> <li>Provides insurance and risk management services.</li> </ul>
African Insurance Corporation of Liberia	<ul style="list-style-type: none"> <li>General insurance services.</li> </ul>
Maersk Liberia, Ltd	<ul style="list-style-type: none"> <li>Shipping services.</li> </ul>
Forwarders International	<ul style="list-style-type: none"> <li>Ensures effective and efficient clearing of goods from the port for the Liberian market.</li> </ul>
Liberia Shipping Center	<ul style="list-style-type: none"> <li>Ship goods for MSMEs.</li> </ul>
SGS	<ul style="list-style-type: none"> <li>Testing and verification services.</li> </ul>
The Marketplace Business Development Service	<ul style="list-style-type: none"> <li>Provides onsite business incubation service to MSMEs.</li> <li>Provides access to finance and skills training.</li> </ul>
Liberia Entrepreneurial and Economic Development	<ul style="list-style-type: none"> <li>Economically empower women and youth through business development activities to reduce poverty.</li> </ul>

## **Appendix D: Relevant Contacts**

National Investment Commission

United Nations Drive, Monrovia, Liberia

Tel: +231(0)777-405-511/(0)777-088-828

[www.investliberia.gov.lr](http://www.investliberia.gov.lr)

National Bureau of Concession

[www.nbcliberia.org](http://www.nbcliberia.org)

Liberia Revenue Authority

ELWA Junction, Paynesville, Liberia

Tel: +231(0)886-510-086

[www.lra.gov.lr](http://www.lra.gov.lr)

Ministry of Foreign Affairs

P.O BOX 10-9021 Capitol Hill 1000 Monrovia 10, Liberia

[www.micat.gov.lr](http://www.micat.gov.lr)

Private Sector

Ministry of Information

P.O BOX 10-9021 Capitol Hill 1000 Monrovia 10, Liberia

[www.micat.gov.lr](http://www.micat.gov.lr)

Liberia Chamber of Commerce

Queen's Avenue, P.O BOX 92 Monrovia, Liberia

Tel: +231(0)886-880-473/(0)777-857-805

[www.info@lcc.org.lr](mailto:www.info@lcc.org.lr)

Ministry of Agriculture

P.O BOX 10-9010 Somalia Drive, Gardnersville, Liberia

Tel: +231(0)777-961-574/(0)886-560-962

[www.moa.gov.lr](http://www.moa.gov.lr)

Liberia Better Business Forum

P.O BOX 660 Bright Building, Monrovia, Liberia

Tel: +231(0)886-930-916

Ministry of Commerce and Industry

Ashmun Street, Monrovia, Liberia

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