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Republic of Congo:

Country Private Sector Diagnostic

MAY 2026

About the Country Private Sector Diagnostic

The private sector is the engine of long-term economic growth and a vital catalyst for global social and economic development. When functioning well, the private sector promotes innovation and entrepreneurship, improves access to and the quality of economic opportunities, and supports the sustainable use of natural resources. In developing economies, the private sector creates the vast majority of jobs, generates tax revenue, and accounts for significant investment.

The Country Private Sector Diagnostic (CPSD) reports seek to unlock private investment and job creation through policy action. Prepared jointly by the institutions of the World Bank Group, each report provides an analysis of specific sectors of the economy in which private sector investment could accelerate growth, if appropriate policy and regulatory issues are addressed.

Designed from the perspective of an investor or entrepreneur, this new generation of reports seeks to identify untapped private investment opportunities and the barriers that stand in their way (earlier reports can be found here). Subsectors of the economy are chosen based on their potential to spur private investment, create more and better jobs, generate domestic revenue, and foster sustainable, inclusive growth in response to targeted policy action. The report aims to help country policy makers prioritize impactful actions that can be taken in the near term to remove disincentives to private investment, while delivering on broader development goals.

The CPSD is a core country diagnostic of the World Bank Group produced to guide the design and implementation of country strategies, public and private investment projects, budget support operations, advisory services, and other analytical work. It is intended to be of interest to domestic and foreign business investors, government officials, World Bank Group staff and management, civil society, and other development partners.

CPSDs are a central instrument of the World Bank Group's jobs agenda as articulated in the 2025 Development Committee Paper on Jobs: The Path to Prosperity, which emphasizes the need to translate private sector development into large-scale employment opportunities. By providing country-level, sector-specific diagnostics, CPSDs help to identify systemic barriers to private investment critical to job creation. It is aligned with the approach to private sector development and job creation outlined by the Development Committee to establish basic preconditions for jobs through investing in human capital and infrastructure, support business-enabling policies, and mobilize private capital at scale to expand firms'capacity to create more and better jobs.

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Executive Summary

The Republic of Congo has significant opportunities for private investors if it can overcome a variety of hurdles and initiate vital regulatory and industry reforms.

While the nation's natural resource exploitation remains heavily concentrated in the oil sector, it is endowed with diverse nonoil resources that present noteworthy potential. This report focuses on four sectors—processed wood, port logistics in the Pointe-Noire to Brazzaville corridor, maize milling, and aquaculture—that could be of interest to private investors if concrete and targeted policy actions are undertaken.

The lack of sector development beyond oil in the Republic of Congo is due, in part, to underinvestment in human capital, low labor productivity, a challenging business environment, weak infrastructure, limited competition, and a small private sector (World Bank 2023). Regional disparities—driven by poverty, inadequate education, and poor infrastructure in rural areas (IMF 2024)—have further constrained economic and employment opportunities, undermining social cohesion. Despite the Republic of Congo's oil wealth, resource revenues have not translated into improvements in health, education, or infrastructure. Public spending on human capital remains low and often below budget targets.

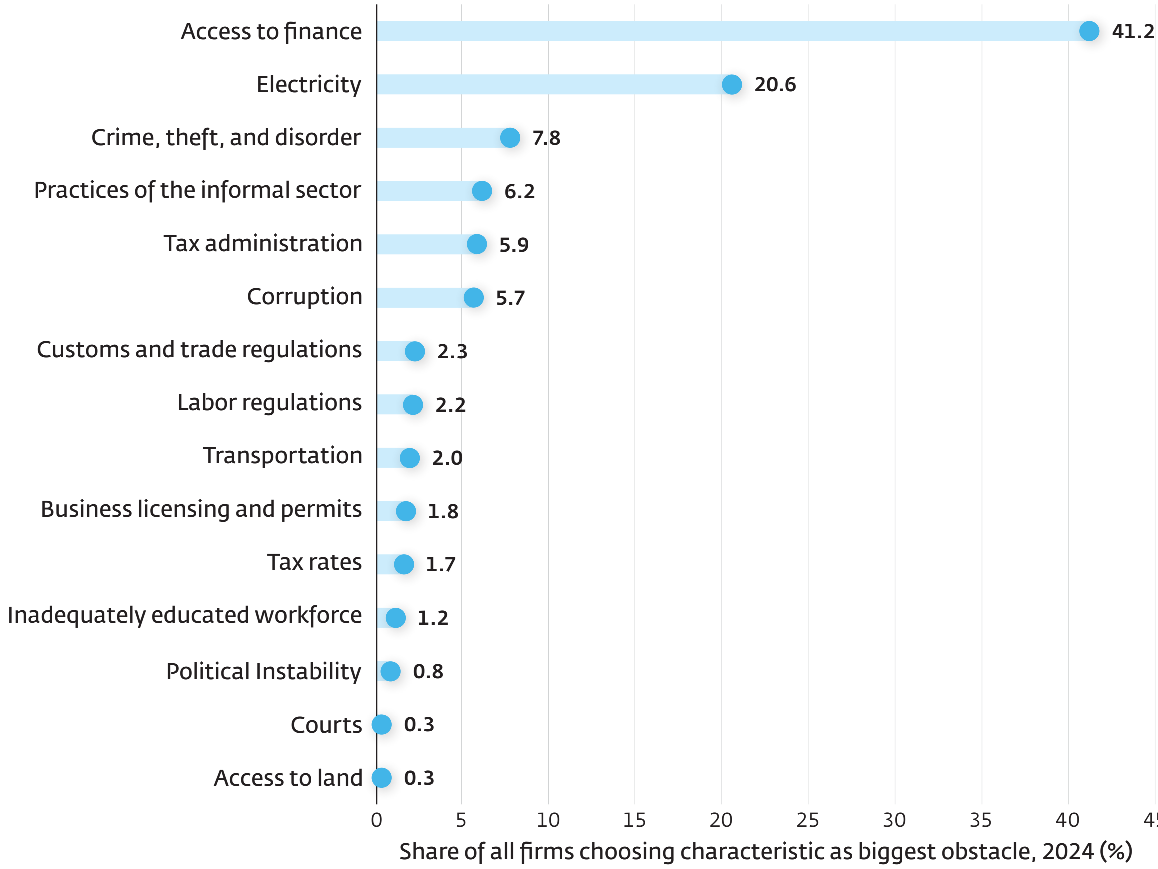
The labor force, though relatively large and active, faces high unemployment, particularly among youth and urban populations. Persistently high public debt and macroeconomic volatility have constrained the government's capacity to invest in infrastructure and services, crowding out private investment. Limited access to finance and electricity are among the top constraints to conducting business identified by firms (figure ES.1).

The Republic of Congo has experienced persistently negative net foreign direct investment (FDI) in recent years, reflecting deep-rooted investor uncertainty and weaknesses in the investment climate. Between 2019 and 2023, net FDI averaged –4.4 percent of gross domestic product, among the lowest globally, reflecting persistent capital withdrawals and profit repatriation (figure ES.2). FDI beyond hydrocarbons is limited (World Bank 2024). Between 2020 and 2024, investors announced approximately US$3.0 billion in FDI, with over 70 percent concentrated in the Republic of Congo's coal, oil, and gas sectors.

Despite deep challenges, the Republic of Congo has considerable potential that can be realized if the right policy actions are taken. The forestry sector offers opportunities for

Figure ES.1

Top constraints identified by firms include access to finance and electricity

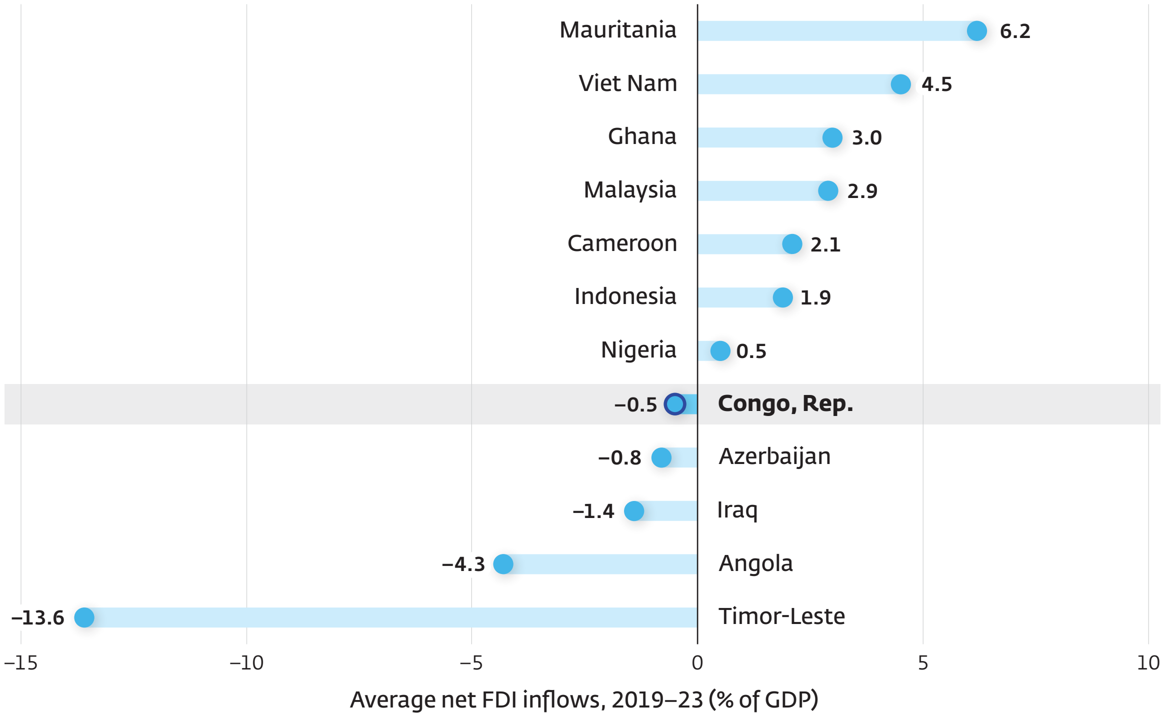


Source: World Bank Enterprise Survey.

private investment and job growth, with an estimated 3.8 to 5 million cubic meters of sustainably harvestable timber that could support value-added wood processing. The Republic of Congo's location on the Atlantic coast and its deep-water port in Pointe-Noire—capable of handling large vessels—positions it as a potential regional trade hub, as well as an attractive destination for private investment in logistics and industrial services. And with nearly 10 million hectares of arable land, as well as abundant inland water resources, a favorable climate, and strong domestic and regional demand for fish, both expanded maize milling and aquaculture could attract private investors, generate jobs, reduce the country's import bill, and enhance food security. With supporting policy reforms, private investment in processed wood, port logistics, maize milling, and aquaculture can be mutually reinforcing and drive diversification in the Republic of Congo. Efficient port logistics lower transport costs and facilitate access to the regional market for other sectors. Meanwhile, increased exports of processed wood, maize products, and aquaculture products can

Figure ES.2

FDI net flows declined over the last five years, similar to other oil producing peers



Source: Calculations based on World Development Indicators data.
Note: FDI = foreign direct investment; GDP = gross domestic product.

boost port activity and revenue, thereby enhancing the Republic of Congo's regional trade competitiveness.

This Country Private Sector Diagnostic takes an investor perspective to identify a few sectors where private investment can be boosted by taking concrete policy actions to remove impediments.

The selection of sectors follows a rigorous, systematic process that includes analysis of quantitative[1] and qualitative indicators (subject to availability) and stakeholder consultations, including interviews with private investors, companies, technical experts, policy makers, and development partners. The criterion for selecting sectors is whether they can attract significant private investment over the medium term if well-identified constraints can feasibly be addressed by the public sector in the near term. Recognizing that an element of judgment is involved, the selection is not intended to be exhaustive; rather, it aims to facilitate focused analysis and concrete recommendations.

Processed Wood

The Republic of Congo is endowed with vast forest resources (more than 70 percent of the nation is covered by forest) and has the potential to attract investment into wood-related industries without raising deforestation risks. Global demand for processed wood products has been increasing at an average of 9 percent per year between 2019 and 2023 for sheets of veneering used in construction, flooring, and wall paneling. In lumber, the Republic of Congo is already serving some of the largest and fastest growing international markets, with world class players holding important concessions.[2] Secondary and tertiary wood processing offers strong investment potential. Sustainable practices—the Republic of Congo deforestation rates are among the lowest globally—are an asset to potential and current investors as they enable sales in the European Union, the largest market for the Republic of Congo's wood exports (table ES.1).

The Republic of Congo is home to wood species well-suited for construction materials. Sapelli and okoume, known for their sturdiness and malleability, are the two most widely harvested species and are ideal for processed products such as window frames, doors, kitchenware, and other housing-related finishes. The Republic of Congo also possesses less-exploited tree species suitable for furniture, paneling, and other processed products, creating an underutilized opportunity for diversification (figure ES.3).

Table ES.1

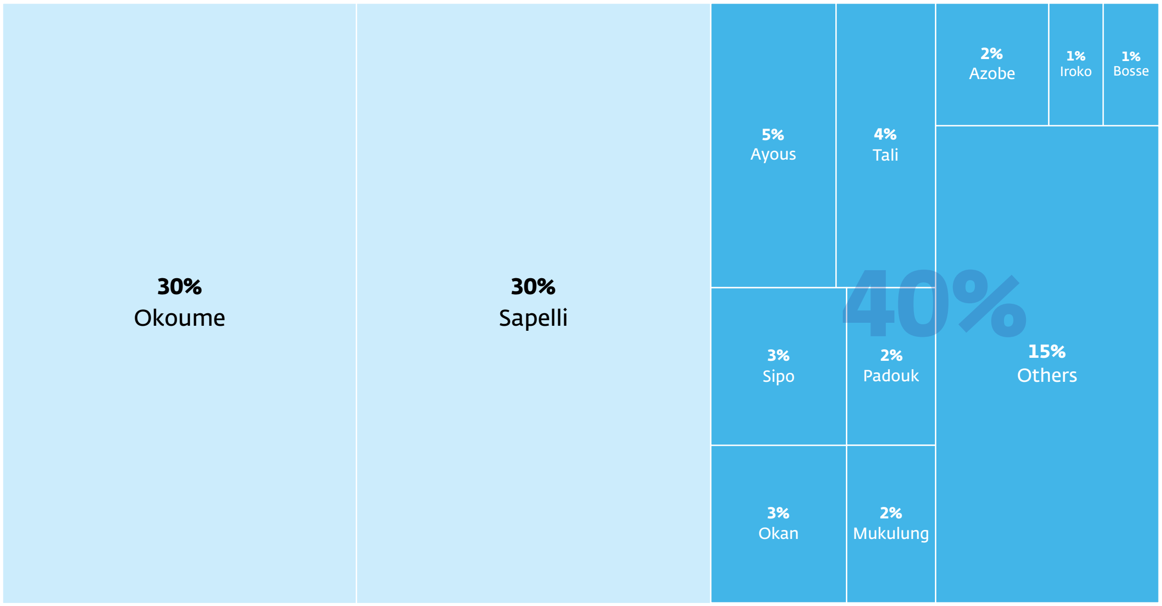
Potential opportunities in Congo, Rep. for private investment in wood processing, if reforms are implemented, concentrate on secondary and tertiary sales to the EU and the United States

Products	Top global importers	How Congo, Rep. performs	Opportunity
Lumber	United States, China, and EU-27	Better than peers and on par with global growth.	n/a
Panel, particle boards products, and composite wood	United States and EU-27	Low exports compared to peers, mostly to Saudi Arabia and Angola.	Both the United States and EU-27.
Finished wood products: furniture, kitchenware, and housing	EU-27	Most exports go to the EU-27, with a small but growing share to the United States.	Given performance: growing exports to US buyers.

Note: EU = European Union; n/a = not applicable.

Figure ES.3

Secondary wood species suitable for processing account for 40% of production



Source: Annual Statistics, Congo, Rep., Ministry of Forest Economy.

The potential to attract private investment has been undermined by the uneven enforcement of the log export ban and by regulatory uncertainty associated with the production sharing agreement, particularly the use of the *Facteur R*, which makes the state's share of logs unpredictable and discourages investment. Access to raw materials for domestic processors remains constrained, especially for firms without concessions. To unlock opportunities in the wood-processing sector, policy actions should establish and enforce clear and transparent criteria for log export-ban exemptions, clarify the production sharing agreement by eliminating the *Facteur R*, simplify volume sharing by focusing on secondary wood species, and facilitate access to raw timber for domestic processors.

The recommendations, if implemented, could attract between US$560 million to US$1.1 billion in private investment and create between 5,300 and 11,500 direct jobs over the next five years.

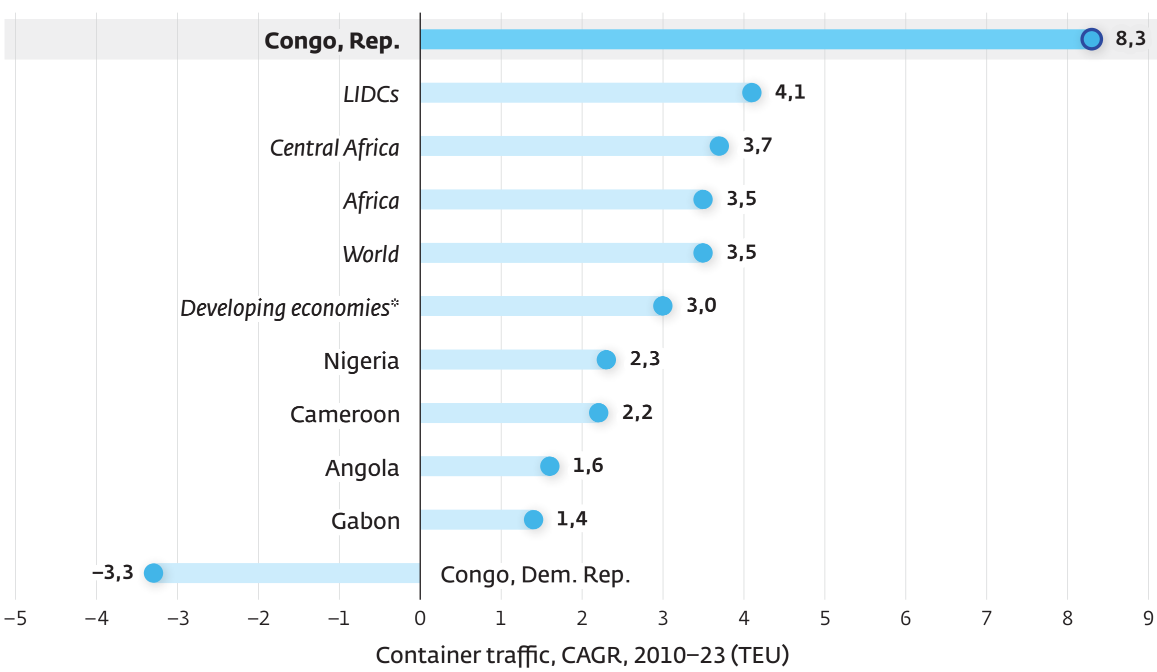
Port Logistics

The country benefits from a strategic location, with a deep-sea port in Pointe-Noire and shared borders with large, landlocked neighbors. The Republic of Congo could serve as a gateway to central Africa, especially the Democratic Republic of Congo's Kinshasa region, which is just eight hours away and whose population is nearly four times that of the Republic of Congo. Over the past decade, the country has made notable investments in transport and logistics infrastructure, including airport upgrades, the RN-1 highway, and the expansion of Congo Terminal. Pointe-Noire has recorded the highest increase in container traffic in the region (UNCTAD 2024), reflecting these improvements (figure ES.4).

Container traffic growth has attracted substantial investor interest and created demand for complementary logistics services to enhance port efficiency and connect with emerging hubs like the new Pointe-Noire Special Economic Zone. Development potential is considerable—particularly in fostering small and medium enterprises (SME) activity and generating employment for lower-skilled workers—given the relatively low entry barriers.[3]

Figure ES.4

Congo, Rep. had the fastest growth in container traffic compared to peers, as well as regional and global averages, between 2010 and 2023



Source: Calculations based on UNCTAD data.

The warehousing market could double in size over the next decade, driven by rising trade, including significant growth in nonoil exports and exports to the Democratic Republic of Congo (table ES.2).

Private investment is constrained by misaligned operating hours between customs and port operators, burdensome entry procedures, non-risk-based inspections, multiplicity of port fees, lack of skills in logistics, as well as insufficient qualified drivers and loaders. With filled and empty trucks charged the same rate, toll pricing remains a key factor producing cost disparities between Pointe-Noire–Brazzaville and competing corridors.

Table ES.2

Growing imports into Congo, Dem. Rep. are the most important source of demand for port activities in Pointe-Noire and logistics in Congo, Rep.

Period	Average annual exports (US$, millions)	Average annual export volumes (tons, thousands)	Export value, 5Y CAGR (%)	Export volume, CAGR (%)	Average annual imports (US$, millions)	Average annual import volumes (tons, thousands	Import value, 5Y CAGR (%)	Import volume, CAGR (%)
Congo, Rep.								
1999–2003	0.65	0.42	...	...	849.9	873.9	...	...
2004–08	1.45	1.19	17.3	23.4	3,116.9	1,542.4	29.7	12.0
2009–13	2.81	0.39	14.1	−19.8	7,596.0	2,941.0	19.5	13.8
2014–18	1.75	0.50	−9.1	4.8	9,728.8	3,456.2	5.1	3.3
2019–23	3.47	0.53	14.7	1.3	3,972.1	2,459.3	−16.4	−6.6
Congo, Dem. Rep.								
1999–2003	2.02	1.19	...	...	627.5	979.3	...	...
2004–08	6.30	8.30	25.6	47.6	2,277.7	1,898.5	29.4	14.2
2009–13	23.78	30.61	30.4	29.8	4,242.0	2,700.5	13.2	7.3
2014–18	30.00	38.32	4.8	4.6	6,792.2	4,270.9	9.9	9.6
2019–23	31.75	44.09	1.1	2.8	10,128.9	6,654.7	8.3	9.3

Note: CAGR = compound annual growth rate.

These constraints could be alleviated by allowing customs staff to operate on rolling eight-hour shifts, adopting a risk-based procedure for scanning and inspection, adopting a single customs platform, providing training, and revising the RN-1 toll pricing framework to reflect axle count and weight.

The recommendations, if implemented, could contribute to unlocking US$70 million to US$200 million in private investment due to increasing container flows and the creation of 2,000 to 6,000 jobs over the next five years. Greater traffic shifts from the Matadi-Kinshasa route to the Pointe-Noire–Brazzaville corridor could increase these figures further.

Maize Milling

The Republic of Congo has potential to attract private investment in maize milling due to rising demand for brewery inputs and animal feed in domestic and regional markets. The country already has large-scale processing firms—mainly focused on other cereals—that possess adaptable technologies that could be scaled to expand maize milling operations, particularly to serve the maize-reliant brewery and animal feed industries. Congolese maize is particularly attractive for processing due to its higher grits yield compared to imported maize. Contract farming between maize processors and producers can help secure domestic supply for milling. Expanding production could strengthen food security, enable sectoral upgrading, and create opportunities in related industries.

Nonetheless, private investment in maize milling faces major constraints. Producer groups cannot formalize cooperatives easily under the Organization for the Harmonization of Business Law in Africa framework—the regional system that harmonizes business laws across 17 African countries; domestic production volumes are low (figure ES.5) due to fragmented farming structures, land tenure conflicts with communities increase investor risk, value added tax (VAT) and tariff exemptions for inputs are not consistently applied at customs, and access to industry-ready land is uncertain.

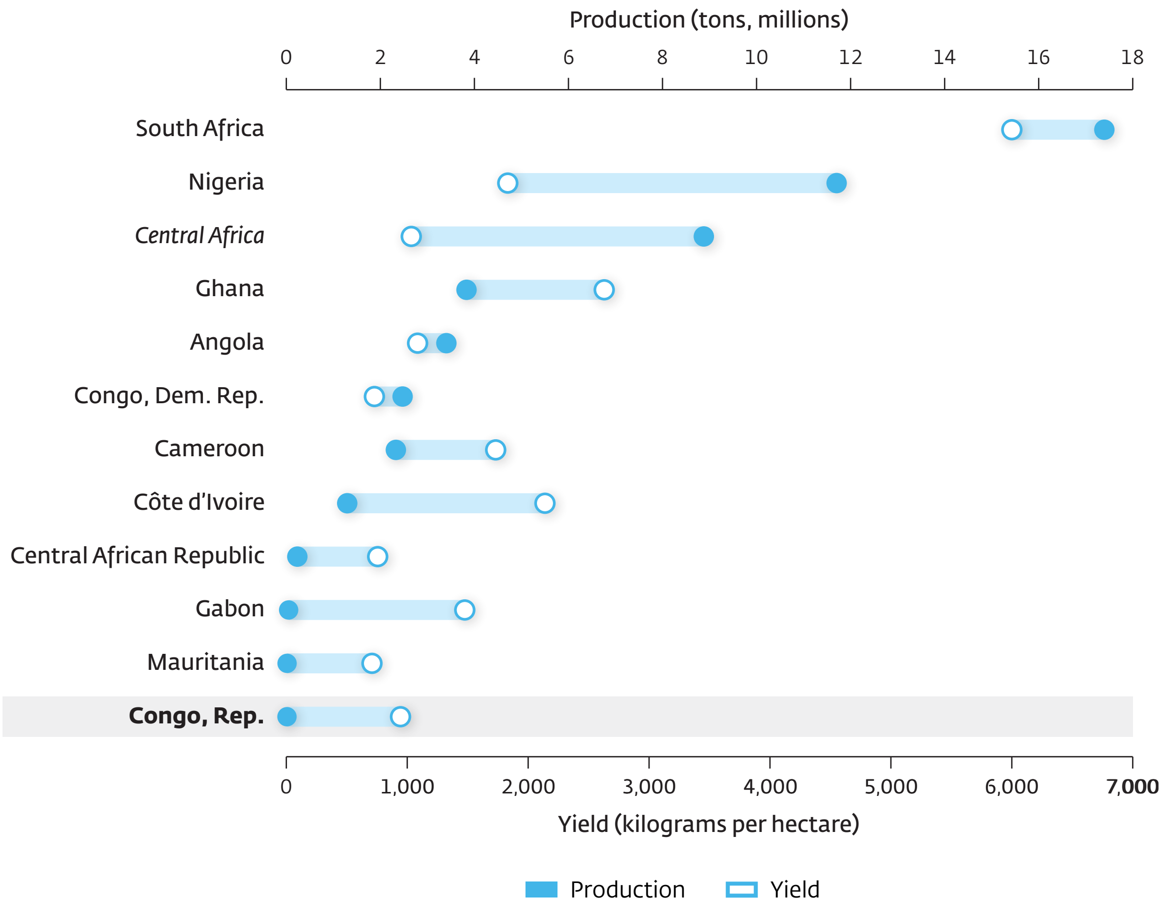
Reforms to attract private investment include: operationalizing the cooperative framework (including simplified agriculture-specific registration), creating a registry of smallholders with capacity to engage in contract farming, establishing standardized procedures for negotiating leases with the government and communities and for extending leases, and adopting preclearance mechanisms for shipments of machinery and inputs to minimize discretionary action at the border and to ensure effective application of VAT and tariff exemptions.

Implementation of these recommendations could contribute to US$24 to US$72 million in new private investment in mills, silos, and land preparation, and to the creation of between 400 and 1,100 direct jobs over the next five years.

Figure ES.5

Maize production and yields in Congo, Rep. remain below most of central Africa

Maize yields and annual production, Congo, Rep. vs. peers, 2023



Source: Based on FAOSTAT data.

Aquaculture

Aquaculture presents noteworthy potential for private investment, underpinned by the Republic of Congo's abundant inland water resources, favorable climate, and strong domestic and regional demand for fish. The Republic of Congo has a comparative advantage in farming tilapia and catfish—species that are highly marketable and adaptable to both traditional and sustainable farming techniques. Land and water access is relatively open, enabling deployment of aquaculture farms across the Republic of Congo's agricultural zones.

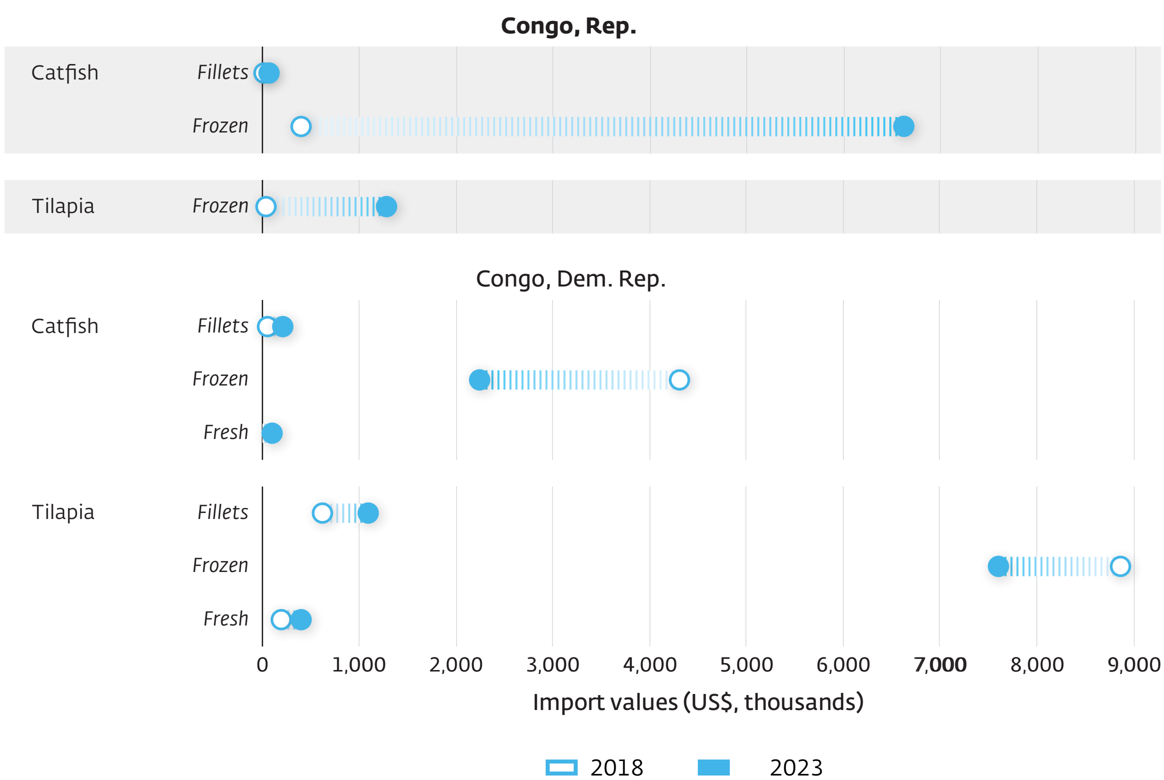
With demand for fish expected to increase, especially in the Global South (UNCTAD 2024), aquaculture is expected to help bridge the demand-supply gap, especially for fresh fish, presenting compelling potential for private investment. Congolese consume more than 160,000 tons of fish per year, most of which is imported and frozen. Per capita consumption is 25.5 kilograms—well above the global average of 20.7 kilograms. Domestic production comprises 60,000 tons from capture fisheries and 1,962 tons from aquaculture, leaving a significant supply gap. There are also opportunities for trade, particularly with neighboring the Democratic Republic of Congo, a net importer of tilapia and catfish (figure ES.6).

Key constraints to private investment include a fragmented sanitary and biosecurity oversight framework, weak markets for quality seed, feed, and technical services, poor spatial planning that results in farms being located at suboptimal sites, and the absence of cold-chain and market infrastructure connecting farms to urban buyers.

Figure ES.6

Imports of catfish and tilapia to Congo, Rep. have increased sharply since 2018

Catfish and tilapia imports, Congo, Rep. and Congo, Dem. Rep.



Source: Calculations based on BACI data.

To remove these barriers, the government should streamline sanitary and biosecurity oversight under a single competent authority, publish a transparent list of aquaculture-specific inputs eligible for VAT exemption, and enable private investment in cold-chain and market infrastructure by supporting more reliable utility access in selected protected agricultural zones (zones agricoles protégées; ZAPs)—government-designated areas intended to concentrate and accelerate agricultural investment—as well as in major markets.

The recommendations, if implemented, could contribute to unlocking potentially US$5 to US$16 million of private investment in farms, and to the creation of between 1,200 and 3,600 jobs over the next five years.

The Path Ahead

Beyond processed wood, port logistics, maize milling, and aquaculture, private investors may well identify additional profitable opportunities in other sectors in the Republic of Congo. This report focuses on sectors where identified constraints can feasibly be alleviated by public policy actions in the near term. The recommended actions are not necessarily sufficient on their own and would likely require complementary measures and longer-term capacity building. Rather, they are highlighted as concrete and observable steps that would represent meaningful progress along the results chain from action to impact, and that can be taken in the near term, with impact on private investment and job creation over the medium term.

Table ES.3

Summary of constraints and recommendations

Constraints	Recommended actions
Processed wood	
Rationale • Large forest endowments. • Fast-growing markets for processed wood.	
1. Inconsistent enforcement of sectoral norms.	**1.** If log export ban is to be retained, establish clear and transparent criteria for exemptions.
2. Regulatory uncertainty and ambiguity around the production sharing agreement.	**2a.** If production sharing agreement is maintained, apply revenue component to total sales only. **2b.** Limit volume sharing to underutilized secondary wood species and eliminate the use of Facteur R.
3. Limited access to raw materials and international markets for domestic wood processors.	**3.** Simplify and operationalize access to domestic exploitation permits (permis d'exploitation domestique) by revising eligibility criteria.
Logistics in the Pointe-Noire–Brazzaville corridor	
Rationale • Fast growth in container traffic and expansion of the port of Pointe-Noire. • Opportunity for logistics services in serving containers in gateway transit toward Brazzaville and Kinshasa.	
1. Delays from misaligned operating hours in customs and port services.	**1.** Amend labor code to require customs staff at the port of Pointe-Noire to operate in rolling 8-hour shifts.
2. Overcrowding inside ports due to inefficient inspections.	**2.** Adopt risk-based inspection procedures at Pointe-Noire.
3. Overlapping procedures that delay import clearance process.	**3.** Integrate clearance processes into a single unified customs platform.
4. Limited availability of skills in transport and logistics.	**4.** Allow the sector association to propose the list of trainers and curriculum to the Fond National de l'Appui à l'Employabilité et l'Apprentissage, which is responsible for vocational training and employment support.
5. Toll pricing in the Pointe-Noire–Brazzaville corridor that raises costs relative to alternative routes.	**5.** Update toll pricing structure to charge tolls as a function of both truck axels and weight—up to the maximum weight allowed.

(Table continues next page)

Table ES.3

Summary of constraints and recommendations *(continued)*

Constraints	Recommended actions
Maize milling	
Rationale • Large arable land area, suitable for maize, not being used. • Opportunity for investment in mills to serve growing demand from breweries and feed industries in Congo, Rep.	
1. Absence of formalized cooperatives to facilitate contract farming.	**1.** Simplify agriculture-specific registration procedures.
2. Land-tenure conflicts with local communities.	**2.** Develop a publicly accessible digital map of agricultural zones, identifying customary and community land.
3. Inconsistent application of duty exemptions on inputs for maize processing.	**3.** Establish a formal preclearance procedure for agricultural shipments eligible for value added tax (VAT) exemptions.
4. Difficulty in obtaining industry-ready land for maize mills.	**4.** Update the protected agricultural zone (zones agricoles protégées, ZAPs) legislation to allow maize mills to operate within the zones.
Aquaculture	
Rationale • High and growing fish consumption per capita in Congo, Rep. • Potential for small and medium farms to invest in better technologies to meet rising domestic demand for fresh fish.	
1. Fragmented sanitary and biosecurity governance framework for commercial aquaculture.	**1a.** Create a streamlined commercial aquaculture regime with a single competent authority. **1b.** Adopt basic biosecurity rules for the aquaculture sector.
2. Inconsistent enforcement of existing import VAT exemption makes access to quality seeds, feed, and inputs unpredictable.	**2.** Publish a concrete list of aquaculture-specific inputs that qualify for the existing VAT exemption, by HS codes.
3. There is uncertainty on private investor participation in ZAPs to build postharvest facilities and cold storage.	**3.** Clarify that private investors in cold-chain and market infrastructure for fish are permitted to operate in selected ZAPs.

1
Country Context and Business Environment

> The Republic of Congo is endowed with diverse nonoil resources that have the potential to generate profitable opportunities in processed wood, port logistics, and agribusiness that would be of interest to private investors.

The country's natural resource exploitation is heavily concentrated in the oil sector, with limited progress in diversifying and adding value to its abundant nonoil resources—many of which hold strong export potential in growing markets. This narrow focus is due to several factors including underinvestment in human capital, low labor productivity, a challenging business environment, weak infrastructure, limited competition, and a small private sector (World Bank 2023). Regional imbalances related to poverty, education and infrastructure for rural populations (IMF 2024), particularly in the north, create disparities in terms of economic and job opportunities, with implications for social cohesion.

Nevertheless, the country has significant untapped potential for profitable private investment that can be realized with concrete policy actions. The Republic of Congo has nearly 10 million hectares of arable land suitable for agribusiness, particularly to support animal feed crops and protein industries. The forestry sector also has investment potential, with an estimated 3.8 to 5 million cubic meters of sustainably harvestable timber that could support value-added wood processing, biodiversity preservation, and climate resilience. Additionally, the Republic of Congo's location on the Atlantic coast and its deep-water port in Pointe-Noire—capable of handling large vessels—positions it as a potential regional trade hub and an attractive destination for private investment in logistics and industrial services.

Persistently high public debt and macroeconomic volatility have constrained the government's capacity to invest in infrastructure and services, discouraging private investment and undermining competitiveness. Triggered by the 2014–2016 collapse in oil prices, the Republic of Congo entered a deep recession, leading to a prolonged period of underinvestment in physical and human capital. Between 2015 and 2023, real gross domestic product (GDP) contracted by an average of 1.9 percent annually, and GDP per capita declined by a cumulative 32 percent (World Bank 2024). The Congolese economy is estimated to have grown modestly in 2025, with real GDP growth of 2.9 percent, slightly above 2.6 percent in 2024. Public debt stood at 93 percent of GDP in 2024 with a gradual decline projected to 83.8 percent by 2026, reflecting planned fiscal consolidation.[4] The prolonged macroeconomic downturn and rising debt have constrained public investment in infrastructure and services, weakening the enabling environment for private sector activity.

The Republic of Congo's growth is heavily reliant on the oil sector and consequently volatile. Agriculture has consistently contributed modestly to growth, but holds untapped potential given the country's fertile land and rising domestic and global demand for crops like maize, particularly for animal feed. The service sector contributed negatively to growth between 2019 and 2023, largely due to the collapse in oil markets during the pandemic (World Bank 2023).

The Republic of Congo's exports remain heavily concentrated in mineral fuels and a few primary commodities. Between 2018 and 2023, mineral fuels, oils, and waxes accounted for 44.9 percent of exports (figure 1.2). Copper, the second-largest export, contributed 15.6 percent, reflecting growing regional mining and transit trade. In contrast,

Table 1.1

Congo, Rep. faces slow growth and debt pressures despite slight reserve gains

Key macroeconomic indicators

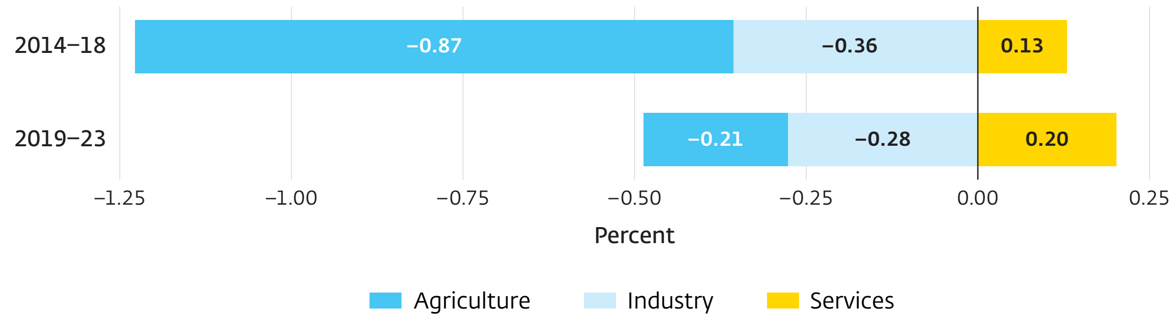
	Averages, 2010–19	**2020**	**2021**	**2022**	**2023**	**2024**	**Estimates** 2025	2026
Population (millions)	5.4	5.7	5.8	6.0	6.1	6.2	6.4	6.5
GDP (US$, billions)	14.6	11.5	14.8	15.8	15.3	15.7	14.9	16.2
Real GDP growth (%)	1.3	−6.3	1.0	1.5	1.9	2.6	2.9	3.2
PPP GDP per capita (constant 2021 international US$)	8,243	6,351	6,263	6,205	6,172	6,181	...	...
Investment (% of GDP)	50.9	26.0	29.3	31.8	33.9	34.9	34.9	34.8
Inflation (%, period average)	2.3	1.4	2.0	3.0	4.3	3.8	4.0	3.8
Fiscal balance (% of GDP)	2.7	−2.2	1.2	7.9	3.6	2.7	3.0	3.4
Public debt (% of GDP)	57.4	103.5	92.1	86.6	96.0	93.5	89.2	83.9
Current account balance (% of GDP)	−0.2	12.6	11.6	15.4	8.6	4.0	−5.2	−1.9
Gross reserves (US$, billions)	3.3	1.2	1.0	1.0	1.5	1.6	1.6	1.8
Total reserves (in months of imports)	5.2	4.5	2.6	2.1	3.0	3.1	3.0	3.1
FDI, net inflows (% of GDP)	7.7	8.7	2.2	7.9	9.5	5.0	5.3	5.4

Sources: World Bank Macro Poverty Outlook and World Development Indicators .
Note: GDP = gross domestic product; FDI = foreign direct investment; PPP = purchasing power parity. In 2023, the total population in Congo, Rep. was 6 million.

Figure 1.1

Since the fall in oil prices in 2014, only agriculture has contributed positively to growth

Contribution to five-year GDP growth, 2014–23

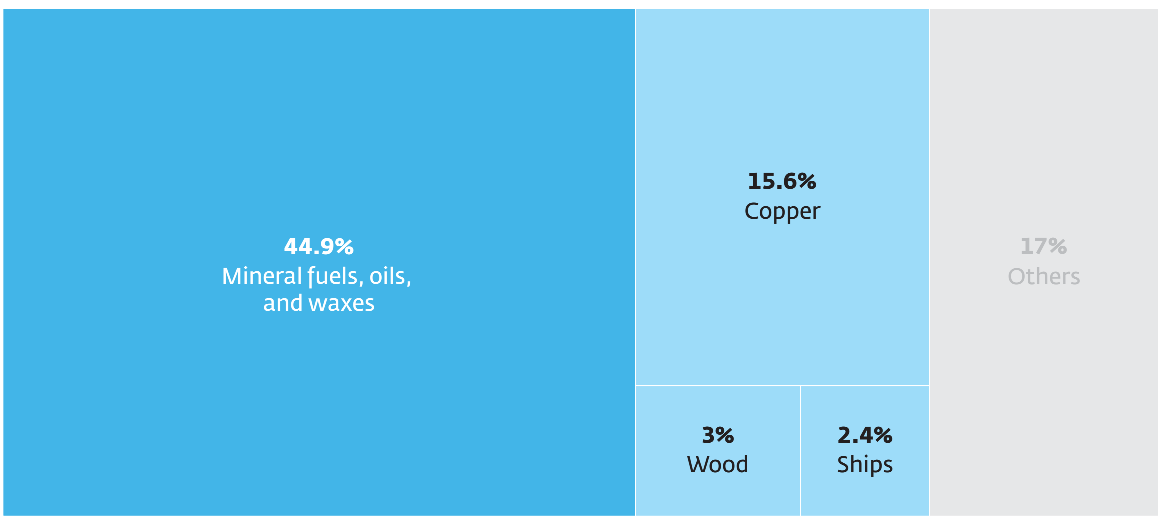


Source: Calculations based on World Development Indicators data.

Figure 1.2

The Congolese export basket is heavily concentrated in oil and gas

Share of annual exports, 2018–23

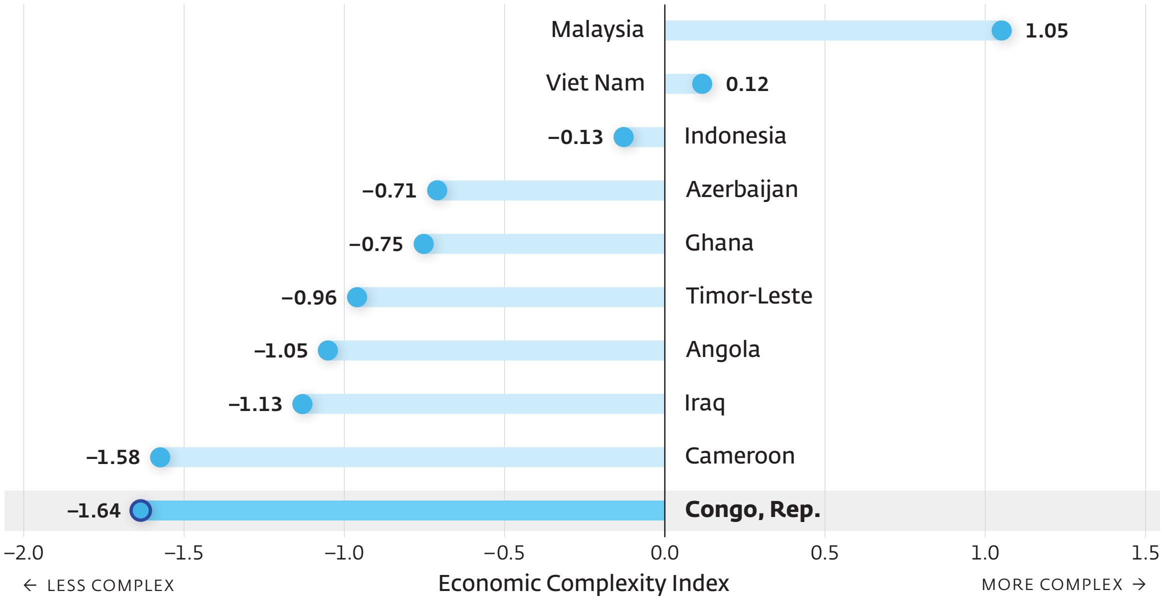


Source: Calculations based on Atlas of Economic Complexity data.

wood exports are modest due to limited domestic processing. The Republic of Congo ranks among the least economically complex countries globally, reflecting its heavy reliance on unprocessed commodity exports and limited diversification (figure 1.3).[5]

Figure 1.3

Congo, Rep. has a low degree of diversification and is the least complex economy among peers, 2023



Source: Atlas of Economic Complexity.
Note: Figure shows standard deviations from the global average.

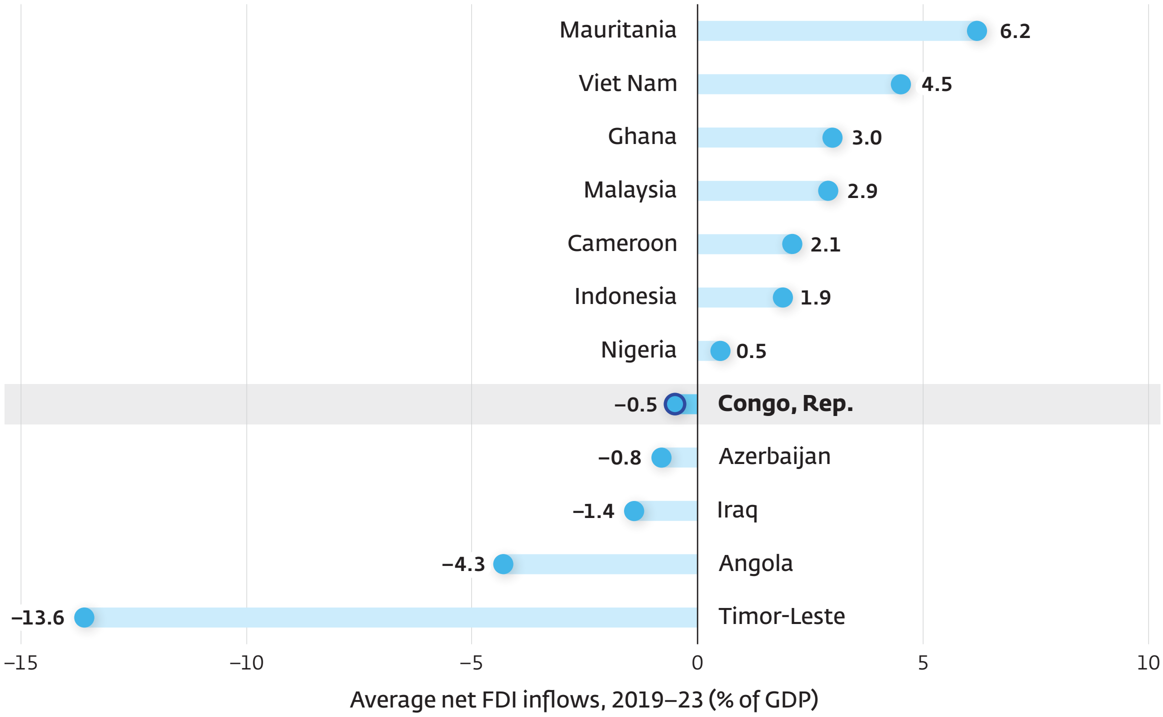
1.1 Financial Sector Development

The Republic of Congo has experienced persistently negative net foreign direct investment (FDI) in recent years, reflecting deep-rooted investor uncertainty and weakness in the investment climate. Between 2019 and 2023, net FDI to the Republic of Congo averaged −4.4 percent of GDP—among the lowest globally—reflecting persistent capital withdrawals, profit repatriation, and disinvestment in the oil and gas sectors (figure 1.4) in the face of governance weaknesses and macroeconomic vulnerabilities. FDI beyond hydrocarbons remains limited (World Bank 2024a). Between 2020 and 2024, investors announced approximately US$3.0 billion in FDI for the Republic of Congo, with over 70 percent concentrated in coal, oil, and gas (figure 1.5).

The financial sector is shallow and dominated by banks, with the private sector having limited access to bank credit. As of end-2023, banks—predominantly subsidiaries of foreign institutions—accounted for 84 percent of the financial sector's balance sheet. The banking sector comprised 10 banks, including two state-owned institutions, with the three largest banks holding approximately 49 percent of total banking assets. While domestic credit to the private sector rose from 6 percent of GDP in 2011 to 14.6 percent in 2023, it remains well below the Sub-Saharan Africa average of more than 20 percent

Figure 1.4

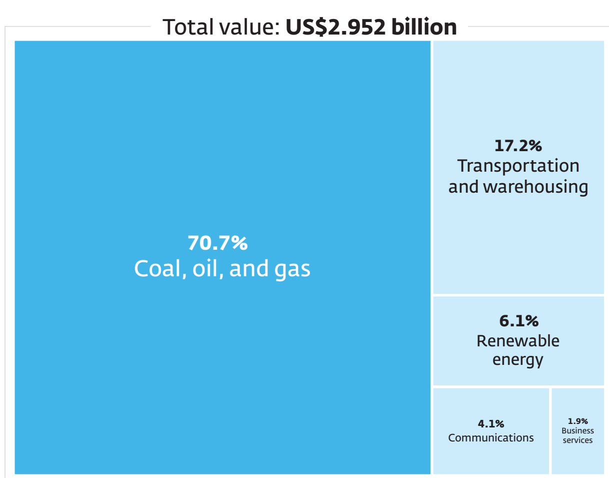
Over the last five years, FDI net inflows have declined in Congo, Rep.



Source: Calculations based on World Development Indicators data.
Note: FDI = foreign direct investment; GDP = gross domestic product.

Figure 1.5

Most announced FDI in Congo, Rep. was in the oil sector



Source: Calculations based on Financial Times fDi Markets data.

(table 1.2). Most firms rely on internal funds to finance fixed assets, with only 2 percent using bank credit—compared to 10 percent in Sub-Saharan Africa and 12 percent in lower- and middle-income countries. According to the 2024 World Bank Enterprise Survey, only 15 percent of small enterprises and 41 percent of medium enterprises have access to loans from formal financial institutions (figure 1.6).[6] Financial vehicles that could facilitate access to credit for small and medium enterprises (SMEs) and enable supply-chain finance and upgrading in the Republic

Table 1.2

Congo, Rep. has lower access to domestic and international financing than other countries in Sub-Saharan Africa and other comparators

Financial additionality indicators, 2025

	Congo, Rep.	Sub-Saharan Africa	LMICs	Emerging economies	Fragile countries
Access to domestic financing[a]					
Domestic credit to private sector (% of GDP)					
2023	14.6	21.5	36.6	39.1	16.5
5Y average	14.5	23.1	36.5	40.8	16.2
10Y average	14.6	23.5	35.3	40	17.4
Bank credit penetration (% of GDP)					
2023	14.6	20.2	34.6	36.1	15
5Y average	14.5	21.5	34.6	37.8	15.1
10Y average	14.6	21.7	33.5	37.3	16.3
Access to international financing[b]					
FDI flows (% of GDP)					
2023	13.9	5.3	2.4	3.5	2.4
5Y average	−0.5	3.5	1.7	3.2	1.3
10Y average	4.9	5	2.4	3.8	1.9

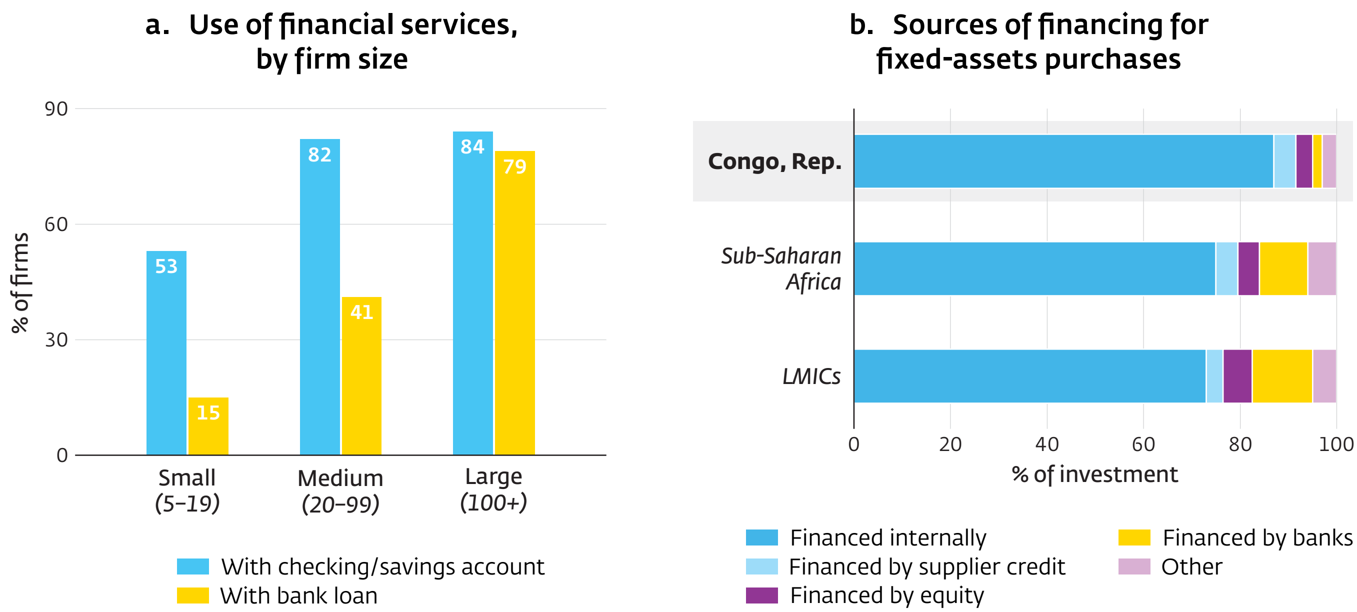
Source: Calculations based IMF World Economic Outlook data.
Note: LMICs = lower-middle-income countries; Y = year.
a. Congo, Rep.'s access to domestic financing has been stable or is mixed. Domestic credit to private sector as a share of GDP is below all comparator averages and has increased against the five-year average. Bank credit penetration as a share of GDP is under all peer group averages and has expanded.
b. Congo, Rep.'s access to international financing has been stable or is mixed. FDI flows as a share of GDP are above all comparator averages and have risen.

of Congo, like factoring, are at an early stage of development and adoption: factoring was only permitted in March 2022, with support from the African Export-Import Bank, and is currently offered by one banking institution.[7]

Figure 1.6

Congolese firms rely more on domestic finance than the Sub-Saharan Africa average

Access to and use of bank services by Congolese firms, 2024



Source: Based on World Bank Enterprise Surveys.
Note: LMICs = lower-middle-income countries.

1.2 Labor Market and Skills

Underinvestment in human and physical capital constrains productivity and deters private investment. Despite its oil wealth, resource revenues have not translated into improvements in health or education outcomes or infrastructure development. Public spending on human capital remains low and often below budget targets, contributing to a Human Capital Index score of 0.42 out of 1 in 2021, significantly below the Sub-Saharan Africa average of 0.6, with little improvement since 2010. The labor force, though relatively large and active, faces skill shortages and high unemployment, particularly among youth and urban populations. Learning-adjusted years of schooling in the Republic of Congo averages 5.3 years—below the average for low- and middle-income countries (LMICs) of 6.4 years and aspirational benchmarks with an average of 9.1 years. Tertiary enrollment is low at 10 percent of tertiary school-age population, compared to 27 percent in LMICs and 43 percent among aspirational peers (table 1.3). Employment has not grown in high-productivity sectors, and sectoral skill mismatches remain acute. Interviews with private sector actors highlight shortcomings in vocational training relative to private sector needs.

Table 1.3

Congo, Rep. has lower enrollment in tertiary education and much higher unemployment than comparators

Labor force indicators, Congo, Rep. and comparators

	Congo, Rep.	Sub-Saharan Africa	Lower-middle income	Regional and structural comparators	Aspirational comparators
Labor force supply					
Population, ages 15–64 (% of total population)	56.2	55.8	64.3	58.2	68.7
Labor force participation rate (% of population ages 15–64)	68.8	71.3	61.77	66.9	72.7
Learning-adjusted years of school	5.3	5.0	6.4	5.6	9.1
School enrollment tertiary (% gross)	10.0	9.0	27.0	19.7	43.0
Labor market conditions					
Unemployment, total (% of total labor force)	19.9	5.9	4.4	6.0	2.9
Share of firms identifying an inadequately educated workforce as a major or very severe constraint (%)	13.6	13.7	15.7	12.7	8.2
Employment by sector (% of total employment)					
Industry	23.2	12.5	22.6	13.8	27.0
Agriculture	30.2	49.0	39.2	39.2	23.9
Services	46.7	38.5	38.3	47.0	49.1

Sources: Approach follows that used in the World Bank Group Growth and Jobs Reports and includes data from: World Development Indicators; International Labour Organization, modeled figures for 2024; Human Capital Index, learning-adjusted years of school adjusts the years of school for how much students learn for each year they are in school, which is done using results from standardized tests; UNESCO—all countries are the latest available, while Congo, Rep. is from 2023; and 2024 Enterprise Survey for Congo, Rep.

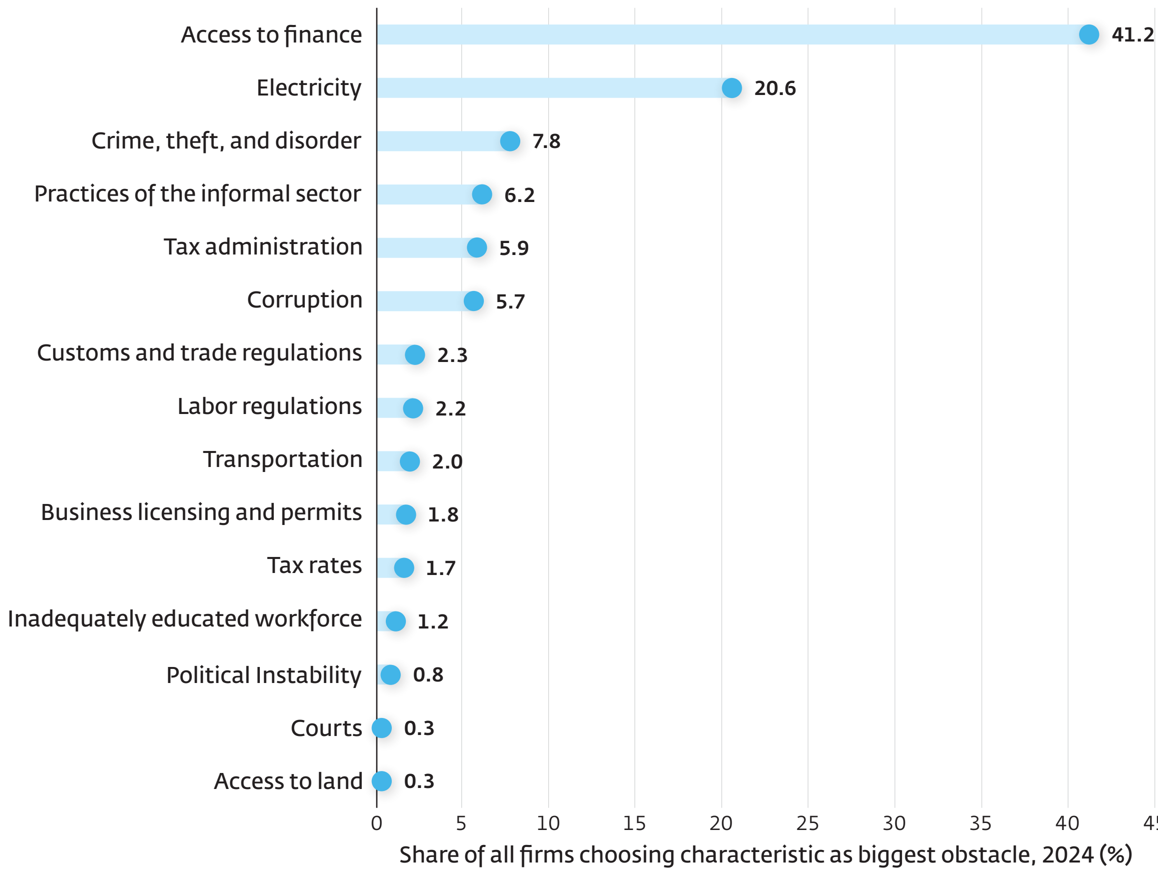
For example, the port logistics sector lacks qualified drivers and loaders. The agriculture and agribusiness sectors face skill shortages across the value chain, particularly in modern agronomic practices, machinery operation, postharvest handling, and contract farming, among others.

1.3 Business Climate

The Republic of Congo's poor infrastructure, governance, and regulatory environment discourage private investment. Limited access to reliable electricity is cited by one in five firms as the most severe obstacle to their operation (figure 1.7). This reflects weaknesses in the financial viability of the country's energy sector due to outdated tariffs and systemic inefficiencies. Electricity tariffs have remained flat in nominal terms since 1994, eroding real revenues and discouraging private investment in power generation. In 2023, the electricity access rate in the Republic of Congo stood at 51 percent, slightly below the Sub-Saharan Africa average of 53 percent, with a pronounced urban-rural divide.

Figure 1.7

Access to finance and to electricity are the top constraints identified by Congolese firms



Source: Based on World Bank Enterprise Surveys.

Land governance also presents challenges. The coexistence of customary norms and formal legal frameworks creates confusion, limiting investors' confidence. Congolese firms also face a challenging governance environment, which impedes competitiveness and limits growth and employment. Corruption in the Republic of Congo is significantly worse than the regional average, with the country scoring just 17 out of 100 in 2023 on the Control of Corruption index, compared to 32.5 for Sub-Saharan Africa.[8] According to the 2024 World Bank Enterprise Survey, 27 percent of respondents reported having paid a bribe at least once.

2
Sector Selection

This Country Private Sector Diagnostic identifies four sectors of the Congolese economy where concrete policy actions can generate commercially viable opportunities for private investors.

This, in turn, has the potential to contribute to growth and jobs, and catalyze broader systemic reform (table 2.1).

Sectors were selected for analysis using the following criteria:

1. Private investment potential if feasible reforms are undertaken in the near term.
2. Potential development impact.
3. Willingness of the government to contemplate needed policy actions in the sector.

Sectors were identified based on both quantitative and qualitative analysis. Quantitative analysis includes measurements of revealed comparative advantage, global demand growth, export gaps, value-added and production growth, economic endowments, FDI inflows, and profitability by sector, as well as broad-based qualitative analysis and consultations. Sector selection was informed by consultations with private and public sector stakeholders in Brazzaville and Pointe-Noire.

Table 2.1

Summary of sectors selected

Sectors	Potential for profitable opportunities if feasible reforms are undertaken in near term	Contribution to job creation	Contribution to other development impacts	Feasibility of removing constraints
Processed wood: construction materials	HIGH	HIGH	HIGH	HIGH
Ports logistics	HIGH	HIGH	HIGH	HIGH
Maize milling	MEDIUM	MEDIUM	HIGH	HIGH
Aquaculture	MEDIUM	MEDIUM	HIGH	HIGH

Sector selection is not intended to be exhaustive. Entrepreneurs may well identify further profitable opportunities in other sectors. The focus here is on sectors where an identified constraint to private investment can feasibly be alleviated by public policy actions. The recommended actions are not necessarily sufficient on their own. Rather, these actions are highlighted as concrete and observable steps that would represent meaningful progress along the results chain from action to impact, and that can be taken in the next few years. The ultimate impacts on investment and job creation would be enhanced by complementary measures and capacity building that extend beyond such a timeframe.

1. **Processed wood.** The Republic of Congo is endowed with vast forest resources and has the potential to attract more investment into wood-related industries without raising deforestation risks. Global demand for processed wood products has been increasing by more than Congolese processed wood exports, especially into the European Union (EU) and the United States.[9] For sheets of veneering used in construction, flooring, and wall paneling, global demand grew by 9 percent per year on average between 2019 and 2023. The wood and forestry sectors are the second-largest employers in the Congolese economy (after public administration), generating economic value across artisanal carpentry, construction, and related industries. The sector's 35 forestry firms and multiple SMEs engaging in processing generate 7,000 direct jobs, 15,000 indirect jobs, and 10,000 informal jobs (World Bank 2024a). The potential to attract private investment is undermined by recent region and country-specific policies whose clarity in implementation is discouraging private investment.
2. **Logistics services in the Pointe-Noire to Brazzaville corridor.** The Republic of Congo benefits from a strategic location, with a deep-sea port in Pointe-Noire and shared borders with large, landlocked neighbors. The Pointe-Noire port is just eight hours from Kinshasa, whose population is nearly four times that of the Republic of Congo. Over the past decade, the country has made notable investments in transport and logistics infrastructure, including airport upgrades, the RN-1 highway, and the expansion of Congo Terminal. Since 2019, Pointe-Noire has recorded the highest increase in container traffic in the region (UNCTAD 2024), reflecting the impact of these infrastructure improvements. This growth has attracted substantial investor interest and created demand for complementary logistics services to enhance port efficiency and connect with emerging hubs like the new Pointe-Noire Special Economic Zone (SEZ). The development potential is considerable—particularly in generating employment for low-skilled workers and fostering SME activity—given the relatively low entry barriers in the transport sector. However, investment in the corridor between Pointe-Noire and Kinshasa is discouraged by long waiting times, high toll costs, and burdensome customs and entry procedures which reduce the attractiveness of the port.

3. **Maize milling.** According to the FAO, only 1.3 percent of the Republic of Congo's agricultural land was used for crops in 2022, well below the African average of 3.8 percent and far behind peer countries that use at least 5 percent. This is striking given the country's natural suitability for maize cultivation and the crop's resilience to climate variability in the Congo Basin. Domestic conglomerates already have processing capacity for imported cereals and are eager to expand into brewery and animal feed industries, both heavily reliant on maize. Congolese maize is particularly attractive for local processing due to its higher grits yield compared to imports. As a versatile crop serving both human consumption and animal protein industries, maize aligns with priorities in the National Development Plan. Expanding production could strengthen food security, enable sectoral upgrading, and create business opportunities across related industries. However, private investment in maize milling faces major constraints, including limited maize supply, land access, access to machinery due to the uneven application of import exemptions, and availability of fertilizers—all factors critical for contract farming and commercial farmers.
4. **Aquaculture.** Fish exports have grown in line with global demand, presenting a private investment opportunity to raise production, exports, and upgrading into new fishing products. Congolese exports of fish (especially frozen fish and fillets) have accounted for about 0.2 percent of nonoil exports per year since 2012. Demand for fish is expected to increase, especially in the global south, the fastest growing market for animal protein. Most of the interest in the Congolese aquaculture industry comes from domestic investors interested in developing farms around Pointe-Noire and Brazzaville. Key constraints to unlocking private investment include limited government enforcement and monitoring of phytosanitary issues, challenges with land and water access, and technical requirements for fish farming.

Other development impacts assessed include food security and climate-friendly GDP growth, among others.[10]

3 Processed Wood for Construction Materials

AT A GLANCE

- The wood industry is a vital part of the Republic of Congo's economy, serving some of the largest global markets and being the most important nonmineral export and second-largest employer in the country. Secondary and tertiary wood processing offers strong investment potential, driven by EU demand and growing local needs.
- Investors in the Congolese wood-processing industry face several constraints, including uncertainties related to the new production sharing agreement, arbitrary application of the log export ban and limited access to raw materials and international markets for domestic wood processors.
- To unlock investment potential in the wood-processing sector, the government should clarify the new production sharing agreement, unify the application of sectoral norms across all stakeholders and improve access to raw timber for potential investors in local processing.
- Implementation of the processed wood sector recommendations will contribute to attracting potentially between US$560 million and US$1 billion in investment and creating 5,300 to 11,500 direct jobs by 2030 over the next five years.

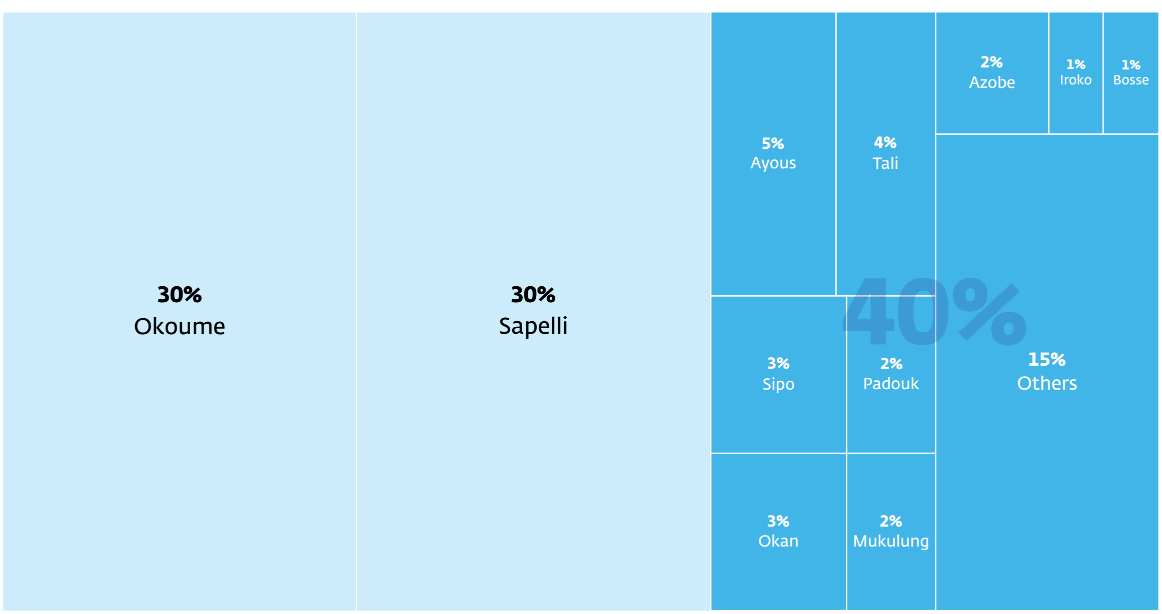
3.1 Sector Context and Potential Opportunity

The Republic of Congo is endowed with forest resources and has the potential to attract private investment in forest-based industries without increasing deforestation risks. Over 70 percent of the Republic of Congo is covered by forest, with approximately two-thirds—around 14.8 million hectares—allocated to sustainable forest management.[11] The volume of sustainably harvestable timber is estimated at 3.8 to 5 million cubic meters, primarily located in the northern and southern forest zones.[12] The Republic of Congo is home to wood species well-suited for construction materials. Sapelli and okoume are the two most widely harvested species, accounting for most of the log production (see figure 3.1). Their sturdiness, malleability, and market appeal make them ideal for processed wood products such as window frames, doors, kitchenware, and other housing-related finishes. The country also possesses many less-exploited species with properties that make them suitable inputs for furniture, paneling, and other tertiary processed products—an underexploited opportunity for market diversification.

The sector's sustainability practices are an asset to potential and current investors as they enable sales in the EU, the largest market for Congolese wood exports. Deforestation rates in the Republic of Congo are among the lowest globally; as of 2025,

Figure 3.1

Secondary wood species suitable for processing account for 40% of wood production in Congo, Rep.



Source: Annual Statistics, Congo, Rep., Ministry of Forest Economy.

more than 98 percent of the country's 2001 forest cover remains unchanged—compared to 93.4 percent in the Democratic Republic of Congo, 94.9 percent in Cameroon, 96.4 percent in Colombia, 91 percent in Brazil, and 88.8 percent in Indonesia.[13] The EU classifies the Republic of Congo as low-risk for deforestation, reinforcing the country's positioning as a sustainable exporter of timber and potentially value-added wood products.[14] Several large concession holders operate under the Forest Stewardship Council certification. Additional lands are managed under other legal certification schemes. Besides, the way in which forest concessions in the Republic of Congo and the Communauté économique et monétaire de l'Afrique centrale (Economic and Monetary Community of Central Africa; CEMAC) region operate—through forest management plans—has not lead to deforestation.[15] While the Republic of Congo has low deforestation rates (in terms of total tree cover), the overexploitation of okoume and sapelli threatens to disrupt species composition and ecological balance within concession areas. This could compromise wood quality and forest productivity over the long term. Both forest concession holders and domestic companies in the Republic of Congo have shown growing interest in diversifying species while maintaining sustainable forest management practices. Additional investments (both foreign and domestic) will need to comply with the forest management practices that make the Republic of Congo attractive in the first place, and the country should maintain traceability efforts to maintain the sector's competitiveness in this regard.

Processed wood represents a small share of the Republic of Congo's export basket but exports are steadily shifting toward higher-value products. Congolese tertiary processed wood exports are growing faster than global demand, creating potential opportunities in major international markets and signaling a small but gradual shift toward value addition and downstream processing. In 2023, the Republic of Congo exported approximately US$161.5 million in raw logs and US$167.4 million in lumber (primary processing), while secondary and tertiary processed products—such as fiberboards, plywood, furniture, and kitchenware—accounted for US$132,300 and US$11 million, respectively). Congolese exporters already serve major markets—particularly the EU, which absorbs about half of the Republic of Congo's processed wood exports. While demand from Japan and China is declining, Viet Nam and Malaysia show mixed trends. The United States, which accounted for 23.3 percent of global demand for processed wood in 2023, is emerging as a destination for Congolese exports, especially for construction and secondary processed products.[16] These dynamics highlight both the sector's evolving competitiveness and its potential to expand market reach and attract private investment.

Potential private investors can tap into growing global markets in processed wood and utilize available industrial space—provided targeted and concrete policy reforms are undertaken. The Republic of Congo is actively leveraging new SEZs[17] to strengthen wood-processing capacity and attract investors to products such as plywood and construction materials, following the model of Gabon. The country has a ministry dedicated to coordinating its SEZ strategy, and current zones are managed by private enterprises with global expertise and financial resources, which also have experience across the continent and in the wood-processing industry. Compared to regional peers—Gabon, Cameroon, the Democratic Republic of Congo, Nigeria, and Angola—the Republic of Congo is the only country that has gained market share in both primary and secondary wood processing when exporting to the largest and fast-growing markets: the EU and the United States.

Growing domestic demand for processed wood presents an investment opportunity, particularly in supplying the sawn timber market through underutilized secondary species and domestic exploitation permits. The domestic market—estimated at over 200,000 cubic meeters of sawn timber in 2024 (Lescuyer and Mboulafini 2024)—is primarily supplied by informal producers, with approximately two-thirds of demand met by artisanal sawmills operating outside the formal sector. Between 2009 and 2024, the volume of industrial (legally sourced) sawn timber tripled, largely due to increased use of secondary-grade wood. These species remain underutilized by large companies due to lower export prices, yet they hold commercial potential that also supports biodiversity preservation by easing pressure on the most commercially exploited species. The introduction of domestic exploitation permits under Law No. 33-2020 offers an opportunity to expand local market supply, as these permits are specifically designed to allocate production forests to operators serving the domestic market.

The Republic of Congo faces competition in products derived from species also developed by regional peers, but can have potential combined advantages in investor presence, logistics and sustainability track record. In terms of primary wood products, the country's main competitors in international markets are Cameroon, Gabon, and, to a lesser extent, the Central African Republic, which also have okoume and sapelli timber. Sawn timber and veneer from these species are relatively interchangeable across producers. For example, Gabonese companies produce okoume sawn timber and veneer that directly compete with similar products processed in the southern region of the Republic of Congo. A similar dynamic exists in the northern region of the Republic of Congo with sapelli and other species—such as sipo, mukulungu, azobe, and Tali—which are also harvested in Cameroon and the Central African Republic. Cameroon and Gabon are especially competitive due to their coastal access. Other regional competitors in secondary and tertiary wood processing include the Democratic Republic of Congo, Angola, and Nigeria. Relative to these competitors, the Republic of Congo can hold key combined advantages relative to these competitors in terms of its access to large markets and presence of large players (like Gabon), its direct access to a domestic large deep-water port in Pointe-Noire—with strong alternatives in Cameroon (Kribi), and high sustainability track record (unlike the Democratic Republic of Congo).

3.2 Constraints and Recommendations

Wood processing in the Republic of Congo faces several challenges that hinder private investment. Top among them are the inconsistent enforcement of the existing log export ban and the lack of implementing regulations to clarify key aspects of the 2020 Forest Code and production sharing agreement. This creates uncertainty around taxes, quotas, and other regulatory conditions. Additional obstacles include misaligned processing capacity and input supply, limited use of certification, and lack of log traceability.

CONSTRAINT 1. Uneven application of the log export ban by national authorities. Since 2012, the CEMAC region has committed to a log export ban aimed at promoting local value addition in wood processing and reducing deforestation risks by prohibiting the export of raw logs. However, the government has granted ad hoc exemptions to concessionaires in the southern region of the Republic of Congo. These exemptions are supposed to help the beneficiary firms generate sufficient cash flow to invest in value addition machinery and capabilities but are granted without oversight or verification. The exemptions also create an uneven playing field and exacerbate north-south economic inequalities, disadvantaging private investors who must fully comply with the ban.

RECOMMENDATION 1. If the log export ban is to be retained, it should be enforced uniformly across firms and regions, and any exemptions granted should be based on objective and transparent criteria. Amending the 2020 Forestry Code to include clear and transparent criteria and procedures for granting exemptions would improve investor confidence while advancing environmental and sector development objectives. The Republic of Congo can formalize exemption applications and approvals to avoid unfair competition between concession holders. It is noteworthy that the log export ban has so far resulted in only minimal processing—like basic squaring of raw logs (équarrissage)—which neither delivers the intended gains in domestic value addition nor contributes meaningfully to forest protection.

CONSTRAINT 2. There is uncertainty around the production sharing arrangement between the state and forestry companies contained in the recently amended Congolese Forestry Code. The Forestry Code (Law No. 33), passed in 2020, introduced the principle of production sharing of wood volumes between the state and forestry companies to spur domestic wood processing and gather additional revenue from forest activities (box 3.1). The scheme was reinforced in Law No. 38 of 2024 which requires forestry companies to extract the maximum annual volume of wood allowed under their concession agreement, to pay an additional 15 percent tax on the value of logs processed, and to transfer a portion of harvested logs to a new state-owned company, based on the net revenue-to-cost ratio (Facteur R), in exchange for reduced forest taxation. The new

Box 3.1

Misaligned objectives in the production sharing agreement discourage investment

The production sharing agreement has four main objectives:

1. Increasing revenue from concessions and the sale of wood for processing;
2. Ensuring raw materials are available for domestic processing;
3. Promoting the use of secondary species that are less known in export markets;
4. Maintaining a sustainable business model that preserves forests.

The log export ban requires all companies to perform at least a first-stage processing of logs before export. While these objectives aim to strengthen the sector, they also create conflicting incentives that discourage private investment. Requiring concession holders to harvest the maximum allowable volume across all species risks damaging the sector's sustainability reputation—a key asset in export markets. Moreover, higher taxation combined with mandatory transfer and repurchase of wood volumes, particularly exportable species, reduces the cash flow available for investment in processing and innovation. Firms facing the log export ban already face this cashflow challenge. Furthermore, the proposal for state institutions to purchase and resell raw logs to domestic buyers does not ensure adequate distribution and could create fiscal risks if the logs are not efficiently sold or allocated.

Table 3.1

If reforms are implemented, there is potential for private investment in the Congolese wood-processing sector to serve the EU and US markets

Products	Top global importers	How Congo, Rep. performs	Opportunity
Lumber	United States, China, and EU-27	Better than peers and on par with global growth.	n/a
Panel, particle boards products, and composite wood	United States and EU-27	Low exports compared to peers, mostly to Saudi Arabia and Angola.	Both the United States and EU-27.
Finished wood products: furniture, kitchenware, and housing	EU-27	Most exports go to the EU-27, with a small but growing share to the United States.	Given performance: growing exports to US buyers.

Note: EU = European Union; n/a = not applicable.

state company would then resell the wood to concession holders and domestic companies for further processing.

However, secondary regulations specifying how this regime will operate in practice have not been published. Initial drafts and existing laws suggest the scheme could apply to all wood species, based on estimated production costs and tap into exports of commercial species like sappeli and okoume. Uncertainty has significantly dampened investor confidence and constrained private investment in wood exploitation. The law also contains the possibility of case-by-case negotiation (Article 108 of Law No. 33-2020) and the possibility of negotiating a payment equivalent to the production of logs to the state (Article 7 of Law No. 38-2024), which contributes to further uncertainty (box 3.1).

RECOMMENDATION 2A. If the production sharing agreement is maintained, the revenue component of the law should apply only to total sales, without requiring companies to transfer logs of exportable species. Under Law No. 38 of 2024, exports are subject to dual taxation, which reduces the profitability of investment in the sector. While recognizing the government's objective of mobilizing fiscal resources, the government can simplify and unbundle the sharing of revenues and volumes in a way that allows exporters to maintain access to international markets while reinvesting cash flow into domestic processing.

RECOMMENDATION 2B. Limit volume sharing to underutilized secondary wood species and eliminate the use of *Facteur R*. Such an approach, focused on underutilized secondary species with limited commercial value for concessionaires, could support the supply of timber to domestic and even regional markets without undermining the profitability of existing operators. Facteur R, which is calculated based on all wood species exploited, is problematic because it relies on opaque cost and revenue assumptions that cannot be independently verified, making the state's production share unpredictable, thereby discouraging investment. A simplified framework would allow companies to maintain export revenues from okoume and sapelli, while sharing production from secondary species and innovating in processing for various traded products (like those identified in appendix A). By narrowing the scheme to species with limited commercial use, the government can still advance its policy objective of increasing local processing without depressing export revenues or distorting established markets.

CONSTRAINT 3. Domestic wood-processing companies have limited access to raw materials. Unlike large foreign concession holders—who possess forest leases, established client bases, and can access export markets—many smaller domestic companies lack concessions and must purchase wood at elevated prices, especially near urban centers. This structural disadvantage limits their competitiveness and restricts the growth of domestic processing. Domestic exploitation permits (permis d'exploitation domestique; PEDs), introduced under Law No. 33-2020, were intended to enable local enterprises to harvest standing timber and supply the national market with processed wood products. However, no PEDs have been granted to date. The technical and administrative requirements are too expensive for potential PED users who cannot amortize the upfront costs of these requirements due to (i) uncertain market returns on secondary species sold in informal domestic markets, and (ii) the fact that timber coming from PED cannot be exported (AFD 2024). According to the new Congolese forest code, potential PED users must submit an exploitation plan with an analysis of the social and environmental impacts and bid for designated areas. These permits are granted for three years, a much shorter period than the 30 years granted to large concessions.

RECOMMENDATION 3. Simplify and operationalize PEDs to facilitate access to raw materials for domestic wood-processing firms. To simplify and operationalize PEDs, the Congolese forest code should: expand permit time frames up to 15 years to allow domestic companies to better amortize investments and replace species, and provide a standardized template for forest a management plan that makes it simpler for companies to report back to the Ministry of Forest Economy on social and environmental impacts during the permit allocation time.

3.3 Impact

The proposed reforms can help ease uncertainty on concessionaires, level the playing field across market participants, increase wood availability for Congolese SME processors and uphold traceability. These improvements could contribute to attracting between US$500 million and US$1.1 billion in private investment over the next five years, which could contribute to creating between 5,300 and 11,500 direct jobs (see appendix C).

3.4 Summary of Constraints and Recommendations

Table 3.2

Priority policy recommendations for increasing private investment in processed wood

Constraint	Recommended actions
1. Inconsistent enforcement of sectoral norms by national authorities.	**1.** If the log export ban is retained, it should be enforced uniformly across firms and regions, and exemptions should be based only on objective and transparent criteria.
	Responsible government entities: Ministry of Forest Economy
2. Uncertainty and ambiguity around the production sharing arrangement between the state and forestry companies contained in the recently amended Congolese Forestry Code.	**2a.** If the production sharing agreement is maintained, the revenue component should be applied to total sales only, without requiring concessionaires to transfer volumes of exportable species. **2b.** Limit volume sharing to underutilized secondary wood species and eliminate the use of Facteur R.
	Responsible government entities: Ministry of Forest Economy; Ministry of Finance
3. Limited access to raw materials for domestic wood processors.	**3.** Simplify and operationalize domestic exploitation permits (permis d'exploitation domestique) to facilitate access to raw materials for domestic investors.
	Responsible government entities: Ministry of Forest Economy

4

Logistics Services in the Pointe-Noire to Brazzaville Corridor

AT A GLANCE

- The Republic of Congo could serve as a major gateway to central Africa, especially the Kinshasa region of the Democratic Republic of Congo. Potential growth in container traffic between Pointe-Noire and Brazzaville could enable investment opportunities in logistics services—warehousing and storage services, freight transport and cargo movement, cold-chain logistics, and support services (repair and security).
- Private investment in logistics is discouraged by misaligned operating hours with customs, overcrowding inside the port from slow inspections, a multiplicity of port fees, and lack of skills in logistics.
- Lifting existing constraints at Pointe-Noire requires creating rolling eight-hour customs shifts, adopting a risk-based procedure for scanning and inspection, establishing a single customs platform, providing timely delivery of training, and revising the RN-1 toll pricing framework to reflect axle count and weight.
- The implementation of the recommendations will contribute to potentially US$70–200 million in private investment due to increasing container flows, and create 2,000 to 6,000 jobs over the next five years. Greater traffic shifts from the Matadi-Kinshasa route to the Pointe-Noire–Brazzaville corridor could further increase both figures.

4.1 Sector Context and Potential Opportunity

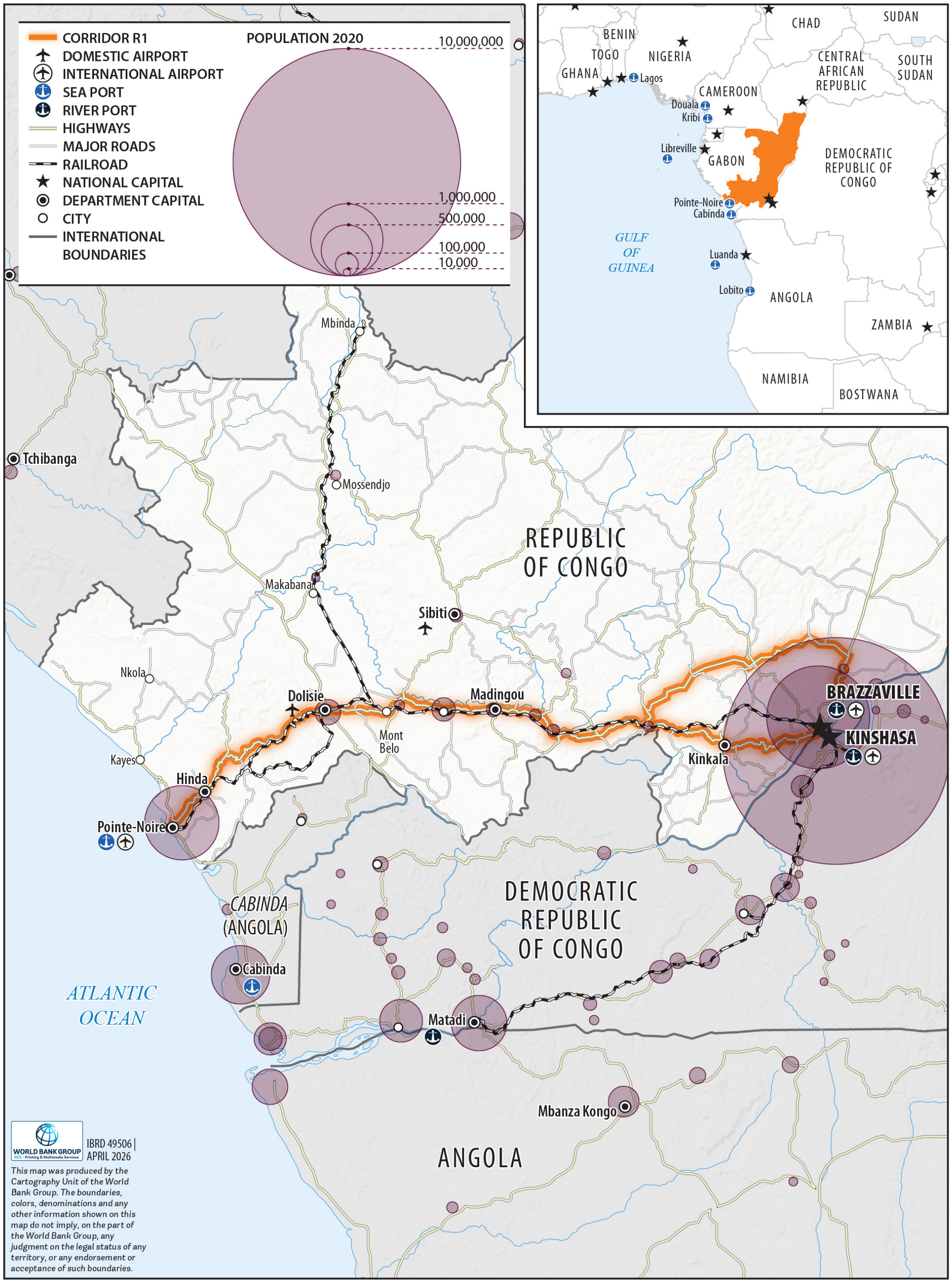
The Republic of Congo can be a competitive hub for trade with central Africa, given its deep seaport and shared borders with large neighbors. The deep-sea port of Pointe-Noire is just eight hours away from Kinshasa, whose population is quadruple that of the Republic of Congo. The port also serves as a feeder for regional ports with shallower drafts, such as Libreville (Gabon), Luanda (Angola), Douala (Cameroon), and river ports like Matadi (the Democratic Republic of Congo). In the World Bank's Logistics Performance Index, the Republic of Congo improved its ranking from 156th in 2014 to 88th in 2023, despite persistent operational and efficiency constraints (figure 4.2). Improvement was largely driven by gains in logistics competence. Between 2010 and 2024, the share of firms that perceived a lack of reliable transport as a major obstacle declined from 57 percent to 21 percent for Congolese manufacturing firms and 46 percent to 18 percent for service firms.[18] Since 2015, the Republic of Congo has strengthened its ability to be a gateway to larger central African markets thanks to its political stability and better quality of infrastructure vis-à-vis peers (World Bank 2015).

With the expansion of the port of Pointe-Noire, the warehousing market could double in size over the next decade, driven by rising trade volumes, including significant growth in the Republic of Congo's nonoil exports and transporting of imports into the Democratic Republic of Congo. In 2023, the Democratic Republic of Congo import volumes were nearly twice as large and as valuable as in 2013 (table 4.1; PwC 2022), partly due to improvements in the port of Pointe-Noire, either through transshipping into Matadi or through direct transit into the country. For the Republic of Congo, the last five years have recorded large increases in the value and volumes of nonoil exports—also on account of traffic through the port of Pointe-Noire—of 14.7 percent and 1.3 percent per year, respectively. If containers in transit double, along with the doubling of port capacity, the warehousing market could double in size over the next decade, given the latent demand for storage of commodities (such as timber, cement, and agricultural goods) and consumer products for distribution.[19] Growth in trade of perishable and time-sensitive goods—such as agricultural produce, frozen and fresh fish, and medical products—along the corridor presents potential opportunities for advanced logistics services. These goods require intensive support like cold storage, specialized warehousing, and container tracking. Reliable and fast delivery is essential to meet the needs of end consumers in Kinshasa and the Republic of Congo.

Container traffic and FDI in port and logistics activities have grown, but growth was concentrated in transshipment[20] activities that generate limited value for the Congolese economy, as they have few spillovers beyond the container terminal. Since 2010, container traffic into the Republic of Congo has expanded by 8.3 percent annually, faster than peers, regional, and global traffic (figure 4.3). Transportation and Warehousing attracted the largest share of FDI announcements in 2025,[21] with smaller investments in

Figure 4.1

Pointe-Noire port as a strategic location for regional trade and transshipments, especially into Kinshasa (Congo, Dem. Rep.), 2025

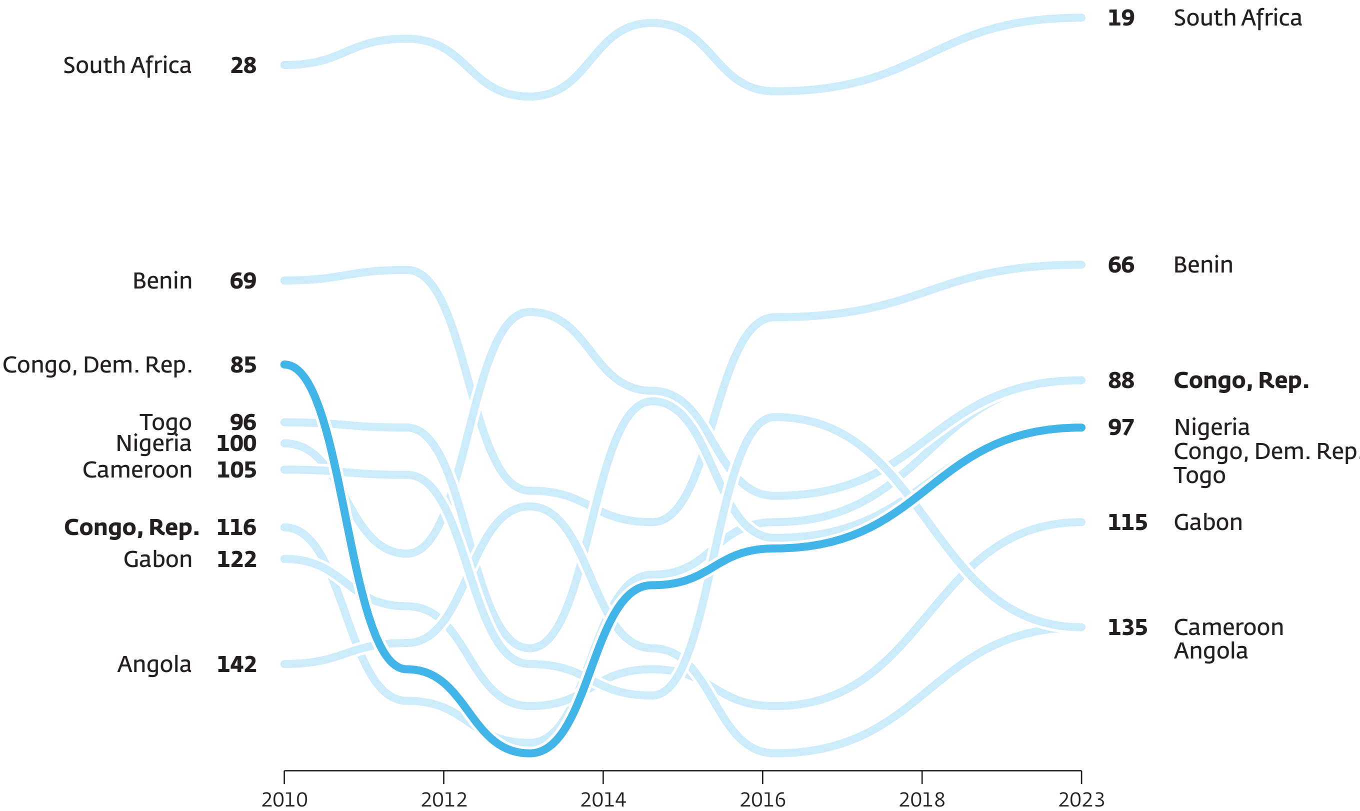


Source: World Bank Group Cartography Unit.

Figure 4.2

Congo, Rep. improved logistics performance since 2014, outperforming most regional peers

LPI rank, 2010–23



Source: Calculations based on World Bank LPI.
Note: LPI = Logistics Performance Index.

logistics consulting in Brazzaville and Pointe-Noire. Currently, the port of Pointe-Noire works with the five biggest global shipping companies, two of which are the parent companies of the current and future port terminals. Major port operations—such as container handling, oil storage, towing, bulk cargo, and scanning—are managed by a few large, predominantly foreign, operators under public-private partnerships. Recent investments have focused on expanding capacity at Congo Terminal and the new Eastern Dock (Môle Est), which will raise container capacity from 1 to 2.5 million 20-foot equivalent unit (TEU) by 2027. This will position Pointe-Noire as a leading logistics hub in Africa. Despite major capacity expansions, growth in the port of Pointe-Noire is mainly transshipment-driven: nearly 80 percent of containers arriving in Pointe-Noire are transshipped—half to the Democratic Republic of Congo via the port of Matadi, and the rest to Cameroon, Angola, Gabon, and China—while only 20 percent enter the Republic of Congo, mostly to cater

Table 4.1

Growing imports into Congo, Dem. Rep. are the most important source of demand for port activities in Pointe-Noire and logistics services in Congo, Rep.

Period	Average annual exports (US$, millions)	Average annual export volumes (tons, thousands)	Export value, 5Y CAGR (%)	Export volume, CAGR (%)	Average annual imports (US$, millions)	Average annual import volumes (tons, thousands	Import value, 5Y CAGR (%)	Import volume, CAGR (%)
Congo, Rep.								
1999–2003	0.65	0.42	...	...	849.9	873.9	...	...
2004–08	1.45	1.19	17.3	23.4	3,116.9	1,542.4	29.7	12.0
2009–13	2.81	0.39	14.1	−19.8	7,596.0	2,941.0	19.5	13.8
2014–18	1.75	0.50	−9.1	4.8	9,728.8	3,456.2	5.1	3.3
2019–23	3.47	0.53	14.7	1.3	3,972.1	2,459.3	−16.4	−6.6
Congo, Dem. Rep.								
1999–2003	2.02	1.19	...	...	627.5	979.3	...	...
2004–08	6.30	8.30	25.6	47.6	2,277.7	1,898.5	29.4	14.2
2009–13	23.78	30.61	30.4	29.8	4,242.0	2,700.5	13.2	7.3
2014–18	30.00	38.32	4.8	4.6	6,792.2	4,270.9	9.9	9.6
2019–23	31.75	44.09	1.1	2.8	10,128.9	6,654.7	8.3	9.3

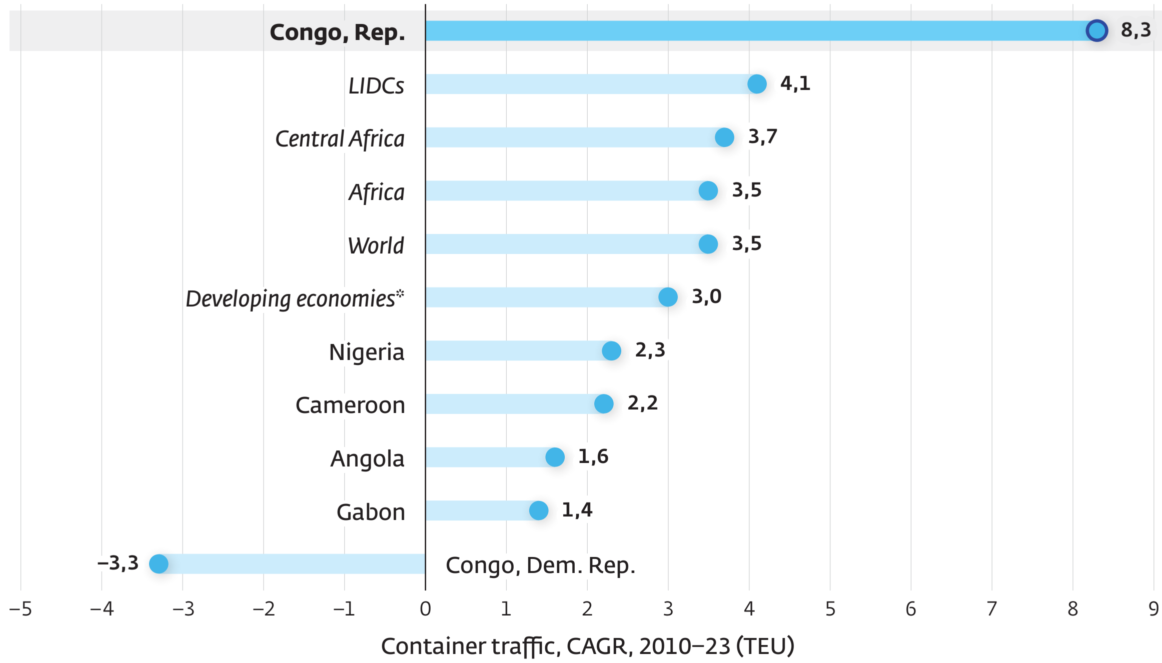
Source: BACI (2025), own calculations.
Note: CAGR = compound annual growth rate; Y = year. Calculations include only nonoil exports from Congo, Rep. and nonmineral exports from Congo, Dem. Rep. and excludes trade with Congo, Dem. Rep.'s eastern neighbors (Zambia, Uganda, Rwanda, Burundi, and South Sudan) that are likelier to use land borders than the port of Pointe-Noire. Minerals were excluded from the calculation for Congo, Dem. Rep. because these tend to use southern corridors for exports and do not present a short-term opportunity for the port of Pointe-Noire or logistics in Congo, Rep.

to domestic consumption. This model has not catalyzed investment in gateway logistics services such as storage, dry ports, and freight transport, limiting the port's potential to generate broader economic value for the Republic of Congo.

Gateway traffic from the port of Pointe-Noire presents potential for private investors to tap into underutilized port land in this fast-growing regional trade hub. Gateway container traffic in the Republic of Congo is small but has grown faster than transshipment: 9.6 percent per year between 2019 and 2024, compared to 1.1 percent per year in trans-

Figure 4.3

Congo, Rep. had the fastest growth in container traffic relative to peers, regional and global averages, since 2010



Source: Calculations based on UNCTAD data.
Note: CAGR = compound annual growth rate; TEU = 20-foot equivalent units.
*Excluding China.

shipment.[22] Transit activities remain dominated by small transport firms and warehouse operators, though large shipping companies are beginning to vertically integrate with local transporters to streamline operations. Most of the products transported out of the port of Pointe-Noire and along the corridor are minerals, vegetable oils, tobacco, cotton, and wood. Imports entering the port and the corridor are more diversified, with machinery, vehicles, and manufactured goods accounting for about half of the potential traffic (see appendix B).

The Pointe-Noire–Brazzaville corridor is emerging as a competitive logistics hub. Recent infrastructure upgrades, together with infrastructure challenges in competing corridors such as Matadi-Kinshasa, have boosted the corridor's competitiveness, creating opportunities for overland logistics into the Republic of Congo and the western region of the Democratic Republic of Congo. If the necessary reforms are undertaken, the corridor could capture import and export traffic currently handled by the Matadi-Kinshasa road and rail route. Although the total cost of moving a single TEU container between Pointe-Noire and Kinshasa via the Republic of Congo remains higher than the transshipment route through Matadi—due to river crossing fees and toll differences (see appendix C)—the cost per kilometer between the two routes is comparable. Moreover, the Pointe-Noire–Brazzaville road corridor could offer faster transit times if port efficiency improves.

Port logistics in the Pointe-Noire–Brazzaville corridor have untapped potential to generate employment and support broader economic diversification, which has not been realized by transshipment investment alone. The construction of warehousing and storage facilities can create jobs.[23] These and other occupations in the logistics sector, like drivers, packers, and carriers, are especially important for creating employment for low-skilled workers. Although long-term job creation in transport itself may not be as high as in other sectors, the logistics sector is a critical enabler for trade growth and value chain development. It also plays an important role in supporting the country's transition toward a more diversified and export-oriented economy.

Despite improvements in travel time and logistics reliability along the Pointe-Noire–Brazzaville corridor, high road toll costs and limited rail capacity constrain gateway traffic and logistics services. The country has made significant progress with the construction of a new route along the corridor, which has reduced travel time for large trucks from three days to just half a day and improved logistics through the rerouting of rail and air cargo.[24] However, road tolls are expensive compared to competing corridors: a 2-axel truck pays the equivalent of €320 to travel from Pointe-Noire to Brazzaville, 506 kilometers or €0.8 per kilometer,[25] while the Matadi-Kinshasa corridor costs up to the equivalent of €188 for 350 kilometers or €0.5 per kilometer (CCC 2024). Consultations with stakeholders currently managing the Pointe-Noire to Brazzaville corridor noted that high tolls are partly due to elevated road maintenance costs driven by challenging topography and low traffic volumes. Meanwhile, the state-owned railway (Chemin de Fer Congo-Océan; CFCO) operates only one train per day between Pointe-Noire and Brazzaville despite strong demand from cement, flour, and gas importers, as well as oil, minerals, and processed wood exporters. The operational problems of CFCO and the poor quality of rail infrastructure continue to limit the rail company's ability to scale up its transport offering and carry heavy cargo that can be too heavy for a road.

Despite paying a mandatory training levy, companies in the Republic of Congo face a shortage of appropriately skilled workers. Congolese companies are required to pay a mandatory training levy to the government—a portion of the unique wage tax (taux unique sur les salaires; TUS). Resources from the TUS are collected by the Congolese National Social Security Fund and are earmarked for employment and employability programs. In practice, however, TUS resources intended to be allocated to the National Employability and Apprenticeship Support Fund (Fond National de l'Appui à l'Employabilité et l'Apprentissage; FONEA) are frequently not being used for relevant and high-quality training. This limits FONEA's ability to provide timely training programs to companies. While this challenge affects all sectors, the logistics industry is particularly constrained due to its high demand for specialized skills.[26]

4.2 Constraints and Recommendations

Private investment in logistics services in the Pointe-Noire–Brazzaville corridor is discouraged by regulatory inefficiencies, high costs, delays, and operational bottlenecks that limit gateway transit and reduce competitiveness. Although the Pointe-Noire container terminal operates efficiently, logistical bottlenecks begin at the terminal gates. Businesses face delays and elevated costs due to customs procedures, excessive paperwork, and infrastructure gaps, which disrupt the smooth flow of goods into and through the country. According to the Conseil Congolais des Chargeurs (2024), customs procedures alone account for at least half of passage costs and 27 percent of delays, with additional delays caused by procedures to get permits (22 percent) and bank letters of credit[27] (18 percent). Fragmented processes, combined with unclear port property rights, overlapping roles between private operators and authorities, misalignment between urban planning and logistics needs, and limited workforce training, create steep costs and prolonged clearance times. Addressing these constraints through streamlined regulatory processes, capacity expansion, and improved operational efficiency is critical to unlocking the corridor's potential as a competitive regional trade gateway.[28]

CONSTRAINT 1. Misaligned operating hours between customs and port services increase costs and delays at the port of Pointe-Noire. Logistics companies report that customs operating hours are misaligned with the port's 24-hour operations. As stipulated by Decree No. 95-85 of April 1995, customs officials work from 7:00 a.m. to 2:00 p.m. Containers processed outside these hours incur an additional fee of XAF 35,000 (~€53) per file, with customs bureau chiefs remaining on-site until 6:00 p.m. to handle after-hours clearances. These operational mismatches reduce the efficiency of port logistics and increase the cost of doing business for transiters, transporters, and shipping companies (figure 4.4). Non-time-sensitive cargo, such as nonperishables, is particularly affected, often experiencing clearance delays as these shippers are less likely to pay for preferential processing. Moreover, if a customs declaration encounters issues that are not resolved before 1:00 p.m., clearance is postponed to the following day. In cases where containers must be opened or inspected, additional storage fees may be incurred.[29]

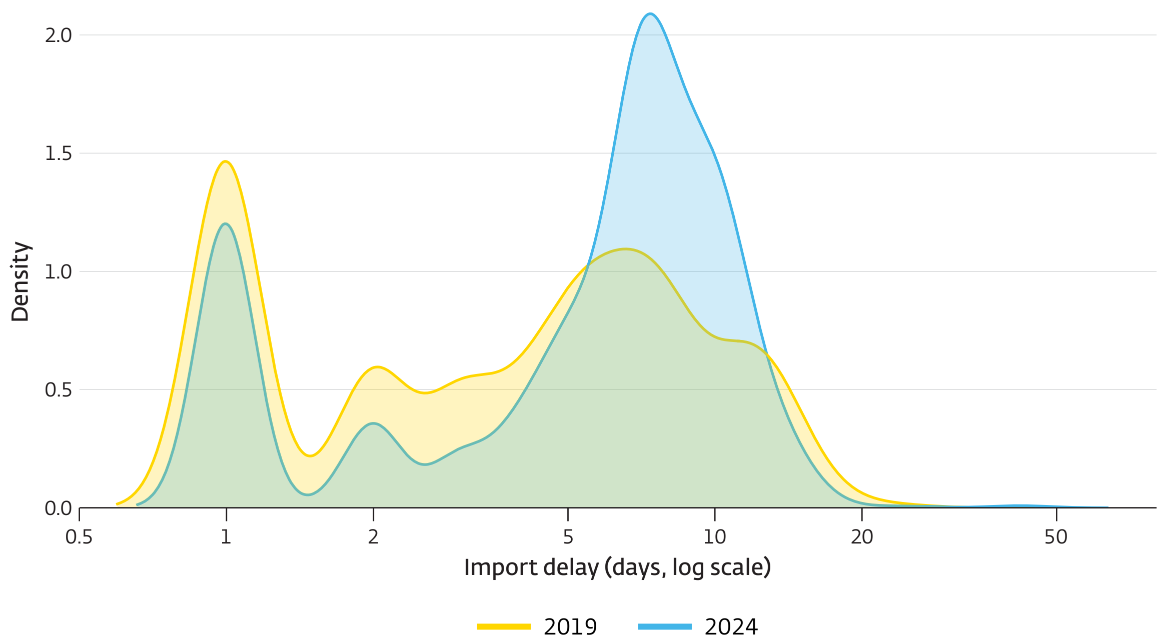
RECOMMENDATION 1. Require customs to operate in rolling eight-hour shifts during 24-hour periods year-round in the port of Pointe-Noire. Adding a special provision to the labor code (Law No. 45-1975 and Decree No. 84-1093 of 1984[30]) pertaining only to customs workers can enable continuous, shift-based operations aligned with port activity. This measure would smooth container flows, reduce congestion, and better align customs processes with terminal operations.

CONSTRAINT 2. Inefficient and non-risk-based inspection procedures lead to overcrowding inside ports. Logistics companies experience significant delays from additional

Figure 4.4

Customs waiting times for imports increased between 2019 and 2024

Distribution of import customs clearance time, by year



Source: Based on data from the Customs Directory, Ministry of Finance, Congo, Rep.

checks, scanning, physical container inspections, and customs audits inside the port. Most containers are first scanned by the private port operator working with the customs authority and then physically inspected by customs to detect undeclared or prohibited goods. Inspection procedures are not risk-based; they do not consider factors such as origin, type of goods, or importer compliance history. In contrast, more efficient ports scan only a subset of containers, with physical inspections limited to higher-risk containers. According to Congolese customs authority, capacity to implement such risk-based inspection systems is lacking at Pointe-Noire.

RECOMMENDATION 2. Implement risk-based inspection procedures to reduce unnecessary container scanning and physical inspections while maintaining cargo security. This reform can be done in collaboration between customs and maritime companies on risk prevention/inspections. Such companies already collect end-to-end data on containers and have the capacity to track containers during shipping and transit. Leveraging new scanning and data from operations and past inspections, the national customs of the Republic of Congo can work with the port to inspect only those containers with higher-value shipments or containers with a mismatch in reports.

CONSTRAINT 3. Overlapping procedures create costly inefficiencies in the import clearance process. Containers entering the country require multiple authorizations and many nonintegrated "single windows" (including the GUOT (Guichet Unique des Opérations de Transit; Single Window for Cross-Border Operations), eCTN, single exit/entry window, inspection clearance, eDouanes (precustoms), and the Automated System for Customs Data by the United Nations Conference on Trade and Development for customs operations), in addition to sector-specific requirements (such as phytosanitary requirements for agricultural imports). These fragmented procedures are especially burdensome for the de facto coordination of the Republic of Congo customs with the Democratic Republic of Congo as containers in transit are supposed to freely pass through port checks, but face scrutiny during passage.[31] For containers entering the Republic of Congo, processes with the institutions involved (i.e., Congolese Customs and Ministry of Trade) account for more than 60 percent of delays (CCC 2022).

RECOMMENDATION 3. Integrate clearance processes into a single customs platform with a unified fee that allows for filings and preprocessing before containers arrive at the port or customs offices. Consolidating the existing platforms associated with Congolese Customs—such as GUOT, eDouanes, inspection clearances, Electronic Cargo Tracking Note, and Automated System for Customs Data—into a single procedure and fee under the purview of Congolese Customs can ease container transit.

CONSTRAINT 4. There is limited availability of relevant training and skills in transport and logistics, even for lower-skilled occupations like driving and loading. Logistics companies need to provide practical training for their workers in areas like driving safety, truck loading, and cargo handling. Many operators raised concerns about the limited availability, timeliness, relevance, and quality of government-provided training programs. As a result, many firms both pay the training levy and provide their own training in critical areas such as driving safety, truck loading, cargo handling, and supply-chain management.

RECOMMENDATION 4. Allow the sector association to propose trainers and curriculum to FONEA to improve relevance of training to sector needs. This would promote more effective use of the mandatory training levy, improve delivery of training, and reduce the need for additional training expenditures by logistics firms.

CONSTRAINT 5. Toll pricing drives cost disparities between the Pointe-Noire–Brazzaville corridor and competing corridors, as full and empty trucks are charged the same rate. Toll costs are significantly higher in the Republic of Congo corridor. While these fees help fund road maintenance, the current structure—charging the same rate for full and empty trucks—increases costs for logistics companies, disconnected from the wear and tear on roads caused by transport. This is particularly problematic since most return traffic from Brazzaville consists of empty containers that pay the same toll as loaded trucks.

RECOMMENDATION 5. Update the RN-1 toll pricing structure to charge tolls as a function of truck axels and weight—up to the maximum weight allowed—to account for road wear and tear, through a formula that meets the cashflow contemplated in the concession with the concessionaire, La Congolaise des Routes. This change can substantially cut the cost of passage for logistics firms, as it makes the Pointe-Noire to Brazzaville corridor a more agile and efficient option for gateway containers transiting to Kinshasa, which usually return empty to the ports due to low exports. In addition, this pricing scheme would address the need of the concession operator to pay for maintenance from the wear and tear of heavier trucks. Given the availability of scales on all tolls in RN-1, price differentiation in the Congolese RN-1 is feasible.

RISKS TO BE MANAGED. There are risks to growth in port logistics services in the Pointe-Noire–Brazzaville corridor that could undermine its competitive position. The construction of a pipeline between Pointe-Noire and Brazzaville may reduce traffic from gasoline tankers, some of the road's biggest clients. These risks underscore the importance of reforms to boost traffic and demand for logistics services and to preserve and strengthen the corridor's comparative advantage relative to neighboring routes such as Luanda, Douala-Kribi, or Banana-Matadi.

4.3 Impact

Implemented, the proposed reforms could attract private investment in the port logistics sector, leveraging ongoing expansion of Pointe-Noire's container terminal, which is expected to increase handling capacity from 1 million to 2.5 million TEU per year by 2027. The reforms can help ease constraints on gateway container traffic, enabling the flow of at least 100,000 additional containers. With such increase in traffic, the reforms could attract at least US$70–200 million in private investment and create 2,000 to 6,000 jobs over the next five years (see appendix D). Further growth in nonmineral exports from the Republic of Congo and the Democratic Republic of Congo, combined with a shift from transshipments through Matadi to transit through the Republic of Congo corridors, could raise these figures even more.

New private investment in logistics on the Pointe-Noire to Brazzaville corridor can ease logistics costs for export-oriented sectors like processed wood at the SEZ in the port of Pointe-Noire—where newly processed materials can be readily available to ship to international markets. In addition, the development of the corridor can help agricultural prime land around the corridor, particularly around Dolisie, to access existing and future mills. Besides the development of commercial crops, the corridor can help connect aquaculture farms to the largest urban markets of the Republic of Congo along the RN-1 corridor, where most of the aquaculture produce is likely to be consumed.

4.4 Summary of Constraints and Recommendations

Table 4.2

Priority policy recommendations for increasing private investment in port logistics

Constraint	Recommended actions
1. Misaligned operating hours between customs and port services increase costs and delays at the port of Pointe-Noire.	1. Amend the labor code to allow customs staff at the port of Pointe-Noire to operate in rolling eight-hour shifts, ensuring 24-hour coverage aligned with port activities.
	Responsible government entities: Minister of Labor, Minister of Finance, Customs
2. Inefficient and non-risk-based inspection procedures lead to overcrowding inside ports.	2. Adopt risk-based inspection procedures at Pointe-Noire by integrating customs and maritime data systems to prioritize high-risk containers and streamline clearance.
	Responsible government entities: Customs, PAPN
3. Overlapping procedures create costly inefficiencies in the import clearance process.	3. Integrate clearance processes into a single unified customs platform, enabling prearrival filings and container preprocessing.
	Responsible government entities: Customs, GUOT, Ministry of Trade, PAPN
4. Availability of relevant training and skills in transport and logistics is limited, even for lower-skilled occupations like driving and loading.	4. Allow the sector association to propose a list of trainers and provide the curriculum to FONEA to organize the training.
	Responsible government entities: Ministry of Labor, FONEA, Congolese National Social Security Fund

(Table continues next page)

Table 4.2

Priority policy recommendations for increasing private investment in port logistics *(continued)*

Constraint	Recommended actions
5. Toll pricing drives cost disparities between the Pointe-Noire–Brazzaville corridor and competing corridors, as full and empty trucks are charged the same rate.	**5.** Update the RN-1 toll pricing structure to charge tolls as a function of both truck axels and weight—up to the maximum weight allowed—to account for road wear and tear, through a formula that meets the cashflow contemplated in the concession with La Congolaise des Routes
	Responsible government entities: Ministry of Public-Private Partnerships, Large Projects, Transport, Finance

Note: FONEA = Fond National de l'Appui à l'Employabilité et l'Apprentissage; National Employability and Apprenticeship Support Fund; GUOT = Guichet Unique des Opérations de Transit; Single Window for Cross-Border Operations; PAPN = Port Autonome de Pointe-Noire; RN = Route Nationale.

5 Maize Milling

AT A GLANCE

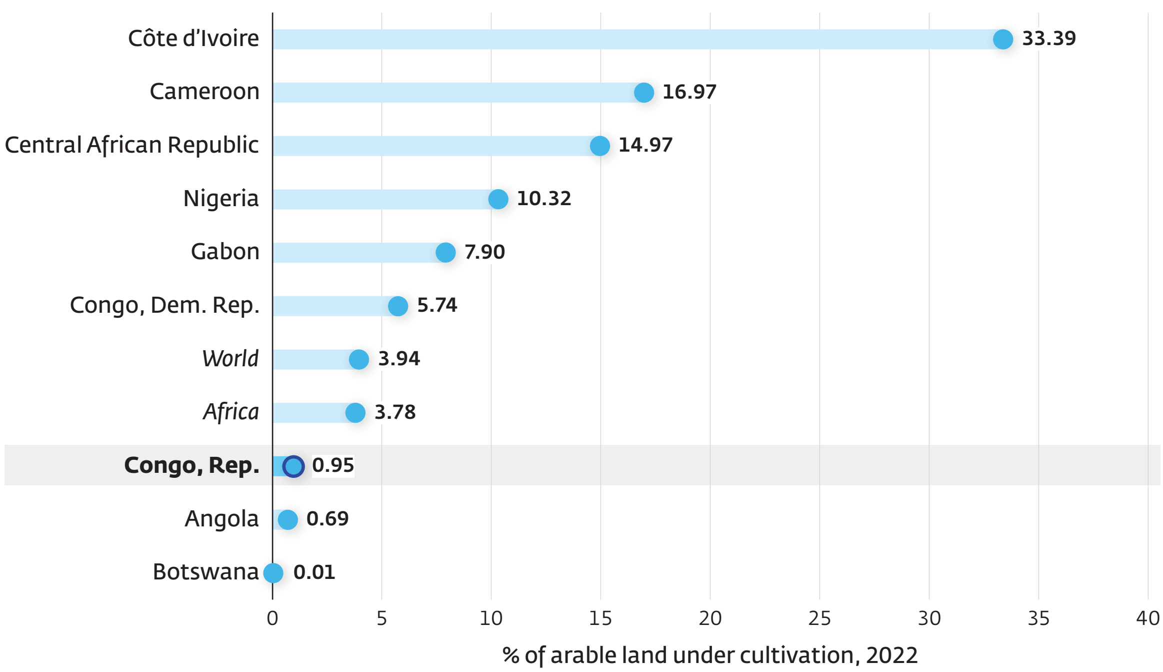
- Maize milling in the Republic of Congo can offer promising opportunities to private investors. The country has existing large-scale processing firms—mainly focused on other cereals—that possess adaptable technologies that could be expanded to maize milling operations, particularly to serve the brewery and animal feed industries.
- Private investors in maize milling encounter low domestic production volumes due to fragmented farming structures, high costs of imported machinery and inputs, and limited availability of land for industrial use.
- Reforms to remove impediments to private investment include creating a registry of smallholder farmers with the capacity to engage in contract farming; and adopting preclearance mechanisms for shipments of agricultural machinery and inputs to minimize discretionary action at the border and ensure the effective application of existing value added tax (VAT) and tariff exemptions at customs.
- The implementation of the recommendations could help attract potentially US$24–72 million in investment in mills, silos, and land preparation, and create 358 to 1,050 jobs over the next five years.

5.1 Sector Context and Potential Opportunity

The Republic of Congo has potential to attract significant private investment in the processing of maize. To realize this, constraints across the value chain must be addressed, starting with maize production. The country has significant underutilized arable land—about 10.6 million hectares near major cities—that could support expanded maize cultivation without increasing deforestation risks. According to the Food and Agriculture Organization of the United Nations, only 1.6 percent of the Republic of Congo's agricultural land was used for crop production in 2022—far below the African average of 3.8 percent, and well behind most peer countries that cultivate at least 5 percent of their arable (agricultural) land (figure 5.1). The success of the Niari valley in attracting large commercial farmers demonstrates that commercial agriculture can thrive in the Republic of Congo. Other regions—such as Plateaux, Cuvette, and Bouenza—also possess significant agricultural potential that remains largely unrealized. The country's soil can grow both yellow and white maize across different ecological zones, which could create an investment opportunity in the processing of products that use maize as a key input, such as animal feed and brewery industries.

Figure 5.1

Arable land in Congo, Rep. remains underutilized, compared with regional, peers, and aspirational comparators

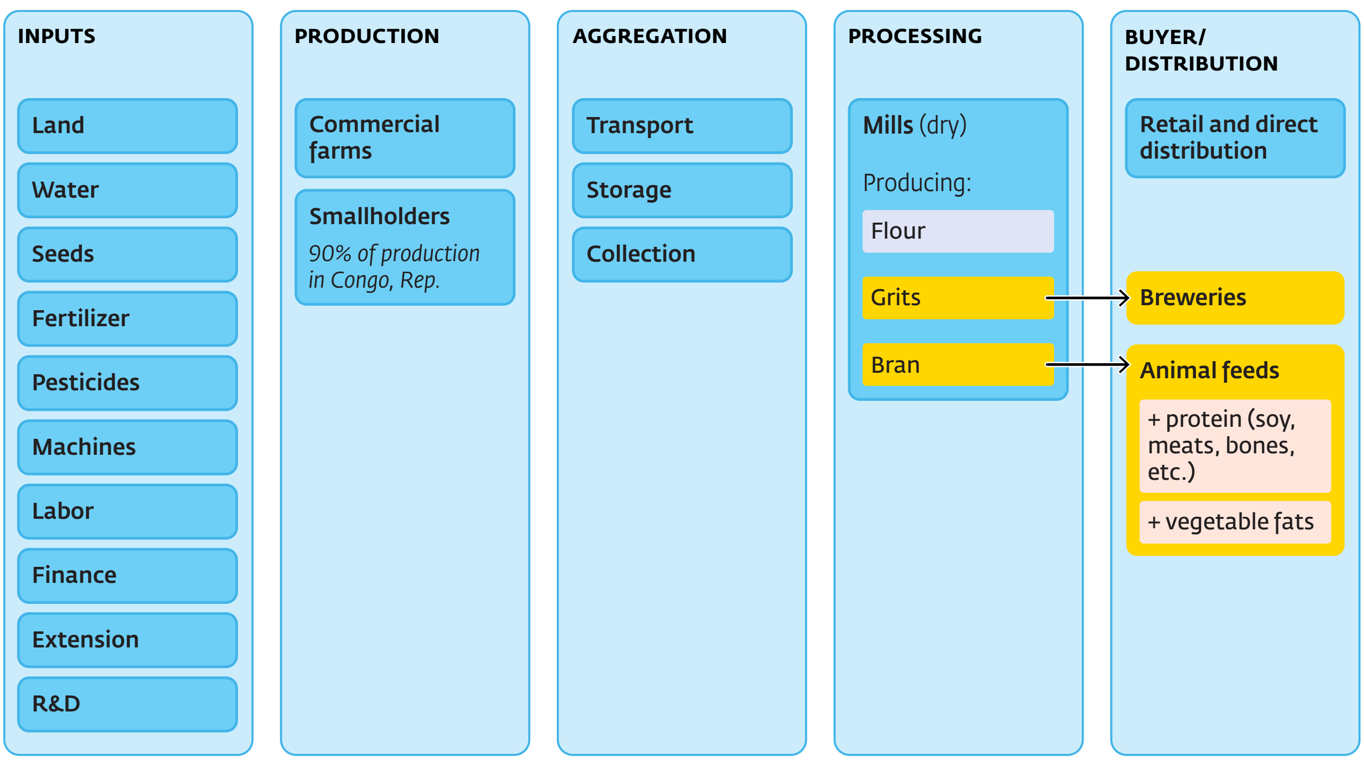


Source: FAOSTAT.

The Republic of Congo has potential to attract private investment in maize milling, particularly as an input into brewery and animal feed for both domestic and regional markets. Maize grits and bran—byproducts of maize milling—are essential inputs for breweries and animal feed industries. Maize processing companies rely on maize grain as the primary input for producing flour, grits, and bran. These processed outputs are inputs for local breweries and livestock feed manufacturers (figure 5.2).[32] The growth in beer production and the rising demand for animal feed—where yellow maize constitutes at least half of the total input—offers an opportunity for investment in local maize milling. Congolese beer production reached 335,000 tons in 2021, more than double the 2010 level,[33] while its imports of animal feed doubled: from US$1.2 million in 2017 to US$2.7 million in 2022. Currently, the Republic of Congo and its neighboring countries are all net importers of maize grits (corn meal), with the country importing US$25.5 million in 2023, from South Africa (67.0 percent), Türkiye (31.1 percent), and Namibia (1.9 percent). Imported maize accounts for 80 percent of total consumption.[34]

Figure 5.2

Maize milling (dry) for breweries and animal feed in Congo, Rep. has potential for commercially viable value-added production*



Source: Elaboration based on Daly et al. (2017).
Note: R&D = research and development.
*The value chain excludes wet mills for starch and ethanol production. The other inputs needed for animal feed come from AFIA (2025).

Industrial cereal milling in the Republic of Congo (mostly of wheat flour) is concentrated in a few firms located near the port of Pointe-Noire to minimize transport costs for imported inputs. More than 90 percent of maize grinding is handled by small, artisanal mills that operate at low efficiency and limited scale (FAO 2022). The Republic of Congo has four large and medium industrial cereal milling companies, including one that processes maize.[35] These firms are located within special regime zones in Pointe-Noire—such as industrial zones and the port area—which reduces transport costs for imported cereals. While the free-on-board cost of one ton of imported maize is lower in the Republic of Congo (US$225) than in peer countries such as in Cameroon (US$272), Gabon (US$432), the Democratic Republic of Congo (US$270), and Angola (US$321) in 2025.[36] World Bank analyses show that the domestic price of one ton of maize is nearly ten times higher than the free-on-board price. This disparity is primarily due to high domestic transport costs.[37] These elevated logistics costs are a key barrier to competitive maize milling and explain why domestic supply struggles to substitute for imports.

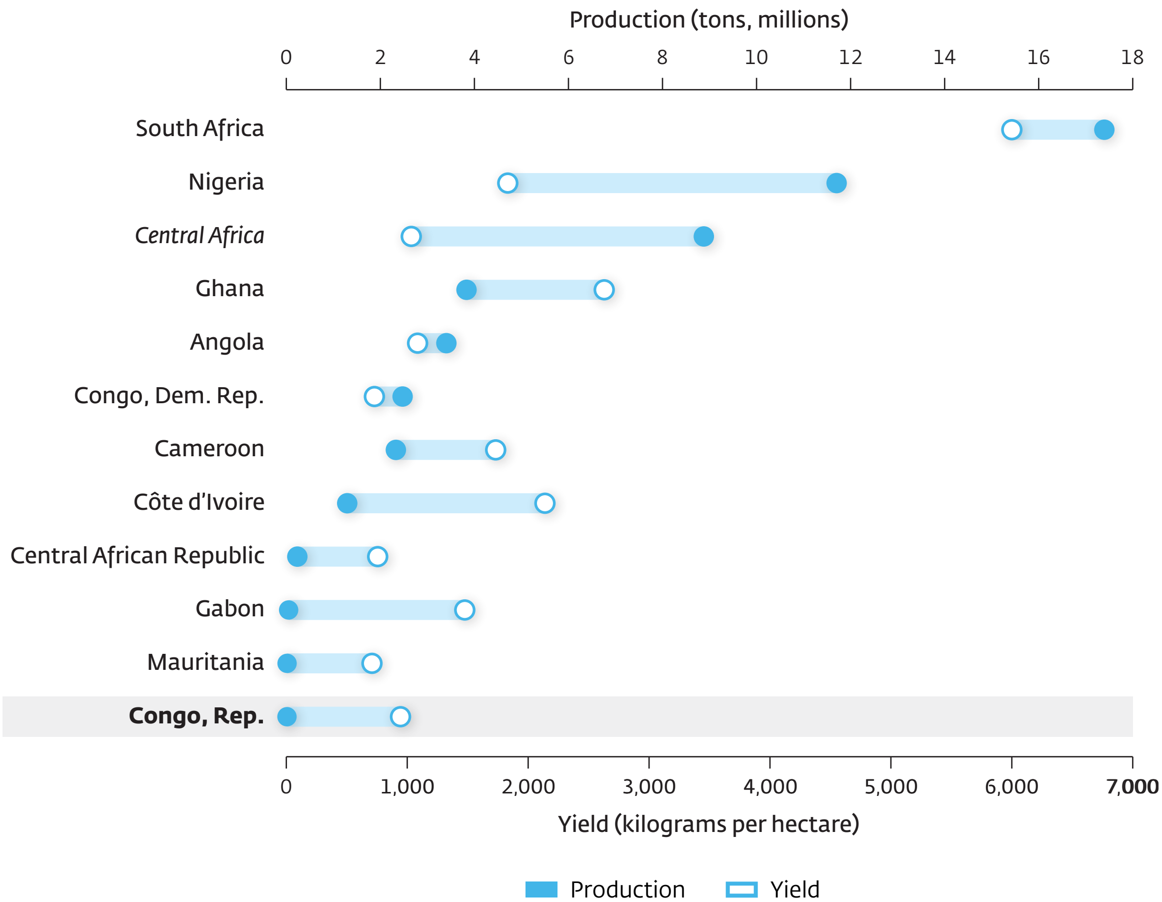
Maize production in the Republic of Congo is undertaken by three types of producers: smallholder farmers, a few large-scale commercial farms, and new "urban-to-rural" entrepreneurs. The country produced 13,000 tons of maize in 2022, with higher yields than the Democratic Republic of Congo (figure 5.3). Smallholders dominate the sector, cultivating approximately 95 percent of the land used for maize. However, due to low productivity, their share of total output is estimated at only 75–80 percent. Large commercial farms—mainly in Cuvette, Bouenza, and Pool—operate with better technical conditions, enabling them to produce a large share of production, especially in integrated value chains linked to poultry and industrial processing.[38] "Urban-to-rural" entrants—including professionals, civil servants, and young entrepreneurs—are drawn to agriculture by government encouragement and income diversification goals. While they may have greater financial resources, many lack agricultural experience, leading to early losses and frequent abandonment of farming activities.

Contract farming between maize processors and producers can help secure domestic maize supply for milling. Processors engage with farmer groups to identify producers who, with access to inputs and purchase agreements, can supply high-quality maize. A large milling company in Pointe-Noire has established aggregator contracts with domestic producers, resulting in an expansion of cultivated areas from 175 hectares in 2020 to nearly 2,000 hectares in 2025. The growing interest from breweries and animal feed manufacturers—who are willing to pay a premium for high-quality, locally sourced maize[39]—suggests commercial opportunities in maize milling. Agricultural cooperatives can serve as contracting entities in contract farming arrangements. Importantly, oversight of investment in the Republic of Congo should maintain strict long-term quality standards to ensure that maize varieties continue to meet industrial requirements and are fit for use in manufacturing.

Figure 5.3

Maize production and yields in Congo, Rep. remain below most of central Africa

Maize yields and annual production, Congo, Rep. vs. peers, 2023



Source: Based on FAOSTAT data.

The lack of a clearly defined cooperative registration process makes it difficult for producers to formalize entities that can support effective aggregation and mechanization. Contract farming schemes with smallholder farmers—who account for 90 percent of agricultural production—tend to be more effective when facilitated by an intermediary, such as a cooperative, as observed in Senegal in maize and Zambia in cotton (World Bank 2014).[40] These cooperatives engage directly with processors and provide the machinery that would otherwise be unaffordable for individual small-scale farmers. However, the Republic of Congo has not fully implemented the formalization and registration process with the state, under the Organisation pour l'Harmonisation en Afrique du Droit des Affaires (OHADA) framework. Cameroon and Côte d'Ivoire—also OHADA members[41]—have introduced agriculture-specific secondary cooperative legislation and formalized registration processes that decrease the de facto costs of formalization and allowed for the development of competitive value chains with contract schemes.

Finally, responsible land governance remains a major barrier to attracting private investment to commercial agriculture in the Republic of Congo. Some large-scale agriculture projects in the country have faced delays or legal disputes due to overlapping land claims with local communities, including customary and ancestral land right claims. For example, foreign investors in maize in the Niari valley grabbled with land conflicts with local communities on land allocated by the national government (Augustine et al. 2018).[42] Such disputes can severely undermine project timelines, increase costs, and damage investor-community relations. Many of the constraints that apply to contract farming in the maize value chain also apply to commercial farming in the Republic of Congo.

5.2 Constraints and Recommendations

Private investment in maize milling is discouraged by an unreliable supply of local maize, limited access to industrial land, and the high cost of imported inputs. Potential investment in maize milling for breweries and animal feed is hindered by weak linkages with domestic maize producers, low and inconsistent yields, and limited infrastructure to support aggregation and scale.

CONSTRAINT 1. Maize aggregation in the Republic of Congo is hindered by the absence of formalized cooperatives to facilitate contract farming with maize processors. The absence of a clear, operational system for registering cooperatives under the OHADA framework prevents producer groups from formally organizing and contracting with buyers. Without legally recognized cooperatives, processors cannot establish scalable contract farming schemes, and producers cannot pool land, access mechanization, or guarantee the volumes and quality required by industrial maize processors. Informality in cooperatives and contracting arrangements can also undermine maize quality and limit its commercial potential.

RECOMMENDATION 1. Operationalize the OHADA cooperative framework using simplified, agriculture-specific registration procedures that allow producer groups to formalize, access finance, and contract with milling investors. Despite the existence of a legal framework, the absence of practical procedures for formalization and guidance on registration has prevented cooperatives from formalizing. The government should adopt and publish simplified registration steps and ensure that formalization is feasible outside of Brazzaville and Pointe-Noire. Improved awareness and user-friendly processes would unlock the benefits of OHADA—allowing maize growers and their associations to reliably enter contract farming schemes with milling investors, formalize, gain access to finance, and acquire machinery.

CONSTRAINT 2. Farmers experience land-tenure conflicts with local communities that discourage long-term investment in commercial farming. Tenure conflicts on land allocated to investors by the Congolese government, without on-the-ground knowledge of communal ownership and use, create legal uncertainty and discourage both domestic and foreign investors from committing to maize farming and processing (IMF 2023). A recent dispute in the Niari valley between foreign maize producers and the local communities was triggered by a lack of information on customary tenure. The investors faced difficulties in increasing production because their concessions overlapped with sacred territories for local communities, who can block projects according to Congolese land law.

RECOMMENDATION 2. Develop a publicly accessible digital map of priority agricultural zones identifying customary and community land claims to reduce land-tenure uncertainty during investor negotiations. Customary land rights in the Republic of Congo often overlap with informal claims and government-issued land leases. Preinvestment land assessments by the Ministry of Agriculture, Livestock and Fisheries (MALF) should clearly demarcate areas of cultural, social, or subsistence importance to local communities, while ensuring compliance with Congolese legislation (notably Law No. 21-2018 to minimize land conflicts). Clarifying property boundaries and land classification early in the investment process—before leasing—is essential to granting investors a license to operate. This will reduce reputational and operational risks, while making land-based investments more attractive to responsible investors.

CONSTRAINT 3. There is inconsistent application of duty exemptions on machinery, seeds, fertilizer, and other inputs for maize processing. VAT and customs exemptions are officially granted for agricultural machinery, seeds, fertilizers, and processing equipment under Congolese law.[43] The Ministry of Finance issues exemption letters to eligible importers, but customs officials often do not honor them—citing the need for separate authorization from the Directorate General of Customs. This secondary authorization is not legally required, as the exemptions are already recognized. This erroneous application of the law leads to delays, discretionary charges, and legal uncertainty for private investors.

RECOMMENDATION 3. Allow preclearance of agricultural shipments eligible for VAT exemptions. To better operationalize existing import duty exemptions on agricultural inputs, seeds, machinery, and processing materials, preclearance of shipments containing these products should be permitted before their arrival in Pointe-Noire to ensure the application of tax-free importation and fast-tracked passage.

CONSTRAINT 4. Obtaining industry-ready land for maize mills, with adequate access to the power grid and roads, is difficult. Consultations noted that industry-ready plots (with access to utilities) for agribusiness facilities in cities or in periurban areas often fall under special areas known as protected agricultural zones (zones agricoles protégées; ZAPs). Investors from outside ZAPs are not allowed to own or lease land inside ZAPs, as these areas are meant to benefit smallholder farmers, avoid land grabbing, and are located on public lands.

RECOMMENDATION 4. Update ZAP legislation (Arrêté #517) to allow maize mills and other processing infrastructure to operate within ZAPs. The MALF should allow processing companies processing grains to locate within ZAPs under leases. This can provide a demonstration effect for other suitable crops by showing how agribusiness processing facilities can colocate and purchase produce from contracted smallholder farmers. For this, the MALF should amend the Arrêté No. 517 of February 24, 2022, which created the ZAPs.[44]

5.3 Impact

The reforms can help ease constraints on making domestic maize supply available and add predictability to the availability of land used by investors. The reforms can contribute to US$24–73 million in private investment in one to three new mills with a capacity of 50,000 tons per year, silos, and land preparation, and create 400 to 1,100 direct and indirect jobs over the next five years (see appendix C).

5.4 Summary of Constraints and Recommendations

Table 5.1

Priority policy recommendations for increasing private investment in maize milling

Constraint	Recommended actions
1. Maize aggregation in Congo, Rep. is hindered by the absence of formalized cooperatives to facilitate contract farming schemes with investors in maize processing.	1. Operationalize the OHADA cooperative framework using simplified, agriculture-specific registration procedures that allow producer groups to formalize, access finance, and contract with milling investors.
	Responsible government entities: Ministry of Agriculture, Livestock and Fisheries; Ministry of Justice and Human Rights
2. Farmers experience land-tenure conflicts with local communities that discourage long-term investment in commercial farming.	2. Develop a publicly accessible digital map of priority agricultural zones, identifying customary and community land claims to reduce land-tenure uncertainty during investor negotiations.
	Responsible government entities: Ministry of Agriculture, Livestock and Fisheries
3. Inconsistent application of duty exemptions on machinery, seeds, fertilizer, and other agricultural inputs for maize processing imposes high hidden import costs on maize producers.	3. Establish a formal preclearance procedure for agricultural shipments eligible for VAT exemptions to allow for simplified customs clearance procedures.
	Responsible government entities: Ministry of Agriculture, Livestock and Fisheries; Ministry of Finance
4. Obtaining industry-ready land for maize mills, with adequate access to the power grid and roads, is difficult.	4. Update ZAP legislation (Arrêté No. 517) to allow maize mills and other processing infrastructure to operate within the zones.
	Responsible government entities: Ministry of Agriculture, Livestock and Fisheries

Note: OHADA = Organisation pour l'Harmonisation en Afrique du Droit des Affaires; VAT = value added tax; ZAP = zones agricoles protégées; protected agricultural zones.

6 Aquaculture

AT A GLANCE

- The Republic of Congo consumes more fish per capita than the regional and global average and has a large amount of land with water access available to establish aquaculture farms.
- The sector remains incipient and largely informal. The lack of clear and predictable policy guardrails creates risks that discourage potential investors.
- To remove the barriers to private investment in the sector, government should revamp phytosanitary oversight for the sector and facilitate investor access to technical skills needed in farms.
- Implementation of the recommendations could contribute to the catalyzation of US$5–16 million in private investment in farms, and the creation of between 1,100 and 3,500 jobs over the next five years.

6.1 Sector Context and Potential Opportunity

Aquaculture has potential for profitable private investment in the Republic of Congo, underpinned by abundant inland water resources, a favorable climate, and strong domestic and regional demand for fish. The country's ecological, climatic, and hydrological characteristics suggest a comparative advantage for farming tilapia and catfish—species that are highly marketable and adaptable to both traditional and innovative, sustainable farming techniques—particularly those leveraging groundwater resources. Land and water access is relatively open for local farmers, enabling the deployment of aquaculture farms across the country's vast agricultural zones. With the agroecological advantages, aquaculture can help meet the needs of both the domestic and regional markets.

The Republic of Congo consumes more than 160,000 tons of fish per year, most of which is imported and frozen. Per capita fish consumption in the Republic of Congo is 25.5 kilograms—well above the global average of 20.7 kilograms. Growth in fish demand is associated with changing dietary preferences for animal protein.[45] Annual demand is estimated at about 163,000 tons. Domestic production currently comprises 60,000 tons from capture fisheries and 2,000 tons from aquaculture. This leaves a supply gap of nearly 100,000 tons, which is currently met through imports—primarily frozen fish from China, India, Oman, and Malaysia—requiring comprehensive cold storage logistics.[46]

Aquaculture in the Republic of Congo is dominated by tilapia (82.5 percent) and African catfish (17.4 percent). According to the MALF, production of these species increased significantly, from 230 tons in 2014 to 1,962 tons in 2024. Farm-gate prices are driven by strong demand for fresh fish from urban households and restaurants. While supermarkets have shown interest in frozen fish, the inadequate cold-chain infrastructure is a constraint to serving this market.[47] There is also a potential market in neighboring countries such as the Democratic Republic of Congo, a net importer of tilapia and catfish. Since 2018, the Democratic Republic of Congo imports of fresh catfish and tilapia have grown by an annual average of 33.7 percent and 11.6 percent, respectively.

Aquaculture in the Republic of Congo is largely small-scale, but is expanding rapidly, with significant potential for modernization and increased private investment. According to MALF, farm installations have more than tripled since 2020, averaging 71 new farms per year from 2020 to 2023, compared to 23 annually before 2019. Growth is supported by low agricultural taxation and low import duties for inputs. While early development was donor-led, there has been a shift toward commercialization and localized capacity building. As of 2023, there were 1,083 aquaculture farms nationwide, with 818 located in rural areas. 77.9 percent of farms are owned by individuals, while 22 percent are operated by producer groups. Women represent nearly a quarter of aquaculture producers.[48]

Most aquaculture farms in the Republic of Congo are split between extensive artisanal earthen ponds (53.4 percent) and intensive commercial basins (46.6 percent), both of which have low yields—typically under 1 ton per hectare per year. Of these, commercial basins have the greatest potential to increase yields. A growing number of large producers are adopting modern, high-efficiency systems such as recirculating aquaculture systems, above-ground tank systems, and integrated models that combine aquaculture with agro-tourism. Market opportunities include feed production, farm modernization, and postharvest processing.

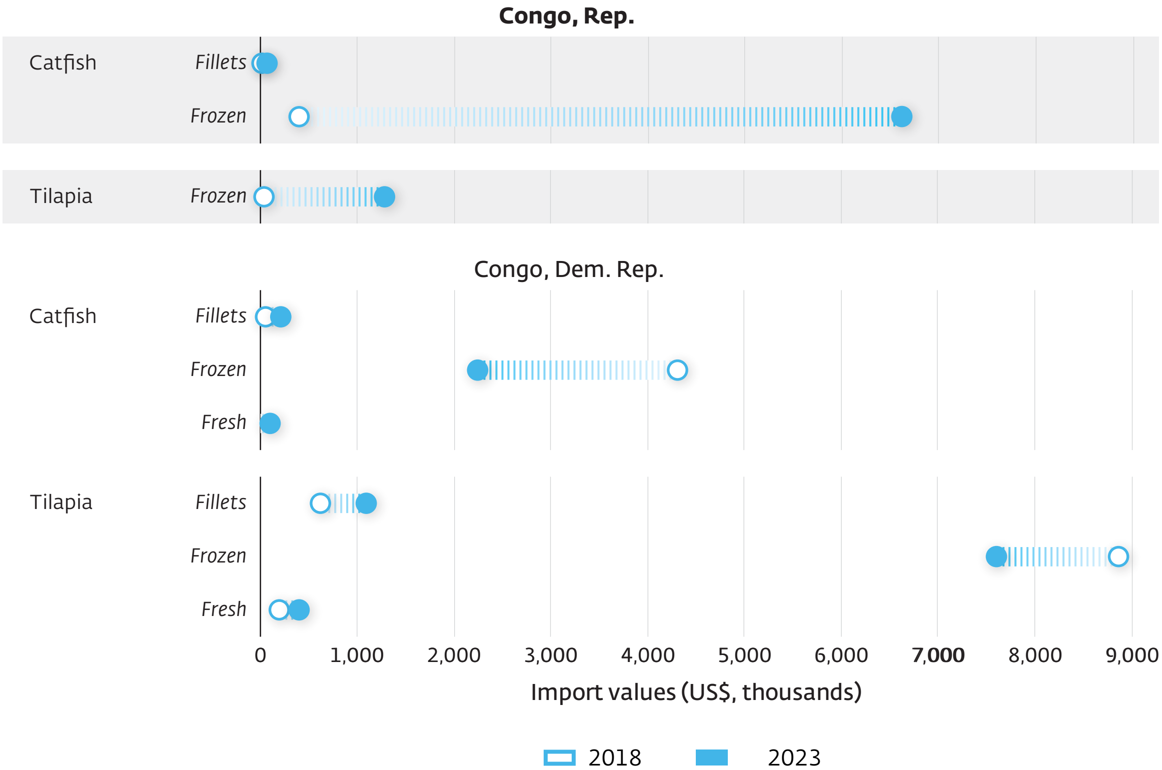
Unlocking aquaculture's profit potential requires a transition from small-scale artisanal units to professional, commercially oriented models—some of which already exist in the Republic of Congo. Regional good practices—such as company-led systems, clustered cage tilapia, and integrated high-efficiency aquaculture—demonstrate the possibility for dramatic gains, with medium-scale systems achieving up to 283 tons annually and 4,500 percent higher profitability compared to small farms.[49] However, widespread adoption is constrained by systemic barriers, including poor seed and feed quality, limited technical capacity, and weak postharvest infrastructure. Many large-scale investors—primarily domestic—are new to the sector and often lack the technical expertise required to design and manage commercially viable operations. Nonetheless, these investors typically have access to capital, land, and modern technologies such as incubators, recirculating aquaculture systems, and temperature-controlled plastic tanks. They also benefit from established links to domestic buyers and supermarkets.

Aquaculture in the Republic of Congo faces long-term development challenges like those affecting other rural sectors. Access to short-term finance tailored to the sector's needs remains limited and costly—particularly for small farms. Critical infrastructure is lacking: poor road conditions and the absence of storage facilities hinder transport between production zones and major markets, while electricity access remains unreliable. As noted in chapter 3, improvements in efficiency and competitiveness in the Pointe-Noire to Brazzaville corridor can help fresh fish from aquaculture farms reach cities in a faster and more reliable way. The sector also suffers from a shortage of skilled professionals, including aquaculture technicians, farm managers, and hatchery specialists. Firms frequently import expertise from countries such as Burkina Faso, Senegal, and Chad. This can exacerbate disparities and grievances, particularly among rural and youth populations.

Figure 6.1

Since 2018, imports of catfish and tilapia into Congo, Rep. have increased sharply, especially in fillets and frozen form

Catfish and tilapia imports, Congo, Rep. and Congo, Dem. Rep.



Source: Calculations based on BACI data.

6.2 Constraints and Recommendations

CONSTRAINT 1. The Republic of Congo has a fragmented sanitary and biosecurity governance framework for commercial aquaculture. Aquaculture in the country operates without a coherent commercial aquaculture framework, clear licensing rules, or robust sanitary and biosecurity oversight, which raises risk for medium- and large-scale investors.[50] Currently, Decree No. 2003-178 of August 2003 assigns multiple responsibilities to the MALF's Fisheries Directorate, which is in charge of aquaculture development. In addition to food safety risks for consumers, weak governance increases the likelihood of losses for producers and creates additional risk mitigation costs for investors.

RECOMMENDATION 1A. Create a streamlined commercial aquaculture regime with a single competent authority and basic biosecurity rules. Phytosanitary and biosecurity responsibilities should be reassigned to a separate department within the MALF dedicated to oversight and risk mitigation, in coordination with investors and farmer associations.

RECOMMENDATION 1B. Adopt basic biosecurity rules for the aquaculture sector. The streamlined regime should adopt basic biosecurity rules that provide investors with confidence around biosecurity and sanitary risks for new farms or technologies for existing farms. One possibility to create such framework is allowing for a practice-based certifications, like the one used in Viet Nam through the VietGAP. The program is based on simple management plans on the farm practices approved ex ante and reviewed regularly rather than based on documentation and certification.[51]

CONSTRAINT 2. Inconsistent enforcement of existing import VAT exemption make access to quality seeds, feed, and inputs unpredictable. In a context like the Republic of Congo, where markets for quality seed, feed, and technical services are underdeveloped, the cost of feed and machinery imports can affect profitability.

RECOMMENDATION 2. Publish the concrete list of aquaculture-specific inputs that qualify for the existing VAT exemption for agricultural projects, by the Harmonized System (HS) of codes. This list can be developed by sector experts, private hatcheries, feed suppliers, and agricultural service providers to establish an up-to-date list of the products needed for aquaculture farms. This list should include seeds, protein and broodstock needed for tilapia and catfish farms and include recent innovations in inputs for the sector, like lower-cost insect-based feed produced in Kenya and Ghana.

CONSTRAINT 3. There is uncertainty on private investor participation in ZAPs to build postharvest facilities and cold storage. In the Republic of Congo, aquaculture farmers face high postharvest losses due to inadequate cold-chain and market infrastructure undermine commercial-scale aquaculture. Fresh tilapia and catfish value chains require infrastructure for cold-chain and packing to enable the produce to reach markets in Brazzaville and Pointe-Noire. ZAPs can offer some of the enabling conditions for private investors to deploy these facilities, but the law is unclear on their participation.

RECOMMENDATION 3. Clarify that private investment in cold-chain and market infrastructure is permitted in selected ZAPs. In ZAPs with an aquaculture vocation, the MALF should allow private investors to build, own, and operate ice plants, cold rooms, and aggregation facilities.

6.3 Impact

The proposed reforms could catalyze private investment in aquaculture of fresh tilapia and catfish by easing constraints on the cost of inputs and feed, potentially leading to US$5–16 million in private investment in farms and 1,200–3,600 jobs direct and indirect jobs over the next five years (see appendix D).

6.4 Summary of Constraints and Recommendations

Table 6.1

Priority policy recommendations for increasing private investment in aquaculture

Constraint	Recommended actions
1. Congo, Rep. has a fragmented sanitary and biosecurity governance framework for commercial aquaculture.	1. Create a streamlined commercial aquaculture regime with a single competent authority and basic biosecurity rules.
	Responsible government entities: Ministry of Agriculture, Livestock and Fisheries
2. Ambiguity in import VAT exemption enforcement make access to quality seeds, feed and inputs difficult and expensive for investors.	2. Publish a transparent list of the relevant aquaculture-specific inputs that qualify for the existing VAT exemption for agricultural projects, by HS codes.
	Responsible government entities: Ministry of Agriculture, Livestock and Fisheries; Ministry of Finance; Customs Authority
3. There is uncertainty on private investor participation in ZAPs to build postharvest facilities and cold storage.	3. Clarify that private investment in cold-chain and market infrastructure is permitted in selected ZAPs.
	Responsible government entities: Ministry of Agriculture, Livestock and Fisheries

Note: HS = Harmonized System. VAT = value added tax; ZAP = zones agricoles protégées; protected agricultural zones.

Appendixes

Table A.1

Draft crosswalk: wood species and wood products, given suitability for secondary and tertiary processing

Processing	HS 92 6-digit code	Product description	Wood species in Congo, Rep. and Congo Basin
First processing	440721 440722 440723 440791 440792 440799	Lumber, meranti Lumber, other Lumber, baboen, mahogany, etc. Lumber, oak Lumber, beech Lumber, nonconiferous, nes	Afina, angueuk, azobe, bahia, bodioa, chitola, clear bump, dabema, edipmbazoa, essia, eveuss, eyong, eyoum, frake, iroko, kanda, kosipo, lati s, limbali, manilkara, movingui, mubala, mukulungu, niove, ohia/diana, okan river, okoume, olene, olon, padouk s, payo, red longhi, safoukala, sappeli, sipo, tali, tiama, wamba, wenge
Second processing	440820 440890	Ply sheet, tropical, <6mm Ply sheet, not coniferous <6mm	Aiele, ayous, bahia, cheesemonger, chitola, emien, essessang, eyong, frake, ilomba, okoume, safoukala
	440920	Shaped nonconiferous wood	Afina, angueuk, azobe, bahia, bodioa, chitola, clear bump, dabema, edipmbazoa, essia, eveuss, eyong, eyoum, frake, iroko, kanda, kosipo, lati s, limbali, manilkara, movingui, mubala, mukulungu, niove, ohia/diana, okan river, okoume, olene, olon, padouk s, payo, red longhi, safoukala, sappeli, sipo, tali, tiama, wamba, wenge
	441211 441212 441219 441221 441229 441299	Plywood, tropical <6mm Plywood, nonconiferous <6mm Plywood, softwood <6mm Panels, nonconiferous and particle board Panels, nonconiferous, nes Panels, laminated wood, nes	Aiele, ayous, bahia, cheesemonger, chitola, emien, essessang, eyong, frake, ilomba, okoume, safoukala
Third processing	441810 441820 441830 441840 441850 441890	Wood windows Wood doors, frames Wood panels, tiles Wood shuttering Wood singles Wood carpentry, nes	Aiele, ayous, azobe, cheesemonger, chitola, clear bump, dabema, edipmbazoa, frake, ilomba, iroko, kosipo, lati s, limbali, movingui, mukulungu, niove, ohia/diana, okan river, okoume, padouk s, safoukala, sappeli, sipo, tali, tiama, wamba, wenge
	460110 460120 460191 460199 460210 460290	Plaits Vegetable plaiting mats Plaited vegetable articles, not mats Nonvegetable plaiting products Wickerwork, vegetable Wickerwork, nonvegetable	Aiele, ayous, chitola, frake, ilomba

Source: Based on Food and Agriculture Organization of the United Nations and International Tropical Timber Organization information on wood characteristics.
Note: HS = Harmonized System; mm = millimeters; nes = not elsewhere specified.

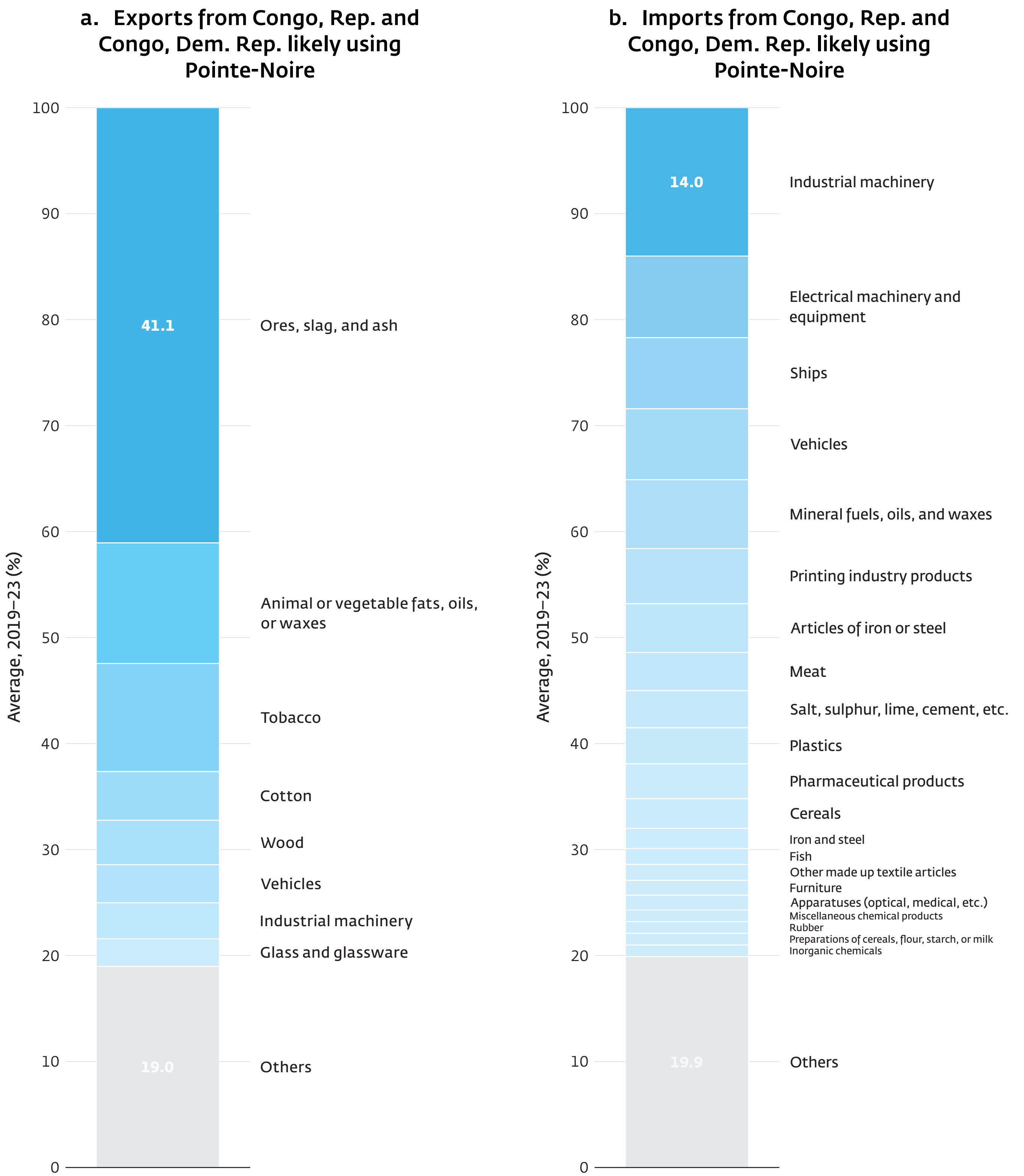
Appendix B

Types of Goods Transported in the Pointe-Noire to Brazzaville/Kinshasa Corridor

The analysis in this appendix estimates what are the types of goods that use the corridor between the port of Pointe-Noire and Brazzaville/Kinshasa. The analysis uses BACI data, filtered to account which trade likely happens on this corridor. The calculation includes only nonoil exports from the Republic of Congo and nonmineral exports from the Democratic Republic of Congo and excludes trade with the Democratic Republic of Congo's eastern neighbors (Zambia, Uganda, Rwanda, Burundi, and South Sudan) that are likelier to use land borders than the port of Pointe-Noire for trade. Minerals were excluded from the calculation for the Democratic Republic of Congo because these tend to use southern corridors for exports and do not pose an immediate short-term opportunity for the port of Pointe-Noire or logistics in the Republic of Congo.

Figure B.1

Distribution of imports and exports in Congo, Dem. Rep. and Congo, Rep. likely transported on the Pointe-Noire to Brazzaville corridor



Source: Calculations based on BACI data and CCC (2022; 2023; 2024).

Appendix C

Modeling Cost of Passage through the Port of Pointe-Noire

Table C.1 presents different components of the cost of port and logistics passage for a single 20-foot container arriving at the port of Pointe-Noire from a non-CEMAC country. The analysis assumes the container weighs 15 tons and holds a value of US$10,000 in nonagricultural, chemical, or mining products. The products in the container are not exempt from tariffs and pay the maximum fees for a 20-foot container, but not the additional fees associated with sanitary and phytosanitary inspections. In addition, the analysis assumes no delays, no payment of extra-legal times of work, and no penalties to customs. The breakdown shows that customs fees account for at least half of all passage costs—including road tolls.

Following a similar approach, table C.2 compares the cost of passage for a 20-foot container arriving at the port of Pointe-Noire and transiting through the overland corridor to cross the Congo River into Kinshasa, with that of a container transshipping through Matadi before being transported by truck to Kinshasa. Assuming a similar transport fee (in US dollars), and assuming the container does not clear customs in the Republic of Congo, there is a modeled difference of US$1,000 per container, where Matadi remains a cheaper option. The differences in fees come from the barge costs crossing the Congo River and the cost of tolls. Note: port fees may differ marginally, but the level of granularity available is better for the port of Pointe-Noire—and these are not fully comparable given the differences in quality across ports.

Table C.1

Landing bill for a 1 TEU container in the port of Pointe-Noire and gateway transit into Brazzaville

Benefits	**Type**	**Explanations** (details of invoicing)	**Pointe-Noire–Brazzaville** (XAF)	**Pointe-Noire–Brazzaville** (US$)
Port passage (Pointe-Noire)	Port discharge	Charged by ATL handler - Congo Terminal	720,405	1,270
		Handling:	160,000	282
		Berthing window	10,000	18
		Tracking (CT)	3,600	6
		Dockside stay (PAPN)	3,421	6
		Stay in the harbor (PAPN)	912	2
		Towing (PAPN)	8,324	15
		Trailer supply (PAPN)	148	0
		Stevedoring (loading/unloading) (CT)	330,000	582
		Unloading - removal from terminal (CT)	120,000	212
		Printed matter costs (CT)	6,000	11
		Port taxes (PAPN)	72,000	127
		ISPS fee (CT)	6,000	11
	Customs costs	Total customs fees	4,031,796	7,107
		Simplified declaration	50,000	88
		Transit declaration	150,000	264
		TEC/DDI (5–30% of imported value)	1,701,906	3,000
		TCI (1% of imported value)	56,730	100
		RDI (2% of imported value)	113,460	200
		CCI (0.4% of imported value)	22,692	40
		OHADA (18% of imported value)	1,021,143	1,800
		TVA (5% of imported value)	283,651	500
		14A (1% of imported value)	56,730	100
		CIA (0.2% of imported value)	11,346	20
		Excise duties (12.5% or more)	709,127	1,250
		Global tax per container (XAF 30,000)	30,000	53
		Extra-legal time, unloading (XAF 10,000–50,000)		
		Paid work (XAF 20,000 for 20-ft container, XAF 40,000 for 40-ft container)	20,000	35
		Customs visit (XAF 10,000–30,000)	10	0
		Extra-legal time, inspection (XAF 20,000–30,000)		
		Customs tent Congo Terminal (XAF 5,000 by file)	5,000	9

(Table continues next page)

Table C.1

Landing bill for a 1 TEU container in the port of Pointe-Noire and gateway transit into Brazzaville *(continued)*

Benefits	**Type**	**Explanations** (details of invoicing)	**Pointe-Noire–Brazzaville** (XAF)	**Pointe-Noire–Brazzaville** (US$)
		Penalties for late submission of declaration (XAF 50,000–200,000)		
		Customs desk opening (XAF 35,000)		
	Noncustoms fees		559,226	986
		Freight fee (SOCOTRAM)	35,985	63
		Commodity tax (CCC)	9,101	16
		Commodity tax (DIGEMAR)	1,125	2
		Commissariat du port	8	0
		Hygiene des frontieres	7	0
		Scanning (global access)	108,000	190
		Transit declaration	150,000	264
		BESC (CCC)	160,000	282
		DI (GUOT: with enrollment XAF 132,000)	45,000	79
		ACONOC	50,000	88
	BL exchange	Invoiced by shipping agent		
		BL exchange	30,000	53
		Deposit/guarantee	20,000	35
	Port charges	Paid to AAP	75,000	132
		Scanner (global access)	108,000	190
Transport (Pointe-Noire–Brazzaville)	Transport (Brazzaville)	Transport fee	900,000	1,586
		Tolls RN-1 (7x XAF 30,000, 2+ axel trucks) x2 - empty containers	840,000	1,481
		Lifting 1	60,000	106
		Lifting 2	60,000	106
		Lifting 3	12,000	21
Total			7,416,427	13,073
		Weight of port handling		9.7%
		Weight of customs		54.4%
		Weight of road fees		25.2%

Sources: Calculations based on CCC, MAERSK, CMA CGM, and Congo Terminal – AGL data.
Note: TEU = 20-foot equivalent unit. The landing bill estimates are based on a 1 TEU container with an assumed gross weight of 15 metric tons and a merchandise value of US$10,000 (approximately XAF 5,673,019), using an exchange rate of XAF 567.3 per US dollar as of November 17, 2025.

Table C.2

Modeled comparison of passage costs: Pointe-Noire–Kinshasa land corridor versus Pointe-Noire–Matadi–Kinshasa

Benefits	**Type**	**Explanations** (details of invoicing)	**Pointe-Noire–Kinshasa (US$)**	**Pointe-Noire–Matadi–Kinshasa (US$)**
Port passage (Pointe-Noire/ Matadi)*	Port discharge/ transshipment	Charged by ATL handler - Congo Terminal	1,270	617
		Handling:	282	
		Berthing window	18	
		Tracking (CT)	6	6
		Dockside stay (PAPN)	6	6
		Stay in the harbor (PAPN)	2	2
		Towing (PAPN)	15	
		Trailer supply (PAPN)	0	
		Stevedoring (loading/unloading) (CT)	582	582
		Unloading - removal from terminal (CT)	212	
		Printed matter costs (CT)	11	11
		Port taxes (PAPN)	127	
		ISPS fee (CT)	11	11
		Paid to AAP	132	
		Scanner (global access)	190	
Port discharge Matadi (excluding Congo, Dem. Rep. Customs)		Total		885
		Ocean feeder (shipping line)		500
		Pilotage		
		Tug assistance		
		Handling (CTM/SITRAM: US$110–220 for 20- and 40-ft containers)		110
		Stevedoring (loading/unloading) (CTM/SITRAM)		
		ISPS fee (CTM/SITRAM)		
		IT fee (CTM/SITRAM)		
		Demeurrage (US$10–20 per day for 20- and 40-ft containers, 1–14 days after free time)		

(Table continues next page)

Table C.2

Modeled comparison of passage costs: Pointe-Noire–Kinshasa land corridor versus Pointe-Noire–Matadi–Kinshasa *(continued)*

Benefits	**Type**	**Explanations** (details of invoicing)	**Pointe-Noire–Kinshasa** (US$)	**Pointe-Noire–Matadi–Kinshasa** (US$)
	Port charges	OCC inspection (2% of FOB value for import values > US$2,500)		200
		BIVAC (0.75% of FOB value)		75
Transport (Pointe-Noire–Brazzaville)	Transport Brazzaville (via Pointe-Noire) or Kinshasa (via Matadi)	Transport fee	1,586	1,586
		Tolls (x2 - empty return - 7 tolls XAF 30,000 per toll, Congo, Dem. Rep.: 3 tolls, XAF 106,000 per toll)	1,481	1,121
		Lifting 1	106	
		Lifting 2	106	
		Lifting 3	21	
Transport (Brazzaville-Kinshasa)	River port fees (Brazzaville)	Barge and port fees (XAF 350,000–700,000 for 20- and 40-ft containers)	617	
Total			5,509	4,484

Sources: Calculations based on CCC, MAERSK, CMA CGM, Congo Terminal – AGL, and LCR data.
Note: The landing bill estimates are based on a 1 TEU container with an assumed gross weight of 15 metric tons and a merchandise value of US$10,000 (approximately XAF 5,673,019), using an exchange rate of XAF 567.3 per US dollar as of November 17, 2025.
**Congo*, Dem. Rep. Customs not paid in Pointe-Noire.

Appendix D

Impact Estimates

This Country Private Sector Diagnostic (CPSD) seeks to estimate the potential for private investment and job creation in the sectors from policy reforms. The approach estimates the output that could be produced in these sectors over the medium term. Investment and employment estimates are only indicative. The estimates rely on secondary data from various sources and expert consultations, without formal primary surveys. As such, the estimates are not based on detailed feasibility studies or statistical analysis. For all four sectors included in the report, estimates assume that there are no financing costs, nor any costs associated with replacement or operation and maintenance. All values are in real 2025 US dollars, unless otherwise noted.

The estimates are only indicative, based on simplified methods, and fair comparisons with alternative options are not possible. Estimates rely on secondary data from various sources and expert consultations, without formal primary surveys. They are not based on feasibility studies or statistical analysis such as regressions and sophisticated modeling. However, indicative preliminary estimates could help interested stakeholders, including private investors and government officials, to assess the importance of reform in each sector.

D.1 Processed Wood

Approach/methodology. The analysis uses a bottom-up approach on the investment necessary to exploit wood for processing in the forests available for the PED (3 million hectares); for context, the Republic of Congo currently has 21 million hectares under concessions.[52] The methodology uses the area available under the first expansion of the Arise Special Economic Zones (SEZ) that has industrial land available in Pointe-Noire. The SEZ is specialized in wood processing in a 500-hectare area. The analysis does not make any assumptions about area for development in new SEZ areas in Ouesso or the Phase 2 of development in Pointe-Noire.

Assumptions. To determine the number of jobs, the analysis takes the number of jobs in current facilities in Pointe-Noire (5,000 jobs) and compares it with total direct and indirect jobs generated in the industry at the national level. As noted in the 2023 Country Economic Memorandum,[53] the Republic of Congo's wood sector has 7,000 direct and 15,000 indirect jobs. With these figures, the analysis calculates the number of jobs per hectare in both PED concessions and at SEZ in new facilities. The scenarios analyzed make different assumptions regarding the achievement of capacity at the SEZ, with Scenario 1 assuming a conservative 50 percent capacity usage and Scenario 2 assuming full capacity use. At the time of visit, two companies were operating in the SEZ.

Results. The proposed reforms could catalyze private investment in processed wood. The reforms can help ease uncertainty on concessionaires, level the playing field across market participants, increase wood availability for Congolese SME processors and uphold traceability. These improvements can contribute to attracting between US$500 million and US$1.1 billion in private investment over the next five years, which could contribute to creating between 5,300 and 11,500 direct jobs.

D.2 Port Logistics in the Pointe-Noire to Brazzaville Corridor

Approach/methodology. The analysis takes a top-down approach to determine the warehousing, trucking, and logistics service needs of the additional amount of container traffic given ongoing port expansion in Pointe-Noire. The analysis uses the gateway transit and transshipment figures from Congo Terminal[54] to analyze annual growth and shares in traffic flows. Currently, the logistics sector in the Republic of Congo moves 215,000 TEU per year into the country and toward Kinshasa and the Democratic Republic of Congo. This accounts for 20 percent of all container traffic in the port. With the expansion of the Eastern Dock under way, the port's container capacity will increase from 1 million TEU to 2.5 million TEU by 2027.

Assumptions. The most important assumption in this calculation is the total number of containers that will begin transiting on the road corridor. A conservative scenario assumes a doubling of containers—aligned with a doubling of total container traffic. A more ambitious scenario considers the possibility of transshipment traffic otherwise going into the port of Matadi shifting toward the road corridor in the Republic of Congo. This shift is assumed to be four times the current container traffic.

Based on the difference with current traffic, the analysis uses the new number of containers to determine the need for trucks (assuming the current fleet is working at capacity) and the new needs for warehousing storage (storage area and turnaround associated with new container traffic). For trucks, the analysis considers a need of 1 TEU container per truck, which requires one driver, and that a truck can do 200 one-way trips between Pointe-Noire and Brazzaville every year. For warehousing area, the analysis uses the fact that 1 TEU has an area of 60 square meters and that each container will require a buffer area for handling.

The analysis excludes the current jobs and investment impact of the construction of a new dock in the port of Pointe-Noire, as this is already underway. Currently, the port of Pointe-Noire is responsible for 4,000 direct and indirect jobs.

Results. The proposed reforms could attract private investment in the port logistics sector, leveraging ongoing expansion of Pointe-Noire's container terminal, which is expected to increase handling capacity from 1 million to 2.5 million TEU per year by 2027. The reforms can help ease constraints on gateway container traffic, enabling the flow of at least 100,000 additional containers. With such increase in traffic, the reforms could attract at least US$70 to 200 million in private investment and create 2,000 to 6,000 jobs over the next five years. Further growth in nonmineral exports from the Republic of Congo and the Democratic Republic of Congo, combined with a shift from transshipments through Matadi to transit through the Republic of Congo corridors, could raise these figures even more.

D.3 Maize Milling

Approach/methodology. The analysis uses a top-down approach considering the investment needs and associated number of jobs required to build one to three maize milling facilities in strategic locations, including ZAPs, to process maize milled in the country.

Assumptions. In 2025, consumption of maize was estimated at 69,000 tons of maize grain (imported and produced locally), 18,000 tons of maize meal (imported), and 4,200 tons of animal feed (imported).[55] By 2030, at current consumption growth rates, total raw maize consumption in the Republic of Congo can reach 211,000 tons.

The analysis makes two important assumptions for production: a high yield of 6 tons per hectare—associated with commercial maize farming in the region, which is higher than average yields—and the fact that a commercially viable maize farm requires at least 1,000 hectares for production. In the Republic of Congo, not all ZAPs will be able to comply with this requirement, as the threshold to create a ZAP is low (100 hectares), but this value is not capped.

Maize mills can come in various forms. This analysis assumes the purchase and installation of an industrial flour mill that processes 30 tons per day, or 50,000 tons per year. These mills can cost up to US$2 million. In addition, the estimate of a single mill assumes the construction of a single silo to hold 50 percent of the mill's capacity, to guarantee the mill can operate all year long at capacity (5,000 tons capacity). The jobs associated with the construction of these facilities in Sub-Saharan Africa have an elasticity of 249 jobs per US$10 million. Then, the operation of these mills requires 50 full-time employees.

The analysis assumes the area required to produce the amount of maize needed to operate a single 50,000 ton mill at capacity, under the target yield. Under these figures, the Republic of Congo will require 8,300 hectares for a single mill to operate. This is less than double the current estimated area under maize cultivation of 13,000 hectares in 2025.[56] For cultivation, the analysis takes 70 jobs per 10,000 hectares for land preparation and 100 jobs per 10,000 hectares for indirect jobs associated with commercial crops.

The analysis uses two scenarios: one where a single mill is built (in addition to the only one in operation), and another where three new mills are built to cater to the potential needs of animal feed from the development of the poultry industry in the country.

Results. The reforms can help ease constraints on availability of domestic maize supply and add predictability to the availability of land used by investors. The reforms can contribute to US$24 to 73 million in private investment in 1 to 3 new mills with a capacity of 50,000 tons per year, including silos, and land preparation, and create 400 to 1,100 direct jobs over the next five years.

D.4 Aquaculture

Approach/methodology. The analysis employs a top-down approach, considering the current production gap in fresh fish in the Republic of Congo, which is 100,000 tons, and calculates the necessary investments to produce 10 percent to 20 percent of this gap by 2030. These values are based on the potential adoption of technologies and improvements in practice in a sector that is fragmented.

The analysis does not include potential investments in freezing facilities and aggregators, given that this CPSD only discusses fresh fish. Such developments are likely to increase the potential impact of the sector.

Assumptions. The most important assumption in the analysis is the target productivity of medium-scale farms of 283 tons per year. In these farms, a tilapia cage has a volume of 216 cubic meters.

The figures used in the analysis take the recent example of Uganda in 2021: in a cycle, a farm can produce 32 kilograms of tilapia per cubic meters per year in two annual cycles. The price for 15 cages is US$115,000. The typical job-to-cage ratio in these farms is 14 jobs for every 30 cages (Nazziwa 2021).[57] Then, tilapia aquaculture in Sub-Saharan Africa can generate three indirect jobs per direct job (Chan et al. 2021).[58]

Results. The proposed reforms could unlock private investment in aquaculture of fresh tilapia and catfish associated with the expansion and increase in productivity of farms in an emerging sector in the Republic of Congo. The reforms can help ease constraints on the cost of inputs and feed and contribute to US$5 to US$16 million in investment in farms, and the creation of 1,200 to 3,600 direct jobs over the next five years.

Notes

1. This Country Private Sector Diagnostic selects four subsectors that satisfy the following three criteria: (a) potential of the sector to attract private investment, if feasible reforms are undertaken in the near term; (b) relevant development impact including job creation, food security, and climate friendly GDP growth; and (c) potential interest of the Congolese government in considering concrete policy reforms measures. The quantitative analysis for the sector selection was based on indicators such as revealed comparative advantage, global demand growth, export gaps, value-added trends, input endowments, and FDI inflows, among others.
2. In 2023, the Republic of Congo exported approximately US$161.5 million in raw logs and US$167.4 million in lumber (primary processing), while secondary and tertiary processed products—such as fiberboards, plywood, furniture, and kitchenware—accounted for US$132,300 and US$11 million, respectively). The EU, which is the largest and fastest growing global market already absorbs about half of the Republic of Congo's processed-wood exports.
3. Consultations indicate SMEs need only minimal investment, such as a few trucks or a basic warehouse.
4. World Bank (2024c).
5. The Economic Complexity Index (ECI) is a measure of the relative capabilities and know-how a country has to produce different goods. The index is measured in standard deviations. A country with a higher ECI has a more diversified export basket and includes products that fewer countries export. By contrast, a country with a low ECI concentrates its exports on fewer products that many countries tend to export.
6. Data from the IMF Financial Access Survey indicate that SMEs in Congo have limited access to services from commercial banks compared to their regional peers.
7. Afreximbank (2025).
8. Based on World Bank Worldwide Governance Indicators data, https://data.worldbank.org/indicator/CC.PER.RNK?locations=ZG.
9. The Republic of Congo is not among the group of the most vulnerable countries to 2025 US tariffs. It has a bilateral trade deficit with the United States and is currently subject to the lowest tariff rate. In addition, Congolese processed-wood exports to the United States may replace imports from countries facing larger tariffs, like Canada.
10. Maize and aquaculture present early opportunities that align with AgriConnect's focus on improving agroindustrial infrastructure, strengthening regulations, and mobilizing private investment. Targeted reforms in these areas would help reduce import dependence, enhance food security, and generate meaningful employment in the Republic of Congo.
11. See "Republic of Congo, Country Context," Timber Trade Portal, last updated 2024, https://www.timbertradeportal.com/en/republic-of-the-congo/152/country-context?utm_source=chatgpt.com.
12. FRMi (2018).
13. See "Republic of the Congo," Dashboards, Country, Global Forest Watch, https://www.globalforestwatch.org/dashboards/country/COG/.
14. See "Country Classification List," Benchmarking for Deforestation Risks, European Union Deforestation-Free Products Regulation, Green Forum, https://green-forum.ec.europa.eu/deforestation-regulation-implementation/eudr-cooperation-and-partnerships/country-classification-list_en.
15. Under forest management plans, wood volumes per hectare and year are capped, and

concessionaires extract and replant trees on a rotational basis, avoiding clearing forest areas by only cutting and replanting select species.

16. Unlike many competitors in processed wood, the Republic of Congo is on the low tariff bracket in the United States (10 percent as per the latest increase in March 2025). Other large wood exporters like Canada currently face higher tariffs and policies are in flux.
17. The Pointe Noire SEZ has already established three wood-processing plants in operation and over 60 percent of land used for phase 1 has been allocated to different firms—noting that not all of them are meant for wood processing.
18. World Bank Enterprise Surveys.
19. Maritimafrica (2022).
20. Transshipped containers are those that in a port are passed from one ship to another, without leaving the container terminal.
21. fDi Markets.
22. See "Nos performances," Congo Terminal, https://congoterminal.net/performances.html.
23. With an estimated employment elasticity of 31.3 jobs per US$1 million invested in the construction of facilities alone.
24. The Republic of Congo saw the construction and upgrade of the 535 kilometers of RN-1, the main highway between Pointe-Noire and Brazzaville, which handles 90 percent of the country's trade tonnage. This new road drastically cut transport times and effectively ended the rail monopoly on heavy cargo in favor of truck freight. However, the cost of transport infrastructure remains high. Airport landing fees for commercial and cargo planes in Brazzaville and Pointe-Noire (US$780 for landing the largest international carriers [AERCO 2025]) in 2025 are lower than those in the Democratic Republic of Congo (where fees range from US$1,000 to US$12,000 for landing [Signé 2018]).
25. Fees for equivalent routes in Cameroon are €0.01 per kilometer, in Cote d'Ivoire the cost is €0.06 per kilometer, and in Senegal €0.12 per kilometer. The next most expensive is the Cotonou–Porto Novo Road in Benin that has a cost of up to €0.46 per kilometer; it was also built in the 2010s but covers a much shorter distance.
26. Congo could draw on Côte d'Ivoire's (Fonds de Développement de la Formation Professionnelle, FDFP) model by improving the predictability of levy transfers to FONEA, establishing tripartite governance, adopting demand-driven co-financing mechanisms, and engaging employers directly in skills planning and training delivery to ensure alignment with labor-market needs
27. These letters of credit provide the importers or exporters a guarantee from their counterpart that they will get paid for the goods being transported.
28. The Port Performance Index (2019–23) has ranked the port of Pointe-Noire among the worst performing in terms of dwell times, adjusted for vessel sizes (World Bank 2024)—even below smaller regional ports with more inefficiencies and much smaller container flows.
29. Consultations with the Customs Office confirmed that the port is not shortstaffed, indicating that this operational constrained is not caused by a lack of customs personnel.
30. See Decree No. 84/1093, https://www.unicongo.cg/wp-content/uploads/2023/03/Decrets-n%C2%B084-1093_1984_Travail-et-Securite-Sociale_Honoraires-Travail-Entreprises-Publiques-Privees.pdf.
31. World Bank (2023a; 2015).
32. Maritz (2022).
33. FAOSTAT.
34. Ibid. Demand for maize and maize-based products in central Africa has almost doubled (12.7 percent annual growth) between 2017 and 2022 due to an increase in animal feed demand in the region (based on Tesfaye et al. 2024 and data from the Atlas of Economic Complexity).
35. Based on 2024 data from the Republic of Congo, Ministry of Finance. According to the Ministry, the largest company has 120 employees while the smallest company has 20 employees.

36. Calculations based on BACI data.
37. World Bank (2017).
38. PADeP Diagnostic Study, 2024; ProClimat Report on Agricultural Value Chains, 2023.
39. Despite the growth in maize imports, consultations with milling companies in the Republic of Congo indicate that locally produced maize is preferred over imported maize due to its higher grits concentration. Congolese maize kernels contain up to 60 percent grits needed for cornmeal, compared to 42–45 percent in imported varieties.
40. World Bank (2014).
41. As a member of OHADA, the Republic of Congo applies the Uniform Act on Cooperative Societies, which provides a general legal framework for cooperatives but it is not sector specific.
42. Augustine et al. (2016).
43. Republic of Congo's VAT Law and confirmed by the 2024 Finance Act (see "Republic of Congo: Corporate – Other Taxes," Worldwide Tax Summaries, PwC, last reviewed December 10, 2025, https://taxsummaries.pwc.com/republic-of-congo/corporate/other-taxes.
44. See "Arrêté No. 517 du 24 février 2022," Journal officiel de la République du Congo, published on April 7, 2022, https://natlex.ilo.org/dyn/natlex2/natlex2/files/download/113154/COG-113154.pdf.
45. Pais, Marques, and Fuinhas (2021).
46. Based on BACI data.
47. Based on interviews and data collected by a World Bank project preparation team in Congo in January 2025.
48. Banz (2020).
49. Calculations based on data collected from aquaculture producers at the World Bank's Poultry and Aquaculture Development Project Mission to the Republic of Congo in January 2025, and expert opinion on regional production in West Africa.
50. See "National Aquaculture Sector Overview - Congo," Fisheries and Aquaculture, FAO, https://www.fao.org/fishery/en/countrysector/naso_congoRep.
51. See "VietGAP: The National Standard for Good Aquaculture Practice and Guidelines for the Application of VietGAP for Pangasius, Tiger Shrimp and White Leg Shrimp Farming in Vietnam," Directorate of Fisheries, Ministry of Agriculture and Rural Development, Vietnam, https://ong-aida.org/wp-content/uploads/2023/04/VieTGAP-Buenas-practicas-estandarizadas-en-acuicultura-Vietnam-2011-EN.pdf.
52. See "Republic of Congo," Country, Central African Forest Initiative, https://cafi.org/country/republic-of-congo/.
53. World Bank (2023a).
54. See "Nos performances," Congo Terminal, https://congoterminal.net/performances.html.
55. Based on FAOSTAT and BACI data.
56. Based on FAOSTAT data.
57. Nazziwa (2021).
58. Chan et al. (2021).

Abbreviations and Acronyms

BACI	Bilateral Analytical Commodity Information
CEMAC	Communauté économique et monétaire de l'Afrique centrale; Economic and Monetary Community of Central Africa
CPSD	Country Private Sector Diagnostic
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
FDI	foreign direct investment
FONEA	Fond National de l'Appui à l'Employabilité et l'Apprentissage; National Employability and Apprenticeship Support Fund
GDP	gross domestic product
HS	Harmonized System
LMIC	low- and middle-income countries
LCR	La Congolaise des Routes
MALF	Ministry of Agriculture, Livestock and Fisheries
OHADA	Organisation pour l'Harmonisation en Afrique du Droit des Affaires
PED	permit d'exploitation domestic
RN	Route Nationale
SEZ	special economic zone
SME	small and medium enterprises
TEU	20-foot equivalent unit
TUS	taux unique sur les salaires; unique wage tax
UNCTAD	United Nations Conference on Trade and Development
VAT	value added tax
XAF	Central African CFA franc
ZAP	zones agricoles protégées; protected agricultural zones

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