

ANNEX 5: CHAD

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1 ECONOMIC ENVIRONMENT

1.1 Main features of the economy

1.1. Chad is the largest landlocked country in Africa, sharing borders with Libya to the north, Sudan to the east, Cameroon, Niger and Nigeria to the west and the Central African Republic to the south. It has a hot continental climate (hot in the north, Sahelian in the centre and tropical in the south) and rainfall varies greatly throughout the year. The country is highly prone to drought. The nearest port, Douala, is 1,700 km from the capital, N'Djamena. As the fifth largest country in Africa by land-mass, Chad has abundant natural resources, in particular minerals, crops and animals. The population was estimated at 17.4 million in 2021 and is growing by 3.6% a year.

1.2. Chad remains one of the poorest countries in the world. According to the human development index of the United Nations Development Programme (UNDP), Chad was ranked 190th out of 191 countries in 2022. Extreme poverty, however, is confined mainly to rural areas. Annual per capita income was USD 686 in 2021, up from USD 663 in 2017. Life expectancy is around 53 years. The proportion of the population living below the income poverty line fell from 55% in 2003 to 46% in 2011 and 42% in 2018, the last year for which data are available.¹ Despite a marked improvement in the school enrolment ratio (from 39% in 2000 to 64% in 2014 and 77% in 2021) and the primary-school completion rate (44% in 2018, as against 23% in 2000), literacy levels are among the lowest in Africa.

1.3. A significant segment of the population (around 20-25%, depending on the year) is regularly exposed to food insecurity. This percentage varies from one part of the country to another and can be as high as 40-45% in the Sahel belt. A large proportion of the population is affected by undernutrition and all its consequences, which include stunting among children, severe malnutrition among children under five, and anaemia in women of reproductive age.

1.4. Ever since crude oil extraction began in 2003, Chad's economic development has depended heavily on the oil market. The country's oil resources have enabled major public investments to be made, in particular in the road network, health and education. Oil is the country's main export product and is transported to international markets via a pipeline more than 1,000 km long, linking the oilfields in the Doba region to the port terminal at Kribi (in Cameroon).

1.5. Services constitute the largest sector of the Chadian economy, contributing anywhere between 37% and 47% of real GDP, depending on the year. This is followed by the agriculture, livestock, forestry and fisheries sector, which contributes around 25% (80% of the workforce), despite the start of oil production in 2003. The mining and energy sector contributes around 19% of GDP, with hydrocarbons accounting for 16% of GDP and other mining and quarrying around 3%. Agriculture, however, still depends heavily on often erratic rainfall and rudimentary cultivation techniques, which affects yields. The manufacturing sector is still embryonic (Table 1.1).

1.6. The deterioration of ecosystems and risks linked to climate change are also a major problem, posing real challenges to the improvement of livelihoods and constituting a potential source of conflict. The country's main environmental challenges are linked to drought and desertification, soil degradation, demographic pressure and population movements driven by conflict. Around 1 million refugees, internally displaced persons and returnees live in Chad as a result of conflicts in neighbouring countries and the threat of terrorism. The Lake Chad area, the south and the east, where many of these people live, are the parts of the country that are most prone to food and nutritional insecurity and where the pressure on resources is the greatest. Desert encroachment and the drying-up of Lake Chad are also putting a strain on the resources needed to develop farming and fisheries activities.

1.7. On the international front, the main risk remains the fact that the economy depends heavily on oil, with volatile oil prices having a significant impact on the country's revenue. In addition, the huge influx of refugees following security crises in neighbouring countries has created a humanitarian risk.

¹ According to a study, 87% of the population faced severe multidimensional poverty in 2014. Oxford Poverty & Human Development Initiative, *Chad Multidimensional Deprivation and Vulnerability Survey*, 2016.

1.8. Chad applies the trade, monetary and exchange rate policies of CEMAC, of which it is a member, and uses the Community's common currency, the CFA franc (CFAF) (Common Report, Sections 1 and 3).

1.2 Recent economic developments

1.9. Chad went through both a budgetary and a security crisis between 2014 and 2017, with oil prices collapsing at the end of 2014 and expenditure increasing because of the regional security situation (Table 1.1). The sharp decline in oil prices between 2014 and 2016 plunged the Chadian economy into recession. Although production increased by 33% between 2015 and 2016, the oil industry saw its revenue fall by 73%, resulting in a marked decline (9%) in GDP. The Chadian economy returned to positive growth in 2018 and 2019, after experiencing negative growth rates of -3.4% and -4.7% in 2016 and 2017, respectively. Since 2020, economic activity has been tested by the COVID-19 pandemic and the war in Ukraine, but the recovery in 2022 was strong.

1.10. There were no sharp fluctuations in overall price levels between 2013 and 2017 as a result of the common monetary policy implemented by the central bank, the Bank of Central African States (BEAC). Nevertheless, inflation reached 4% in 2018 and 4.5% in 2020. In the area of public finances, the positive performance of oil prices helped the State to implement its expansionary fiscal policy until 2014. Similarly, the budgetary balance (excluding grants) widened to 7% of GDP in 2015, mainly owing to transfers and subsidies. International reserves have declined since 2012, though the situation has improved slightly since 2018.

Table 1.1 Basic economic indicators, 2012-21

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Miscellaneous										
GDP at current market prices (CFAF billion)	7,118.4	6,821.4	7,037.9	6,800.1	6,165.2	5,986.4	6,374.2	6,499.6	6,431.5	6,770.4
Non-petroleum nominal GDP (CFAF billion)	5,405.1	5,685.1	5,933.1	5,833.1	5,721.1	5,474.2	5,647.9	5,734.7	5,923.8	5,986.3
GDP at market prices (USD billion)	13.9	13.8	14.3	11.5	10.4	10.3	11.5	11.1	11.2	12.2
Real GDP growth (% , at 2005 prices)	8.2	3.2	2.6	4.2	-2.8	-4.2	1.9	2.5	-2.2	-0.6
petroleum sector	-1.1	-18.9	11.1	43.2	-14.7	-10.9	12.9	11.8	-3.6	-4.6
non-petroleum sector	9.7	6.2	1.7	-0.4	-0.8	-3.2	0.4	1.1	-1.9	0.1
Population (million)	12.3	12.7	13.2	13.6	14.1	14.7	15.2	15.7	16.3	16.9
GDP per capita (USD)	1,136.5	1,086.0	1,082.1	842.7	735.6	703.5	756.4	705.5	686.9	723.8
Inflation (N'Djamena)	7.5	0.2	1.7	3.7	-1.6	-1.1	4.0	1.2	4.5	-0.8
National accounts at current prices (% of GDP)										
Consumption	67.0	83.2	87.4	84.0	80.0	68.2	70.1	70.5	73.1	71.0
Public (Government)	10.7	13.7	14.5	12.2	13.5	13.9	11.0	10.7	11.9	14.1
Private	56.3	69.5	73.0	71.8	66.6	54.3	59.1	59.8	61.2	56.9
Gross investment	27.1	27.3	28.9	24.8	22.7	25.8	26.6	27.5	27.1	30.1
Gross fixed capital formation	26.7	27.2	28.8	24.7	22.5	25.6	26.5	27.4	26.9	29.9
Public	12.4	9.5	10.0	5.5	2.9	3.5	3.5	4.4	6.6	3.9
Private	14.3	17.7	18.8	19.1	19.6	22.1	23.0	23.0	20.3	26.0
petroleum sector	9.2	10.9	10.0	9.8	9.6	12.8	14.0	14.0	11.0	16.9
non-petroleum sector	5.1	6.8	8.8	9.3	10.0	9.2	9.0	9.0	9.4	9.2
Changes in inventories	0.4	0.1	0.1	0.1	0.2	0.2	0.2	0.2	0.2	0.1
Net exports	5.9	-10.5	-16.3	-8.8	-2.7	6.0	3.3	2.0	-0.2	-1.0
Exports of non-factor goods and services	37.1	27.6	24.5	24.7	22.5	26.5	23.8	24.5	18.5	24.4
Imports of non-factor goods and services	-31.3	-38.2	-40.8	-33.5	-25.2	-20.5	-20.6	-22.5	-18.7	-25.4
Sectoral distribution of GDP at current prices (% of GDP at factor cost)										
Agriculture, livestock, forestry and fisheries	23.3	28.4	27.4	28.0	32.3	31.5	30.0	28.6	31.0	28.8
Agriculture	14.9	18.3	17.5	17.5	20.7	19.0	17.3	15.7	16.8	14.7
Food crops	14.2	17.5	16.7	16.5	19.5	17.7	16.9	15.6	15.9	13.8
Industrial crops	0.6	0.9	0.8	1.0	1.2	1.3	0.4	0.1	0.9	0.9
Livestock	6.0	7.1	6.8	7.1	7.9	8.6	8.9	9.0	9.9	9.9
Forestry and logging	0.5	0.6	0.6	0.7	0.7	0.7	0.8	0.8	0.8	0.8
Fisheries	1.9	2.4	2.6	2.8	3.0	3.2	3.0	3.1	3.4	3.4
Oil	24.6	17.1	16.1	14.5	7.4	8.8	11.7	12.0	8.1	11.9
Other extractive activities	2.9	3.3	3.5	3.5	3.6	2.0	1.9	1.9	2.0	1.9
Manufacturing	9.2	7.0	7.5	8.7	10.4	11.2	11.2	11.1	11.2	11.9
Cotton lint	0.4	0.3	0.2	0.3	0.3	0.3	0.1	0.0	0.2	0.3
Petroleum products	1.2	1.0	0.9	0.4	0.9	1.2	1.5	1.4	1.0	1.5
Other	7.7	5.8	6.5	8.0	9.2	9.6	9.5	9.6	10.1	10.1
Handicrafts	0.3	0.2	0.2	0.3	0.4	0.4	0.4	0.4	0.4	0.4
Construction and public works	6.0	6.2	6.1	4.1	1.8	1.8	1.9	4.4	5.5	4.2
Water and electricity	0.2	0.1	0.1	0.2	0.1	0.1	0.2	0.2	0.2	0.3
Services	33.6	37.5	38.9	40.6	44.0	44.3	42.8	41.4	41.6	40.7

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Transport and telecommunications	5.9	6.0	6.9	7.0	7.3	6.8	6.4	6.3	6.7	6.8
Trade	14.0	14.5	14.6	17.3	19.5	19.9	19.5	18.5	17.6	16.4
General government	3.9	3.3	3.6	3.0	4.0	4.3	3.7	3.8	4.5	4.7
Hotels and restaurants	0.1	0.2	0.5	0.5	0.4	0.4	0.4	0.4	0.4	0.4
Real estate and business services	4.0	5.6	6.1	6.0	4.7	4.8	4.8	4.7	4.7	4.7
Other	5.8	7.8	7.1	6.9	7.9	8.0	8.0	7.7	7.7	7.7
Public finances (% of GDP)										
Total revenue	19.3	17.8	20.2	10.0	9.3	10.4	11.6	12.4	14.2	15.0
Petroleum revenue	14.3	11.0	9.0	3.7	2.8	3.3	5.3	5.0	6.2	7.1
Non-petroleum revenue	5.0	6.8	11.2	6.3	6.6	7.0	6.3	7.4	8.0	7.8
Total expenditure	22.9	22.3	22.5	17.5	14.1	14.5	12.8	14.2	17.4	16.8
Current expenditure	10.5	12.9	12.6	11.9	11.2	11.0	9.3	9.8	10.8	13.0
Capital expenditure	12.4	9.5	10.0	5.5	2.9	3.5	3.5	4.4	6.6	3.9
Budgetary balance, commitments basis, excluding grants (deficit (-))	-3.6	-4.5	-2.3	-7.4	-4.8	-4.2	-1.2	-1.8	-3.2	-1.8
Budgetary balance, commitments basis, including grants (deficit (-))	-1.2	-3.0	-0.3	-4.4	-2.4	-0.7	1.5	-0.6	1.2	-1.1
External sector (% of GDP, unless otherwise indicated)										
Real effective exchange rate (% change) ^a	0.8	0.7	0.5	-4.3	-1.1	-1.3	5.2	-3.9	4.6	-2.2
CFAF per USD (annual average)	511	494	494	591	593	581	555	586	576	555
Current account balance (% of GDP) ^a	2.6	-11.5	-11.8	-16.4	3.4	11.6	-7.4	3.7	1.6	-6.5
Outstanding external debt-to-GDP ratio	14.3	18.2	24.6	19.0	26.3	26.3	25.2	24.9	25.5	24.3
Overall external debt-to-GDP ratio	14.3	46.1	49.6	43.2	49.6	50.3	46.4	52.0	52.5	49.7
External reserves (in months of imports of goods and services)	3.1	2.6	2.5	1.2	0.1	0.1	0.8	1.6	2.2	0.9
Foreign direct investment (FDI) inflows (USD million)	579.8	520.2	-675.5	559.6	244.7	363.4	460.9	566.6	557.7	562.2
% of GDP	4.2	3.8	-4.7	4.9	2.4	3.5	4.0	5.1	5.0	4.6
Inward FDI stock (USD million)	4,455.6	4,975.8	4,300.3	4,859.7	5,104.2	5,467.6	5,928.5	6,495.1	7,052.8	7,615.0
% of GDP	32.0	36.0	30.2	42.3	49.1	53.0	51.7	58.6	63.1	62.4

a A minus sign indicates depreciation.

Note: The CFA franc used by the CEMAC countries is pegged to the euro at a rate of EUR 1 = CFAF 655.96.

Source: BEAC. Viewed at: <https://www.beac.int/economie-stats/statistiques-economiques/>; IMF, International Financial Statistics. Viewed at: <http://data.imf.org/>; IMF, Regional Economic Outlooks, October 2022. Viewed at: <https://www.imf.org/en/Publications/REO/SSA/Issues/2019/10/01/sreo1019>; and UNCTADstat. Viewed at: <http://unctadstat.unctad.org/EN/Index.html>; information provided by the authorities.

1.11. In April 2015, Chad reached the completion point of the Heavily Indebted Poor Countries (HIPC) Initiative², which directly resulted in the cancellation of USD 170 million under its IMF commitments and a portion of its multilateral debt (USD 1.1 billion). In 2022, Chad concluded another agreement on the restructuring of its USD 3 billion of external debt.³

1.12. Chad's economic environment was also marked by insecurity because of terrorism in the Lake Chad basin. Hundreds of thousands of people fled their homes in the area following attacks by armed insurgents.

1.13. The balance of payments showed a current account deficit for the whole of most of the period under review (Table 1.2). International trade in goods has since declined considerably. Although a recovery began in 2017, the previous level was not reached.

Table 1.2 Balance of payments, 2012-21

(USD million)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Current account balance	364.1	-1,586.6	-1,684.2	-1,885.4	352.7	1,196.4	-850.1	413.7	183.3	-795.8
Foreign trade balance	2,005.3	872.8	798.0	-436.6	1,068.3	1,634.5	404.5	1,260.1	469.3	1,089.4
Exports	4,840.0	3,917.8	3,908.8	2,468.3	2,090.1	2,621.3	2,580.3	2,588.1	1,712.5	2,693.6
Imports	-2,834.9	-3,045.0	-3,110.8	-2,904.9	-1,021.9	-986.8	-2,175.7	-1,328.0	-1,243.3	-1,604.4
Balance of services	-1,933.2	-2,731.9	-2,789.2	-2,055.8	-684.4	-633.4	-1,362.9	-933.2	-454.3	-2,135.1
Balance of revenue	-390.4	-358.6	-346.5	82.9	-100.4	-357.7	-70.0	-25.4	-47.4	-60.4

² IMF (2015).

³ Information viewed at: <https://www.imf.org/en/News/Articles/2022/11/13/pr-22379-chad-imf-managing-director-welcomes-debt-treatment>.

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Current transfers balance	682.4	631.1	653.4	523.8	69.4	553.0	178.2	112.1	215.8	310.4
Capital and financial account	-41.3	1,769.2	1,494.9	261.2	-1,113.6	-1,372.8	702.3	-332.5	-272.4	248.1
Capital account	268.7	152.7	201.7	361.5	30.0	10.3	291.8	19.5	188.0	169.7
Public (net)	273.8	152.7	201.7	362.0	31.9	10.0	179.3	18.9	188.0	169.9
Private (net)	-4.9	0.0	0.0	-0.5	-1.9	0.5	112.5	0.5	-0.2	-0.2
Financial account	-310.2	1,616.5	1,293.1	-100.3	-1,143.6	-1,383.3	410.5	-351.9	-460.4	78.3
Direct investment (net)	790.3	1,060.3	0.8	-168.6	-650.5	-939.3	417.5	-6.7	524.5	665.6
Portfolio investment (net)	0.4	0.0	0.0	3.9	0.0	108.3	273.7	98.5	0.0	0.0
Other net investment	-1,100.8	556.2	1,292.3	64.4	-493.2	-552.3	-280.7	-443.6	-984.9	-587.2
Errors and omissions	-111.1	-269.1	146.2	-229.0	-90.8	173.4	326.9	-45.6	-61.5	146.4
Overall balance	211.7	-86.5	-43.3	-1,853.3	-851.7	-3.1	179.1	35.5	-150.6	-401.2
Financing	-211.7	86.5	43.3	1,853.3	851.7	3.1	-179.1	-35.5	150.6	401.2
Changes in official reserves (decrease (+))	-211.7	21.7	-13.4	658.3	755.5	-77.8	-222.3	-83.3	105.5	385.0
Exceptional financing	0.0	64.8	56.7	1,195.2	96.2	80.9	43.2	47.8	45.2	16.2

Source: Information compiled by the WTO Secretariat on the basis of BEAC annual reports (2014-21).

1.14. The main risk remains the fact that the economy depends heavily on oil exports, since volatile oil prices still have a significant impact on the country's revenue. The humanitarian crisis created by the huge influx of refugees following security crises in neighbouring countries is also an economic threat. Chad's economic environment is still marked by insecurity due to terrorism in the Lake Chad basin.

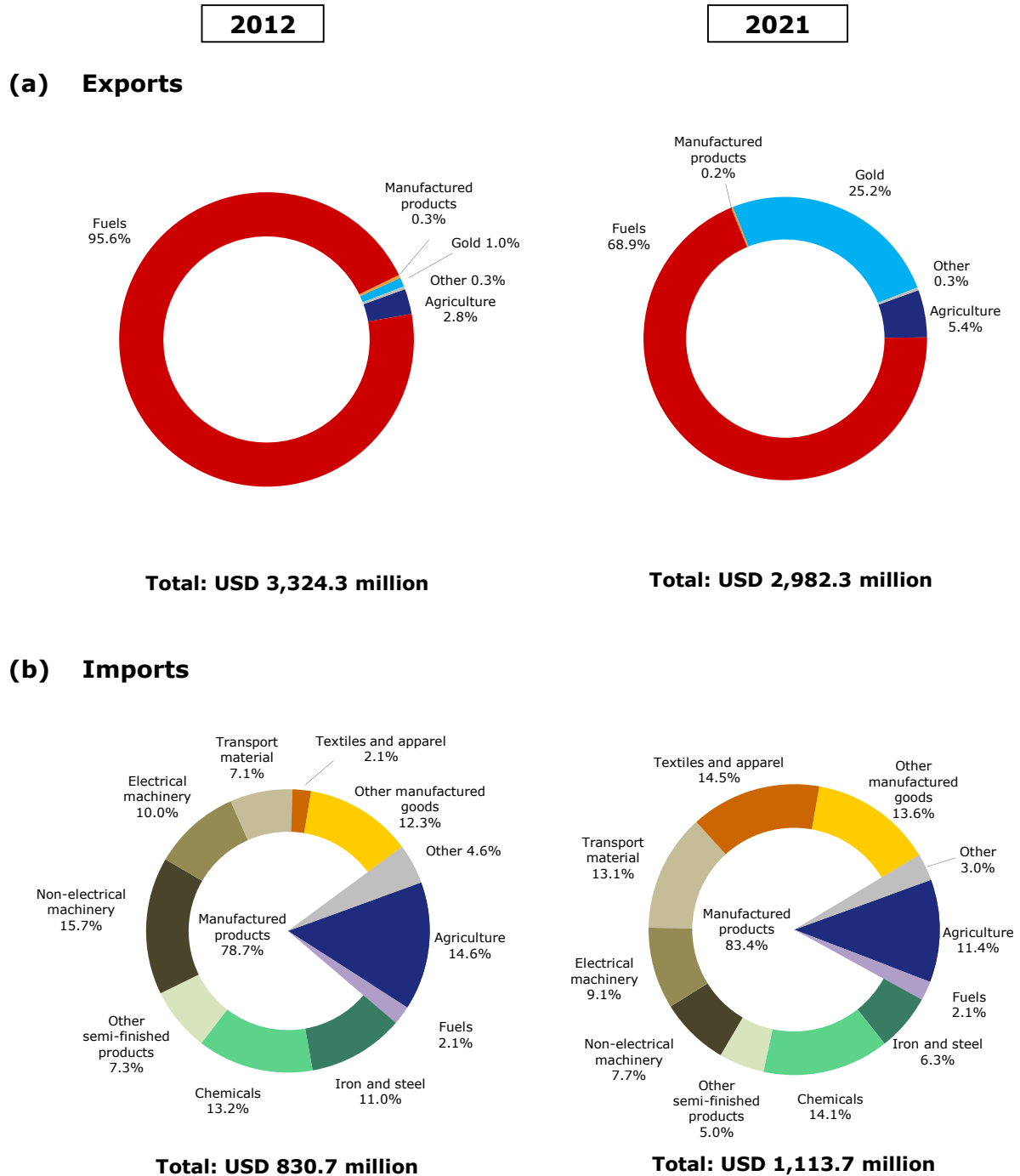
1.3 Developments in Trade and Investment

1.3.1 Trends and patterns in merchandise and services trade

1.15. Chad's trade almost doubled between 2017 and 2021, having contracted during the preceding years. The country's exports are still poorly diversified⁴, consisting mainly of crude oil exported to the United States, China and the European Union and, in recent years, gold exported to the United Arab Emirates and the countries of Asia (Chart 1.1, Tables A1.1 and A1.3). Chad's other main export products are livestock on the hoof, exported mainly to Nigeria and Cameroon; ginned cotton, exported to Europe; and gum arabic, exported mainly to Europe and the United States. Many goods, especially livestock, are still exported informally to Cameroon and Nigeria, which means that exports are underestimated in the official statistics.

⁴ Since 1995, the Government of Chad has not submitted any data on foreign trade to the UN Comtrade database. The trade statistics in this report are therefore generally based on mirror trade data from the country's main trading partners.

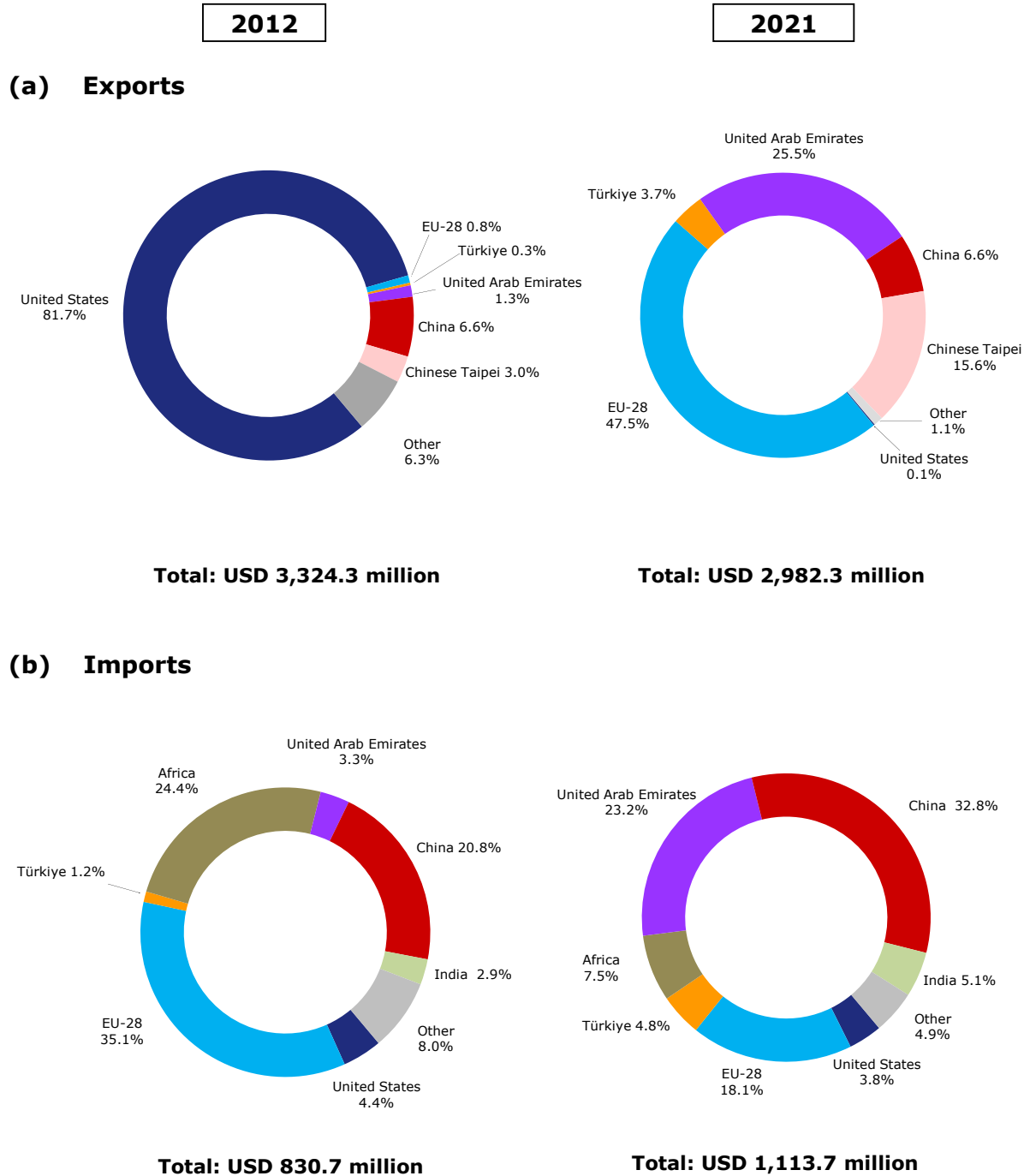
Chart 1.1 Patterns in merchandise trade, 2012 and 2021



Source: WTO Secretariat calculations, based on data obtained from Comtrade, mirror statistics, United Nations Statistics Division (UNSD) (SITC, Rev.3).

1.16. Imports are dominated by capital goods, which are used in the petroleum sector, and by chemical and agricultural products. The imports originate mainly from China (33% in 2021, 18% in 2012), the United Arab Emirates (23% in 2021, 3% in 2012) and the European Union (18% in 2021, 35% in 2012) (Chart 1.2, Tables A1.2 and A1.4).

Chart 1.2 Direction of merchandise trade, 2012 and 2021



Note: There are no recent data for some African countries. Please note, therefore, that the figures for Africa are considered to be underestimates.

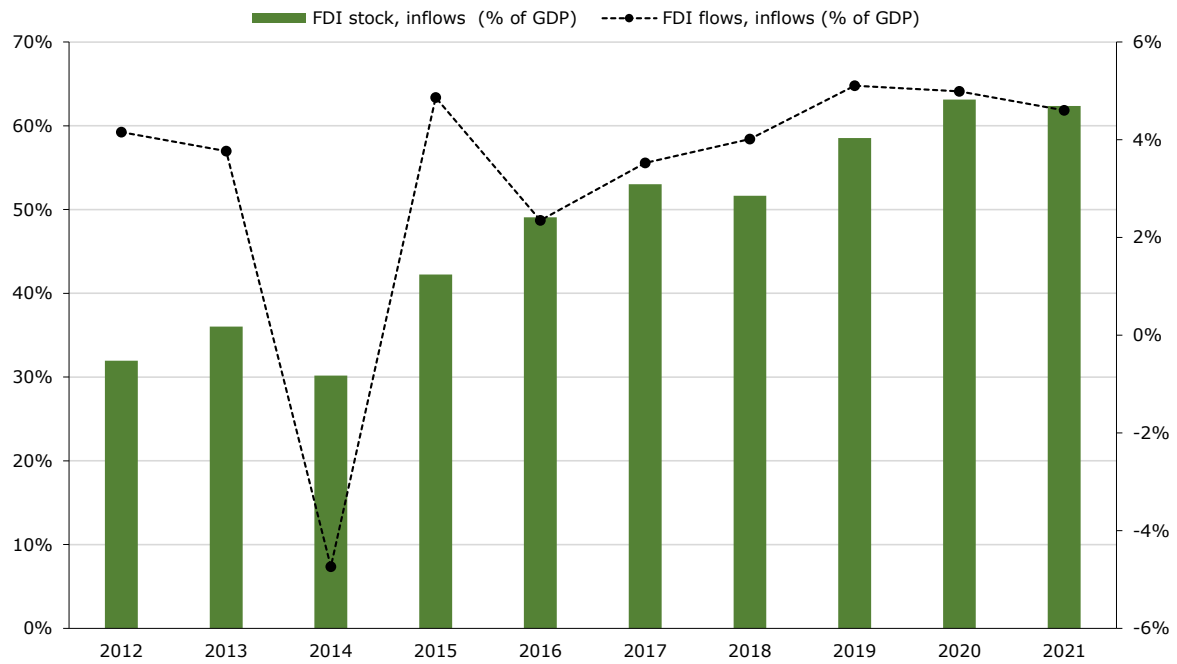
Source: WTO Secretariat calculations, based on data obtained from Comtrade, mirror statistics, UNSD (SITC, Rev.3).

1.17. The stock of FDI in Chad remains relatively high, at around USD 7.6 billion in 2021, with annual flows of USD 500-600 million (Chart 1.3).⁵

⁵ UNCTAD, World Investment Report, 2022.

1.18. FDI flows are directed mainly to the oil sector; the remainder are found in the food, hotels, banking, construction materials, telecommunications and transport logistics sectors.⁶

Chart 1.3 FDI stock in Chad, 2012-21



Source: UNCTAD. Viewed at: <http://unctadstat.unctad.org/EN/Index.html>.

⁶ UNCTAD (2019), *Examen de la politique d'investissement: Tchad, 2019*.

2 TRADE AND INVESTMENT REGIMES

2.1 General framework

2.1. The Constitution of the Republic of Chad has been the basic law since 4 May 2018, when it replaced the 1996 Constitution. The text created a presidential regime and removed the post of prime minister. It also made the Government answerable to the National Assembly, the members of which are elected by direct universal suffrage. Ministers are appointed by the President of the Republic.

2.2. Legislative power is exercised by the National Assembly, which has 188 members elected by direct universal suffrage for a four-year renewable term. The most recent legislative elections were held in April 2021.

2.3. Since April 2021, however, power has been concentrated in the hands of a Transitional Military Council. The Government and the National Assembly have been dissolved.

2.4. Judicial power is vested in the Supreme Court, the appeals courts, the commercial courts and justices of the peace. The Supreme Court is the highest authority for judicial, administrative and audit matters. Its members are chosen by the President of the Republic and the President of the National Assembly. Magistrates are appointed by the Judicial Service Commission. The Constitution provides for an independent judiciary and the separation of the legislative, executive and judicial branches.

2.5. Commercial courts are the courts of first instance for cases relating to commercial transactions, disputes concerning commercial companies and incidents relating to insolvency.⁷ Disputes between economic agents are generally settled out of court through arbitration provided by the Chamber of Commerce, Industry, Agriculture, Mining and Crafts (CCIAMA). The Ministry responsible for trade has had to intervene in a number of out-of-court settlements.

2.6. In August 2018, the Government published an ordinance creating administrative units and autonomous communities, with the country divided into 23 provinces, 107 departments and 377 municipalities. The administrative units are underpinned by traditional chiefdoms (*chefferies*), organized on a customary law basis. These represent the first level of jurisdiction for settling inter-community conflicts and property disputes.

2.2 Trade policy formulation and objectives

2.7. "Vision 2030, the Chad We Want" reflects the Government's commitment to forging a long-term process of development. The main goal of the Vision is to make Chad an emerging country by 2030.⁸ Four strategic lines of action have been defined for achieving that objective: (i) strengthening national unity; (ii) strengthening good governance and the rule of law; (iii) developing a diversified and competitive economy; and (iv) improving the quality of life of the Chadian population.

2.8. The Vision will be implemented through three National Development Plans (2017-21, 2022-26, 2027-30). One of the goals of the National Development Plan for 2017-21 is to diversify the sources of economic growth and boost the sectors that drive growth and create decent jobs. The National Development Plans also aim to increase the role that private investment can play in diversifying the economy.

2.9. Chad's trade policy is framed by commitments made at the multilateral and regional levels (Common Report, Section 2) and by national legislation. The Government's overall objective in this domain is to promote trade to sustain growth, and thus contribute to poverty alleviation efforts. Its actions aim specifically to support competitive sectors and create a suitable framework for

⁷ Ordinance No. 009/PR/2004 of 23 August 2004 on the organization and functioning of the commercial courts.

⁸ Government of Chad (2017).

the development of domestic and international trade. The National Trade Strategy⁹, adopted by decree in 2019, sets out the main intervention areas for the development of trade.

2.10. The Ministry of Trade and Industry is responsible for the design, implementation and evaluation of trade policy. It is also the WTO focal point. The other entities involved in developing and implementing trade policy include the Office of the President of the Republic; the Ministry of Finance, Budget and Planning; the Ministry of the Economy; the Ministry of Foreign Affairs and African Integration; the Ministry of Agriculture; and the Ministry of Livestock. According to the authorities, the following bodies are frequently consulted when trade policies are being developed: the CCIAMA, the National Investment and Export Agency (ANIE), the Chadian National Employers' Council (CNPT) and the Consumer Protection Association (ADC).

2.3 Trade agreements and arrangements

2.3.1 WTO

2.11. Chad is an original Member of the WTO and has a permanent mission in Geneva.

2.12. Chad is one of the four African countries sponsoring the Sectoral Initiative in Favour of Cotton (C-4). It has not been directly involved, either as complainant or defendant, in any trade dispute settlement procedure. It was a third party in the *United States – Subsidies on Upland Cotton* dispute.¹⁰

2.13. As an LDC, Chad has been participating in the Integrated Framework programme since 2004 and, automatically, in the Enhanced Integrated Framework (EIF) since its launch in 2009. The Unit for the Implementation of the Enhanced Integrated Framework of Chad (UMOCIRT), which was established as part of the Ministry of Industrial Development, Trade and Private Sector Promotion, is responsible for coordinating and implementing the EIF programme. To date, UMOCIRT has conducted several studies to incorporate trade into the Government's policies and strategies. The Unit has also organized workshops and seminars and has provided technical support to the Government for the development of its trade-related programmes and strategies.

2.14. Chad is fulfilling few of its notification obligations (Common Report, Section 2). According to the authorities, this situation is partly attributable to the complexity of the notification process and insufficient human and financial resources.

2.3.2 Regional and preferential agreements

2.15. Chad has signed and ratified the African Continental Free Trade Area (AfCFTA) Agreement.

2.3.3 Other agreements and arrangements

2.16. Chad benefits from trade preferences under the European Union's Everything but Arms programme. It is also eligible to benefit from the African Growth and Opportunity Act (AGOA), including the Third Country Fabric provision. Chad is granted trade preferences by other developed countries under their national preference schemes.

2.17. Although Chad has not signed the Agreement on the Global System of Trade Preferences among Developing Countries (GSTP), as an LDC it is granted preferences by certain signatories.

2.4 Investment regime

2.18. Chad's 2008 Investment Charter remains the main regulatory framework for investment.¹¹ The Charter is applicable to investments in the following sectors: processing or packaging of industrial products; preparation or processing of products of plant, animal or fisheries origin; geological, mining and petroleum prospection and exploration; mineral production, processing and related activities; production and distribution of water and electricity and development of other

⁹ Government of Chad (2019), *National Trade Strategy*.

¹⁰ WTO document series WT/DS/267.

¹¹ Law No. 006/PR/2008, instituting the Investment Charter of the Republic of Chad.

energy sources; manufacture and assembly of articles or objects for mass consumption; tourism and hotel services; construction, public works and transport industries; maintenance of industrial equipment; and information and communication technologies.

2.19. Under the Charter, certain sectors are closed or restricted *de facto*, or require a specific prior authorization, with no distinction made between domestic and foreign operators. Water and fixed telephony services are sectors reserved for state enterprises. Health, private security, tourism, education, transport and media are regulated sectors and require prior approval or a permit from the corresponding authority before a company is created (Section 4.4). The Charter contains no explicit reference to standards of treatment and protection. Nevertheless, these sectors cannot be subject to higher taxes and charges.

2.20. For large-scale investments, most foreign investors enter into establishment agreements. Applications for such agreements must be filed with the Ministry of Trade and Industry and must include administrative, legal and technical dossiers and an investment programme examined by the National Investment Commission (CNI).¹²

2.21. Such agreements establish the purpose, location, time frame and duration of the authorized production period; the business activities; the nature and quantity of the goods that will be exempt; the nature and duration of the benefits granted and the obligations of businesses. The agreements also provide for arbitration procedures. Decree No. 416/PR/RM/MECDT/2014 establishing the procedures for granting benefits under the Investment Charter introduced certain clarifications. Notification of acceptance or rejection must in principle take place within two months. Establishment agreements are not published, but the list of signed agreements is available from the Ministry responsible for industry. Between 2013 and 2019, 18 agreements were entered into with companies from France, China, Cameroon, Libya, Morocco, Sudan and Türkiye.

2.22. Natural or legal persons of any nationality, if legally established in Chad, may benefit from special investment schemes defined in the Charter:

- Scheme A: handicraft enterprises and small and medium-sized enterprises (SMEs);
- Scheme B: large enterprises (with an investment programme of more than CFAF 500 million);
- Scheme C: large export-oriented enterprises.

2.23. The benefits under schemes B and C include various five-year tax exemptions, exemption from customs duties and potential taxable-base reductions.

2.24. The legal environment for business is governed by the various Uniform Acts of the Organization for the Harmonization of African Business Law (OHADA) (Common Report, Section 2). The authorities indicate that domestic laws have been brought fully in line with these provisions, thus significantly reducing the number of procedures.

2.25. The mission of the National Investment and Export Agency (ANIE) is to encourage and promote investment in Chad. Its mandate is defined in Law No. 004/PR/2007 of 4 January 2008 and includes managing the Charter, participating in the National Investment Commission, tracking the business climate, managing the single window and supporting SMEs. ANIE is attached to the Ministry of Trade and Industry. It has an annual budget of around CFAF 500 million, of which 90% comes from public resources.

2.26. Starting a business involves four stages: registration in the Commercial and Personal Property Credit Register, obtaining a tax identification number, registration with the National Social Security

¹² UNCTAD (2019). Viewed at: <https://unctad.org/fr/publication/examen-de-la-politique-dinvestissement-du-tchad>.

Fund and receipt of a certificate issued by ANIE. For regulated activities¹³, a licence or authorization must be obtained from the relevant ministry.

2.27. The Business Start-up Single Window (GUCE) was introduced within ANIE in 2016. The GUCE incorporates the public services involved in starting a business: the Registry of the Commercial Court, the Directorate-General of Taxes (DGI), and the National Social Security Fund (CNPS). According to the authorities, the GUCE has considerably reduced the cost and the number of procedures required to start a business. In addition to its N'Djamena base it has three regional offices, which are situated in Abéché, Moundou and Sahr. The authorities have stated that the GUCE also plans to introduce integrated information technology solutions and online procedures. In addition, the Presidential Council for Improving the Business Climate and the Business Climate Observatory were created in 2019 to improve the business climate.¹⁴

2.28. The cost of these procedures depends on the legal form of the business in question (Table 2.1). ANIE has registered around 3,500 business start-up dossiers a year since 2013.

Table 2.1 Start-up cost by business type

Business type	Cash costs	Service costs	Stamp duty	Amount due
	Amount in CFAF			
Sole proprietorship (EI)	15,000	18,000	3,000	36,000
Private limited company (SARL)	20,000	50,000	3,000	73,000
Economic interest group (GIE)	25,000	55,000	3,000	83,000
Public limited company (SA)	35,000	75,000	3,000	113,000
Branch	60,000	270,000	3,000	333,000

Source: Decree No. 1793 on the procedure governing the establishment, modification, winding-up or deregistration of companies. National Investment and Export Agency.

2.29. Chad has signed 14 bilateral investment protection and promotion agreements, three of which are still in force.¹⁵ It has been a member of the International Centre for Settlement of Investment Disputes (ICSID) since 1966, the Multilateral Investment Guarantee Agency (MIGA) since 2002 and the Extractive Industries Transparency Initiative (EITI) since 2010.

2.30. Chad's business environment remains one of the least attractive in the world. The country is ranked 182nd out of 190 countries for ease of doing business in the World Bank's Doing Business report.¹⁶ Investors must deal with chronic legal and institutional instabilities that affect their establishment and operating conditions. Other considerations are high energy costs and the security problems in the subregion. Given these factors, the institutional measures introduced in 2019 to improve and track the business climate are an important step.

2.31. Despite a few actions taken by the Government, corruption remains a scourge. According to the Transparency International index, Chad is one of the lowest-ranked countries in terms of corruption perception. In 2021, it was ranked 164th out of 180 countries (compared with 165th out of 176 countries in 2012).¹⁷

2.32. Since the last TPR report, the Government has taken several steps to stamp out corruption. It acceded to the United Nations Convention against Corruption (UNCAC) in June 2018. In January 2017, the President of the Republic announced the creation of a special court for economic crimes and corruption, but no additional information is available. A freephone number was also introduced in 2018 to encourage people to report incidents of corruption. In the context of the country's accession to the EITI, several measures have been taken to make the petroleum sector more transparent (Section 4.2).

¹³ Activities in the health, security, telecommunications, financial and banking services, tourism, education and transport sectors.

¹⁴ Decree No. 278/PR/2019 establishing a Presidential Council to Improve the Business Climate, and Decree No. 267/PR/2019 establishing the Business Climate Observatory in Chad.

¹⁵ Benin, Burkina Faso, China, Egypt, Germany, Guinea, Italy, Lebanon, Mali, Mauritius, Morocco, Qatar, Switzerland and Türkiye. Only the agreements with Germany, Italy and Switzerland have been ratified.

¹⁶ World Bank (2020).

¹⁷ Information viewed at: <https://www.transparency.org/country/TCD>.

3 TRADE POLICIES AND PRACTICES BY MEASURE

3.1 Measures directly affecting imports

3.1.1 Customs procedures, valuation, and requirements

3.1. Only economic operators with commercial exporter/importer status may import goods for commercial purposes. The formalities for obtaining this status are identical to those for starting a business (Section 2.4). Upon completion of the procedure, ANIE issues the economic operator with a certificate bearing the words "Import/export". All commercial activities are open to Chadian and foreign nationals.

3.2. Pursuant to Community legislation, only an approved customs broker or the owner of the goods being cleared may file a customs declaration (Common Report, Section 3). A simplified declaration may be filed for goods with a taxable value not exceeding CFAF 30,000.

3.3. The applicable customs regimes are those defined in the CEMAC Customs Code. In Chad, entry for home use is the most widely used regime. Under this regime, a separate declaration of the value of the goods must be submitted. Other customs regimes are seldom used. A few warehouses are used to stock chemical products pending resale to the State. The temporary admission regime is used only in connection with oil or mining exploration and prospecting and also by NGOs. Inward processing is confined to one or two operations per year by the national cigarette company, Manufacture des cigarettes du Tchad.

3.4. Chad uses Sydonia++ for customs procedures, but a transition to SydoniaWorld is planned. The authorities report that an online declaration system is under development. There are 15 customs bureaux in Chad.

3.5. The preshipment inspection programme introduced in 2003 was abolished in 2018.

3.6. Electronic cargo tracking notes (ECTNs) managed by the Chad Freight Forwarders Council (COC-Tchad) are mandatory for imports and exports. The notes must be validated by COC-Tchad (which has an office in Douala) or a representative thereof before each shipment.¹⁸ For imports shipped without a tracking note or from places with no COC-Tchad office, the ECTN may be issued on arrival. An ECTN is one of the documents required for a customs declaration. ECTN costs vary according to the origin of the imported goods (costs for trade within Africa and with Europe are lower than for trade with the rest of the world), the container size and the type of vehicle. The authorities acknowledge that the costs for issuing ECTNs need to be reduced.

3.7. Owing to the country's landlocked status, transit through Chad is rare. Goods in transit from Cameroon must be accompanied by the compulsory vehicle certificate (LVO) and an international safe-conduct document ("document T1"). The LVO costs CFAF 2,000 for vehicles registered in Cameroon and 7.5% of the freight value for vehicles registered in Chad. Document T1, which was adopted to facilitate transit between Chad and Cameroon¹⁹, is issued for each journey between the two countries and is meant to facilitate border crossings.

3.8. Despite the large volume of trade with Nigeria, particularly in livestock and livestock products, there is no official exchange bureau and trade is generally informal.

3.9. Around a dozen operators have obtained approved consignee status, and benefit from specific provisions serving to prioritize and facilitate their operations.

3.10. Customs valuation methods, as defined in the Agreement on Implementation of Article VII of the GATT, were made mandatory by an order issued in 2009.²⁰ However, the customs authorities

¹⁸ Decree No. 04/PR/PM/MTAC/2013.

¹⁹ Decision No. 03/MTPTHU/SE/DG/DTS/2000 of 10 February 2000, creating a procedure to facilitate transit transport between the Republic of Chad and the Republic of Cameroon.

²⁰ Order No. 110/MFB/SE/SG/DGDDI/2009 of 29 June 2009, concerning the Agreement on Implementation of Article VII of the GATT 1994, in relation to methods for determining customs value.

have reported difficulties in implementing this provision of the Agreement and would like to receive training in this respect.

3.11. Chad therefore generally applies the transaction value, although the customs authorities use other values in certain cases (baseline, market value). Minimum values are systematically applied to imports from Nigeria, the United Arab Emirates and Saudi Arabia, and undervaluations are said to have been frequently detected. Market prices are generally used for cross-border trade in products such as rice, sugar and wheat flour.

3.12. The customs authorities systematically inspect all goods declared for importation. They are currently considering introducing a system of selective controls, based on risk analysis.

3.13. Community provisions in relation to appeals are, in principle, applicable. The Director-General of Customs is the first level of jurisdiction in the event of a dispute. The commercial courts are the only avenue of appeal. In general, disputes have been few and far between, with two to four cases each year, generally involving valuation issues.

3.14. Chad ratified the Agreement on Trade Facilitation in February 2017. It notified its commitments under the Agreement in November 2016.²¹ The authorities have indicated that the implementation of the Agreement has been initiated but that it requires the necessary financial support. A national trade facilitation committee was established, with the Ministry of Trade and Industry and the Directorate-General of Customs serving as the focal point.

3.1.2 Rules of origin

3.15. The rules of origin currently in force are those of CEMAC (Common Report, Section 3). Rules of origin are also in force in the context of preferential or regional trade agreements. In 1998, Chad notified the WTO that it had no national rules of origin for non-preferential purposes.²²

3.16. In principle, requests for authorization to enter the Community's preferential scheme must be received and processed by a national approval committee, but the latter is not in place. Currently, a certificate of origin is issued by the Chamber of Commerce, Industry, Agriculture, Mining and Crafts upon payment of CFAF 3 per barrel of crude oil, CFAF 2.5 per litre of fuel, and CFAF 1 per kilogram of cotton.

3.1.3 Tariffs

3.1.3.1 Most-favoured-nation tariff

3.17. Barring a few exceptions, Chad applies the CEMAC common external tariff (CET) (Common Report, Section 3). The exemptions come from the annual budget laws passed by Parliament. The tariff applied by Chad in 2023 contains exceptions to the CET for 46 tariff lines (Table A3.2), as against 45 in 2012. Designed to reduce the cost of living, these exceptions provide for 0% tariffs introduced unilaterally in annual budget laws. The exceptions mainly concern food items (flour, rice, oil and pasta).

3.18. According to the authorities, the transition from the Harmonized System (HS) nomenclature 2007 to HS 2017 is under way.

3.19. The taxation of foreign trade generates a large proportion of the country's non-oil fiscal revenue (Table 3.1).

²¹ WTO document WT/PCTF/N/TCD/1 of 15 November 2016.

²² WTO document G/RO/N/22 of 16 September 1998.

Table 3.1 Composition of government revenue, 2013-21

(CFAF billion)

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Total revenue	1,186,534	1,420,291	563,011	435,079	558,032	667,721	758,652	..	..
Oil revenue	748,573	558,760	133,289	30,059	87,194	265,169	278,519	..	..
Non-oil revenue	437,961	507,306	429,722	405,020	490,090	402,552	480,133	..	..
Tax receipts	425,176	464,047	405,269	347,598	390,701	371,757	461,606	..	..
Taxes on foreign trade								..	..
Import duties	126,122	148,496	124,904	112,681	108,160	124,343	142,986	..	..
Export duties	..	..	..	..	..	..	..	..	..
VAT on imports	..	..	..	..	..	..	..	..	..
Other revenue	..	..	..	..	..	..	..	..	..
Non-tax revenue	12,785	23,259	22,953	44,922	31,447	30,795	18,527	..	..

.. Not available.

Source: Ministry of Finance, Studies and Forecasting Directorate.

3.1.3.2 Other duties and charges

3.20. Like the other CEMAC countries, Chad collects the Community integration tax (TCI), the OHADA levy, and the Community integration contribution (CCI) (Common Report, Section 3). These various charges jointly amount to 1.45% of the c.i.f. value of imports.

3.21. The other levies are:

- the Community preference tax (TPC): initially intended to finance the Community's Economic Commission on Livestock, Meat and Fishery Resources (CEBEVIRHA), this tax was replaced by the TCI in the other CEMAC countries, but Chad still collects it on tariff lines relating to fish, meat, dairy products and other products of animal origin;
- the down payment of 4% of the c.i.f. value of imports, charged in the form of personal income tax (15% for unregistered companies);
- the statistical fee of 2% of the c.i.f. value of imports, charged on all imports, irrespective of their origin;
- the African Union financing levy, introduced in 2017, amounting to 0.2% of the c.i.f. value of imports from outside Africa;
- the levy to finance the National Food Security Office (ONASA)²³, charged at rates between 0.3% and 0.5%, on around 9% of tariff lines (plant products, meat and fish).²⁴ The levy goes to the Ministry of Agriculture; and
- for goods in transit through Cameroon, an information fee of CFAF 500 per journey and a communications network and *en route* assistance fee of CFAF 2,000 per journey, payable to Cameroon's Land Freight Management Bureau (BGFT).

3.22. Although Chad levies this broad spectrum of other duties and charges on imports, it has bound them at zero rates on tariff lines for which it has made tariff commitments. These levies have not been notified to the WTO.

3.1.3.3 Bindings

3.23. During the Uruguay Round, Chad bound its agricultural product tariff lines at a ceiling of 80%. In the case of non-agricultural products, tariff lines encompassing motor vehicles and passenger transport vehicles (subheadings 8702 and 8703 of the 1992 HS), have been bound at a rate of 75%. In total, bindings affect 15.2% of six-digit tariff items, and the simple average rate is 79.9%.²⁵

²³ This levy replaced the Rural Intervention Fund (FIR) duty.

²⁴ The rates have been substantially lowered since the last TPR (they were previously between 1% and 4%).

²⁵ Based on bindings transposed according to HS 2007.

3.24. Chad's schedule of concessions was transposed in the 2007 version, then in the 2012 version and finally in the 2017 version of the HS. These schedules were certified in 2013, 2017 and 2020 as part of the transposition exercise undertaken by the WTO Secretariat.²⁶

3.25. Other duties and taxes affecting tariff lines for which Chad has made multilateral commitments have been bound at a zero rate.

3.1.3.4 Exemptions and concessions on duties and taxes

3.26. Chad grants customs duty exemptions pursuant to the CEMAC Customs Code (Common Report), the Investment Charter, the Mining Code²⁷ and the Hydrocarbons Law.²⁸ As a result, the holders of mining rights and oil contracts and the beneficiaries of authorizations and their agents may use the temporary admission regime to import material, equipment and motor vehicles for use in their exploration and production activities. In the case of the mining sector, materials and consumables intended for these activities are also exempt from customs import duties and taxes. To benefit from this exemption, an administrative certificate is required from the minister responsible for mining or petroleum, as the case may be.

3.27. Regime B of the Investment Charter guarantees that construction material and equipment needed to produce and process products are exempt from CEMAC customs duties. The exemption applies to new or expanded activities under an approved investment programme. The regime also guarantees the suspension of customs duties for temporary admission and duty-free entry, as well as under the inward-processing mechanism for export-oriented activities.

3.28. Materials and consumables intended for the mining sector are exempt from customs import duties and taxes. To benefit from this exemption, an administrative certificate is required from the minister responsible for mining or petroleum, as the case may be.

3.29. The authorities have indicated that the value of the exemptions far exceeds customs revenue, but figures were not made available to the Secretariat.

3.1.4 Other charges affecting imports

3.30. Chad applies the Community regime in respect of VAT (Common Report, Section 3). Its standard VAT rate on local and imported goods and services is 18%. The 2018 Budget Law broadened the VAT tax base and increased the liability thresholds.²⁹ A reduced rate of 9% was introduced in 2020. It applies to the following local products: cement, sugar, oil, soap and products and by-products of the local agri-food industry other than alcohol. Micro enterprises (with a turnover below CFAF 50 million) are exempt from VAT.

3.31. In addition to Community-level exemptions (Common Report, Section 3), the following products are exempt from VAT: drinking water and electricity; aircraft fuelling; and material and equipment for the production and promotion of renewable energies.

3.32. Excise tax is charged on a number of local and imported products at rates of 5%, 10% or 25%. These rates fall within the bracket agreed upon at the Community level (Common Report, Section 3). In addition to excise tax, a special tax was introduced in 2019 (Table 3.2); it applies to motor vehicles, alcoholic beverages and tobacco. The "antiretrovirals fee" was abolished in 2017.

²⁶ WTO documents WT/Let/924 of 9 December 2013, WT/Let/1286 of 18 October 2017 and WT/Let/1479 of 24 October 2020.

²⁷ Law No. 011/PR/1995 of 20 June 1995 on the Mining Code.

²⁸ Law No. 006/PR/2007 of 2 May 2007 on hydrocarbons.

²⁹ Law No. 037/PR/2018 of 31 December 2018 on the 2019 General State Budget.

Table 3.2 Excise taxes and special taxes in force in 2022

Tariff item	Product subject to excise tax	Rate of excise tax	Rate of special tax
87.03.23.10	Motor vehicles of a cylinder capacity exceeding 1,500 cm ³ but not exceeding 3,000 cm ³ , with a single drive axle	25%	20%
87.03.32.10	Other motor vehicles with compression-ignition internal combustion piston engine (diesel or semi-diesel) of a cylinder capacity exceeding 1,500 cm ³ but not exceeding 2,500 cm ³ , with a single drive axle	25%	20%
22.04 and 22.05	Wine	25%	15%
22.08	Liqueurs	25%	20%
22.03	Beer	25%	10%
24.02	Cigars, cheroots, cigarillos and cigarettes, of tobacco or of tobacco substitutes)	30%	CFAF 100/packet
22.02	Aerated waters, and beverages containing added sugar	10%	
	Games of chance	25%	10%
95.04	Devices for games of chance and recreational games	15%	
Chapter 71 except 71.17	Jewellery, precious metals and stones	20%	
87.11.30.00; 87.11.40.00; 87.11.50.00; and 87.11.90.00	Motorcycles with a cylinder capacity exceeding 250 cc	12.5%	
	Non-recoverable packaging	25%	FCAF 25, up to a maximum of 10% of the product sold
	Polypropylene		25% of ex-works value
33.03.00.00	Perfumes and toilet waters	20%	
33.04 and 33.05	Cosmetics	20%	
..	Video recorders, video and television cameras, colour television receivers, photographic cameras, slide projectors	20%	
..	Arms and ammunition	20%	

.. Not available.

Source: 2022 Budget Law.

3.1.5 Import prohibitions, restrictions, and licensing

3.33. Chad applies import prohibitions provided for in connection with environmental protection, and those arising from its international commitments (Table 3.3). According to the authorities, no quantitative restriction is currently in force.

Table 3.3 Products subject to import prohibition, authorization or control, 2023

Products	Measure and conditions	Grounds
Non-biodegradable plastic bags	Prohibition	Environmental protection ^a
Non-digital television sets	Prohibition	Conversion to digital in 2015
Communications technology equipment	Control	Compliance
Non-iodized salt	Prohibition	Public health
Certain products or materials containing or operating by means of substances capable of depleting the ozone layer ^b	Special authorization from the Ministry responsible for trade	Environmental protection (Montreal Protocol)
Arms and ammunition	Prior authorization and control by the Ministry responsible for public security	Public safety

Products	Measure and conditions	Grounds
Sulphur and other explosives	Special authorization jointly issued by the Minister responsible for trade and the Minister responsible for mining	Environmental protection ^c
Second-hand vehicles	Restrictions based on the technical state and age of the vehicle	Environmental protection ^d
Petroleum products (gasoline, diesel, fuel oil, lubricating oils and kerosene)	Qualitative and quantitative control, potentially leading to the issuance of a certificate of nationality and quality	Security ^e
Certain harmful or dangerous chemical substances	Prohibition	Environmental protection ^f
Certain harmful or dangerous chemical substances Medicaments	Restrictions (authorization, packaging and transport conditions) Prior authorization by the Ministry of Health	Environmental protection Public health

- a Order No. 007/MCPI/SE/DG/DC/DCE of 22 May 1993 prohibiting the importation of non-biodegradable plastic bags throughout the country.
- b This covers the following products: automobile air-conditioning units; domestic or commercial refrigeration and air-conditioning equipment; refrigeration equipment; portable fire extinguishers; insulation boards, panels and pipe covers; aerosol products, except medical aerosols; freon; and thermal insulation (Decree No. 09/PR/PM/MERH of 6 August 2009 regulating environmental pollution and nuisances).
- c Decree No. 451/PR/95 of 29 June 1995 repealing Decree No. 282/PR/MCI/89 of 5 May 1989 specifying procedures for the importation, distribution and circulation of products in the Republic of Chad.
- d Decree No. 1112/PR/PM/MI/2006 of 11 December 2006 regulating the importation of second-hand vehicles in the Republic of Chad.
- e Decree No. 021/PR/MMEP of 1 February 1995 on the qualitative and quantitative control of petroleum products.
- f Decree No. 09/PR/PM/MERH of 6 August 2009 regulating environmental pollution and nuisances.

Source: Information provided by the national authorities.

3.34. Other than in regard to sulphur and explosives, the import licensing regime was abolished in 1995.³⁰

3.35. Import permits are required for live animals, meat and other animal products, and vegetable products (Section 3.3.2).

3.36. The authorities have indicated that it is planned to introduce an import permit for petroleum products.

3.1.6 Anti-dumping, countervailing, and safeguard measures

3.37. Chad has no national legislation on anti-dumping measures, subsidies or countervailing measures.³¹

3.38. There are no regulations concerning safeguard measures³², but there are two specific safeguard committees in place: one for sugar, one for cement. Consequently, import quotas were introduced for sugar in 2017 and 2018.

3.1.7 Other measures affecting imports

3.39. Chad does not apply any trade-related investment measures.

3.40. The National Food Security Office (ONASA) maintains a buffer stock of food products (Section 4).³³ It constitutes/replenishes this stock through local purchases or imports. In 2021-22,

³⁰ WTO document G/LIC/N/1/TCD/1 of 31 August 1998.

³¹ WTO documents G/ADP/N/1/TCD/1, G/SCM/N/1/TCD/1 of 25 August 1998; and G/SG/N/1/TCD/1 of 31 July 2000.

³² WTO document G/SG/N/1/TCD/1 of 31 July 2000.

³³ Law No. 002/PR/01 of 21 February 2001, creating a National Food Security Office (ONASA).

this stock consisted of 34,900 tonnes of cereals. Operators in the downstream oil sector, such as refineries and distributors, are also required to hold a buffer stock of petroleum products covering at least 15 days of their domestic demand.³⁴ Lastly, for national defence and domestic security reasons, the State maintains a buffer stock to cover at least 30 days of domestic consumption.

3.2 Measures Directly Affecting Exports

3.2.1 Customs procedures and requirements

3.41. As in the case of imports, only operators holding commercial importer/exporter status are authorized to engage in export activities for commercial purposes (Section 3.1.1). Export declarations may only be presented by authorized customs brokers, who must submit the following documents on behalf of their clients: certification of importer/exporter status, and proof of registration in the Commerce and Personal Property Credit Register. Where applicable, a sanitary or phytosanitary certificate of origin must be issued. The goods are controlled according to their sensitivity. The electronic cargo tracking note (ECTN, Section 3.1.1) is mandatory for exports passing through Cameroon.

3.42. For certain products such as livestock, meat, and food products of animal origin, additional formalities are required. When live animals are taken across a border, a livestock passport and an International Certificate of Transhumance must be shown.³⁵ The fee for issuing the passport is CFAF 2,500 per herd. In addition, there is a livestock tax per head, charged as follows: CFAF 5,000 for cattle and camels; CFAF 4,000 for equine animals; CFAF 1,000 for sheep, goats and asses; and CFAF 500 for swine.

3.43. Around a dozen operators have obtained approved consignor status, and benefit from specific provisions serving to prioritize and facilitate their operations.

3.44. Payment for the export of goods outside CEMAC is subject to domiciliation with an approved intermediary where the value exceeds CFAF 5 million.

3.2.2 Taxes, charges, and levies

3.45. The statistical tax of 2% applies to all exports.

3.46. An exit duty of 8% of the f.o.b. value is levied on livestock exports. The duty is applied to market values defined by the Ministry responsible for finance (Table 3.4). This relatively high rate, on a product for which Chad enjoys a comparative advantage in the subregion, hinders the sector's development and is not without consequences for the proliferation of instances of fraud and informal trade.

3.47. Exports of livestock, leather and raw hides and skins are also subject to the standard flat-rate tax (IGL, Table 3.4).³⁶ The IGL is levied on exports of raw hides and skins at a rate of CFAF 100 per kilogram.

Table 3.4 Market values and levies on exports of live animals

(CFAF per head of livestock)

Tariff line	Designation	Market value	Export duties (8%)	Standard flat-rate tax (IGL)
0101.10.10	Racehorses	366,000	29,280	1,500
0101.10.10	Other horses	219,600	17,568	1,500
0106.90.10	Camels	219,600	17,568	1,500
0102.90.10	Cattle	183,000	14,640	1,000
0104.10.00	Sheep	54,900	4,392	150

³⁴ Ordinance No. 006/PR/12 of 7 February 2012, concerning the export and import of petroleum products.

³⁵ Order No. 039/MERA/SG/08 of 14 October 2008, regulating the export of live animals and livestock by-products.

³⁶ Law No. 01-2007 of 5 January 2007 on the 2007 General State Budget.

Tariff line	Designation	Market value	Export duties (8%)	Standard flat-rate tax (IGL)
0104.20.00	Goats	36,600	2,928	150
0101.90.00	Asses	36,600	2,928	100
0103.10.00	Swine	29,280	2,342	150

Source: Order No. 037/MFB/SE/SG/DGDDI/2011 of 1 March 2011 revising the export market values of live animals.

3.48. Exports of meat and animal products are subject to a tax at rates of CFAF 50 per kilogram of meat, CFAF 100 per bovine hide, CFAF 50 per sheepskin or goatskin, and CFAF 100 per sheepskin or skin of another species. An extra charge of CFAF 2,500 is also levied to finance the Livestock Fund.

3.49. A charge of CFAF 3 per barrel is levied on crude oil exports for issuance of the certificate of origin. For fuel exports, this amounts to CFAF 2.5 per litre. A fee of CFAF 2.5 per litre is also collected on fuel exports to finance the Downstream Petroleum Regulatory Authority of Chad (ARSAT).

3.50. The authorities have indicated that there are plans to introduce a 2.5% levy on petroleum products, regardless of their destination.

3.51. No information was available on tax revenue from export taxes.

3.2.3 Export prohibitions, restrictions, and licensing

3.52. In general, the only quantitative restrictions and controls in force on exports are those derived from the international treaties to which Chad is party, including the Basel Convention, the Convention on International Trade in Endangered Species of Wild Fauna and Flora, the Chemical Weapons Convention, and the Treaty on the Non-Proliferation of Nuclear Weapons.

3.53. Where necessary, the Minister responsible for trade may prohibit or restrict the export of a product.³⁷

3.54. Exports of heifers and calves have been banned since 2003 to preserve the livestock population.³⁸ The same applies to live animals of camel species under five years of age. The local administrative authorities may also restrict cereal exports at any time in the event of a shortage.

3.55. The export licensing regime was abolished in 1995, but the authorities have indicated that it is planned to introduce an export permit for petroleum products.

3.56. Export permits are required for live animals, meat and other animal products (Section 3.3.2).

3.2.4 Export support and promotion

3.57. Chad does not grant export subsidies, but various Community-level suspensive arrangements are applicable (Common Report, Section 3). Chad also has no free zones. Studies are ongoing for the creation of dry docks.

3.58. Article 21 of the Investment Charter guarantees a zero rate of VAT on exported products, to allow reimbursement of the VAT paid on inputs used.

3.59. The mission of ANIE is to promote exports by assisting and advising Chadian exporters, providing them with information, and exploring promising markets. It has an annual budget of around CFAF 500 million.

³⁷ Decree No. 451/PR/95 of 29 June 1995 repealing Decree No. 282/PR/MCI/89 of 5 May 1989 determining procedures for the importation, distribution and circulation of products in the Republic of Chad.

³⁸ Decision No. 001/ME/2003 of 5 March 2003.

3.60. In 2019, ANIE developed an Export Action and Promotion Plan on export procedures and modalities.

3.61. The CCIAMA occasionally organizes trade fairs, which are financed by the businesses that take part and by state subsidies.

3.2.5 Export finance, insurance, and guarantees

3.62. Chad does not have a public financing, insurance or guarantee programme exclusively for exporters or a financing programme for domestic production.

3.3 Measures Affecting Production and Trade

3.3.1 Standards and other technical regulations

3.63. Law No. 044/PR/2014 of 31 December 2014 on standardization was passed to establish the general framework of standardization; improve the quality of products, services and technology transfer; remove technical barriers to trade and foster non-discrimination; encourage interested parties to participate in standardization and enforce the principle of transparency; prevent overlapping and duplicate work on standardization; encourage mutual recognition of technical regulations, standards and assessment procedures with equivalent effect; and save resources and protect the environment. The national standards institutions created under this law were the Chadian Standardization Agency (ATNOR), which became operational in 2020; the National Quality Council (CONAQ); and the Interministerial Regulatory Committee (CNIR). ATNOR operates under Decree No. 1470/PR/MMDICPSP/2018 of 1 August 2018.

3.64. Chad has submitted no notifications to the WTO on technical regulations.

3.65. Chad is a member of the African Organisation for Standardisation and a corresponding member of the International Organization for Standardization.

3.66. There is no accreditation system, although a seed certification and standardization service is operational within the Ministry of Agriculture.

3.3.2 Sanitary and phytosanitary requirements

3.67. Chad has submitted no notifications to the WTO on sanitary and phytosanitary measures. Chad still does not have a national SPS committee.

3.68. An import permit is required for live animals, meat and other animal products, leather, raw hides and skins. Imports of such products must be accompanied by a sanitary certificate issued by the countries of origin. Upon arrival in Chad, the products are subject to a health control conducted by officials of the Veterinary Services Department in the Ministry responsible for livestock. A sanitary certificate is issued on completion of the control.

3.69. Under the plant protection law³⁹, anyone who, for commercial or professional reasons, wishes to import plant material or products liable to be carriers of organisms that could harm plants or have an effect on crops must obtain prior authorization to engage in the activity. The products in question must be accompanied by a phytosanitary certificate issued by the official department in the country of origin and drawn up according to the model of the International Plant Protection Convention (IPPC). Upon entry into Chadian territory, the products (including those in transit) undergo a phytosanitary control.

3.70. The Ministry of Agriculture's Department of Plant Protection and Packaging (DPVC) is responsible for phytosanitary protection and controls. The DPVC has 19 phytosanitary checkpoints at the borders to carry out controls on imports of plant products. On completion of the controls,

³⁹ Law No. 14/PR/95 of 13 July 1995 and Decree No. 010/PR/MA/99 of 7 January 1999 establishing the procedures for implementing Law No. 14/PR/95 on plant protection.

products presenting a danger to plant material, the environment, humans or animals may be disinfected, denied entry or destroyed, depending on the level of risk. No fee is charged by the DPVC.

3.71. The DPVC is also responsible for implementing the obligations arising from the international conventions to which Chad is party, including the IPPC, the Inter-African Phytosanitary Council, the Codex Alimentarius Commission, and the World Organisation for Animal Health (WAHO).

3.72. A sanitary or phytosanitary certificate is required for exports of animal and plant products (Table 3.5). The certificate must set out the description of the goods using the scientific name, the origin of the goods, the net weight and the nature of the packaging.

Table 3.5 Animal and plant products subject to certification

Restricted articles	Authorizations and/or approvals required
Cereals	Phytosanitary certificate issued by the Directorate-General for Regulation and Control
Fruit and vegetables and other raw materials	Phytosanitary certificate issued by the Directorate-General for Regulation and Control
Livestock and meat of all species	Phytosanitary certificate and international livestock passport of the Economic Commission on Livestock, Meat and Fishery Resources (CEBEVIRHA)
Carcasses and trophies of common game	Hunting permit

Source: National Investment and Export Agency (2017).

3.73. In relation to animal health, a law enacted in 2004 lists diseases that are "recognized in law as contagious" and specifies the hygiene, medical, sanitary and legal measures that the authorities can take to tackle such diseases.⁴⁰ The law authorizes the Ministry responsible for livestock to introduce "permanent measures" to protect national livestock herds, even when there has been no outbreak of these diseases. The measures can be imposed on imports and exports of live animals and their products.

3.74. Chad is the only CEMAC country that is a member of the Permanent Interstate Committee for Drought Control in the Sahel (CILSS). As a CEMAC member, it has ratified the regulations on pesticide registration. Under the regulations, all pesticides must be approved or authorized before they are imported, distributed, marketed or used. The implementation of these regulations, particularly pesticide approval, is the responsibility of the Sahelian Pesticide Committee, the decisions of which apply in the nine member countries. Chad is also a member of the Pesticides Committee of Central Africa (CPAC). The Food Quality Control Centre (CECOQDA) was created in 2010 to contribute to the drafting of national standards on the hygienic and nutritional quality of foodstuffs and to serve as an advisory bureau for producers and consumers on related issues.⁴¹ CECOQDA has two laboratories and regularly issues analytical bulletins on food conformity. Since January 2020, CECOQDA has been empowered to certify foodstuffs at the national, subregional and international levels.

3.3.3 Competition policy and price controls

3.75. The Community regime (Common Report, Section 3) and Law No. 43/PR/2014 form the legal basis for Chad's competition regime. Moreover, the investment charters of CEMAC and Chad prohibit anti-competitive practices.

3.76. Law No. 43/PR/2014 has as its purpose to organize and promote competition, define competition rules, and establish the National Competition Council (CNC), which is attached to the Ministry of Trade and Industry. The Law includes provisions on anti-competitive practices such as agreements, cartels, collusion, abuse of dominant position, mergers and acquisitions, price transparency infringements, restrictive pricing and loss-making or related sales. In principle, the Law applies to all natural persons and all public and private legal persons.

⁴⁰ Law No. 009/PR/2004 of 19 May 2004 organizing the sanitary inspectorate and the collective prevention of legally recognized contagious animal diseases on the territory of the Republic of Chad.

⁴¹ Law No. 10/PR/021 establishing the Food Quality Control Centre (CECOQDA).

3.77. The decrees on the organization and functioning of the CNC were adopted in August 2018 and its members were appointed in March 2019.

3.78. Barring a few exceptions, prices can generally be set freely (Table 3.6). In this connection, the authorities have indicated that the provisions of national legislation apply only to petroleum products.

Table 3.6 Products subject to price controls

Product	Measure	In force
3 m galvanized corrugated iron sheets	Fixed selling price	Introduced in 2007 but not applied
Water	CFAF 100/m ³	..
Electricity	Low voltage: CFAF 85/kWh for the first 150 kWh; CFAF 125/kWh thereafter Other: single tariff at CFAF 125/kWh	Latest review in 2012
3 kg and 6 kg gas bottles	Maximum selling price set at CFAF 1,400 (3 kg) and CFAF 2,900 (6 kg)	..
Generic medicaments	Profit margins set at 20% for wholesalers, and 30% for dispensaries and pharmaceutical stores	..
Local petroleum products	Premium petrol: CFAF 523/l; diesel fuel: CFAF 568/l; A1 jet fuel: CFAF 556/l; kerosene: CFAF 395/l	Latest review in 2017

.. Not available.

Source: Information provided by the Chadian authorities.

3.79. In 2015, Chad introduced a consumer protection law and a national consumer protection council.⁴²

3.3.4 State trading, state-owned enterprises, and privatization

3.80. Chad notified the WTO that it had no state-trading enterprises.⁴³

3.81. In April 2018, the Chadian State sold 60% of the Société cotonnière du Tchad (CotonTchad) to the private enterprise Olam for more than CFAF 9 billion. In 2019, the Société tchadienne de jus de fruit was sold to a private company.

3.3.5 Government procurement

3.82. Chad is not a party to the WTO Plurilateral Agreement on Government Procurement, nor is it an observer. No steps are being taken towards future accession.

3.83. A new Government Procurement Code was adopted in 2015.⁴⁴ The Code establishes the rules applicable to the preparation, award, execution and oversight of government procurement for works, supplies and services, including intellectual services in Chad. The Code also establishes the Government Procurement Regulatory Authority (ARMP), which has as its mission to regulate the procurement system and undertake reforms and modernization of the rules.

3.84. The Code specifies the applicable administrative sanctions and actions relating to the prevention and settlement of related disputes. It covers purchases made by the State, the decentralized authorities, public institutions, and majority state-owned companies. Sovereignty

⁴² Law No. 005-PR-2015 on Consumer Protection in Chad.

⁴³ WTO document G/STR/N/7/TCD of 5 July 2001.

⁴⁴ Decree No. 2417/PR/PM/2015 of 17 December 2015 establishing the Government Procurement Code.

spending, such as military expenditure, is not covered by the Code. Nevertheless, the procurement rules established by Decree No. 503/PR/PM/SGG/2003 remain in effect.

3.85. Government procurement in Chad is particularly susceptible to corruption. For example, one third of companies surveyed indicated that "gifts" were expected for a company to win a public contract.⁴⁵ In the 2017-18 Global Competitiveness Index, Chad was ranked 109th out of 137 in the indicator on favouritism in decisions of government officials, and 137th out of 137 in the indicator on irregular payments and bribes.⁴⁶

3.3.6 Intellectual property rights

3.86. Chad is a member of the African Intellectual Property Organization (OAPI) and the World Intellectual Property Organization. It ratified the revised Bangui Agreement (1999) and is a party to the Berne Convention.

3.87. Intellectual property issues are dealt with by the Department of Industrial Property and Technology, which is part of the Ministry responsible for trade. This department also serves as the contact point under Article 69 of the TRIPS Agreement. To date, it has received hundreds of deposits of different intellectual property instruments (Table 3.7).

Table 3.7 Number of deposits at the National Liaison Structure (SNL), 2013-21

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Patents	2	37	..	34	52	103	17	86	..
Marks	..	51	..	3	396	221	208	392	411
Industrial designs	..	17	..	17	..	..	85	663	119

.. Not available.

Source: World Intellectual Property Organization.

3.88. Copyright and related rights are protected by a law adopted in 2003⁴⁷, which designates the Chadian Copyright Office (BUTDRA) as the body authorized to deal with issues relating to the promotion and exploitation of artistic, literary or scientific works, and the protection of the rights of authors and their successors in title. The Office is also authorized to manage the interests of members of foreign copyright societies in Chad when there is a mandate, reciprocity agreement or convention on the subject that is binding on Chad. It may collect royalties and authorize any communication of literary, musical, dramatic or artistic works to the public. It also organizes copyright information and awareness campaigns. In 2019, BUTDRA paid out around CFAF 54 million to successors in title, up from CFAF 34 million in 2013.

3.89. According to the authorities, the pirating of artistic works and the counterfeiting of pharmaceutical products are the main spheres in which intellectual property rights are infringed in Chad.

⁴⁵ World Bank (2017).

⁴⁶ World Economic Forum (2017).

⁴⁷ Law No. 005/PR/2003 of 2 May 2003, on the protection of copyright, related rights and expressions of folklore.

4 TRADE POLICY BY SECTOR

4.1 Agriculture, forestry, and fisheries

4.1.1 Introduction

4.1. The agricultural sector plays a leading role in the Chadian economy, contributing an average of 27% to GDP, with livestock farming alone contributing 8%. The sector employs 80% of the working population, more than half of whom are women.

4.2. Agricultural production remains an essentially informal activity and consists mainly of subsistence farming.⁴⁸ The yields of extensive traditional agro-pastoral systems generally remain low. Despite the country's potential for the development of agriculture, forestry, livestock and fisheries, the agricultural sector's development has been erratic because of its dependence on weather conditions, poor infrastructure, absence of marketing structures, lack of improved seeds, and inadequate cultivation techniques and equipment.

4.3. The semi-desert areas of the Sahel, in the north of the country, are used for grazing during the rainy season, whereas the fertile fields of the south provide most of the cash and food crops. Around 3.4 million ha of land were cultivated in 2020, compared with 2 million ha in 2013, but only 30,000 ha were irrigated. The main cash crops are cotton, gum arabic, sesame, sugar cane and groundnuts. The main food crops are millet, sorghum, berbere, maize, rice and market garden produce (Table 4.1).

Table 4.1 Food production, 2013-21

(Thousands of tonnes)

Year	2013	2014	2015	2016	2017	2018	2019	2020	2021
Cereals	3,161.2	2,622.4	2,748.7	2,452.5	2,873.7	2,716.9	2,925.3	2,882.3	2,620.3
Millet	847.1	555.6	694.8	592.1	725.7	660.2	717.6	686.6	621.4
Sorghum	1,171.6	799.2	921.7	835.4	991.0	946.3	972.1	970.2	895.8
Maize	456.0	418.0	332.9	349.5	443.8	396.5	414.6	407.4	364.6
Rice	177.7	378.2	304.1	243.5	257.7	263.6	290.6	278.1	242.6
Berberere	500.1	469.6	494.4	431.1	453.7	448.5	528.4	538.2	494.4
Wheat	8.8	1.8	0.8	1.0	1.7	1.9	1.6	1,815.0	1.5
Oilseeds, pulses and tubers	2,312.2	1,777.8	1,424.1	1,301.9	1,888.4	1,734.6	1,817.4	1,753.4	1,695.9
Groundnuts	1,297.7	965.2	791.1	720.1	871.2	870.1	873.2	840.0	798.0
Sesame	124.6	125.9	204.8	152.6	153.6	158.7	217.7	202.1	196.9
Cowpeas	124.1	121.1	113.9	138.1	144.1	152.0	152.9	154.6	151.7
Bambara beans	24.7	28.0	0.4	33.1	37.6	34.7	34.1	31.7	32.3
Cassava	222.6	224.0	166.9	141.0	492.5	290.6	297.0	293.9	295.1
Sweet potatoes	518.4	290.1	142.7	97.1	170.4	199.9	217.3	206.2	195.8
Dasheen		23.6	4.3	20.3	19.0	28.7	25.1	24.9	26.2

Source: Department of Agricultural Production and Statistics, Ministry of Production, Irrigation and Agricultural Equipment (MPIEA).

4.4. The land tenure regime does not lend itself to the establishment of an official land market, particularly in rural areas. A "modern" regime coexists with customary law. As a result, land ownership can be attested either by registering it or farming it (customary law). In rural areas, customary law predominates. In principle, it is prohibited to sell land to nationals of countries with which Chad does not have a reciprocity agreement on the subject, but in practice this provision is not applied. The State may take ownership of undeveloped land. A land code is in the process of being adopted by the National Assembly.

4.5. Chad is particularly exposed to the risks associated with climate change.⁴⁹ The main climate risks are: (i) reduced and increasingly variable rainfall and water resources; (ii) continuous temperature rises observed since the 1990s; (iii) the resurgence of extreme weather events (droughts, floods, heat waves), which will become increasingly frequent.

⁴⁸ For example, according to the general census of enterprises published by the National Institute of Statistics and Economic and Demographic Studies (INSEED) in 2015, only five economic units were involved in agriculture, forestry or fishing.

⁴⁹ In a study on the climate vulnerability of 186 countries, Chad was ranked as the country most at risk. Verisk Climate Change Vulnerability Index 2016.

4.6. Chad is a major exporter of livestock, hides and skins, cotton and sesame. A large proportion of trade in agricultural products is conducted informally. For example, exports to Cameroon and Nigeria, especially livestock exports, remain strong, but are likely to be underestimated in the official statistics.

4.7. Agricultural imports are dominated by edible preparations, tobacco and rice.

4.1.2 Agricultural policy

4.8. The Ministry of Agriculture and Irrigation is responsible for the design, implementation and evaluation of the Government's agricultural policy. It relies on technical services, including the National Rural Development Office (ONDR) for matters relating to producer support programmes, the National Food Security Office (ONASA) for the management of a buffer stock of food, the National Rural Development Support Agency (ANADER) and the Chadian Institute of Agricultural Research for Development (ITRAD).

4.9. The overall objective of the National Investment Plan for the Rural Sector (PNISR), an agricultural sector policy paper, is to make the rural sector a significant source of economic growth and ensure food security for the population.⁵⁰ The Plan navigates the transition between the National Development Plan guidelines and the action plans of different sectors. It strategically integrates all rural sector projects and programmes in terms of operationalization, budgeting and steering of actions. The PNISR's budget amounts to CFAF 2,431 billion for the six years from 2016 to 2022.

4.10. The PNISR has set itself five specific objectives:

- promote sustainable rural development by improving the living environment for rural producers, managing natural resources rationally and judiciously adapting local economies to climate hazards;
- develop rural infrastructure to make optimum use of land and water resources and improve access to markets, material, equipment and financing;
- sustainably develop three subsectors – agriculture, forestry and livestock; fisheries; and wildlife – to give added value to Chadian products and make them more competitive;
- sustainably improve the food and nutritional security of rural populations, better integrate young people and women into production systems and strengthen the resilience of rural households;
- create favourable conditions for rural development by improving governance and strengthening research, training, outreach and effective participation for all stakeholders.

4.11. Food security is the responsibility of ONASA, whose mission includes building up and managing a reserve stock of food, enabling it to intervene in case of necessity or emergency. ONASA's stock consists of direct purchases and food aid; it is managed by the Action Committee for Food Security and Crisis Management. The Committee targets vulnerable areas according to circumstances, and decides whether to sell food at subsidized prices or distribute it free of charge. In 2021, the stock stood at 12,641 tonnes.

4.12. In 2016, ANADER was created to support more intensive and more diverse agricultural, livestock, fisheries and forestry production; promote the agriculture, livestock, fisheries and forestry subsectors; and support the training and structuring of farmers' organizations capable of managing collective actions. ANADER's resources consist of state subsidies and other contributions, payments for services provided and resources from domestic and foreign entities.

4.13. The common external tariff (CET) generally applies to all imports of agricultural products, but 46 tariff lines covering food products (flour, rice, oil and pasta) are exempt from the CET to reduce the cost of living (Section 3.1.3.1). Market prices are generally used as the customs value for cross-border trade in products such as rice, sugar and wheat flour. In relation to customs duties,

⁵⁰ Government of Chad (2019).

the free movement of agricultural products of Community origin is, in principle, guaranteed within the CEMAC zone.

4.14. An exit duty is levied on exported products: 8% for animals and 2% for other products. For live animals, the exit duty is applied to market values (Section 3.2.2). This relatively high rate substantially hinders the sector's development and is not without consequences for the proliferation of instances of fraud and informal trade. Exports of livestock, raw hides and skins, and leather are also subject to the standard flat-rate tax (IGL), at CFAF 100/kg (Section 3.2.2). Exports of heifers, calves and camel species under five years of age are prohibited.

4.15. Import permits must be obtained in advance for live animals, meat, leather, raw hides and skins, and vegetable products (Section 3.3.2). The import of animal products is subject to a health control, attested by a sanitary certificate. A sanitary or phytosanitary certificate is also required for imports and exports of plant products. The Food Quality Control Centre (CECOQDA) contributes to the drafting of national standards on the hygienic and nutritional quality of food products. CECOQDA also certifies food products in cooperation with the Chadian Standardization Agency (ATNOR)

4.16. The Government has participated in numerous projects in the agro-pastoral sector in cooperation with its development partners.

4.1.3 Policy by subsector

4.1.3.1 Livestock farming and by-products

4.17. Livestock farming employs around 40% of the working population and 80% of the rural population. Natural pastures are the main pastoral resource. Together with range land, they occupy 84 million ha, or 65% of Chad's total land area.

4.18. Livestock farming is essentially based on nomadism and transhumance. Because weather conditions are variable, the availability of water and grazing land varies by region and over time. As a result, nomadic herders sometimes have to migrate long distances, sometimes in excess of 500 km, which naturally creates conflict with sedentary herders and crop farmers who use the same resources. Other constraints on the development of livestock farming include the shortage of grazing land and water resources, low productivity, and barriers that hinder access to subregional and regional markets.

4.19. With livestock numbers having surged to around 140 million head – mostly bovine animals, small ruminants and dromedaries – Chad is the largest livestock and meat producer in Central Africa (Table 4.2).

Table 4.2 Livestock numbers, 2013-21

Number of heads	2013	2014	2015	2016	2017	2018	2019	2020	2021
Bovine animals	22,446,215	23,637,542	24,892,098	26,213,239	27,604,500	29,069,601	30,612,461	32,237,210	33,948,191
Sheep	22,697,074	24,495,381	26,436,170	28,530,729	30,791,242	33,230,856	35,863,764	38,705,279	41,771,929
Goats	27,070,013	28,742,985	30,519,349	32,405,495	34,408,208	36,534,693	38,792,597	41,190,044	43,735,656
Camels	5,645,776	6,017,416	6,413,521	6,835,700	7,285,669	7,765,258	8,276,416	8,821,223	9,401,892
Equine animals	987,482	1,029,592	1,073,498	1,119,276	1,167,006	1,216,772	1,268,660	1,322,760	1,379,167
Asses	2,467,670	2,630,564	2,804,210	2,989,319	3,186,647	3,397,001	3,621,240	3,860,282	4,115,103
Swine	1,323,171	1,483,986	1,664,346	1,866,627	2,093,492	2,347,112	2,633,293	..	3,312,279
Total	82,637,401	88,037,466	93,803,192	99,960,385	106,536,764	113,561,293	121,068,432	129,090,134	137,664,217

.. Not available.

Source: Ministry of Livestock and Animal Production (MEPA), 2022.

4.20. Livestock is Chad's second largest export product. The main species exported are bovine animals and camels. Bovine animals are exported live to Nigeria and, to a lesser extent, Cameroon and the Central African Republic; camels are exported to Libya and Egypt.

4.21. In addition to the strong tariff protection provided under the CET (Common Report, Section 3), the livestock sector is also subject to numerous levies and procedures on both the export and import fronts (Section 3). Livestock exports are subject to an 8% exit duty (Section 3). A fee of up to

CFAF 5,000 per head for bovine animals and camels is charged and paid into the National Livestock Fund.

4.22. The goal of government policy in the sector is to make the products competitive on regional and international markets by providing substantial support for livestock farmers and their grazing practices. The main measures taken since 2013 are the launch of the project to support the development of the livestock industry (PADIAT), the purpose of which is to establish complexes of abattoirs, tanneries, food factories and pharmaceutical factories and to implement a pilot project to support value chains.

4.23. Since 2013, two National Livestock Development Plans (2013-17 and 2018-21) and two strategies (one for pastoral development and one for local milk) have been drawn up with several department guidelines. In the area of health, the department has made a commitment to eradicate peste des petit ruminants by 2025 and to contain soil-borne diseases and parasitic diseases. In the area of livestock production, the focus is on increasing productivity while securing pastoral systems by developing the subsectors through more modern and more intensive farming methods and by industrializing the sector.

4.24. Processing activities are underdeveloped. At the two abattoirs (Farcha and Moundou), the meat-preservation facilities that exist are seldom operational. As a result, meat is exported only by private persons acting in their personal capacity. The commercialization of livestock by-products, such as raw hides and skins, leather, hoofs and horns, is merely incipient. There is no modern industrial facility for the treatment and processing of these products. The techniques used are traditional and inefficient, resulting in poor-quality products.

4.25. To address these concerns, the State began to build industrial facilities for animal products: the Logone abattoir complex (opened in February 2020), the Mandélie dairy industry complex (under construction) and the Djarmaya abattoir complex (under construction).

4.26. The National Livestock Fund (FNE) has several missions: (i) to supply veterinary posts with veterinary material and products for identifying and processing cattle for export; (ii) to collect the proceeds of the fund and track the status of payments; (iii) to contribute to the financing of non-salary cost activities (missions, studies); and (iv) to support stations with vaccination campaigns when required.

4.27. In addition, health control requires the payment of CFAF 2,500 per herd for the health passport. All of these charges undermine the competitiveness of a sector in which the country nonetheless has a definite comparative advantage. As a result, informal border crossings and under-declarations of the number of animals being exported are frequent.

4.1.3.2 Cotton and its by-products

4.28. Cotton has traditionally been the main cash crop in the Chadian economy. The cotton-growing area covers around 100,000 km², or 80% of the Sudanian part of the country, with rainfall ranging from 800 to 1,200 mm per year. Seed cotton production, however, has declined sharply in recent years. The subsector is still going through a deep crisis, which has led many producers to switch from cotton to food crops.

4.29. Cotton production slumped to an all-time low during the 2018-19 season, with a crop of only 45,899 tonnes, down from 159,805 tonnes the previous season. This contraction was caused mainly by a lack of funds for the mobilization of resources to deploy factors of production, the accumulation of arrears among farmers and the difficulties faced in terms of mobilizing financing from local banks. Most of the cotton fibre produced is exported to Asia and Europe. Some units manufacture textile products for the local market.

4.30. In 2018, the Government partially privatized Société CotonTchad SN. The privatization reshaped the company's share structure, with 60% of its shares, worth CFAF 9.8 billion, being transferred to the Olam International Group; 35% belonging to the State; and 5% going to the cotton farmers. CotonTchad has nine cotton-ginning factories, all in the south of the country.

4.1.3.3 Sugar

4.31. The sugar market is organized at the Community level (Common Report, Section 4.1.3.3). In Chad, the subsector is centred around the Compagnie sucrière du Tchad (CST), 82.2% of which is owned by Société d'organisation de management et de développement des industries alimentaires et agricoles, 8.9% by the Chadian State and 8.9% by Société sucrière du Cameroun. The CST is the only sugar producer in Chad and produces around 40,000 tonnes per year.

4.32. The National Sugar Market Regulation Committee is the safeguard committee for sugar. Import quotas were introduced in 2017 and 2018, and each of the 14 registered importers (including the CST) was allocated a specific quota.

4.1.3.4 Gum arabic

4.33. Chad is the world's second largest exporter of gum arabic, after Sudan. Average production is estimated at between 12,000 and 13,000 tonnes a year, which is around a quarter of global production. Gum arabic is a source of additional revenue for more than 500,000 households, farmers and herders, sedentary and nomadic, especially during the dry season. The rubber-producing regions cover a vast area. Usage rights are favourable to mobile communities.

4.34. The subsector's performance led the Government to draw up a policy to promote gum arabic cultivation. The policy is enshrined in the National Development Plan 2017-21, the purpose of which is to strengthen the subsector's competitiveness by delivering training, awareness-raising and advisory services to operators in the subsector and providing them with essential equipment and material to make them more professional and better organized. Recent years have seen a significant increase in the quantity and quality of the support provided.

4.1.3.5 Other agricultural products

Spirulina

4.35. Chad is one of the world's leading producers of spirulina, with an annual output of between 150 and 200 tonnes.⁵¹ The natural conditions of the Lake Chad area strongly favour its cultivation. The algae are processed for food using traditional methods that have been practised for generations.

Shea

4.36. Shea has strong potential in Chad. Felling operations cover only 4-5% of the country's 50-60 million trees. Potential production is estimated at around 556,000 tonnes of kernels per year.⁵² These relatively large quantities of shea trees grow naturally in the south of the country.

4.1.3.6 Fishing

4.37. Fishing is practised in the country's numerous water bodies: rivers (including the Chari and the Logone), lakes (Chad, Léré, Fitri, Iro and others) and secondary watercourses and watering points. Fishing in Chad has not yet been industrialized; it is purely artisanal. Average annual production is estimated at 150,000 tonnes of fish, out of a potential production of 250,000 tonnes. It is estimated that about 500,000 people practise fishing and related activities (drying, smoking, marketing, etc.).

4.38. Located in an area with low rainfall and high evaporation, Lake Chad is a huge, flat basin with a depth generally not exceeding 4 metres. Around 90% of Lake Chad has disappeared in the last 50 years due to a combination of drought and increased water use for irrigation.

4.39. Fishing in Chad is entirely artisanal. Products are preserved in the usual forms: smoked, dried or under ice. The infrastructure built for this purpose is, for the most part, not functional. Annual output fluctuates depending on weather conditions, and is situated at around 110,000 tonnes

⁵¹ Spirulina (dihé) is a blue alga used for nutritional and pharmaceutical purposes and is renowned for its protein and vitamin content.

⁵² Djekota, Christophe, *et al.*, *Potentiel karité au Tchad*, Journal of Animal and Plant Sciences, 2014.

per year, out of an estimated potential of 250,000 tonnes. Aquaculture plays only a marginal role, with an annual output of 115 tonnes.

4.40. Fishing is governed by Title IV of Law No. 014/PR/2008 of 10 June 2008 establishing the forestry, fauna and fisheries regime. Articles 274, 275 and 276, in Chapter 7, establish the conditions for transporting and marketing fisheries products. Under this law, fishing requires a permit. There are two categories of permits: category A for Chadian nationals, and category B for foreign nationals. Permits are valid for one year and are renewable. They are issued following payment of a CFAF 50,000 fee for Chadian nationals or a CFAF 200,000 fee for foreign nationals, as set out in Article 41 of the 2017 Budget Law.

4.41. The average common external tariff on fish products (as defined by the WTO) is 25.6%. Additional levies also apply (Section 3). The sale of fish on the market requires a movement permit, which is issued subject to a 3% fee.

4.42. No projects devoted exclusively to fish have existed since the Fisheries Development Project (PRODEPECHE), which ended in 2013. Nevertheless, some rural development projects include a fishing component among their forms of intervention. Notable examples include the Support Project for Resilience and Agricultural Systems in Chad (PARSAT), the Project for the Development of Resilience and Action to Combat Food Insecurity in Chad (PDRLIAT), and two subregional projects carried out by the Lake Chad Basin Commission (CBLT) and the Economic Commission on Livestock, Meat and Fishery Resources (CEBEVIRHA).

4.1.3.7 Forestry products

4.43. The goal of the Government's forestry policy is to use forestry products to boost development and reduce poverty while protecting biological diversity in forests. The forestry management and conservation regime is contained in Law No. 014/PR/08 of 10 June 2008 establishing the forestry, fauna and fisheries regime. This Law supplements Law No. 14/PR/98 of 17 August 1998 defining the general principles of environmental protection.

4.44. Under the Law, any commercial logging is subject to the payment of fees and taxes. The Law envisages incentives for reforestation. Concessions may be granted on areas of up to 20 ha for private persons and 100 ha for companies. These concessions may be awarded to individuals or communities, subject to reforestation or regeneration requirements.

4.2 Mining, energy and water

4.2.1 Mining

4.45. Chad has abundant deposits of gold, iron, bauxite, salt and natron, as well as other minerals that can be used in construction, such as limestone, kaolin, marble and diatomites. The only minerals currently being worked are alluvial gold (on a small scale), natron, gravel and sand. Because of its enormous potential, mining is a priority sector in the National Development Plan. The sector contributes around 4% to GDP. Gold mining is a very recent activity in Chad and remains mainly artisanal. Most of the gold is exported to the United Arab Emirates and Asian countries.

4.46. The Mining Code regulates the prospecting, exploration, production, possession, transportation and processing of all mineral and fossil resources except liquid and gaseous hydrocarbons.⁵³ Under the Code, mineral resources contained in the country's soil and subsoil are the property of the State, and mining rights are required for prospecting, exploration and production.

4.47. Table 4.3 shows the various mining rights and the conditions under which they are issued by the Ministry responsible for mines and geology. The operator must submit a comprehensive dossier, the composition of which varies depending on the licence being sought. All mining rights and licences are renewable, subject to certain conditions.

⁵³ Law No. 011/PR/95 of 20 June 1995 establishing the Mining Code in the Republic of Chad, and Decree No. 821/PR/MMEP/95.

Table 4.3 Characteristics of mining rights

Type of licence	Activity or nature of the right	Land area / means	Duration	Fees and taxes (in CFAF)
Prospecting licence	Surface and underground work/Non-exclusive right	By order of the Minister	1 year	Issuance fee: 1 million Renewal: 1 million Land-use fee (km ² /year) – see exploration permit
Artisanal quarrying licence	Quarrying without crushing/Non-exclusive right	1 ha	1 year	Issuance fee: 5 million Renewal: 5 million Land-use fee (km ² /year) for mines and at (ha/year) for quarries: 50,000
Temporary industrial quarrying licence	Quarrying with crushing/Exclusive, divisible, mortgageable right and free use of the quarry materials requested	1 ha	1 year	Issuance fee: 5 million Renewal: 5 million Land-use fee (km ² /year): 50,000
Permanent industrial quarrying licence	Quarrying with crushing for commercial purposes or public projects/Exclusive right and free use of the quarried material	Dependent on the deposit	5 years	Issuance fee: 15 million Renewal: 15 million Land-use fee (km ² /year): 50,000
Tailings reprocessing licence	Reprocessing of waste at an artificial deposit not subject to a mining right/Exclusive right to reprocess and freely use processed material	Dependent on the quantity and size of the waste	3 years	Issuance fee – see Industrial mining permit Renewal – see Industrial mining permit
Traditional artisanal deposit mining licence (gold deposit = gold panning)	Artisanal mining of alluvial, eluvial and vein deposits using artisanal methods (shovels, picks, tamping bars, etc.) at a depth not exceeding 10 m./ Reserved for Chadian nationals	1 km ²	1 year	Issuance fee: 1 million Renewal: 1 million Land-use fee (km ² /year): 10,000
Semi-mechanized artisanal mining licence	Artisanal mining of alluvial, eluvial and vein deposits using semi-mechanized methods (excavators, skips, crushers, engine-generators, etc.) at a depth not exceeding 50 m. Open to all Chadian and foreign companies	2 km ²	3 years	Issuance fee: 1 million Renewal: 1 million Land-use fee (km ² /year) for mines and at (ha/year) for quarries: First period of validity: 20,000
Mineral exploration permit	Surface and underground work to define a deposit/Exclusive right to explore the designated area for the material	Dependent on the deposit type		Issuance fee: 2 million Renewal: 2.5 million Transfer fee: 5 million Land-use fee (km ² /year): 5,000. Renewal: 7,500. Second renewal: 10,000
Semi-industrial mining permit	Semi-industrial mining work/Exclusive prospecting, exploration and mining right and free use of the extracted material	5 km ² for precious metals	10 years	Issuance fee: 10 million Renewal: 10 million Transfer fee: 15 million Land-use fee (km ² /year): 750,000 First period of validity: 750,000 Each renewal: 750,000
Industrial mining permit	Industrial mining work/Exclusive, divisible and mortgageable prospecting, exploration and mining right and free use of the extracted material/ accompanied by a mining agreement	Dependent on the deposit	20 years	Issuance fee: 10 million Renewal: 10 million Transfer fee: 15 million Land-use fee (km ² /year): 750,000 First period of validity: 750,000 Each renewal: 750,000

Source: Directorate-General of Mines.

4.48. Holders of mining rights and oil contracts are eligible for broad exemptions and duty and tax concessions. Materials and consumables intended for mining sector activities are generally exempt from customs import duties and taxes. In addition, businesses can import material, equipment and motor vehicles used for their exploration and extraction activities under the temporary admission procedure.

4.49. Chad has been a member country of the Extractive Industries Transparency Initiative (EITI) since 2010. In May 2019, the EITI Board determined that Chad had made significant progress in implementing the EITI Standard 2016 because the oil and gas sectors had become more transparent in recent years. However, in the third validation report, published in 2022 and based on the EITI Standard 2019, it was noted that Chad achieved a fairly low overall score.⁵⁴

4.2.2 Petroleum sector

4.50. Estimated at 1.5 billion barrels, Chad's oil reserves are the 10th largest in Africa. Most of its reserves are in the Doba basin, in the far south of the country. Oil accounts for 15% of GDP, 87% of exports and 80% of government revenue. Oil production and exports are carried out mainly by foreign consortiums.

4.51. The Ministry of Energy and Petroleum is responsible for designing, coordinating, implementing and monitoring government policy on energy and hydrocarbons. In the hydrocarbon sector, it relies on the Société des hydrocarbures du Tchad (SHT), a state enterprise created in 2006 to implement industrial and commercial policy in the hydrocarbon sector. The SHT can intervene in the various activities (prospecting, production, refining, marketing, etc.) by acquiring direct or indirect equity stakes.

4.52. Law No. 006/PR/2007 of 2 May 2007 on hydrocarbons and the 2010 ordinance amending it cover activities relating to hydrocarbon prospecting, production and refining and the distribution of petroleum products, as well as related structures and installations. The texts also set out the rules on environmental protection. Under this law, any substances and hydrocarbon resources existing either underground or on the surface are the exclusive property of the State. Related activities, including exploration, production and pipelining, require an authorization or permit issued by the Ministry of Energy and Petroleum. Table 4.4 shows the various types of authorizations/permits.

Table 4.4 Authorizations and permits for engaging in hydrocarbon-related activities

Authorization	Sundry requirements	Period of validity
Prospecting authorization (non-exclusive right)	Fee payable to the Treasury	2 years, renewable once
Exploration permit / Exclusive exploration authorization	Fee payable to the Treasury, and performance bond from a bank	5 years, renewable once
Production permit / Exclusive production authorization	Hold an exploration authorization	25 years
Transport and pipeline construction authorization	Hold a production permit	Upon expiration of the production licence or recovery of the investment costs

Source: Law No. 006/PR/07 on hydrocarbons and Ordinance No. 001/PR/10.

4.53. Mining rights may be granted under a concession contract or a production-sharing agreement. In a concession contract, the right-holder has exclusive hydrocarbon exploration and production rights within a specified area. The contract holder assumes all risks and finances the operations. Nonetheless, the State, through the SHT, is entitled to an initial share. A production permit may be granted to the operator if the exploration activities lead to the discovery of a commercially viable

⁵⁴ Extractive Industries Transparency Initiative (2022): EITI Progress Report 2020.

deposit, in which case the SHT is entitled to an additional share in the mining operations. The SHT's stake in production-sharing agreements is 25%.

4.54. In addition to the taxes provided for in the General Tax Code, oil contract holders are subject to a land-use fee and royalties on production. The rates and payment procedures for these levies are specified in the oil contract. The Hydrocarbons Law sets royalties at 5-10% for natural gas and 14.25-16.5% for crude oil. The State may choose between receiving the levy in kind or in money. The company tax rate is subject to negotiation in the establishment agreements, and must be set between 40% and 75%.

4.55. Oil contracts may be awarded through an international tendering procedure. The contractor is required to establish its head office in Chad and maintain its accounts there.

4.56. Thanks to an oil refinery operating to the north of N'Djamena since 2011, Chad produces its own fuels. Annual production at the refinery is 700,000 tonnes of petrol and kerosene, 20,000 tonnes of diesel fuel, 25,000 tonnes of polypropylene, 60,000 tonnes of liquefied petroleum gas, and 40,000 tonnes of fuel oil. The refinery is managed by the Société de raffinerie de N'Djamena and the China National Petroleum Company International (Chad) Ltd; the State holds a 40% share in the former and a 60% share in the latter.

4.57. Refineries and distributors are required to hold a buffer stock of petroleum products covering at least 15 days of their domestic demand.⁵⁵

4.2.3 Energy and water

4.2.3.1 Energy

4.58. In 2017, 10.9% of the population had access to electricity (mainly in N'Djamena), as against 3.6% in 2002 and 3.7% in 2011. Traditional biomass remains the main source of energy for the majority of the population.

4.59. The Société nationale d'électricité (SNE) has a monopoly on electricity generation, transmission and distribution. Its five power stations have a total capacity of around 22 MW. The electricity produced by the SNE is of thermal origin.

4.60. The sale prices of electricity are set by an order issued by the Minister of Trade and Industry. In principle, uniform prices apply throughout the country. For household use (low voltage), the price per kilowatt-hour (kWh) is CFAF 85 for the first tier (the first 150 kWh) and CFAF 125 for the second tier. Other users pay a single tiered price of CFAF 125 per kWh. These prices, however, do not reflect production costs, and the SNE operates at a loss.⁵⁶

4.61. There are a number of development projects for solar power, including plans for a 32 MW photovoltaic power station in Djermaya, 30 km north of N'Djamena. The Djermaya plant will be the first power station in Chad to produce renewable energy and is the first public-private partnership in the electricity sector.

4.62. The Government intends to accelerate the development of a 225 KW cross-border power line between Chad and Cameroon. In addition to connecting the two countries, the project will bring electricity to nearby localities. The project is expected to become operational in 2027.

4.2.3.2 Water

4.63. Access to drinking water remains a challenge for most of the Chadian population, particularly in rural areas. An estimated 63% of the population have access to drinking water, compared with 54% in 2017.

⁵⁵ Ordinance No. 006/PR/12 of 7 February 2012, concerning the export and import of petroleum products.

⁵⁶ "Enquête: la SNE vend l'électricité à perte" (10 April 2019). Viewed at: <https://tchadinfos.com/tchad/enquete-la-sne-vend-lelectricite-a-perse/>.

4.64. The Water Code sets out the terms for the use of water from rivers, lakes and underground sources and the operation and management of water works.⁵⁷ The Code establishes that all water resources are a public good. It stipulates that water development requires prior authorization and must be carried out in a way that encourages private initiative and free competition. The rates charged must cover all operating costs, including the operator's profit margin, the charge or rental fee for goods made available to the operator, and any other government levies. The operator must submit its rates to the regulatory authority, which first approves them and then submits them to the Government for authorization.

4.65. Water policy in semi-urban and rural areas falls within the remit of the Water Board. The Board delegates the management and maintenance of water points to the local populations. Depending on the size of the localities, the State equips them with manual, thermal or solar pumps, in exchange for a financial contribution on their part. Equipment maintenance, repair and renewal are financed by the local populations. The pumps are managed by village associations or user associations. In more heavily populated places, such as semi-urban areas, pump management may be outsourced to a private operator.

4.66. Decree No. 330/PR/PM/MEH/SG/2014 of 20 January 2015 establishes the conditions for powers related to the delegation of public water services to be transferred from the State to decentralized authorities. Implementing decrees have been issued, including in the following areas: procedures for controlling and monitoring the quality of water intended for human consumption⁵⁸; model contracts for delegating the public drinking-water service⁵⁹; the legal framework for water management advisory and support units⁶⁰; the perimeter of jurisdiction for the management of public water services⁶¹; and technical and regulatory specifications for village-level water works.⁶²

4.3 Manufacturing

4.67. The manufacturing sector remains very poorly developed. Its contribution to GDP has remained below 3% in recent years. Manufacturing in Chad consists mainly of petroleum and agri-food products.

4.68. Numerous constraints continue to hold back the manufacturing sector, including the poor quality and high cost of transport and communications services; and the high cost and difficulties of access to other inputs, including raw materials and financing.

4.69. The National Crafts Development Agency (ANDA) exists to strengthen the capacity of organizations that support the development of handicrafts.

4.4 Services

4.4.1 Telecommunications services

4.70. Table 4.5 shows the main telecommunications indicators for Chad in 2020 and Table 4.6 lists the average prices of the different types of services in 2021.

Table 4.5 Key telecommunications indicators, 2020

Indicators	Data
Population covered by a mobile-cellular network	86%
Population covered by at least a 3G network	48%
Population covered by at least a 4G network	22%
Individuals owning a mobile phone	..
Households with Internet access at home	..
Households with a computer at home	..
Mobile-cellular subscriptions per 100 inhabitants	53

⁵⁷ Ordinance No. 0186/PR/2011 of 1 March 2011, amending and supplementing Law No. 016/PR/99 of 18 August 1999 on the Water Code.

⁵⁸ Decree No. 616/PR/PM/ME/MSP/2010.

⁵⁹ Order No. 029/MEE/DG/2022.

⁶⁰ Order No. 2869/ME/2007.

⁶¹ Order No. 01/PR/MHVP/09.

⁶² Order No. 26/ME/2010.

Indicators	Data
Fixed-telephone subscriptions per 100 inhabitants	0
Active mobile-broadband subscriptions per 100 inhabitants	3
Fixed broadband subscriptions per 100 inhabitants	0
International bandwidth per Internet user (kbits/s)	9
Percentage of individuals using the Internet	10
Average monthly fixed broadband Internet traffic per fixed broadband subscription (MB)	0
Average monthly mobile broadband Internet traffic per mobile broadband subscription (MB)	2,809

.. Not available.

Source: ITU Digital Development Dashboard.

Table 4.6 Average prices of different telecommunications services, 2021

Type of service	Price (percentage of gross national income per capita)
Fixed-broadband basket as a percentage of gross national income per capita	41.3%
Mobile-cellular low-usage basket as a percentage of gross national income per capita	24.9%
Mobile data and voice high-consumption basket as a percentage of gross national income per capita	24.1%
Mobile data and voice low-consumption basket as a percentage of gross national income per capita	19.4%
Data-only mobile-broadband basket as a percentage of gross national income per capita	..

.. Not available.

Source: ITU Digital Development Dashboard.

4.71. The telecommunications sector in Chad employs around 1,000 people.

4.72. The following types of services have been fully liberalized: data, fixed satellite services, fixed broadband, mobile personal communications by satellite (fixed and mobile satellite services), international mobile telephony (3G and 4G), domestic mobile telephony, mobile satellite services, Internet services, leased lines, wireless local loop and very-small-aperture terminals (VSATs).

4.73. Others, however, are still under monopoly: cable reception modems, domestic long-distance fixed lines, international gateways, international long-distance fixed lines, local fixed lines and digital subscriber lines.

4.74. No data are available on the extent to which cable television and radio-messaging services have been liberalized.

4.75. Chad has three telephone operators: the historic operator Sotel Tchad/Salam, which has a marginal market share (0.3%); Tigo, a subsidiary of the Luxembourg group Millicom, which was sold in 2019 to Maroc Telecom (51.1% share in 2018) and Bharti Airte (formerly Zain), a company originally from India (48.5% market share in 2018). These operators use 3G, 4G/GPRS and EDGE. Some Internet service providers have a market share of less than 0.1%. Sotel Tchad dominates the fixed-telephony market. Its only competitor, Tawali, has only a 0.1% market share.

4.76. Mobile network coverage increased from 59% in 2015 to 86% in 2021, but there are still disparities in coverage between urban and rural areas owing to the size of the country, a lack of relay stations and a difficult climate. The ITU has drawn attention to relatively high taxation on the mobile sector (tax on SIM cards and calls). Mobile broadband was deployed only recently, with two of the three operators introducing 3G services in 2014 and one introducing LTE services the same year.

4.77. Fixed broadband is still limited. The service mainly uses wireless technology and is provided by several competing operators. Chad is connected to a fibre-optic network that runs alongside the oil pipeline to Cameroon, but the volume of data that uses this route remains low. Work is under way on two other fibre-optic networks to link Chad to its neighbours: the Central African Backbone project, financed by the World Bank, and the trans-Saharan fibre-optic backbone, financed by the

African Development Bank. Pending completion of these projects, Chad continues to depend on expensive satellite connections for a substantial portion of its international Internet bandwidth.

4.78. The Ministry of Postal Services and New Information Technologies is responsible for determining policy for the sector. The Ministry has drawn up a seven-point strategic development plan for information technology: (i) infrastructure development; (ii) the use of information technology to reduce poverty; (iii) a stronger regulatory framework; (iv) content development; (v) capacity-building; (vi) e-government; and (vii) better access to information technology for vulnerable groups.

4.79. The core legislation for the sector is contained in Law No. 2014-14 of 21 March 2014 on electronic communications, which replaced the Chadian Telecommunications Regulation Office (OTRT) with the Electronic Communications Regulatory Authority (ARCE)

4.4.2 Postal and express services

4.80. The regulatory framework for the postal sector in Chad underwent no major changes during the period under review. The core legislation remains Law No. 008/PR/98 of 1998, which entered fully into force on 1 June 2000. The Law replaced the National Post and Telecommunications Office with the Société tchadienne des postes et de l'épargne (STPE), a public corporation that is fully state-owned but has financial and managerial autonomy. The STPE also provides financial services.

4.81. The STPE is the designated operator of the universal postal service and has a monopoly on postal services. It also has regulatory roles in the sector, conferred on it by the State. Unlike in the telecommunications sector, Chad has not created a regulatory body independent of the operator.

4.82. The STPE sets its own prices within its terms of reference. It is financed by its own revenue and state subsidies. Its staff are a mixture of civil servants and contracted employees.

4.83. The monopoly applies only to letters and parcels weighing less than 1 kg. For any larger items, the STPE competes with private operators. Several major foreign operators of express services operate in Chad (DHL, Western Union, Saga Express and Universal Express).

4.4.3 Transport services

4.4.3.1 Land transport services

4.84. Chad has a 40,000 km-long road network, of which 2,227 km are paved⁶³ (up from 1,602 in 2011), and 5,125 km of rural tracks (up from 2,130 in 2012). The network is difficult to navigate during the rainy season.

4.85. The roads strategy for the period 2011-20, which was approved in March 2012 and described in the previous report, has reached completion. It is currently being evaluated and updated.

4.86. Haulage and passenger transport on public roads require a licence issued by the Ministry of Transport. The system was introduced in 1983⁶⁴ and did not change during the period under review. The most recent data publicly available show that in 2018 there were 306 holders of a valid haulage licence and 39 holders of a valid passenger transport licence. Haulage prices are negotiated freely between customers and carriers. Passenger transport operators also set their prices freely.

4.87. Road cabotage is reserved for domestic transport operators. Freight transport for more than 50 km requires a waybill issued by the National Freight Office against payment of a fee equal to 7.5% of the value of the cargo. This system was introduced in 2000 and applies to domestic and international transport.⁶⁵ In addition, fixed fees per journey are charged, with the amount determined by the type of transport and the country of registration of the vehicle: CFAF 165,000 for

⁶³ Agence nationale des investissements et des exportations (ANIE), *Guide d'installation des entreprises au Tchad*, April 2017. Viewed at: https://anie-tchad.com/sites/default/files/useful-document/guide_dinstallation_des_entreprises_version_revue_15042017.pdf.

⁶⁴ Decree No. 76PR MT 83 of 4 April 1983.

⁶⁵ Decree No. 419 PR MTPHV 2000 of 18 September 2000.

international transport by a vehicle registered in a non-CEMAC country; CFAF 55,000 for international transport by a vehicle registered in Chad or another CEMAC country; and either CFAF 1,000 per tonne (for bulk commodities) or CFAF 2,000 per tonne (for manufactured products) for domestic transport by a Chadian haulier.

4.88. Despite this regulation, the road transport sector remains largely informal and is dominated by micro enterprises consisting of drivers with only one truck. Some foreign companies, such as Bolloré Logistics, and a few Chadian companies maintain a larger fleet.⁶⁶ Much of the fleet was upgraded during the oil boom at the start of the period under review, but it has been ageing since then.

4.89. The main international road transport corridor is the road towards Douala, in Cameroon. The corridor is shared between hauliers from Chad (65%) and Cameroon (35%). The journey can take as long as 10 days and is often interrupted by costly internal barriers on both sides of the border. Chad signed bilateral road transport agreements with Sudan in 2010 and Niger in 2013, with costs apportioned on a 50-50 basis in both cases. Negotiations on bilateral agreements with Nigeria and the Central African Republic are ongoing.

4.4.3.2 River and lake transport

4.90. Transport on Lake Chad, whether domestic or to Nigeria, is carried out informally. Plans to carry out a feasibility study on the use of large vessels were abandoned due to a lack of financing. River crossings to Cameroonian towns on the other side of the Chari and Logone are also carried out informally.

4.4.3.3 Rail transport

4.91. In 2011, Chad signed a contract with the Chinese company China Civil Engineering Construction Cooperation to build a railway between Sudan and Chad, but no work has taken place to date.

4.4.3.4 Air transport services

4.92. Air transport policy falls within the purview of the Ministry responsible for civil aviation and meteorology. The Chadian Civil Aviation Authority takes care of the day-to-day running of the sector, dealing in particular with matters of safety and security, and overflight and landing clearances. It also sets the level of aviation charges, plans airport development, represents Chad in international organizations and ensures compliance with the rules on competition and with national and international aviation regulations.

4.93. The core legislation for the sector consists of two civil aviation codes: the CEMAC code, which dates back to 2012 and was covered in detail in the previous Common Report, and the earlier national code, which was enacted by Law No. 032/PR/2000. During the period under review, the national code was amended by Ordinance No. 008/PR/2015 of 27 March 2015, which confirmed that for a company to be accredited as a Chadian air transport company, at least 50% of its capital had to belong to Chadian shareholders. This ordinance was subsequently amended by Law No. 011/PR/2017 of 16 June 2017, which strengthened the powers of civil aviation inspectors, as recommended by the International Civil Aviation Organization.

4.94. No new public airports were opened in Chad during the period under review, but some private airfields were built for oil development and humanitarian assistance. Chad has a network of six airports that can be used by commercial air traffic (airports with paved runways more than 2,500 m long): N'Djamena, Moundou, Abéché, Amdjarass, Faya-Largeau and Sahr. N'Djamena is the only one classified as an international airport.

4.95. Table 4.7 shows passenger numbers and freight volume at N'Djamena airport from 2013 to 2018; more recent data are not publicly available.

⁶⁶ For a full list of medium-sized and large enterprises in the sector, see <https://dica.logcluster.org/display/public/DLCA/3.2+Chad+Transporters>.

Table 4.7 Statistics on air transport at N'Djamena, 2013-18

Year	2013	2014	2015	2016	2017	2018
Movements (thousands)	4.1	6.6	5.2	4.8	4.5	4.6
Scheduled traffic	1.7	2.7	2.2	2.1	2	2
Non-scheduled traffic	2.4	3.9	3	2.7	2.5	2.6
Passengers (thousands)	226.1	240.3	248.9	228.1	221.6	227.9
Scheduled traffic	195.9	215.6	230.7	216.5	209.7	212.6
Non-scheduled traffic	30.2	24.7	18.2	11.6	11.9	15.3
Freight (thousands of tonnes)	4.7	6.4	6.2	4.5	4.2	4.9
Scheduled traffic	3	5.1	3.5	1.8	1.4	1.3
Non-scheduled traffic	1.7	1.3	2.7	2.7	2.8	3.6

Source: Information provided by the national aviation authorities.

4.96. All six of these airports belong to the State, which manages N'Djamena airport directly but has placed the management of Abéché, Faya-Largeau, Moundou and 14 secondary airports in the hands of the Agency for Air Navigation Safety in Africa and Madagascar (ASECNA), a pan-African public body.

4.97. As in all CEMAC countries, ASECNA is in charge of air navigation services and the provision of meteorological services.

4.98. The Chadian authorities have issued a licence and an operating certificate to 12 ground-handling companies.

4.99. The Chadian authorities have issued a licence and an air transport operating certificate to seven airlines: Avmax-Tchad, RJM Aviation, Fly Art, Maiba Airways, Tchadia Airlines, MAF-Tchad and Travel Air Service. With the exception of Tchadia Airlines, all are small charter airlines operating mainly on the domestic market.

4.100. Tchadia Airlines, which was majority-owned by the Chadian State, was launched in October 2018 in partnership with Ethiopian Airlines as the new national airline, following the bankruptcies of Air Tchad in 2002 and Toumaï Air Tchad in 2012. Tchadia Airlines ceased operations in August 2022 after three consecutive loss-making years, and was then liquidated.

4.101. Table 4.8 shows Chad's bilateral agreements with non-CEMAC countries using the WTO's Quasar method.⁶⁷ No data are available on the characteristics of 19 of these agreements. Nine of the 24 agreements (those with Ethiopia, France, Egypt, Türkiye, Sudan, Cameroon, Niger, Nigeria and the United Arab Emirates) were actually used in 2023 for terminal services. Aviation relations with CEMAC members are governed by the Libreville Treaty, which is described in the Common Report.

Table 4.8 Air transport agreements

Partner	Date	Entry into force	5 th	7 th	Cabotage	Coop.	Designation	Withholding	Tariffs	Capacity	Stat.	ALI
France	30.07.2003		Y	N	N	N	M	SOEC	DA	PD	Y	10.0
Libya	08.08.2008		N	N	N	N	S	SOEC	DA	PD	Y	0.0
Mali	12.02.1974		N	N	N	N	M	SOEC	DA	B1	Y	0.0
Qatar	02.07.2012											
United States	31.05.2006	31.05.2006	Y	N	N	Y	M	SOEC	DD	FD	N	28.0
Nigeria	19.07.2011											
Côte d'Ivoire	10.10.2007											
Benin	25.04.2005											
Togo	17.08.2006											
Ethiopia	05.10.2008											

⁶⁷ For more information on this methodology, see WTO document S/C/W/270/Add.1, 30 November 2006.

Partner	Date	Entry into force	5 th	7 th	Cabotage	Coop.	Designation	Withholding	Tariffs	Capacity	Stat.	ALI
Sudan	20.09.2013											
Eritrea	24.04.2004											
South Africa	12.04.1994											
Egypt	23.05.2014											
Morocco	19.08.2011											
Algeria	09.04.2007											
Belgium	31.01.1990											
Russian Federation	06.08.1974											
Luxembourg												
Saudi Arabia	22.11.2014											
United Arab Emirates	21.10.2015											
Jordan	20.11.2014											
Cameroon												
Niger												

Note: "5th" = fifth freedom rights; "7th" = seventh freedom rights; "Cabotage" = domestic traffic; "Coop." = cooperation clauses; "Stat." = statistics; "ALI" = Air Liberalization Index. "Y" = yes; "N" = no; "S" = single designation; "M" = multiple designation; "FP" = free pricing; "DA" = dual approval; "DD" = dual disapproval; "PD" = predetermination; "FD" = free determination; "COI" = community of interest; "POB" = principal place of business; "SOEC" = substantial ownership and effective control; "OR" = other restrictive; "COO" = country of origin; "BI" = Bermuda I.

Source: WTO Secretariat QUASAR/ASAP database.

4.4.4 Tourism services

4.102. The regulatory institutional framework for tourism services was changed during the period under review. Tourism policy remains under the responsibility of the Minister of Tourism and Culture. The set-up for implementing tourism policy, however, was changed by Ordinance No. 002 PR/2016 of 15 September 2016, under which three existing tourism entities (the Chadian Tourism Office, created in 2007; the National Artists' Support Fund, created in 2011; and the National Crafts Development Agency, created in 2012) were amalgamated to form a single body, the National Office for the Promotion of Tourism, Arts and Crafts. Decree No. 639/PR/PM/MDTCA/2017 of 7 June 2017 clarified the operating procedures of the Office, whose responsibilities include promoting tourism in Chad. It operates as an administrative public body and is financed by subsidies and the tourism development fee.

4.103. The hotel and tourism sectors stand to benefit from the national Investment Charter, provided that approval is obtained from the National Investment Commission. The business activities of small and medium-sized enterprises fall under regime A of the Investment Charter. For businesses to be eligible for this regime, they must be listed in the commercial register, they must have a programme to invest between CFAF 50 million and CFAF 500 million and they must hire at least 20 Chadian nationals on permanent contracts. Under this regime, businesses benefit from a five-year exemption on a range of taxes (corporation tax, minimum fiscal levy, business licence tax (*patente*), tax on the rental value of business premises, property tax on developed and undeveloped land), as well as a 50% reduction on registration fees for start-ups, mergers, capital infusions and actions taken for the direct benefit of the company. Registration fees are waived on purchases of land for project implementation, and businesses investing in remote areas located far from urban centres benefit from an additional exemption period of 2 to 5 years.

4.104. Table 4.9 shows the main economic indicators for the tourism sector in Chad.

Table 4.9 Main economic indicators of the Chadian tourism sector, 2014-21

	2014	2015	2016	2017	2018	2019	2020	2021
Inbound tourism								
Arrivals (thousands)^a	119	120	98	87	77	79	11	40
By region								
Africa	84	84	43	40	46	45	10	21
Americas	5	5	7	8	12	11	0.3	0.4
East Asia and Pacific	14	10	19	15	5	5	0.4	3
Europe	15	20	27	23	9	18	1	14
Middle East	1	1	2	1	5	..	0.3	1
Main purpose of journey								
Personal reasons	..	..	..	..	..	..	7	16
Business and professional reasons	..	..	..	..	..	..	3	17
By mode of transport								
Air	119	120	98	87	77	79	11	40
Land (road)	..	..	..	..	..	..	..	..
Accommodation (thousands)								
Hotels and similar establishments	..	..	..	..	..	..	..	..
Guests	51	69	..	47	63	81	10	32
Nights	93	85	40	72	78	95	14	44
Average length of stay (days)	..	..	..	..	..	..	..	..
Tourism industries								
Number of establishments	..	..	..	..	..	45	45	45
Number of rooms	1,684	1,799	..	..	..	1,827	1,827	2,011
Number of beds	3,020	3,220	..	..	..	3,603	3,603	4,005

.. Not available.

a Overnight visitors (tourists) by air.

Source: World Tourism Statistics.

4.105. As shown in the table, the number of inbound tourists varied greatly (from 1 to 10 between the two extremes, in 2014 and 2020). There was an overall downward trend across the whole period, though there was a rebound from the low point in 2020, with a fourfold increase in 2021, bringing numbers close to half the level seen during the best years of the period. Most of the tourists were from neighbouring countries, with entries from Africa accounting for more than half of inbound tourists and visitors from Europe, the second largest group, accounting for only 10-15% of arrivals, depending on the year. Only 20% of visitors, on average, were tourists in the strict sense of term. The vast majority of inbound tourists arrived by air, probably because the country is landlocked.

4.106. The World Tourism Organization's (UNWTO) data on accommodation are fairly fragmented. They do, however, show an increase in visits and overnight stays and an increase in rooms and beds, but the figures remain rather low by global and regional standards. No data are available on employment in the sector. Despite the country's natural and cultural attractions and government efforts to promote the sector, tourism in Chad is still at the embryonic stage.

4.4.5 Financial services

4.4.5.1 Banking and microfinance services

4.107. Banking regulations and supervision are the responsibility of the Central African Banking Commission (COBAC).

4.108. Chad has a small banking sector that is still largely embryonic in relation to its potential. In July 2020, banking sector assets in Chad totalled USD 2.2 billion (compared with 1.4 billion in December 2016), or 7% of total CEMAC banking assets, whereas Chad's GDP stands at more than 15% of total CEMAC GDP. Chad's banking sector is also highly concentrated, with only three banks holding two thirds of total assets.

4.109. Business loans accounted for 69% of total credit to the economy in 2020, the remaining 31% being attributable to government financing needs. Most of this credit is to large companies in the oil, cotton and sugar sectors. Although credit to the economy increased substantially during the

period under review, its relative share, compared with government financing, decreased. This situation makes the banking sector vulnerable due to its exposure to government revenue and raw material exports. Government bonds are the largest source of exposure for Chadian banks.

4.110. In addition to the eight banks that already existed at the start of the period under review, the Banque de l'habitat du Tchad (BHT) was launched in 2016 and the existing banks received major recapitalization. The State also strengthened its presence in the banking sector by acquiring equity in the BHT.

4.111. Table 4.10 shows the breakdown of the capital of the various banks between the Chadian State and foreign private shareholders as a whole.

Table 4.10 Breakdown of banks' capital between the Chadian State and foreign private shareholders as a whole, 2023.

	Capital (CFAF million)	Share of capital	
		State	Foreign shareholders
Société générale Tchad (SGT)	10,000	33.84	66.16
Sahel-Sahara Investment and Trade Bank (BSIC)	8,000	0	99
Commercial Bank Tchad (CBT)	10,000	62.5	22
Banque Commerciale du Chari (BCC)	18,000	50	50
Orabank Tchad (OBT)	10,000	0	100
Ecobank Tchad	10,000	0	100
Banque agricole et commerciale (BAC)	7,500	100	0
United Bank for Africa (UBA)	10,000	0	100
Banque de l'habitat du Tchad (BHT)	10,000	50	50

Source: International Finance Corporation, "Creating markets in Chad", March 2023.

4.112. Table 4.11 shows the main indicators for the Chadian banking sector.

Table 4.11 Key banking sector indicators, Chad

Number of banks	Banking concentration (top 3 banks)	Domestic credit (% of GDP)	Annual credit growth (%)	Loans to deposits (%)	Financial Soundness Indicators: Latest available	Indic 1 Capital to risk weighted assets (%)	Indic. 2 Return on equity (%)	Indic. 3 Non performing loans (% of total loans)
9	70	9	-9	93	Q2 2021	7	19	26

Source: European Investment Bank, "Finance in Africa: Navigating the Financial Landscape in Turbulent Times", October 2022.

4.113. Banking activity in Chad during the period under review was greatly affected by back-to-back economic crises: the 2014-15 crisis linked to the collapse in oil prices and the 2019-20 crisis linked to the COVID-19 pandemic. The pandemic led to a decline in public and private deposits and declining credits to the economy. Outstanding commercial bank loans to small and medium-sized enterprises and households fell by 14% in 2018 and 9% in 2019. The volume of non-performing loans fluctuated during the recent period, but at a high level: 29% in 2018, 23% in 2019 and 26% in 2021. The increase in domestic debt during the pandemic has made the banking system more vulnerable.

4.114. To strengthen the banking system, the Government of Chad concluded a memorandum of economic and financial policies with the IMF in 2022⁶⁸ whereby it committed itself to enforcing the performance contracts of the two systemic public banks (CBT and BCC), facilitating the implementation of their restructuring and financing plans (approved by the Central African Banking Commission (COBAC/BEAC)) and repaying its direct debt owed to Banque commerciale du Chari (CFAF 250 million) every month, which must be paid off in full by August 2023.

4.115. In the medium term, the Government of Chad has also committed itself to reducing its shareholdings in banks, exploring ways to increase private-sector ownership in CBT's capital and

⁶⁸ IMF Report No. 23/7, January 2023.

signing up to COBAC's request for progressive equity recovery plans so that additional capital can be made available if a reassessment of the bank's financial situation reveals new weaknesses in light of the negative impact of the COVID-19 pandemic. The Ministry of Finance and Budget will track outstanding claims and evaluate how the banking sector has been affected by the BEAC's recent tightening of its policy and the lifting of the special regulatory measures that COBAC introduced in response to COVID-19.

4.116. The microfinance sector is governed by the regulatory provisions issued by COBAC and BEAC, which also supervise the sector, as explained in the Common Report. At the national level, this role is fulfilled by the Directorate of Financial and Monetary Affairs and Supervision of Microfinance Institutions, which is part of the Ministry of Finance.

4.117. At the end of May 2019, Chad had 123 approved microfinance institutions (MFIs) across the entire country, ten or more of which are insolvent or have ceased trading. Only two of the sector's five networks are operating in conditions deemed satisfactory by the supervisory authorities.

4.118. The main sectors that receive credits from MFIs are agriculture (50-60%), small retail (15-20%), livestock farming and fisheries (5-10%) and others (5-10%). Table 4.12 shows the main microfinance sector indicators for Chad until 2018, the last year for which data are available.

Table 4.12 Microfinance sector statistics, 2014-18

	2014	2015	2016	2017	2018
Number of approved establishments	161	113	118	119	122
Number of customers	144,336	197,262	220,354	247,223	258,650
Deposits (CFAF million)	8,790.15	10,287.15	11,991.37	12,367.91	12,659.48
Credits (CFAF million)	11,272.89	16,317.35	12,539.95	12,322.12	10,688.41

Source: Information provided by the authorities.

4.119. As shown in the table, the number of establishments declined significantly during the period under review, while the number of customers doubled and credits and deposits increased steadily (with the exception of a decline in credits in 2018).

4.120. Financial inclusion remains limited, since in 2017 only 9% of the adult population had access to a bank account and only 4% to credit. The same is true, albeit to a lesser extent, for Chadian companies, in particular small and medium-sized enterprises, of which only 12% have a current bank credit line. High collateral requirements (as much as 100% of the value of the loan) and barriers to land titles contribute to these difficulties.

4.121. Despite these challenges, financial inclusion improved during the period under review thanks to digital financial services and, in particular, mobile phone payment services. Chad is among the 10 countries where there are more adults who have an account for fund transfers by mobile phone than adults who have an account with a financial institution. In 2019, these mobile payment services had 271,000 active users (out of 2.5 million mobile phone subscribers) and 19% of the population made or received digital payments over the course of the year. This percentage, however, is below the sub-Saharan average of 35%.

4.4.5.2 Insurance services

4.122. Chad has only three insurance companies⁶⁹: two non-life insurers (one domestic and one foreign) and one life insurer (domestic). In 2014, premiums collected increased from USD 17 million in 2011 to USD 27 million in 2014. The same year, the insurance penetration rate was 0.16% and the insurance density (premiums per capita) was USD 1.69; both these figures are among the lowest on the continent. Car insurance is mandatory.

⁶⁹ IMF report No. 19/352, Chad, July 2019, page 47; and CICA_RE dashboard. Viewed at: <https://dashboards/DanaInfo=www.africa-re.com,SSL+TD>.

4.123. As explained in the Common Report, regulation and supervision of the insurance sector is carried out by the Inter-African Conference on Insurance Markets (CIMA), a pan-African body formed by the member States of WAEMU and CEMAC.

5 APPENDIX TABLES

Table A1.1 Structure of exports, 2012-21

(USD million and %)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Total exports (USD million)	3,324.3	3,210.9	3,178.1	2,399.0	1,685.5	1,334.8	1,686.1	1,332.4	1,696.5	2,982.3
	(Percentage share)									
Total primary products	98.6	97.5	94.5	95.7	88.4	91.8	91.0	80.7	87.2	74.6
Agriculture	2.8	2.9	2.5	4.9	4.7	5.3	3.7	4.6	6.2	5.4
Food products	0.3	0.5	0.7	1.0	1.5	1.6	1.5	2.8	4.9	4.5
2225 - Sesame seeds	0.3	0.4	0.6	1.0	1.4	1.5	1.4	2.8	4.4	4.4
Agricultural raw materials	2.4	2.4	1.8	3.8	3.3	3.7	2.3	1.8	1.4	0.9
2922 - Lac	0.8	0.9	0.7	1.2	1.4	2.1	1.5	1.6	1.0	0.7
2631 - Cotton, not carded or combed	1.6	1.4	1.0	2.5	1.8	1.5	0.6	0.1	0.3	0.2
Extractive industries	95.9	94.6	92.0	90.9	83.7	86.5	87.3	76.1	81.0	69.2
Ores and other minerals	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Non-ferrous metals	0.3	0.1	0.0	0.0	0.1	0.2	0.0	0.0	0.2	0.3
Fuels	95.6	93.9	92.0	90.8	83.6	86.3	87.2	76.1	80.8	68.9
3330 - Petroleum oils and oils obtained from bituminous minerals, crude	82.4	93.3	90.1	89.5	83.6	86.3	87.2	75.7	79.7	68.9
Manufactures	0.3	0.4	0.3	1.3	1.5	0.8	0.9	0.3	0.2	0.2
Iron and steel	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Chemicals	0.1	0.2	0.0	0.0	1.2	0.2	0.2	0.0	0.0	0.0
Other semi-manufactures	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0
Machinery and transport equipment	0.1	0.1	0.1	0.5	0.2	0.3	0.5	0.2	0.1	0.1
Power-generating machinery	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Other non-electrical machinery	0.0	0.0	0.0	0.0	0.0	0.1	0.2	0.0	0.0	0.0
Office machines and telecommunications equipment	0.1	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.0	0.0
Other electrical machinery	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Automotive products	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0
Other transport equipment	0.0	0.0	0.0	0.4	0.0	0.1	0.1	0.0	0.0	0.0
Textiles	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Clothing	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other consumer goods	0.0	0.1	0.1	0.6	0.1	0.2	0.1	0.1	0.0	0.0
Other	1.0	2.0	5.3	3.0	10.0	7.4	8.1	19.0	12.6	25.2
9710 - Gold, non-monetary	1.0	2.0	5.2	3.0	9.9	7.3	8.1	18.9	12.5	25.2

Source: WTO calculations, based on data obtained from Comtrade, mirror statistics, United Nations Statistics Division (UNSD) (SITC, Rev.3).

Table A1.2 Structure of imports, 2012-21

(USD million and %)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Total imports (USD million)	830.7	1,255.1	1,370.2	909.9	649.1	639.8	900.0	1,001.8	1,039.2	1,113.7
	(Percentage share)									
Total primary products	17.5	14.0	13.6	19.6	20.4	25.3	25.1	15.0	17.4	13.8
Agriculture	14.6	12.0	10.4	15.0	16.1	22.9	16.2	12.5	15.1	11.4
Food products	13.4	11.3	9.6	14.0	14.7	20.4	14.1	11.8	14.4	10.7
0989 - Food preparations, n.e.s	3.6	2.0	2.1	3.1	3.0	4.0	3.1	3.1	3.2	2.8
Agricultural raw materials	1.2	0.7	0.8	1.0	1.4	2.4	2.1	0.7	0.7	0.7
Extractive industries	2.9	2.0	3.2	4.6	4.3	2.4	8.9	2.5	2.3	2.5
Ores and other minerals	0.6	0.2	0.1	0.1	0.2	0.1	0.2	0.0	0.0	0.1
Non-ferrous metals	0.1	0.2	0.1	0.3	0.5	0.6	0.5	0.2	0.2	0.2
Fuels	2.2	1.6	2.9	4.1	3.7	1.8	8.2	2.3	2.0	2.1
Manufactures	78.7	83.9	85.2	77.0	76.2	72.6	73.1	82.7	81.8	83.4
Iron and steel	11.0	7.1	5.2	3.4	4.6	5.5	5.5	5.7	2.8	6.3
6791 - Tubes, pipes and hollow profiles, seamless, of iron or steel	1.1	0.7	1.7	0.5	0.4	1.1	1.5	3.4	0.3	1.9
6762 - Bars and rods	0.6	1.7	1.7	1.3	2.1	1.8	1.8	0.2	0.5	1.7
Chemicals	13.2	13.6	11.0	17.0	20.5	14.9	22.4	19.5	18.1	14.1
5429 - Medicaments, n.e.s.	3.0	2.9	1.8	3.8	5.3	4.1	4.8	3.7	6.2	3.8
5416 - Glycosides; glands or other organs and their extracts; antisera, vaccines and similar products	1.5	1.0	0.8	1.3	2.1	1.2	0.9	0.8	1.1	1.7
Other semi-manufactures	7.3	8.7	8.7	10.0	10.5	8.2	6.7	5.7	5.3	5.0
Machinery and transport equipment	32.8	39.0	47.1	32.6	24.3	30.8	29.3	37.6	40.8	29.8
Power-generating machinery	1.7	2.6	1.8	2.6	1.0	1.5	3.6	2.8	1.7	2.1
Other non-electrical machinery	14.0	19.3	21.2	12.1	8.0	9.1	9.8	9.5	8.7	5.6
Agricultural machines and tractors	0.7	1.3	0.0	1.9	0.1	0.2	0.2	0.1	0.3	0.2
Office machines and telecommunications equipment	4.1	3.5	5.5	5.0	4.0	5.8	5.1	6.4	13.5	5.4
7643 - Transmission apparatus for radio-telephony, radio-telegraphy, radio-broadcasting or television	0.3	0.2	1.2	0.6	0.6	2.6	2.3	3.7	3.9	3.2
Other electrical machinery	5.9	5.2	3.9	3.1	3.3	6.7	4.1	5.3	4.6	3.6
Automotive products	5.5	5.4	5.1	6.8	6.7	5.3	4.3	8.3	8.7	11.3
7812 - Motor vehicles for the transport of persons, n.e.s.	1.2	1.3	0.8	2.1	3.5	2.6	1.9	2.0	3.3	5.8
7821 - Motor vehicles for the transport of goods	1.5	1.5	1.6	1.4	1.4	0.9	1.1	4.1	3.1	2.1
7843 - Other parts and accessories of the motor vehicles of groups 722, 781, 782 and 783	0.7	0.5	0.6	1.0	0.6	0.3	0.7	0.8	1.2	1.8
Other transport equipment	1.6	3.0	9.7	2.9	1.4	2.4	2.4	5.3	3.5	1.8
Textiles	1.1	2.1	0.9	1.7	1.9	1.6	1.2	2.2	2.9	5.0
6552 - Other knitted or crocheted fabrics, not impregnated, coated, covered or laminated	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	2.6
Clothing	1.0	0.6	0.9	0.6	3.2	2.0	1.1	0.7	1.5	9.5
8423 - Jackets and blazers	0.0	0.0	0.0	0.0	0.7	0.1	0.0	0.0	0.1	3.8
8424 - Women's or girls' dresses	0.0	0.0	0.0	0.0	1.2	0.8	0.2	0.1	0.3	2.3
Other consumer goods	12.3	12.9	11.5	11.8	11.1	9.6	7.1	11.3	10.4	13.6
8973 - Jewellery of gold, silver or platinum group metals and goldsmiths' or silversmiths' wares	0.0	0.0	0.7	0.6	0.5	0.3	0.6	2.0	2.1	4.6
8513 - Footwear, n.e.s., with outer soles and uppers of rubber or plastics	2.2	3.2	1.4	2.0	1.8	1.5	1.2	1.8	1.7	1.8
Other	3.8	2.1	1.2	3.5	3.4	2.1	1.8	2.3	0.8	2.7

Source: WTO calculations, based on data obtained from Comtrade, mirror statistics, UNSD (SITC, Rev.3).

Table A1.3 Destinations of exports, 2012-21

(USD million and %)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Total exports (USD million)	3,324.3	3,210.9	3,178.1	2,399.0	1,685.5	1,334.8	1,686.1	1,332.4	1,696.5	2,982.3
	(Percentage share)									
America	85.1	78.2	74.9	56.7	56.8	40.7	29.4	10.2	0.2	0.2
United States	81.7	78.1	74.9	56.7	56.8	40.7	29.4	10.2	0.2	0.1
Other America	3.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Europe	1.2	2.5	1.2	5.6	9.1	18.7	25.5	14.2	40.0	51.2
EU-27	0.8	2.1	0.7	4.6	7.7	17.0	24.0	11.4	35.7	47.5
Germany	0.1	0.1	0.1	0.1	0.2	0.2	0.1	5.0	15.9	35.5
France	0.3	1.6	0.2	1.9	6.0	0.7	2.7	6.1	19.3	6.7
Netherlands	0.0	0.0	0.0	0.0	0.9	15.3	20.8	0.2	0.5	5.1
EFTA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Europe	0.4	0.4	0.6	1.0	1.4	1.7	1.5	2.7	4.2	3.7
Türkiye	0.3	0.4	0.5	0.9	1.4	1.7	1.5	2.7	4.2	3.7
Commonwealth of Independent States (CIS)^a	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Africa	0.2	0.9	0.3	0.2	0.2	0.6	0.7	0.6	1.6	0.2
Egypt	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.3	0.1
Middle East	1.3	2.2	5.3	3.1	10.2	7.7	8.2	19.0	12.8	26.1
United Arab Emirates	1.3	2.1	5.3	3.0	10.0	7.7	8.2	19.0	12.8	25.5
Asia	12.1	16.2	18.3	34.5	23.7	32.3	36.2	56.0	45.4	22.5
China	6.6	3.2	3.4	3.8	6.8	21.0	5.7	34.0	24.8	6.6
Japan	1.1	5.8	9.3	10.4	4.1	0.0	0.0	0.0	0.0	0.0
Other Asia	4.4	7.2	5.6	20.3	12.7	11.3	30.5	22.0	20.5	15.9
India	3.0	1.5	4.3	2.8	1.7	2.0	0.0	0.0	13.3	15.6
Pakistan	0.2	4.1	0.5	15.4	8.3	6.5	30.3	19.1	6.8	0.1
Indonesia	0.0	0.0	0.0	0.4	0.1	0.0	0.1	0.0	0.0	0.1
Chinese Taipei	0.2	0.2	0.2	0.0	0.1	0.2	0.1	0.0	0.2	0.1
Thailand	0.0	0.1	0.0	0.1	1.3	2.5	0.0	2.8	0.0	0.0
Memo:										
CEMAC (WTO Members)	0.0	0.6	0.0	0.1	0.1	0.4	0.4	0.0	0.9	0.0
EU-28	0.9	2.0	0.7	2.4	7.7	17.0	23.9	11.5	35.8	47.5

a Commonwealth of Independent States, including certain associate and former member States.

Source: WTO Secretariat calculations, based on data obtained from Comtrade, mirror statistics, UNSD.

Table A1.4 Origin of imports, 2012-21

(USD million and %)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Total imports (USD million)	830.7	1,255.1	1,370.2	909.9	649.1	639.8	900.0	1,001.8	1,039.2	1,113.7
	(Percentage share)									
America	5.9	5.6	7.8	7.3	5.6	5.5	6.8	10.7	5.3	4.1
United States	4.4	3.3	4.9	6.2	5.1	4.9	5.9	8.4	4.4	3.8
Other America	1.5	2.3	3.0	1.1	0.6	0.6	0.9	2.3	0.9	0.4
Europe	38.8	29.4	40.9	35.7	37.0	31.5	28.1	27.3	27.9	24.5
EU-27	35.1	24.3	37.3	32.6	33.2	26.8	21.0	19.3	22.4	18.1
France	19.4	12.7	12.1	15.9	18.7	15.3	10.1	9.6	9.7	7.4
Netherlands	3.0	2.3	3.7	3.5	1.9	1.6	3.2	1.7	5.4	2.5
Belgium	2.3	1.9	1.6	1.7	2.0	2.0	0.8	1.5	1.6	2.0
Germany	3.0	1.7	3.4	2.2	3.2	1.9	1.9	1.8	1.4	1.6
Poland	0.3	0.2	0.4	0.8	0.5	0.8	0.8	0.8	0.6	0.9
Italy	4.1	2.7	12.7	4.6	1.6	1.5	0.6	0.8	0.6	0.9
EFTA	0.2	0.2	0.2	0.5	0.4	0.3	0.3	0.2	0.2	0.2
Other Europe	3.5	4.9	3.4	2.7	3.4	4.4	6.8	7.8	5.3	6.2
Türkiye	1.2	1.1	1.4	2.0	2.9	2.8	3.5	4.0	4.0	4.8
United Kingdom	1.4	1.4	1.0	0.5	0.5	1.5	3.1	3.7	1.1	1.0
Commonwealth of Independent States (CIS)^a	1.7	0.1	0.1	0.0	0.1	0.3	0.3	2.1	1.4	0.2
Africa	24.4	22.9	16.0	22.1	22.6	26.5	20.9	7.3	8.5	7.5
Benin	7.2	3.5	1.9	0.9	0.1	0.3	0.4	0.6	1.3	3.3
Senegal	1.1	2.9	1.2	3.0	3.6	3.8	2.9	1.4	0.7	0.8
Morocco	0.5	0.5	0.6	0.3	0.6	0.3	0.6	0.5	0.7	0.8
Niger	0.0	0.0	0.0	0.0	0.0	6.1	0.4	1.6	1.7	0.7
Cameroon	9.4	8.1	8.7	12.4	14.1	10.7	11.1	..	..	..
Middle East	4.1	4.1	7.3	12.0	11.5	11.9	16.8	16.2	18.7	23.7
United Arab Emirates	3.3	2.9	6.8	10.5	10.7	11.3	12.5	15.8	17.9	23.2
Asia	25.1	37.9	27.9	22.8	23.1	24.3	27.1	36.4	38.2	40.0
China	20.8	29.6	23.2	13.6	14.4	18.0	20.5	27.9	28.7	32.8
Japan	0.3	0.2	0.2	1.0	1.3	0.6	0.3	0.4	0.2	0.3
Other Asia	4.0	8.0	4.5	8.3	7.4	5.6	6.3	8.2	9.3	6.9
India	2.9	6.1	2.6	5.8	5.8	4.1	3.4	5.2	5.9	5.1
Hong Kong, China	0.6	0.6	0.9	1.3	0.5	0.7	1.5	2.1	2.9	1.6
Memo:										
CEMAC (WTO Members)	9.9	8.5	8.8	14.1	14.3	12.1	11.2	0.0	0.1	..
EU-28	32.5	22.9	25.5	28.4	32.2	26.8	23.5	22.1	22.9	18.3

.. No data available.

a Commonwealth of Independent States, including certain associate and former member States.

Source: WTO Secretariat calculations, based on data obtained from Comtrade, mirror statistics, United Nations Statistics Division (UNSD).

Table A3.1 State participation in businesses

State-owned companies	Sphere of activity	State ownership share (%)
Primary products		
National Food Security Office (ONASA)	Management of a stock of food products	100
Société des hydrocarbures du Tchad	Petroleum products	100
Manufactures		
CotonTchad SN	Cotton	100
Société tchadienne de filature	Textiles	100
Société tchadienne de jus de fruit	Agri-food	100
Société nationale du ciment (SONACIM)	Cement production	100
Services		
Centrale pharmaceutique d'approvisionnement (CPA)	Pharmaceuticals	100
Société industrielle de matériels agricoles (SIMATRAC)	Agricultural materials	100
Société tchadienne des eaux	Water	100
Société Nationale d'Électricité du Tchad (SNE)	Electricity	100
Toumaï Air Tchad	Air transport	..
Société générale tchadienne de banque (SGTB)	Financial services	20
Commercial Bank Tchad (CBT)	Financial services	62.5
Caisse nationale de prévoyance sociale (CNPS)	Pension fund	100
Caisse nationale de retraite du Tchad (CNRT)	Pension fund	100
Société tchadienne des postes et de l'épargne (STPE)	Postal services	100
Société des télécommunications du Tchad (SOTEL TCHAD)	Telecommunications	100
Novotel (SOTEXHO)	Hotels	100
Le Méridien Hôtel (Sonex Chari)	Hotels	100

.. Not available.

Source: Information provided by the Chadian authorities.

Table A3.2 Number of tariff lines with rates that differ from those of the CET, 2019

No.	Product	CEMAC CET, 2019	Tariffs applied by Chad
	Rice		
1	10061010	5.0	0.0
2	10061090	5.0	0.0
3	10062000	5.0	0.0
4	10063010	5.0	0.0
5	10063090	5.0	0.0
6	10064000	5.0	0.0
	Flour		
7	HS 1101 Wheat or meslin flour 11010010	5.0	0.0
	Oil		
	HS 1501 Pig fat (including lard) and poultry fat		
8	15011000	30.0	0.0
9	15012000	30.0	0.0
10	15019000	30.0	0.0
	HS 1502 Fats of bovine animals, sheep or goats		
11	15021000	30.0	0.0
12	15029000	30.0	0.0
	HS 1504 Fats and oils and their fractions, of fish or marine mammals		
13	15043000	30.0	0.0
	HS 1505 Wool grease and fatty substances derived therefrom (including lanolin)		
14	15050000	30.0	0.0
	HS 1506 Other animal fats and oils and their fractions		
15	15060000	30.0	0.0
	HS 1507 Soya-bean oil and its fractions		
16	15071000	30.0	0.0
17	15079000	30.0	0.0
	HS 1508 Ground-nut oil and its fractions		
18	15081000	30.0	0.0
19	15089000	30.0	0.0
	HS 1509 Olive oil and its fractions		
20	15091000	30.0	0.0
21	15099000	30.0	0.0
	HS 1510 Other oils and their fractions, obtained solely from olives		
22	15100000	30.0	0.0
	HS 1511 Palm oil and its fractions		
23	15119000	30.0	0.0
	HS 1512 Sunflower-seed, safflower or cotton-seed oil and fractions thereof		
24	15121100	30.0	0.0
25	15121900	30.0	0.0
26	15122100	30.0	0.0
27	15122900	30.0	0.0
	HS 1513 Coconut (copra), palm kernel or babassu oil and fractions thereof		
28	15131100	30.0	0.0
29	15131900	30.0	0.0
30	15132900	30.0	0.0
	HS 1514 Rape, colza or mustard oil and fractions thereof		
31	15141100	30.0	0.0
32	15141900	30.0	0.0
33	15149100	30.0	0.0
34	15149900	30.0	0.0
	HS 1515 Other fixed vegetable fats and oils and their fractions		
35	15151900	30.0	0.0
36	15152100	30.0	0.0
37	15152900	30.0	0.0
38	15155000	30.0	0.0
39	15159000	30.0	0.0
	HS 1516 Animal or vegetable fats and oils and their fractions		
40	15161000	30.0	0.0
41	15162000	30.0	0.0

No.	Product	CEMAC CET, 2019	Tariffs applied by Chad
	HS 1517 Margarine; edible mixtures or preparations of animal or vegetable fats or oils		
42	15171000	30.0	0.0
	Pasta		
43	19021100	30.0	0.0
44	19021900	30.0	0.0
45	19022000	30.0	0.0
46	19023000	30.0	0.0

Source: WTO Secretariat calculations, based on data provided by CEMAC and the Chadian authorities.