

# BEYOND HORMUZ CRISIS: MARITIME CHOKEPOINTS, ENERGY SECURITY AND THE CASE FOR A RESILIENT NIGERIA LOGISTICS ECOSYSTEM

ENERGY MOVES.  
PROGRESS DEPENDS.

Secure today. Resilient tomorrow.



**ENERGY SECURITY**  
Protect supply,  
safeguard nations



**GLOBAL IMPACT**  
Disruptions here,  
ripple everywhere

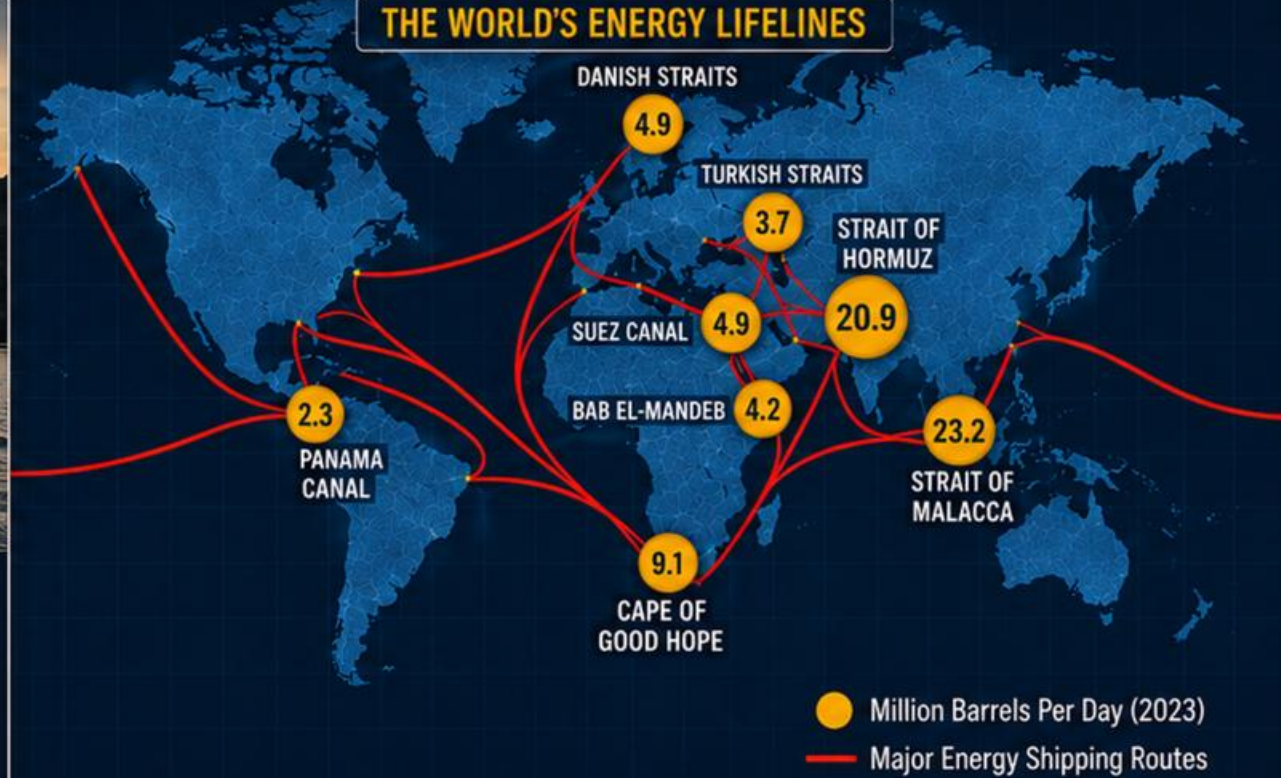


**RESILIENT LOGISTICS**  
Diversify routes,  
strengthen systems



**STRATEGIC ACTION**  
Anticipate risks,  
build resilience

## THE WORLD'S ENERGY LIFELINES



A PRESENTATION AT

CHARTERED INSTITUTE OF LOGISTICS AND TRANSPORT, NIGERIA

MANDATORY PROFESSIONAL DEVELOPMENT



30/06/26



DR ALBAN IGWE, B.TECH., MSc, PhD, LL.M, FCILT.

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## AND THE CASE FOR A RESILIENT NIGERIA LOGISTICS ECOSYSTEM

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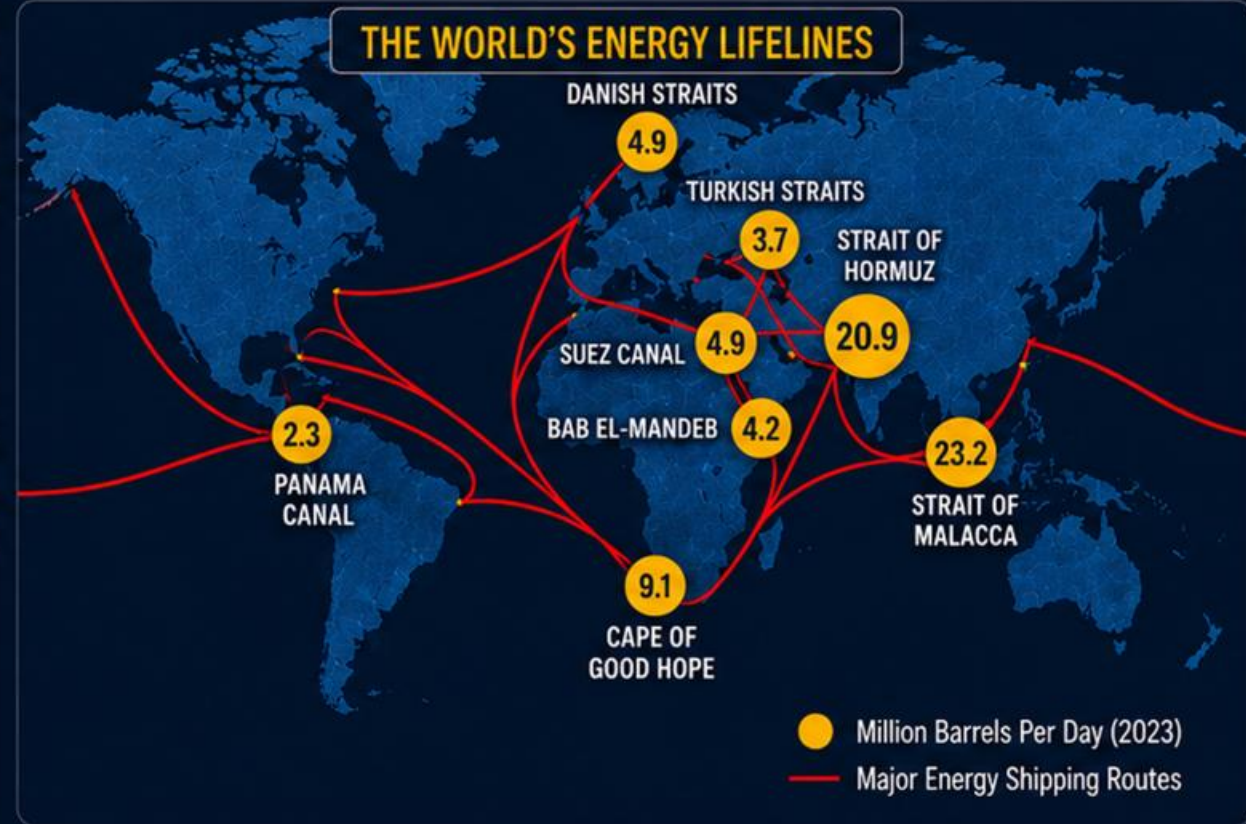


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# PRESENTATION FLOW

A Strategic Journey from *Global Risk* to *National Resilience*



FROM VULNERABILITY TO RESILIENCE • FROM DEPENDENCE TO SOVEREIGNTY • FROM RISK TO OPPORTUNITY →



A Resilient Logistics Ecosystem. A Stronger Economy. A Secure Future for Nigeria.

# EXECUTIVE SUMMARY

## THREE STRATEGIC MESSAGES

01



### THE HORMUZ CRISIS IS NOT A MIDDLE EAST PROBLEM.

It is a warning signal that geopolitical shocks now travel through global supply chains faster than they travel through diplomacy.

STRAIT OF HORMUZ

02



### CHOKEPOINT DISRUPTIONS ARE BECOMING THE DEFINING RISK OF GLOBAL TRADE.

From Hormuz to the Red Sea, Suez Canal, Panama Canal and the Taiwan Strait, the world's logistics architecture is increasingly exposed to geopolitical, security and climate-driven disruption.

03



### NIGERIA MUST TRANSITION FROM LOGISTICS DEPENDENCE TO SUPPLY CHAIN SOVEREIGNTY.

National competitiveness will increasingly be determined by a country's ability to absorb external shocks, secure critical flows, and sustain trade, energy and industrial activity during periods of global disruption.



SECURE CRITICAL FLOWS



ABSORB SHOCKS



SUSTAIN GROWTH



LEAD COMPETITIVELY

“ The objective is not just to move goods cheaper. The objective is to keep the economy moving during disruption. ”

## OLD MODEL

### EFFICIENCY

Optimize for Cost and Speed

- Cost Minimization
- Lean Inventory
- Single Sourcing
- Just-in-Time Delivery
- Lowest Cost Routes
- Limited Visibility

The old paradigm worked in a stable world.



The new paradigm is built for uncertainty.

## NEW MODEL

### EFFICIENCY + RESILIENCE

Optimize for Performance and Continuity

- Diversification**  
Multiple sources, suppliers and routes.
- Redundancy**  
Built-in capacity and alternative pathways.
- Visibility**  
End-to-end real-time supply chain intelligence.
- Security**  
Physical, cyber and operational protection.
- Flexibility**  
Agile systems that adapt and recover quickly.
- Sustainable Value**  
Resilience drives growth, trust and competitiveness.



THE WINNING FORMULA FOR THE NEXT DECADE:  
EFFICIENCY DRIVES PERFORMANCE. RESILIENCE SUSTAINS IT.



# WHAT IS A STRAIT?



## A PRACTICAL LEGAL DEFINITION

A strait is a naturally formed passage of water connecting one part of the high seas or an exclusive economic zone (EEZ) with another part of the high seas or an EEZ, and which is used for international navigation.



HIGH SEAS  
OR EEZ



HIGH SEAS  
OR EEZ

## KEY LEGAL CHARACTERISTICS



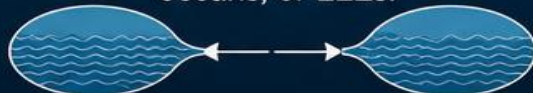
### 1. NATURAL WATERWAY

It must be naturally formed, unlike canals such as the Suez Canal or Panama Canal.



### 2. CONNECTS TWO LARGER MARITIME AREAS

It connects one part of the high seas or an EEZ with another part of the high seas or an EEZ, such as seas, oceans, or EEZs.



### 3. USED FOR INTERNATIONAL NAVIGATION

Ships of different nations regularly transit through it as a route for international maritime navigation.



### 4. STRATEGIC SIGNIFICANCE

Many straits are critical maritime chokepoints for global trade and energy transport.



**LEGAL CONTEXT:** Under UNCLOS (Part III), ships and aircraft enjoy the right of transit passage through straits used for international navigation, ensuring continuous and expeditious passage between one part of the high seas or EEZ and another.



UNITED NATIONS  
CONVENTION ON THE  
LAW OF THE SEA (UNCLOS)

# WHY CHOKEPOINTS MATTER

A handful of maritime corridors carry a disproportionate share of global trade.

## THE WORLD'S CRITICAL MARITIME CHOKEPOINTS

### THE REALITY



**~90%**  
OF GLOBAL TRADE  
moves by sea



**~60%**  
OF GLOBAL TRADE  
passes through maritime  
chokepoints



**~30%**  
OF GLOBAL OIL TRADE  
transits the Strait of Hormuz



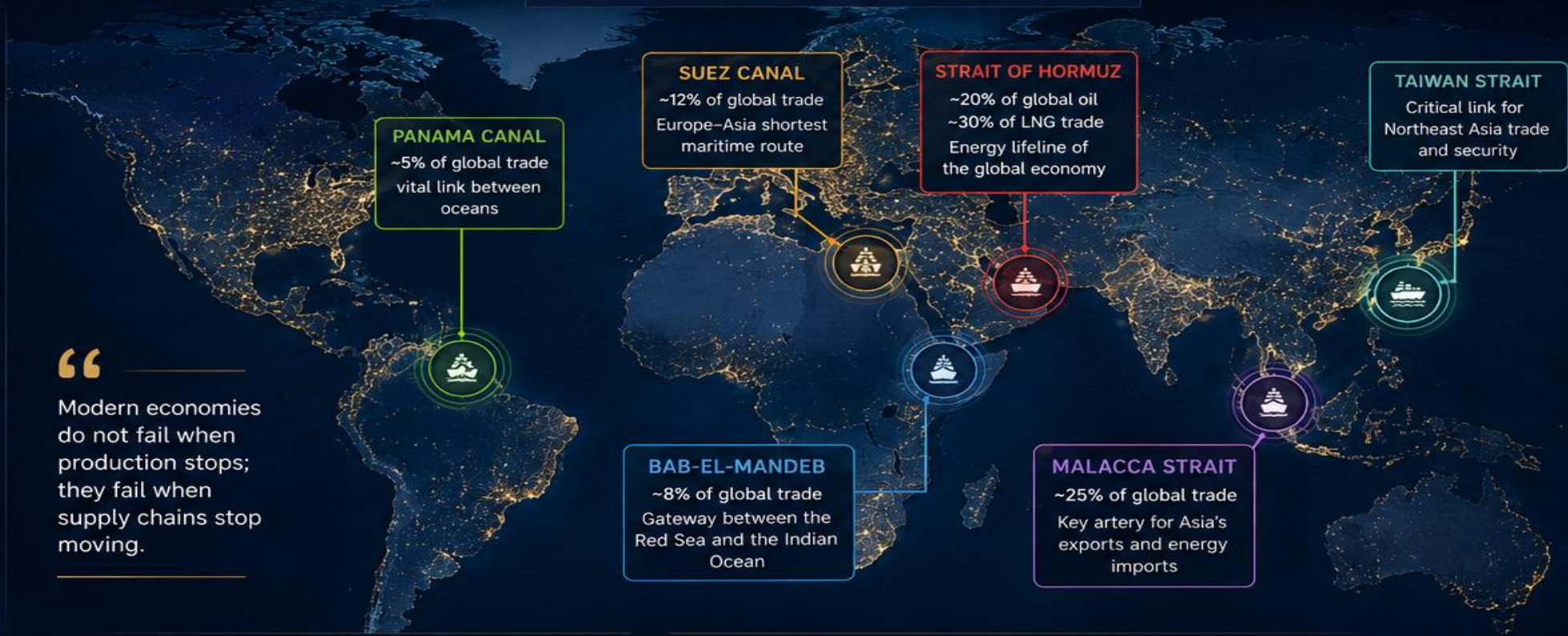
**>\$10 TRILLION**  
in trade value moves through  
these chokepoints annually



**1 DISRUPTION**  
can trigger global inflation,  
supply shocks and growth  
slowdowns

“

Modern economies do not fail when production stops; they fail when supply chains stop moving.



### WHY IT MATTERS



**HIGH CONCENTRATION**  
Few routes. High volumes.  
Limited alternatives.



**HIGH VULNERABILITY**  
Geopolitical tensions,  
conflict, piracy, terrorism,  
cyber and climate risks.



**HIGH IMPACT**  
Disruptions ripple across  
markets, industries and  
economies.



**HIGH COST**  
Rerouting, delays, insurance  
spikes and inventory  
build-up.



**STRATEGIC ADVANTAGE**  
Nations with resilient  
routes and redundancy  
outperform in crises.



Chokepoints are not just geography. They are leverage points in global power, prosperity and security.

# MAJOR GLOBAL MARITIME CHOKEPOINTS



NARROW PASSAGES. CRITICAL CONNECTIONS. **GLOBAL IMPACT.**



## WHY THEY MATTER



Carry key volumes of global trade and energy



Vulnerable points for disruption and conflict



Essential for economic security and stability



**~60%**

OF GLOBAL MARITIME TRADE TRANSITS THROUGH THESE CHOKEPOINTS



1

## STRAIT OF HORMUZ

Persian Gulf – Gulf of Oman



Carries ~20% of global oil supply (~21 million barrels/day)



Vital for energy exports from the Middle East



Narrowest point: ~33 km

2

## SUEZ CANAL

Mediterranean Sea – Red Sea



Carries ~12% of global trade



Key link between Europe and Asia



Reduces voyage distance by ~7,000–10,000 km

3

## BAB-EL-MANDEB

Red Sea – Gulf of Aden



Carries ~10% of global trade and 4% of oil



Strategic gateway to the Suez Canal



Security risks due to regional instability

4

## PANAMA CANAL

Atlantic Ocean – Pacific Ocean



Carries ~6% of global trade



Crucial shortcut between the Atlantic and Pacific



Saves ~8,000 nautical miles compared to Cape route

5

## MALACCA STRAIT

Indian Ocean – South China Sea



Carries ~25% of global trade



Main route for energy imports to East Asia



Narrow in places: ~2.7 km



These choke points are lifelines of global commerce and energy. **Their security and stability are vital to the world economy.**





# GLOBAL CHOKEPOINTS MAP

## THE WORLD'S MOST CRITICAL MARITIME ROUTES



**80%+**  
OF GLOBAL TRADE  
BY VOLUME  
TRAVELS BY SEA



**70%+**  
OF GLOBAL OIL  
TRANSPORTED  
BY SEA



MAJOR CHOKEPOINTS  
ARE VITAL TO GLOBAL  
TRADE, ENERGY FLOW  
AND ECONOMIC STABILITY



- MAJOR CHOKEPOINT
- MAJOR SEA ROUTES
- MAIN SHIPPING LANES
- ALTERNATE ROUTES
- MAJOR PORTS

**1 Strait of Hormuz**  
Persian Gulf – Gulf of Oman



~20% of global oil supply

Crucial for energy exports from the Middle East

**2 Suez Canal**  
Mediterranean Sea – Red Sea



~12% of global trade

Reduces Europe–Asia voyage by ~7,000–10,000 km

**3 Bab-el-Mandeb**  
Red Sea – Gulf of Aden



~10% of global trade and 4% of oil

Strategic gateway to the Suez Canal

**4 Panama Canal**  
Atlantic Ocean – Pacific Ocean



~6% of global trade

Saves ~8,000 nautical miles compared to Cape route

**WHY IT MATTERS**

- Essential for global trade, energy security, and supply chain resilience
- Vulnerable to disruption from conflict, natural events, or geopolitical tensions
- Alternative routes are longer, costlier, and less efficient

**ROUTE HIGHLIGHTS**

- Asia – Europe
- Asia – North America (via Panama Canal)
- Middle East – Europe (via Suez Canal)
- Middle East – Asia (via Indian Ocean)
- Alternate Routes (Cape of Good Hope / Arctic Routes)

# THE STRAIT OF HORMUZ

THE WORLD'S MOST CRITICAL ENERGY CHOKEPOINT



## 1 GEOGRAPHIC OVERVIEW



Connects the Persian Gulf with the Gulf of Oman and the Arabian Sea.



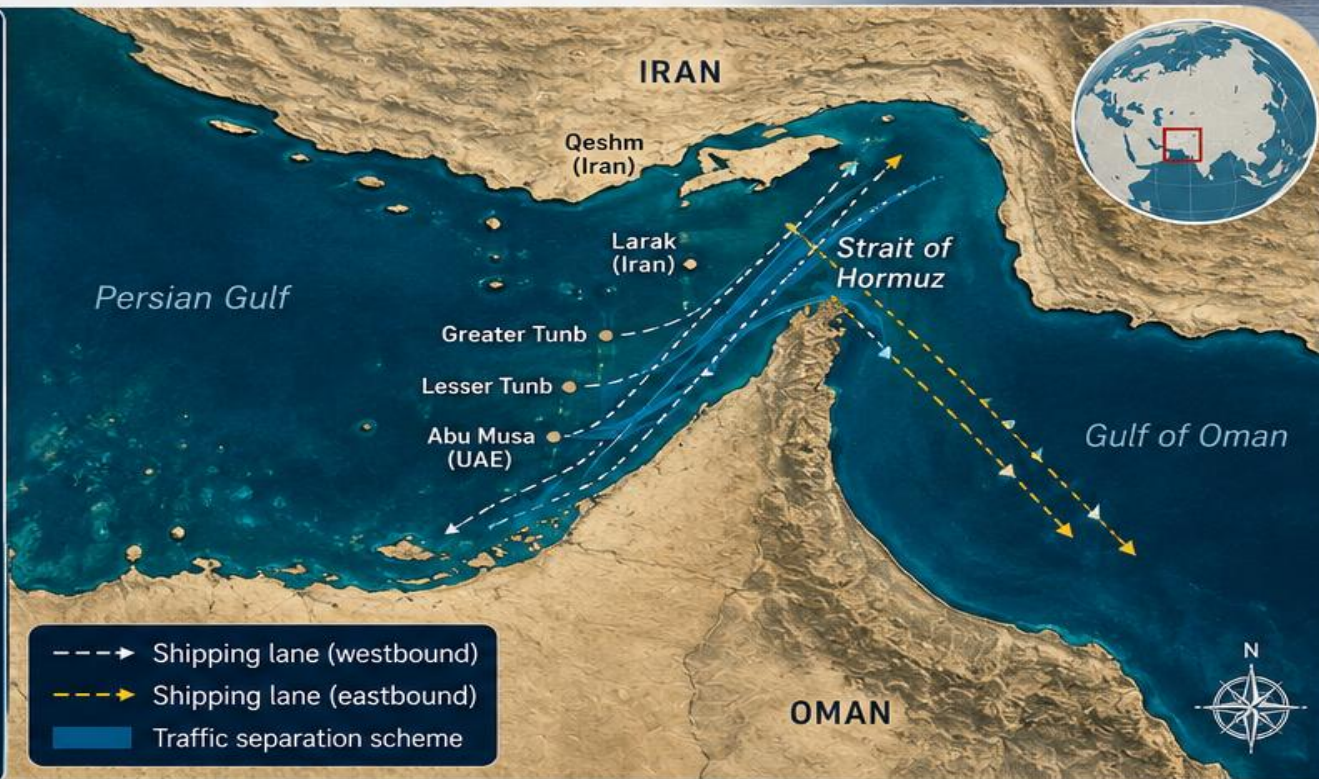
~21 nautical miles (39 km) wide at its narrowest point (shipping lanes in each direction are ~2 nm wide).



Bordered by Iran (north) and the United Arab Emirates and Oman (south).



Key islands: Qeshm (Iran), Larak (Iran), Greater Tunb, Lesser Tunb, Abu Musa (UAE).



## 2 TRADE SIGNIFICANCE



One of the world's busiest maritime chokepoints.



**~20%** OF GLOBAL OIL CONSUMPTION PASSES THROUGH THE STRAIT



Carries ~20% of global LNG trade and a significant volume of chemicals, petrochemicals, and general cargo.



Links the energy-rich Persian Gulf to global markets in Asia, Europe, and beyond.

## 3 ENERGY SIGNIFICANCE



The Strait of Hormuz is the lifeline for global energy security. It is the primary export route for crude oil and natural gas from the Persian Gulf.

### KEY ENERGY FLOWS THROUGH THE STRAIT OF HORMUZ

(Approximate)



**20–21**  
MILLION BARRELS  
OF OIL PER DAY

~20% of global oil consumption



**300**  
BILLION CUBIC FEET  
OF NATURAL GAS PER DAY

~20% of global LNG trade



**1,000+**  
VESSELS TRANSIT  
MONTHLY

(Tankers, LNG carriers, container ships, etc.)



### WHY IT MATTERS

- ✓ Any disruption can cause immediate spikes in global energy prices.
- ✓ Critical to the economies of Gulf producers and energy-importing nations.
- ✓ Heavily monitored by regional navies and international maritime forces.



**A STRATEGIC CHOKEPOINT** The Strait of Hormuz is a narrow gateway with enormous consequences—essential to global energy supplies, economic stability, and maritime security.



# WHY HORMUZ MATTERS

## THE WORLD'S MOST CRITICAL ENERGY CHOKEPOINT

The Strait of Hormuz is a narrow gateway between the Persian Gulf and the Gulf of Oman. Its disruption would send shockwaves through global energy markets, economies, and security.



### 1 SHARE OF GLOBAL OIL TRADE

The Strait of Hormuz is the world's most important oil transit chokepoint.

**~20%**

OF GLOBAL OIL CONSUMPTION PASSES THROUGH HORMUZ



**~20-21 MILLION**

BARRELS PER DAY

OF CRUDE OIL, CONDENSATE, AND FUELS TRANSIT THROUGH THE STRAIT

#### KEY FACTS

- Supplies from Saudi Arabia, Iraq, UAE, Kuwait, and Iran's exports all rely on this narrow waterway.
- Reaches global markets in Asia, Europe, and the Americas.
- Any major disruption could remove millions of barrels per day from global supply.

#### WHERE THE OIL GOES

ASIA 74%    EUROPE 17%    N. AMERICA 9%



### 2 LNG MOVEMENTS

Hormuz is also vital for global LNG trade, especially from Qatar.

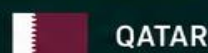


**~20% OF GLOBAL LNG TRADE PASSES THROUGH HORMUZ**

**~300 MILLION CUBIC FEET PER DAY** (bcf/d) of LNG transits the strait, primarily from Qatar to Asia.



#### MAJOR LNG EXPORTER



**QATAR**

#### MAIN DESTINATIONS



CHINA



JAPAN



SOUTH KOREE



INDIA

### 3 STRATEGIC VULNERABILITIES

Narrow, congested, and exposed—Hormuz faces multiple risk factors.



#### NARROW WATERWAY

At its narrowest point, the strait is just ~33 km wide with shipping lanes only ~2-3 km wide in each direction.



#### MILITARY THREATS

Coastal missile systems, mines, fast attack crafts, and drones pose significant risks.



#### MARKET IMPACT

Disruption could cause massive spikes in oil and gas prices, inflation, and global economic instability.



#### GLOBAL SECURITY CONSEQUENCES

Critical to energy-importing nations' economies and to maritime security worldwide.

#### A DISRUPTION WOULD IMPACT:



**ENERGY PRICES**  
Sharp price spikes across oil & gas markets



**GLOBAL TRADE**  
Higher shipping costs and supply chain disruption



**ECONOMIES**  
Slower growth, higher inflation, market volatility



**SECURITY**  
Increased risk of conflict escalation in the region



**THE BOTTOM LINE:** The Strait of Hormuz is indispensable to the world's energy lifeline. Its security and stability are vital to the global economy and energy future.



# RECENT HORMUZ CRISIS

## RISING TENSIONS. GLOBAL IMPLICATIONS.



~20% OF GLOBAL OIL PASSES THROUGH HORMUZ



~21 MILLION BARRELS OF OIL PER DAY TRANSIT THE STRAIT



### 1 TIMELINE



APRIL 2024

#### Rising Regional Tensions

Israel– Hamas war intensifies; U.S.–Iran tensions escalate.



MAY–JUNE 2024

#### Maritime Incidents Increase

Seizure of tankers, GPS jamming, and suspicious attacks near the Strait.



JULY 2024

#### Iran Threatens to Close Hormuz

Iranian officials warn of potential closure in response to Western pressure and sanctions.



AUGUST 2024

#### Military Posturing Intensifies

Iran conducts naval drills; U.S. and allies increase naval presence in the region.



SEP–MAY 2024 (ONGOING)

#### Fragile Deterrence, High Risk

No full-scale conflict, but elevated risk of miscalculation remains.



#### MARKET IMPACT

Oil prices spiked above \$90/barrel during peak tension. Insurance costs for shipping surged.

### 2 ESCALATION FACTORS



#### GEOPOLITICAL CONFLICT

Iran–Israel shadow war, U.S. sanctions, and regional proxy clashes heighten the risk of confrontation.



#### MARITIME SECURITY INCIDENTS

Tanker seizures, drone attacks, and electronic interference undermine freedom of navigation.



#### ECONOMIC PRESSURE

Oil sanctions and revenue restrictions increase Iran's incentives to threaten energy chokepoints.



#### DOMESTIC POLITICS IN IRAN

Hardline rhetoric and nationalist posturing used to rally domestic support.



#### ENERGY MARKET SENSITIVITY

Tight oil markets leave little room for disruption; even threats trigger volatility.



**A CLOSURE OR SEVERE DISRUPTION OF HORMUZ COULD REMOVE UP TO 20–30 MILLION BARRELS OF OIL PER DAY FROM GLOBAL MARKETS.**

### 3 INTERNATIONAL RESPONSE



#### U.S. & ALLIED NAVAL PRESENCE

The U.S. Navy's 5th Fleet and allied forces increased patrols and surveillance to ensure freedom of navigation.



#### DIPLOMATIC ENGAGEMENT

Backchannel talks and diplomatic efforts by the U.S., EU, China, and regional partners to de-escalate tensions.



#### MULTILATERAL STATEMENTS

The UN, G7, and GCC condemned threats to maritime security and called for restraint and safe passage.



#### MARITIME COALITIONS

Operations such as EUNAVFOR ASPIDES and Combined Maritime Forces (CMF) enhanced information sharing and escort capabilities.



#### ENERGY MARKET & POLICY ACTIONS

Strategic reserves monitored; energy importing nations coordinated on supply diversification and contingency planning.



#### THE GLOBAL PRIORITY:

Prevent escalation, protect energy flows, and maintain stability in one of the world's most critical maritime chokepoints.



**THE BOTTOM LINE:** The Strait of Hormuz remains a powder keg. Vigilance, diplomacy, and deterrence are essential to prevent a crisis that could shake the global economy.



20% OF GLOBAL OIL



ENERGY SECURITY



MARITIME STABILITY



GLOBAL PROSPERITY

# IMPACT ON ENERGY SECURITY

## THE STRAIT OF HORMUZ: A CHOKEPOINT THE WORLD CANNOT AFFORD TO LOSE



Approximately 20% of global oil and a significant share of LNG transit the Strait of Hormuz. Any disruption would ripple across global energy markets, economies, and security.



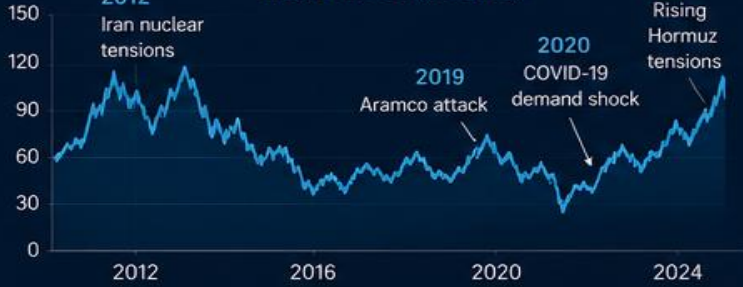
### 1 OIL PRICES

Hormuz disruptions create immediate volatility and sharp price spikes.



#### HISTORICAL PRICE SPIKES

BRENT CRUDE (USD/BBL)



#### POTENTIAL IMPACT OF A PROLONGED DISRUPTION



Oil prices could surge by 20–30% or more



Reduced supply creates global inflationary pressure



Higher energy costs slow economic growth worldwide

#### WHO IS MOST EXPOSED?



Asia (major importers)



Europe



Emerging economies



Net oil-importing nations

### 2 LNG SUPPLY

Hormuz is critical for LNG exports, especially from Qatar.



#### KEY LNG FLOWS THROUGH HORMUZ



#### IMPACT OF DISRUPTION



Tight LNG supply leads to higher prices and volatile markets



Utilities face higher costs; risk of power shortages in importing countries



Long-term contracts and spot markets are both affected

**QATAR EXPORTS ~77 MILLION TONNES OF LNG/YEAR**

The majority relies on safe passage through Hormuz.

### 3 STRATEGIC RESERVES

Strategic reserves are a buffer—not a solution.



#### HOW STRATEGIC RESERVES HELP



Provide an immediate cushion to offset supply disruptions



Buy time for markets and governments to respond



Help maintain stability and confidence in energy markets

#### LIMITATIONS



Reserves are finite and cannot replace prolonged supply losses



Large releases can only temporarily lower prices



Not all countries have adequate reserves

#### IEA RECOMMENDATION

Maintain at least 90 days of net oil imports in strategic reserves.



### THE BOTTOM LINE

The Strait of Hormuz is vital to global energy security. Disruptions would drive up prices, strain LNG supply, and test the resilience of strategic reserves worldwide.

### WHAT STAKEHOLDERS MUST DO



#### DIVERSIFY SUPPLY ROUTES

Reduce dependency on a single chokepoint.



#### INVEST IN RESILIENCE

Strengthen infrastructure and alternative energy.



#### BUILD & MAINTAIN RESERVES

Ensure adequate strategic oil and gas stocks.



#### ENHANCE COOPERATION

International coordination is key to crisis response.

# IMPACT ON MARITIME SHIPPING

## THE STRAIT OF HORMUZ: A SMALL WATERWAY WITH MASSIVE MARITIME CONSEQUENCES



**~30% OF GLOBAL CONTAINER TRADE**  
Transits within range of disruption



**~20% OF GLOBAL OIL AND LNG**  
Moves through the Strait of Hormuz



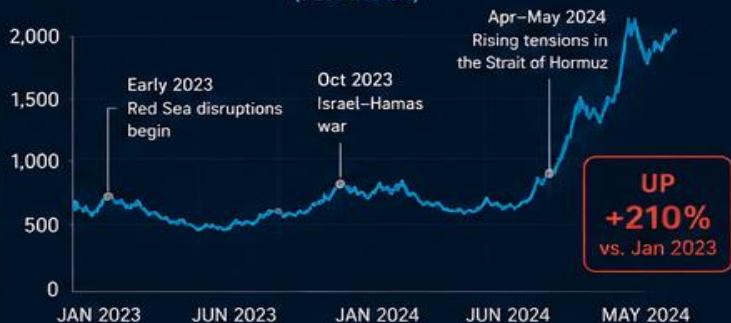
Any disruption causes immediate ripple effects across shipping, costs, and supply chains.



### 1 FREIGHT RATES

Tensions and risk premiums lead to sharp spikes in freight rates across key shipping segments.

#### CONTAINER FREIGHT RATE INDEX (FBX INDEX)



#### IMPACT

Higher freight rates increase import/export costs, reduce demand, and contribute to inflationary pressure across global markets.

#### EXAMPLES OF RATE INCREASES (APR-MAY 2024)

Asia-Europe



**+180%**

Middle East-Asia



**+220%**

Gulf-Europe

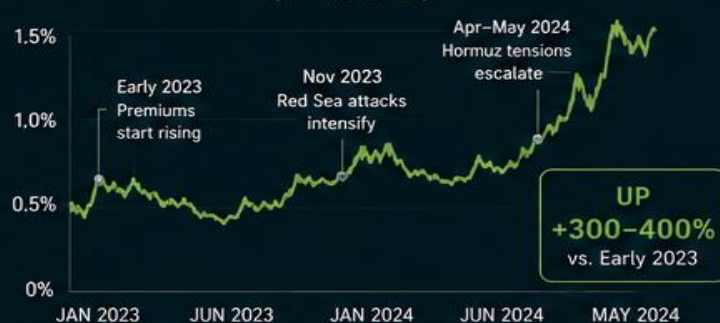


**+200%**

### 2 INSURANCE PREMIUMS

Heightened risk in the region leads to surging war risk premiums and higher insurance costs.

#### WAR RISK INSURANCE PREMIUMS (% of Hull Value)



#### IMPACT

War risk premiums for vessels transiting the Gulf and adjacent waters have increased significantly, adding hundreds of thousands of dollars per voyage.

#### ADDITIONAL INSURANCE COST IMPACT (PER VOYAGE)

VLCC (Oil Tanker)

**+\$250K-\$400K**



LNG Carrier

**+\$300K-\$500K**



Container Ship

**+\$100K-\$250K**



### 3 ROUTE DIVERSIONS

Shipowners reroute vessels to avoid risk, leading to longer transit times and higher costs.

#### COMMON ALTERNATIVE ROUTES



**EXTRA DISTANCE**  
(vs. Hormuz Route)

Asia-Europe  
**+3,500-5,500**  
nautical miles

Gulf-Asia  
**+2,000-3,000**  
nautical miles



#### IMPACT

Longer routes mean higher fuel consumption, more days at sea, crew costs, and delays in supply chains.

#### ADDITIONAL IMPACTS



Higher fuel costs



Increased transit time  
(7-14 days)



Schedule disruptions



Supply chain bottlenecks



Higher overall shipping costs



#### THE BOTTOM LINE

Disruptions in the Strait of Hormuz don't just affect oil and gas. They send shockwaves through global shipping, costs, and trade.

#### KEY TAKEAWAY

Even a short-term disruption can lead to:



Higher costs for businesses and consumers



Greater risk for shipping and crews



Strained global supply chains



Broader economic and inflationary pressures

# SUPPLY CHAIN DISRUPTIONS

## THE STRAIT OF HORMUZ: DISRUPTING GLOBAL TRADE, DELIVERING GLOBAL IMPACT

Tensions or disruptions in the Strait of Hormuz send shockwaves across global supply chains—causing delays, shortages, and rising costs for businesses and consumers worldwide.



**~20%**  
OF GLOBAL OIL TRADE  
PASSES THROUGH HORMUZ



**~20%**  
OF GLOBAL LNG TRADE  
PASSES THROUGH HORMUZ



**~30%**  
OF GLOBAL CONTAINER TRADE  
IS IMPACTED INDIRECTLY



### A SINGLE DISRUPTION CAN:

Delay Shipments | Trigger Shortages | Drive Up Costs

## 1 DELAYS

Rerouting and congestion lead to longer transit times across key trade lanes.

### TYPICAL DELAY INCREASE (VS NORMAL ROUTES)

ASIA → EUROPE via Cape of Good Hope	<b>+10–15 DAYS</b>
ASIA → NORTH AMERICA via Cape of Good Hope	<b>+7–12 DAYS</b>
MIDDLE EAST → ASIA via alternative routes	<b>+5–10 DAYS</b>

### WIDER IMPACTS

Missed delivery windows	Port congestion and backlogs
Production scheduling delays	Higher demurrage and detention costs

## 2 INVENTORY SHORTAGES

Delays and higher demand for alternative routes strain inventories across industries.

### INDUSTRIES MOST AT RISK

<b>ENERGY</b> Crude oil, refined products, LNG	<b>MANUFACTURING</b> Raw materials, components	<b>RETAIL</b> Consumer goods, electronics	<b>AGRICULTURE</b> Fertilizers, grains, food products	<b>PHARMACEUTICALS</b> APIs, medical supplies
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### WHAT HAPPENS

- Just-in-time supply chains break down
- Safety stock depleted faster
- Stockouts and unfulfilled orders increase

### GLOBAL SUPPLY CHAIN PRESSURE INDEX (EXAMPLE)



## 3 COST INFLATION

Higher freight rates, insurance premiums, and scarcity translate into rising costs across the economy.

### KEY COST PRESSURES

<b>HIGHER FREIGHT RATES</b> Rerouting increases distance and fuel costs	<b>HIGHER INSURANCE PREMIUMS</b> War risk and security surcharges increase	<b>HIGHER INPUT COSTS</b> Raw materials and components become more expensive	<b>PASS-THROUGH TO CONSUMERS</b> Higher costs lead to inflation in goods and services
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### ESTIMATED COST IMPACT (EXAMPLES)

Freight rates (Asia–Europe)	<b>+150% to +250%</b>
War risk insurance premiums	<b>+200% to +500%</b>
Crude oil price impact	<b>+\$5 to \$15 per barrel</b>
Overall supply chain costs	<b>+10% to +20%</b>



### THE BOTTOM LINE

Disruptions in the Strait of Hormuz ripple across global supply chains, causing delays, shortages, and cost inflation that impact every industry and every consumer.

### THE CHAIN REACTION



### WHAT BUSINESSES MUST DO

- ✓ Diversify suppliers and routes
- ✓ Increase strategic inventory
- ✓ Strengthen risk monitoring
- ✓ Build financial and operational resilience

# CASE STUDIES THE STRAIT OF HORMUZ: GLOBAL RIPPLE EFFECTS, REGIONAL REALITIES

Disruptions in the Strait of Hormuz don't stay local. They ripple across the world—impacting energy security, supply chains, economies, and everyday lives.



**GLOBAL IMPACT**  
One chokepoint.  
Three regions.  
Worldwide consequences.



## EUROPE

HIGH DEPENDENCY  
ON IMPORTED ENERGY

### CONTEXT

Europe imports ~40% of its oil and ~1/3 of its LNG. Much of this energy transits through the Strait of Hormuz.

Crude Oil ~40% LNG ~33%

### IMPACT



#### DELAYS

Shipping delays of 7–15 days for energy and goods.



#### INVENTORY SHORTAGES

Refineries and industries face tighter supply; utilities increase emergency stocks.



#### COST INFLATION

Higher energy bills, production costs, and consumer prices.

### KEY SECTORS AFFECTED



Energy & Utilities



Manufacturing



Chemicals



Transportation



Food & Retail

### RESULTS / OUTCOMES (RECENT DISRUPTIONS)

- Energy prices surged across Europe in 2022–2024.
- Industrial output slowed due to high energy and raw material costs.
- Inflationary pressures impacted consumer spending.



### RESPONSE / ACTIONS



- Diversifying energy imports (LNG from US, Qatar, Africa).
- Accelerating renewables and efficiency investments.
- Building strategic petroleum reserves.
- Strengthening EU energy solidarity and crisis coordination.



## ASIA

GROWTH DRIVEN,  
IMPORT DEPENDENT

### CONTEXT

Asia imports ~80% of its oil, with over 60% of seaborne oil transiting the Strait of Hormuz.

Oil Imports ~80% Hormuz Transit ~60%

### IMPACT



#### DELAYS

Longer shipping times disrupt just-in-time manufacturing.



#### INVENTORY SHORTAGES

Refining, petrochemical and power sectors face feedstock and fuel shortages.



#### COST INFLATION

Higher energy costs feed into goods prices and inflation.

### KEY SECTORS AFFECTED



Refining & Petrochemicals



Electronics



Automotive



Shipping & Logistics



Power Generation

### RESULTS / OUTCOMES (RECENT DISRUPTIONS)

- Spikes in oil and LNG prices impact industries and households.
- Export competitiveness pressured by higher input costs.
- Currency volatility and trade balance strains.



### RESPONSE / ACTIONS



- Securing long-term contracts and diversified suppliers.
- Expanding strategic reserves (oil & LNG).
- Investing in domestic energy and alternative fuels.
- Enhancing regional energy cooperation.



## UNITED STATES

INDIRECT BUT  
SIGNIFICANT IMPACTS

### CONTEXT

The U.S. is a net energy exporter, but global disruptions impact markets, inflation and supply chains.

Net Energy Exporter Global Market Exposure

### IMPACT



#### DELAYS

Supply chain bottlenecks slow down imports/exports.



#### INVENTORY SHORTAGES

Shortages of critical materials and components from Asia and Europe impact industries.



#### COST INFLATION

Higher energy prices and freight costs drive inflation.

### KEY SECTORS AFFECTED



Aviation & Shipping



Manufacturing



Agriculture



Retail & Consumer Goods



Energy Markets

### RESULTS / OUTCOMES (RECENT DISRUPTIONS)

- Higher gasoline and diesel prices at the pump.
- Increased freight costs and shipping delays.
- Elevated inflation impacts consumer confidence.



### RESPONSE / ACTIONS



- Releasing from Strategic Petroleum Reserve when needed.
- Strengthening domestic production and energy infrastructure.
- Working with allies to ensure stable energy markets.
- Investing in supply chain resilience and nearshoring.



**THE BOTTOM LINE** The Strait of Hormuz is a small waterway with a massive global footprint. Disruptions here create real-world consequences—across continents and industries.



**Delays**  
Slow trade and growth



**Shortages**  
Strain inventories and production



**Inflation**  
Raises costs for all

# THE GLOBAL CHOKEPOINT SYSTEM

SEVEN CRITICAL NODES. ONE INTERCONNECTED WORLD.



	CHECKPOINT	STRATEGIC IMPORTANCE
1	 Strait of Hormuz	 Gulf oil & LNG exports
2	 Strait of Malacca	 Asia's primary energy gateway
3	 Bab el-Mandeb	 Access to Red Sea & Suez
4	 Suez Canal	 Europe-Asia trade
5	 Panama Canal	 Atlantic-Pacific trade
6	 Turkish Straits	 Black Sea exports
7	 Danish Straits	 Baltic energy exports



## ENERGY SECURITY

Protect supply, safeguard nations



## GLOBAL IMPACT

Disruptions here, ripple everywhere



## RESILIENT LOGISTICS

Diversify routes, strengthen systems



## STRATEGIC ACTION

Anticipate risks, build resilience



30 JUNE 2026



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A PRESENTATION AT  
CHARTERED INSTITUTE OF LOGISTICS  
AND TRANSPORT, NIGERIA



MANDATORY  
PROFESSIONAL  
DEVELOPMENT

# SUEZ CANAL BLOCKAGE (EVER GIVEN)

A SHIP. A CANAL. A GLOBAL WAKE-UP CALL.

On March 23, 2021, the massive container ship Ever Given became wedged across the Suez Canal, blocking one of the world's most critical trade arteries for 6 days.



## 1 WHAT HAPPENED

**March 23, 2021 – 07:40 (Local Time)**  
Ever Given, a 400-meter container ship, was en route from China to Rotterdam with nearly 20,000 containers.

Strong winds and a sandstorm reduced visibility. The ship veered off course and ran aground, wedging diagonally across the canal.

The blockage stopped all traffic in both directions, stranding more than **400 ships**.

**March 29, 2021**  
After a massive salvage operation, Ever Given was refloated and traffic resumed.



**400+m** Ships delayed  
**6** Days blocked  
**19,224** Containers on board  
**400 m** Length of Ever Given

## 2 ECONOMIC IMPACT

The 6-day blockage had far-reaching economic consequences worldwide.

**\$9 – \$10 BILLION**  
Estimated cost to global trade per day

**\$54 – \$59 BILLION**  
Total estimated economic impact

**15%**  
Of global maritime trade temporarily affected

**7 MILLION+ BARRELS**  
Of oil stuck on tankers daily

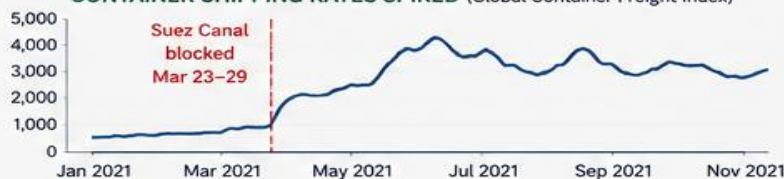
**Supply chain delays**  
Raw materials, components, and finished goods delayed across industries

**Price increases**  
Surging freight rates and commodity prices in the weeks that followed

### INDUSTRIES IMPACTED



### CONTAINER SHIPPING RATES SPIKED (Global Container Freight Index)



## 3 LESSONS LEARNED

The Ever Given incident highlighted critical vulnerabilities and the need for greater resilience.

**Diversify and De-risk Routes**  
Over-reliance on chokepoints like the Suez Canal creates systemic risk.

**Build Supply Chain Resilience**  
Companies need flexible sourcing, inventory buffers, and alternative logistics strategies.

**Real-Time Risk Monitoring**  
Better weather forecasting, vessel tracking, and risk alerts can prevent or reduce disruptions.

**Stronger Global Coordination**  
Rapid collaboration between governments, canal authorities, and industry is essential.

**Salvage & Contingency Preparedness**  
Investing in salvage capacity and clear contingency plans minimizes downtime.

“One ship incident exposed how interconnected—and fragile—our global supply chains truly are.”



### THE BIG TAKEAWAY

The Suez Canal blockage was not just a maritime incident—it was a global supply chain stress test that the world cannot afford to fail again.



Critical chokepoints must be managed as global assets.



Resilience is the best defense against the unexpected.



Preparedness today prevents paralysis tomorrow.



Investing in flexibility pays off far more than disruption costs.

# RED SEA CRISIS

## A NEW FRONT IN GLOBAL SHIPPING RISK

Escalating Houthi attacks in the Red Sea since late 2023 have disrupted a vital trade corridor, forcing ships to reroute, driving up costs, delays, and global economic uncertainty.



### 1 HOUTHİ ATTACKS

Iran-aligned Houthi rebels have targeted commercial ships transiting the Red Sea and Bab el-Mandeb Strait.

#### KEY FACTS



**Since Nov 2023: 60+ attacks** missiles, drones, and armed assaults on commercial vessels



**Targets:** Container ships, bulkers, tankers, and naval vessels



**Impact:** Ships damaged, seafarers injured, crew taken hostage, and vessels sunk



**Goal:** Disrupt maritime traffic linked to Israel and its allies

#### NOTABLE INCIDENTS

- Nov 19, 2023 Galaxy Leader hijacked
- Dec 2023–Apr 2024 Multiple missile & drone attacks
- Feb 18, 2024 UK-flagged Rubymar sunk
- Mar 2024–May 2024 Continued attacks despite international presence



The Red Sea has become one of the world's highest-risk maritime zones.

### 2 SHIPPING REROUTING

Major shipping lines have suspended Red Sea transits and rerouted around the Cape of Good Hope.

#### ROUTE COMPARISON

--- Traditional Route (Suez Canal)    - - - Rerouted Route (via Cape of Good Hope)



#### IMPACT ON VOYAGES

- +10–15 DAYS** additional transit time
- +3,500–4,500** nautical miles
- +30–40%** more fuel consumption

#### SHIPS AVOIDING RED SEA



Major lines rerouting: Maersk, Hapag-Lloyd, MSC, CMA CGM, ONE, Evergreen, etc.



**~85%** of container capacity avoiding Red Sea (as of May 2024)

### 3 COST IMPLICATIONS

Rerouting and heightened risk have significantly increased shipping and insurance costs, affecting global trade.

#### SURGING FREIGHT RATES (SHANGHAI → EUROPE)



**HIGHER FREIGHT**  
2–4x increase on some key routes



**INSURANCE COSTS**  
War risk insurance up 5–10x or more



**FUEL COSTS**  
+\$300,000 to \$500,000 per round voyage



**SUPPLY CHAIN DISRUPTIONS**  
Delays, congestion, and inventory pressures

#### ECONOMIC IMPACT



Higher import costs for businesses and consumers



Inflationary pressure across global markets



Production delays due to component shortages



Disproportionate impact on emerging economies



#### THE BIG PICTURE

The Red Sea is critical for ~12% of global trade and ~30% of global container traffic.

The crisis is reshaping global shipping routes, cost structures, and risk strategies.



#### WHAT COMES NEXT?

Continued security threats likely in the near term



More naval presence, but no quick fix



Diversification of routes and suppliers accelerating



Businesses must build resilience and flexibility



#### A CRISIS STILL UNFOLDING

The Red Sea crisis is a stark reminder of how geopolitical conflicts can rapidly disrupt global trade and economies.

# COMMON PATTERNS ACROSS CHOKEPOINTS

## THREE RECURRING THEMES. ONE CLEAR MESSAGE.

From Hormuz to Suez to the Red Sea, disruptions follow familiar patterns. Understanding them helps build stronger, more resilient global supply chains.



### 1 CONCENTRATION RISK

A large share of global trade and energy flows through a very small number of chokepoints.

#### BY THE NUMBERS

~60% of global oil trade passes through just 3 chokepoints

~40% of global container trade passes through the Suez Canal

~30% of global LNG trade transits the Strait of Hormuz

#### EXAMPLES

**Strait of Hormuz**  
Oil & LNG lifeline for global markets

**Suez Canal**  
Critical bridge between Asia & Europe

**Bab el-Mandeb (RED SEA)**  
Gateway between Asia and Europe

#### TYPICAL IMPACT WHEN DISRUPTED

Trade slowdowns

Price spikes

Supply shortages

Higher transport costs

### 2 GEOPOLITICAL VULNERABILITY

Chokepoints are located in regions prone to conflict, tension, or political instability.

#### COMMON VULNERABILITY FACTORS

Regional conflicts

State rivalries & proxy threats

Terrorism & non-state actors

Sanctions & political pressure

Military posturing

#### RECENT EXAMPLES

**Strait of Hormuz** | Iran tensions, threats of closure, tanker harassment

**Suez Canal** | Blockage (Ever Given), regional instability

**Red Sea (Bab el-Mandeb)** | Houthi attacks, drone & missile threats on shipping

#### TYPICAL IMPACT WHEN DISRUPTED

Sudden route interruptions

Insurance premium spikes

Military presence increases

Market volatility

### 3 NEED FOR RESILIENCE

Resilient systems, flexible strategies, and international cooperation reduce impact and speed recovery.

#### KEY RESILIENCE PILLARS

Diversify routes

Build strategic reserves

Strengthen maritime security

Invest in visibility & early warning

Enhance supply chain flexibility

#### RESILIENCE IN ACTION

**Governments** | Strengthen diplomacy, secure sea lanes, and coordinate responses

**Businesses** | Diversify suppliers, build inventory buffers, and stress-test operations

**Industries** | Collaborate on standards, data sharing, and joint risk mitigation

#### BENEFITS OF RESILIENCE

Lower disruption impact

Faster recovery

Cost stability

Stronger long-term competitiveness



#### THE BIG TAKEAWAY

Disruptions at chokepoints may be unavoidable—but their impact doesn't have to be devastating.



#### Anticipate risks

Understand concentration and geopolitical risks before they hit.



#### Prepare proactively

Invest in capabilities, partnerships, and flexibility to absorb shocks.



#### Respond together

Collaboration and information sharing make the global system more resilient for all.



Chokepoints connect the world—resilience keeps it moving.

## THREE PATTERNS. ONE SOLUTION: BUILD RESILIENCE.

# WHY NIGERIA SHOULD CARE

Disruptions in global chokepoints like the Strait of Hormuz, Suez Canal, and the Red Sea have direct and immediate consequences for Nigeria's economy, energy security, and everyday lives.



GLOBAL DISRUPTIONS.  
LOCAL IMPACT.  
NATIONAL CONSEQUENCES.



## 1 IMPORT DEPENDENCE

Nigeria relies heavily on imported goods, machinery, and energy products that transit through global chokepoints.

### WHAT NIGERIA IMPORTS



Machinery & Equipment



Food & Agricultural Products



Pharmaceuticals & Medical Supplies



Vehicles & Auto Parts



Electronics & Consumer Goods

### KEY ROUTES USED



### WHY IT MATTERS



Delays increase lead times for critical imports.



Higher freight and insurance costs are passed on to businesses and consumers.



Disruptions slow industrial activity and economic growth.

## 2 EXPORT DEPENDENCE

Nigeria depends on global markets to sell its oil and LNG, which transit through these same chokepoints.

### NIGERIA'S MAJOR EXPORTS



#### CRUDE OIL

~90% of total exports  
Shipped via terminals with routes through the Strait of Hormuz and Suez Canal



#### LNG

Exported to Asia, Europe & the Americas via chokepoint-dependent maritime routes

### POTENTIAL IMPACT OF DISRUPTIONS



Delayed shipments



Reduced export volumes



Lower foreign exchange earnings



Pressure on the naira and fiscal revenues

### WHY IT MATTERS



Less foreign exchange to fund budgets and imports.



Higher production costs and shipping premiums.



Weaker investor confidence in the energy sector.

## 3 FUEL SUPPLY VULNERABILITIES

Nigeria's domestic fuel supply remains fragile and vulnerable to global shocks.

### THE REALITY



Nigeria imports most of its refined petroleum products



Many shipments come from Europe, Asia & the Middle East



These routes pass through high-risk chokepoints



Any disruption means tighter supply and higher costs at home

### POTENTIAL CONSEQUENCES



Fuel price increases



Scarcity and long queues



Higher transport and logistics costs



Higher cost of living and public discontent

### WHY IT MATTERS



Impacts households, businesses, and inflation.



Disrupts transport, power, agriculture and industrial operations.



Threatens economic stability and national security.

## THE BIG PICTURE



When global chokepoints are disrupted, Nigeria pays more, earns less, and suffers more.



Diversify import sources and routes



Increase local refining capacity



Build strategic fuel reserves



Deepen regional trade and energy cooperation



Strengthen risk monitoring and early warning systems


## RESILIENT NIGERIA, STRONGER FUTURE



Building resilience to global disruptions protects our economy, our people, and our future.

# NIGERIA'S LOGISTICS ECOSYSTEM TODAY

A vast market. Strategic location. Undeveloped potential.

 Nigeria sits at the center of West Africa with access to **400M+** people in the region. Yet, high logistics costs, infrastructure gaps and inefficiencies constrain trade and competitiveness.

### THE BIG PICTURE



-  Logistics cost: 23–25% of GDP (vs. global avg: 8–10%)
-  Trade facilitation ranking: 141/167 countries (World Bank)
-  Global LPI ranking: 139/154 countries (2023)
-  Huge potential, but multimodal connectivity remains weak.

## 1 PORTS



Gateway for 90%+ of Nigeria's international trade by volume.

- KEY STRENGTHS**
- 5 major sea ports (Lagos, Tin Can Island, Onne, Port Harcourt, Calabar)
  - Deep seaport at Lekki (under development)
  - Significant private investment in terminals

- KEY CHALLENGES**
- Congestion and vessel delays
  - Shallow drafts in some ports
  - High turnaround time (5–10 days vs. global avg. 2–3 days)
  - Multiple charges and inefficiencies

**KEY METRICS**

-  **~95%** of trade by seaborne transport
-  **5–10 DAYS** average ship turnaround time

## 2 ROADS



Carries over 90%+ of domestic freight and passenger traffic.

- KEY STRENGTHS**
- Extensive road network (~195,000 km)
  - Connects all states and major economic hubs
  - Flexible and door-to-door service

- KEY CHALLENGES**
- Poor road conditions and maintenance
  - Traffic congestion in urban corridors
  - High transport costs and long transit times
  - Security risks on major routes

**KEY METRICS**

-  **~90%** of domestic freight moves by road
-  **2–3x** higher logistics cost due to road inefficiencies

## 3 RAIL



Underutilized but critical for long-haul, bulk and container transport.

- KEY STRENGTHS**
- Standard gauge line (Lagos–Ibadan, ongoing to Kano)
  - Freight service operational on key corridors
  - Cost-effective and safer for bulk cargo

- KEY CHALLENGES**
- Limited network coverage
  - Inconsistent service and aging infrastructure
  - Last-mile connectivity gaps
  - Low integration with ports and ICDs

**KEY METRICS**

-  **~10%** of freight moves by rail
-  **~3,500 km** existing rail network (narrow & standard gauge)

## 4 INLAND WATERWAYS



Natural advantage with over 3,000 km of navigable waterways.

- KEY STRENGTHS**
- Cost-effective for bulk cargo
  - Connects hinterland regions
  - Potential to decongest roads

- KEY CHALLENGES**
- Siltation, shallow drafts and obsolete equipment
  - Poor port and jetty infrastructure
  - Limited cargo handling facilities
  - Low private sector participation

**KEY METRICS**

-  **<5%** of freight moves by waterways
-  **3,000+ km** of navigable waterways

## 5 AIR CARGO



Fastest mode, critical for high-value, time-sensitive goods.

- KEY STRENGTHS**
- Active international airports (Lagos, Abuja, Port Harcourt, Kano)
  - Growing cargo terminals and operators
  - Strong demand for e-commerce and perishables

- KEY CHALLENGES**
- High air freight rates
  - Limited cargo capacity and cold chain
  - Complex customs and documentation
  - Poor multimodal integration

**KEY METRICS**

-  **~1%** of total freight by volume
-  **24–48 HRS** typical air cargo transit time

**CROSS-CUTTING ISSUES**

-  **Security:** Theft, extortion and vandalism increase costs and risks
-  **Policy & Regulation:** Multiple agencies, bureaucracy and inconsistent policies

-  **High Cost of Doing Business:** Fuel, tariffs, delays and informal charges

-  **Infrastructure Gaps:** Limited warehousing, ICDs, cold chain and logistics parks

-  **Low Digitization:** Manual processes, low visibility and poor data systems

**THE WAY FORWARD**

Integrated infrastructure, policy reforms, private investment, technology adoption and regional collaboration can unlock Nigeria's logistics potential and drive trade-led growth.

# CURRENT LOGISTICS CHALLENGES

## Key constraints holding back Nigeria's trade competitiveness

Despite its strategic location and market size, Nigeria's logistics sector faces major challenges that raise costs, cause delays, and limit economic potential.

### THE BIG PICTURE

Inefficient logistics is estimated to cost **23-25%** of Nigeria's GDP (World Bank)

## 1 CONGESTION

Persistent congestion across ports, roads, and urban corridors causes delays and unreliability.



### KEY ISSUES

- Port congestion leads to vessel delays
- Gridlock on access roads and highways
- Bottlenecks at border posts and checkpoints
- Poor traffic management and enforcement

### IMPACT

-  Delays in cargo movement
-  Higher turnaround times
-  Unreliable delivery performance

### KEY METRIC

Average time to clear cargo at ports:

**10-21 DAYS**

vs. global best practice of 2-4 days



## 2 INFRASTRUCTURE GAPS

Inadequate and deteriorating infrastructure limits efficiency and capacity.



### KEY GAPS

- Dilapidated road networks
- Limited rail coverage and poor connectivity
- Obsolete port equipment and limited berths
- Inadequate inland waterways infrastructure
- Irregular power and ICT systems

### IMPACT

-  Low asset utilization and capacity
-  Breakdowns and service disruptions
-  Limits industrial growth and trade expansion

### KEY METRIC

Only **~30%** of Nigeria's roads are in good condition (FERMA, 2023)



## 3 HIGH LOGISTICS COSTS

Multiple inefficiencies and structural issues drive up the cost of moving goods.



### COST DRIVERS

- Multiple levies, charges and informal payments
- Fuel costs and volatility
- Inefficient processes and documentation
- Low competition and high reliance on road transport
- Security risks and insurance premiums

### IMPACT

-  Higher cost of goods and services
-  Reduced competitiveness of exports
-  Lower purchasing power and profitability

### KEY METRIC

Logistics costs in Nigeria: **23-25% OF GDP** vs. global average of 8-10%



## OVERALL IMPACT



Longer lead times and delays



Higher cost of doing business



Reduced trade competitiveness



Lower industrial productivity



Discourages investment and job creation



## THE WAY FORWARD

Addressing congestion, closing infrastructure gaps, and reducing logistics costs through coordinated investment, policy reform, and technology adoption is critical to unlocking Nigeria's economic potential.

# NIGERIA'S SUPPLY CHAIN VULNERABILITIES

**Global disruptions. Local consequences.**

Nigeria's heavy reliance on imports, weak infrastructure, and external shocks make critical sectors highly vulnerable to global supply chain disruptions.



**THE BIG PICTURE**  
Disruptions in global trade routes, logistics, or production hubs can quickly translate into shortages, price spikes, and economic instability in Nigeria.



**ENERGY**  
High dependence on imported fuels and equipment.




**FOOD**  
High dependence on imported food and inputs.




**MANUFACTURING**  
Dependent on imported raw materials and components.




**PHARMACEUTICALS**  
Heavily reliant on imported medicines, APIs and medical equipment.



- KEY VULNERABILITIES**
- Import-dependent for refined petroleum products
  - Limited domestic refining capacity
  - Offshore supply routes exposed to global disruptions
  - Dependence on imported power sector equipment and spare parts

- KEY VULNERABILITIES**
- Import-dependent for wheat, rice, sugar, fish, milk, edible oils, and fertilizers
  - Global price volatility affects local food prices
  - Weak storage, cold chain, and post-harvest infrastructure
  - Climate change adds pressure on local production

- KEY VULNERABILITIES**
- Reliance on imported raw materials, chemicals, and industrial inputs
  - Supply chain disruptions cause production delays
  - Foreign exchange constraints limit access to inputs
  - Inadequate local supplier base and technology gaps

- KEY VULNERABILITIES**
- Over 70% of medicines and 100% of APIs imported
  - Dependence on a few global suppliers (e.g., India, China)
  - Long lead times for regulatory approvals and imports
  - Cold chain and storage gaps increase spoilage risk
  - FX limitations and import restrictions disrupt supply

**EXAMPLES**

- Fuel import delays due to shipping disruptions
- Crude oil theft and pipeline vandalism
- Power plant downtime due to spare part delays

**EXAMPLES**

- Wheat import delays from Black Sea disruptions
- Surging fertilizer prices affect farm yields
- Shipping delays raise cost of food imports

**EXAMPLES**

- Auto and electronics assembly affected by component shortages
- Import delays for industrial raw materials
- Forex scarcity limits raw material imports

**EXAMPLES**

- Delays in API imports disrupt local production
- Global shortages of critical medicines
- Cold chain failures spoil temperature-sensitive drugs

**POTENTIAL IMPACT**

- Power shortages and blackouts
- Higher energy costs and inflation
- Reduced industrial productivity

**POTENTIAL IMPACT**

- Food inflation and insecurity
- Malnutrition and social unrest
- Higher household expenditure

**POTENTIAL IMPACT**

- Reduced production and output
- Higher production costs
- Job losses and business closures

**POTENTIAL IMPACT**

- Drug shortages and stockouts
- Higher drug prices
- Threats to public health outcomes

**CROSS-CUTTING VULNERABILITIES AFFECTING ALL SECTORS**

- OVER-DEPENDENCE ON IMPORTS**  
High reliance on foreign suppliers for critical goods and inputs.
- LOGISTICS & INFRASTRUCTURE GAPS**  
Port congestion, poor roads, limited rail, and high logistics costs cause delays.
- FOREIGN EXCHANGE CONSTRAINTS**  
Limited forex access restricts ability to import essential commodities.
- GLOBAL SHOCK EXPOSURE**  
Geopolitical tensions, pandemics, climate events, and shipping disruptions create ripple effects.
- POLICY & REGULATORY BOTTLENECKS**  
Multiple taxes, complex processes, and inconsistent policies raise costs.

**THE IMPACT ON NIGERIA**  
Vulnerable supply chains mean:

- ✓ Higher costs for businesses and consumers
- ✓ Frequent shortages and inflation
- ✓ Lower competitiveness and investment
- ✓ Threats to economic stability and national security



**KEY TAKEAWAY:** Building resilient, diversified, and local supply chains is critical for Nigeria's economic security and sustainable growth.

# WHAT IS SUPPLY CHAIN SOVEREIGNTY?

Supply Chain Sovereignty is the ability of a nation to **secure, control, and sustain** access to critical goods, services, technologies, and resources across the supply chain—**on its own terms**—so it can protect its economy, society, and national security.



**IN SIMPLE TERMS:** It means a country is not overly dependent on others for the things it needs to survive, thrive, and compete.

## THE CORE COMPONENTS



### SECURE ACCESS

Reliable access to critical goods, materials, and technologies.



### DOMESTIC CAPACITY

Strong local production, innovation, and human capital to reduce over-dependence.



### DIVERSIFICATION

Multiple trusted suppliers and markets to reduce concentration and risk.



### RESILIENCE

Agility to anticipate, absorb, adapt, and recover from disruptions.



### STRATEGIC CONTROL

National ability to set priorities, shape trade rules, and protect vital interests.



## THE GOAL

To ensure reliable access to critical inputs and markets, build domestic capabilities, and have the resilience to withstand global disruptions, coercion, or shocks.

## THE 5 PILLARS OF SUPPLY CHAIN SOVEREIGNTY



### PRODUCE

Build strong domestic industries



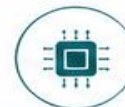
### SOURCE

Secure and diversify trusted suppliers



### MOVE

Control critical logistics and infrastructure



### INNOVATE

Invest in technology, R&D, and skills



### GOVERN

Strengthen policies, institutions, and standards

SOVEREIGNTY = CHOICE + CONTROL + RESILIENCE

## WHAT SUPPLY CHAIN SOVEREIGNTY IS NOT



### ISOLATIONISM

It's not shutting out the world or rejecting global trade.



### SELF-SUFFICIENCY IN EVERYTHING

It's not about producing everything locally, but focusing on what matters most.



### PROTECTIONISM

It's not about high walls, but smart, strategic engagement.

## KEY BENEFITS



Enhances national security and economic stability



Protects critical industries and jobs



Reduces vulnerability to external shocks and coercion



Builds long-term competitiveness and innovation



Strengthens national independence and influence

## WHY IT MATTERS FOR NIGERIA



Reduces over-reliance on imports for critical goods (e.g., food, fuel, medicines).



Builds local industries and jobs across key sectors.



Protects the economy from global disruptions, price shocks, and geopolitical risks.



Enables sustainable growth and improves living standards.



Supply Chain Sovereignty is about having the right goods, from the right sources, at the right time, with the right control—sustainably and securely.

STRONG SUPPLY CHAINS. SOVEREIGN NATION. SECURE FUTURE.



# WHY SOVEREIGNTY MATTERS FOR NIGERIA

In an uncertain world, supply chain sovereignty is not a luxury—it is a necessity for Nigeria's prosperity, stability, and national security.



**OUR GOAL:**  
A self-reliant Nigeria with resilient supply chains that power sustainable growth and improve the lives of every citizen.



## SOVEREIGNTY MEANS CHOICE. RESILIENCE ENSURES SURVIVAL. PROSPERITY IS THE RESULT.

When Nigeria controls and builds the strength of its supply chains, it can withstand shocks, create jobs, reduce poverty, and compete globally on its own terms.

### 1 ECONOMIC GROWTH




- Strong domestic supply chains drive industrialization.
- Reduce import bills and conserve foreign exchange.
- Increase local value addition and exports.

### 2 JOB CREATION & INCLUSIVE DEVELOPMENT




- Local production creates more jobs across sectors.
- Empowers SMEs and builds regional economies.
- Drives skills development and innovation.

### 3 RESILIENCE TO GLOBAL SHOCKS




- Less vulnerable to disruptions like pandemics, wars, or shipping crises.
- Ensures continuity of essential goods and services.
- Quicker recovery from external shocks.

### 4 NATIONAL SECURITY & STABILITY




- Reliable access to critical resources strengthens national security.
- Reduces risks of social unrest caused by shortages.
- Protects strategic industries and critical infrastructure.

### 5 IMPROVED QUALITY OF LIFE




- Stable supply of affordable food, medicines, energy and goods.
- Better healthcare, education and living standards.
- Greater dignity and opportunities for all.

### 6 GLOBAL COMPETITIVENESS & INFLUENCE




- Strong supply chains enable Nigeria to compete globally.
- Attracts investment and builds investor confidence.
- Positions Nigeria as a reliable trade and manufacturing hub in Africa and beyond.


## THE HIGH COST OF LACKING SOVEREIGNTY

- ECONOMIC LOSS**  
Higher import bills, currency pressure, and lost growth opportunities.
- SUPPLY DISRUPTIONS**  
Shortages, delays and price spikes impact businesses and households.
- SOCIAL IMPACT**  
Job losses, poverty, inequality and social unrest increase.
- SECURITY RISKS**  
Dependence on others weakens national autonomy and security.
- MISSED OPPORTUNITIES**  
Resources are exported raw while value is created elsewhere.

## KEY ENABLERS OF SOVEREIGNTY

-  Invest in local production and industrial capacity
-  Build world-class infrastructure and logistics networks
-  Drive innovation, technology and skills development
-  Strengthen local suppliers and value chains
-  Enable smart policies, standards and regulation
-  Foster public-private partnerships and collaboration
-  Promote sustainable and inclusive growth

## THE BOTTOM LINE



Sovereignty over our supply chains means Nigeria controls its destiny—builds wealth, creates jobs, protects its people, and secures a stronger future for generations to come.

**STRONG SUPPLY CHAINS. SOVEREIGN NATION. PROSPEROUS FUTURE.**



# BUILDING NATIONAL RESILIENCE

**STRONGER SUPPLY CHAINS. SAFER NATION. SUSTAINABLE FUTURE.**

National resilience is the ability of a country to **anticipate, withstand, adapt to, and recover** from disruptions to its supply chains—ensuring continuity of essential goods and services, economic stability, and national security.



## THE GOAL

To build a resilient Nigeria that can withstand global shocks, reduce vulnerabilities, and guarantee uninterrupted access to critical goods and services for our people and economy.

## THREE PILLARS OF BUILDING NATIONAL RESILIENCE

### 1 REDUNDANCY

Multiple paths. Backup options. Continuous flow.

Redundancy means having alternative routes, suppliers, assets and systems so that if one fails, others take over.



#### MULTIPLE ROUTES AND CORRIDORS

Use different ports, shipping lanes, roads, rail lines and air routes.



#### MULTIPLE SUPPLIERS

Avoid over-reliance on a single supplier or source country.



#### ALTERNATIVE MODES

Integrate road, rail, waterways and air for flexible logistics.



#### BACKUP SYSTEMS AND TECHNOLOGY

Invest in digital visibility, data systems and power backup.



#### BENEFIT

Minimizes disruption impact and ensures business and trade continuity.

### 2 DIVERSIFICATION

Spread risk. Expand choices. Build strength.

Diversification reduces concentration risk by broadening sources, markets, and capabilities.



#### DIVERSE SOURCES OF IMPORTS

Source critical inputs from multiple countries and regions.



#### DIVERSE EXPORT MARKETS

Expand into new markets to reduce dependence on a few buyers.



#### DIVERSE INDUSTRIAL BASE

Develop multiple sectors to reduce dependence on one industry.



#### DIVERSE LOGISTICS PARTNERS

Work with multiple logistics providers and platforms.



#### BENEFIT

Reduces vulnerability to country-specific shocks, market swings and supply shortages.

### 3 STRATEGIC RESERVES

Prepare today. Protect tomorrow.

Strategic reserves ensure the availability of essential goods and inputs during crises and emergencies.



#### ESSENTIAL GOODS RESERVES

Maintain stocks of food, fuel, and other essentials for emergencies.



#### ENERGY RESERVES

Build and sustain strategic petroleum reserves to stabilize supply.



#### HEALTH & MEDICAL RESERVES

Stockpile critical medicines, vaccines and medical supplies.



#### CRITICAL INPUTS RESERVES

Secure key industrial inputs and spare parts for national industries.



#### BENEFIT

Buys time, stabilizes markets, and protects lives and the economy during disruptions.

## THE RESULT: A RESILIENT NATION



#### Resists Shocks

Withstands natural, economic and geopolitical shocks.



#### Recovers Faster

Restores operations quickly and reduces downtime.



#### Protects Citizens

Ensures availability of essential goods and services.



#### Strengthens Economy

Supports growth, jobs, investment and global competitiveness.



#### Secures the Nation

Enhances national security and strategic autonomy.

## KEY ENABLERS



Strong Policy & Governance



Investment in Infrastructure



Local Production & Innovation



Data & Digital Visibility



Skilled People & Partnerships

“ Resilience is not luck. It is a strategy.

**BUILD REDUNDANCY. EMBRACE DIVERSIFICATION. STOCK STRATEGIC RESERVES. SECURE NIGERIA'S FUTURE.**

# VISION FOR LOGISTICS COMPETITIVENESS

Building world-class logistics that power Nigeria's economy, connect our people to opportunities, and position Nigeria as a regional and global trade hub.



## OUR VISION

A seamlessly connected, efficient, resilient, and sustainable logistics ecosystem that drives inclusive growth, industrialization, and Nigeria's global competitiveness.

## OUR PILLARS



### SEAMLESS CONNECTIVITY

Integrated multimodal networks that connect ports, inland hubs, industries, and markets across the nation and beyond.



### OPERATIONAL EXCELLENCE

World-class infrastructure, processes, and technology that deliver speed, reliability, and cost efficiency.



### RESILIENCE & SOVEREIGNTY

Strong, diversified, and secure supply chains that protect our economy from disruptions and global shocks.



### SUSTAINABILITY

Environmentally responsible logistics that reduce emissions, optimize resources, and support a greener future.



### PEOPLE & INCLUSION

Skilled talent, innovation, and inclusive opportunities that empower Nigerians and strengthen local communities.

## OUR STRATEGIC FOCUS



### PORT EFFICIENCY

Unlock capacity and improve turnaround time.



### MULTIMODAL INTEGRATION

Connect modes for seamless movement.



### LOGISTICS PARKS & INLAND HUBS

Drive industrial growth and decongest ports.



### DIGITAL & DATA-DRIVEN LOGISTICS

Visibility, tracking, and smart decision-making.



### LAST-MILE CONNECTIVITY

Reliable access to businesses, consumers, and communities.



## KEY ENABLERS



### POLICY & REGULATORY REFORM

Predictable policies, simplified regulations, and effective institutions.



### INFRASTRUCTURE INVESTMENT

Modern ports, roads, rail, inland waterways, and logistics parks.



### DIGITAL TRANSFORMATION

Smart systems, data visibility, and innovation to drive efficiency and transparency.



### STRATEGIC PARTNERSHIPS

Stronger public-private collaboration and regional/global partnerships.



### FINANCING & INCENTIVES

Access to affordable finance and incentives to grow the logistics ecosystem.

## THE OUTCOMES WE SEEK



Lower logistics costs and faster trade



Stronger industrial competitiveness



More jobs and inclusive prosperity



Nigeria as the preferred logistics hub in Africa



A stronger, more resilient economy

“ Our vision is simple: world-class logistics for a globally competitive Nigeria. Together, we can move more than goods—we can move Nigeria forward. ”



ONE VISION. SMARTER LOGISTICS. STRONGER NIGERIA.



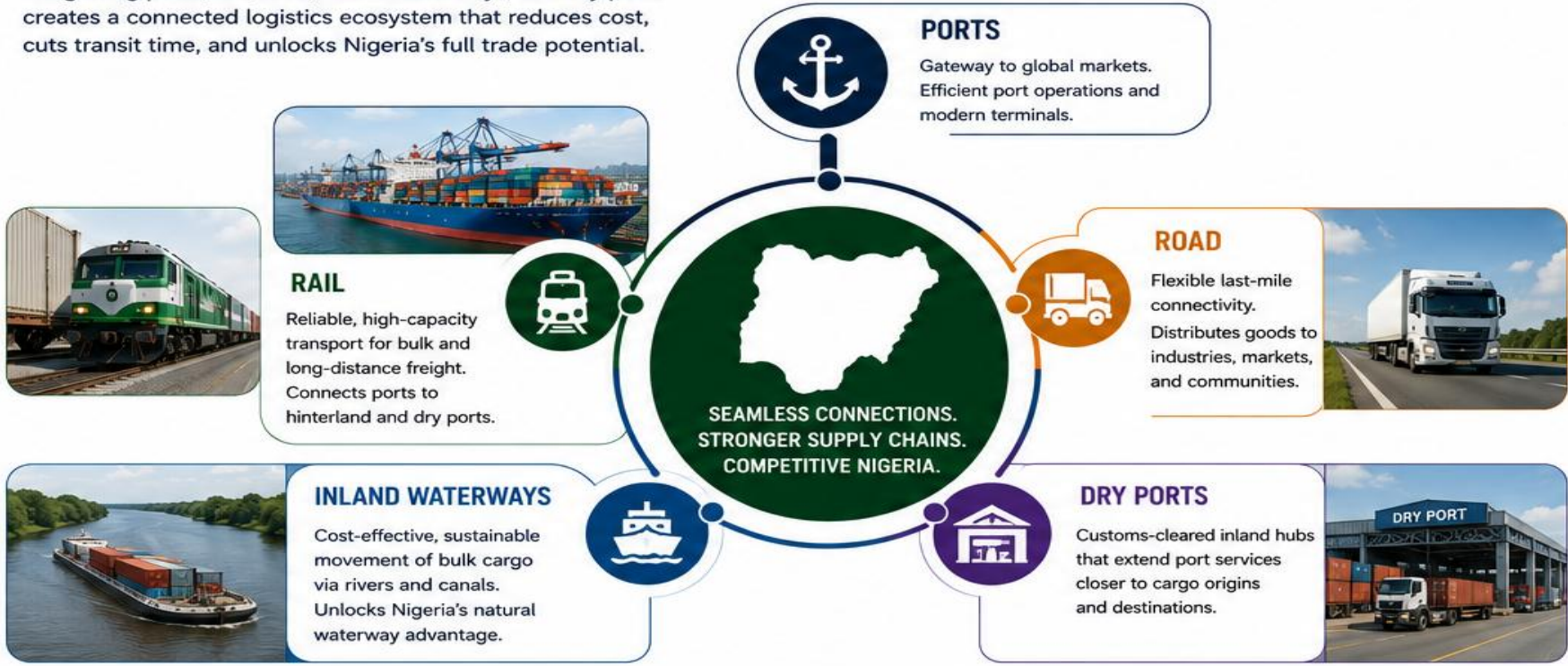
CONNECTING TODAY. POWERING TOMORROW.

# MULTIMODAL FREIGHT INTEGRATION

One Network. Seamless Movement. Greater Value.

Integrating ports, rail, road, inland waterways, and dry ports creates a connected logistics ecosystem that reduces cost, cuts transit time, and unlocks Nigeria's full trade potential.

**THE GOAL**  
 A seamless, efficient, and cost-effective freight network where goods move through the right mode, on the right route, at the right time.



**WHY MULTIMODAL INTEGRATION MATTERS**

- LOWER LOGISTICS COSTS**  
 Use the most efficient mode for each leg of the journey.
- FASTER DELIVERY**  
 Reduce delays through better connectivity and coordination.
- REDUCED CONGESTION & EMISSIONS**  
 Shift more freight to rail and waterways to ease road pressure and cut emissions.
- GREATER COMPETITIVENESS**  
 Improve reliability and attract investment, boosting trade and industrial growth.
- REGIONAL CONNECTIVITY**  
 Strengthen links to West and Central Africa markets.

**ENABLERS FOR SUCCESS**

- Integrated planning & investment**  
 Coordinated development of infrastructure and services.
- Interoperable systems**  
 Standardized operations, data sharing, and digital platforms.
- Policy & regulatory alignment**  
 Harmonized policies, incentives, and streamlined procedures.
- Public-private partnerships**  
 Collaboration to mobilize capital, expertise, and innovation.



**THE IMPACT**

- Lower costs, higher efficiency
- Faster transit, reliable delivery
- Resilient supply chains, less disruption
- Boost to industry, exports & jobs
- Stronger regional trade & economic leadership

**INTEGRATED MODES. CONNECTED NATION. COMPETITIVE FUTURE.**

# STRATEGIC INFRASTRUCTURE INVESTMENTS

Invest Today. Unlock Tomorrow. Power Nigeria's Future.

Targeted, high-impact investments in logistics infrastructure will reduce costs, improve competitiveness, and drive inclusive economic growth.






## OUR GOAL

Build modern, resilient, and integrated infrastructure that positions Nigeria as Africa's logistics hub of choice.

## PRIORITY INVESTMENT AREAS

 <b>PORTS &amp; TERMINALS</b>	 <b>RAIL NETWORK EXPANSION</b>	 <b>ROADS &amp; LOGISTICS CORRIDORS</b>	 <b>INLAND WATERWAYS DEVELOPMENT</b>	 <b>DRY PORTS &amp; LOGISTICS HUBS</b>	 <b>DIGITAL &amp; SMART INFRASTRUCTURE</b>
					
<ul style="list-style-type: none"> <li>• Deepen and modernize seaports</li> <li>• Expand container terminals</li> <li>• Invest in cargo handling equipment &amp; systems</li> <li>• Improve port access roads and connectivity</li> </ul>	<ul style="list-style-type: none"> <li>• Complete and expand standard gauge corridors</li> <li>• Connect ports to inland hubs</li> <li>• Increase freight capacity and reliability</li> <li>• Develop intermodal rail terminals</li> </ul>	<ul style="list-style-type: none"> <li>• Upgrade key freight corridors</li> <li>• Build bypasses and truck parks</li> <li>• Strengthen maintenance and safety</li> <li>• Improve last-mile connectivity to markets</li> </ul>	<ul style="list-style-type: none"> <li>• Dredge and maintain navigable routes</li> <li>• Build jetties and river ports</li> <li>• Invest in barges and terminals</li> <li>• Integrate waterways with other modes</li> </ul>	<ul style="list-style-type: none"> <li>• Develop inland clearance depots</li> <li>• Build logistics parks &amp; warehouses</li> <li>• Expand cold chain and specialized facilities</li> <li>• Promote public-private partnerships</li> </ul>	<ul style="list-style-type: none"> <li>• Deploy port and logistics community systems</li> <li>• Invest in tracking, IoT, and automation</li> <li>• Improve data sharing and interoperability</li> <li>• Build cybersecurity resilience</li> </ul>


## THE RETURNS




**ECONOMIC GROWTH**  
Lower logistics costs and boost trade and industrial output.



**JOB CREATION**  
Create jobs across construction, operations, and services.



**COMPETITIVENESS**  
Attract investment and strengthen regional leadership.



**SUSTAINABILITY**  
Promote green, resilient infrastructure for a better tomorrow.



**NATIONAL CONNECTIVITY**  
Stronger links between regions, markets, and global opportunities.

## KEY ENABLERS

 <b>POLICY &amp; REGULATORY REFORM</b>	 <b>PUBLIC-PRIVATE PARTNERSHIPS</b>	 <b>INNOVATIVE FINANCING</b>	 <b>CAPACITY BUILDING &amp; LOCAL CONTENT</b>	 <b>EFFECTIVE PROJECT MANAGEMENT</b>
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## OUR INVESTMENT PATH

 <b>IDENTIFY PRIORITIES</b>	 <b>PLAN &amp; DESIGN</b>	 <b>MOBILIZE FUNDING</b>	 <b>BUILD &amp; IMPLEMENT</b>	 <b>OPERATE &amp; OPTIMIZE</b>
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## THE OUTCOMES

 <p> Faster, more reliable movement of goods</p>	 <p> Lower logistics costs for businesses</p>	 <p> Stronger industries and exports</p>	 <p> Inclusive growth and opportunities</p>	 <p> A stronger, more resilient Nigeria for generations</p>
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“ Strategic infrastructure today builds a competitive, connected, and prosperous Nigeria tomorrow. **INVEST. CONNECT. TRANSFORM.** ”

# DANGEROUS GOODS AND ENERGY LOGISTICS

Safe Today. Secure Tomorrow.

Building a safe, compliant, and resilient logistics ecosystem for the movement of dangerous goods and energy products across all modes—protecting people, assets, and the environment.



## OUR COMMITMENT

We are committed to the highest safety standards and international best practices in dangerous goods and energy logistics.



### 1 ADR PRINCIPLES



Apply the European Agreement concerning the International Carriage of Dangerous Goods by Road (ADR) principles for safe road transport.



Proper classification, packaging and labelling



Competent drivers and trained personnel



Vehicle fitness and equipment requirements



Route planning and risk assessment



Incident reporting and emergency response

### 2 IMDG CODE ALIGNMENT



Align with the International Maritime Dangerous Goods (IMDG) Code for the safe carriage of dangerous goods by sea.



Proper storage, segregation and compatibility



Accurate documentation and declarations



Marine pollutant protection and environmental safeguards



Trained crew and shipboard emergency preparedness



Port facility safety and security compliance

### 3 IATA/ICAO CONSIDERATIONS



Comply with IATA Dangerous Goods Regulations and ICAO Standards for the safe transport of dangerous goods by air.



Acceptance based on proper classification and packing



Shipper's Declaration for Dangerous Goods



Handling, storage and loading requirements



Personnel training and awareness



Aircraft and airport operational readiness

### 4 NATIONAL PREPAREDNESS



Strengthen Nigeria's national frameworks, capacity and coordination for dangerous goods and energy logistics.



Robust legal and regulatory frameworks



National contingency plans and emergency response



Multi-agency coordination and information sharing



Risk assessments and critical route mapping



Public awareness and community engagement

### KEY BENEFITS



Protects lives, assets and the environment



Reduces incidents and disruptions



Improves efficiency and reduces costs



Enhances compliance and global market access



Builds trust and strengthens Nigeria's logistics reputation

### KEY DANGEROUS GOODS & ENERGY CATEGORIES



FLAMMABLE GASES



FLAMMABLE LIQUIDS



OXIDIZING SUBSTANCES



TOXIC & INFECTIOUS SUBSTANCES



CORROSIVE SUBSTANCES



MISCELLANEOUS DANGEROUS SUBSTANCES



ENERGY PRODUCTS (Petroleum, LNG, LPG, etc.)

### OUR SAFETY PILLARS



COMPLIANCE Always



COMPETENCE Always



AWARENESS Always



PREPAREDNESS Always



SUSTAINABILITY Always



**SAFETY IS NON-NEGOTIABLE.**  
COMPLIANCE IS OUR DUTY. PROTECTION IS OUR PROMISE.

### MODAL READINESS – ONE STANDARD, ALL MODES



ROAD ADR principles in action



SEA IMDG Code compliance



AIR IATA/ICAO alignment



RAIL Safe carriage standards



INLAND WATERWAYS Safe movement by water



SAFE HANDLING. SECURE TRANSPORT. SUSTAINABLE FUTURE.



PLAN Clearly



PACK Correctly



LABEL Clearly



COMMUNICATE Effectively



RESPOND Swiftly



IMPROVE Continuously

# DIGITAL SUPPLY CHAINS

SMARTER SYSTEMS. SEAMLESS FLOW. STRONGER COMPETITIVENESS.

Digital solutions connect people, processes, and platforms to create an intelligent, transparent, and efficient logistics ecosystem that drives trade, reduces costs, and delivers value.



### OUR GOAL

Build a connected, data-driven supply chain ecosystem that enhances efficiency, transparency, security, and decision-making across Nigeria and the region.

## 1 PORT COMMUNITY SYSTEMS

Collaborate. Connect. Optimize.



- Connect ports, terminals, shipping lines, customs, freight forwarders, and other stakeholders on one platform
- Streamline processes and reduce paperwork through digital workflows
- Improve coordination, reduce vessel turnaround time, and increase efficiency
- Secure data exchange and real-time operational updates

**Better collaboration. Faster operations. Lower costs.**

## 2 SINGLE WINDOW

One Submission. Multiple Agencies.



- One point of entry for all trade-related information and documents
- Reduce duplication, delays, and manual interventions
- Standardized processes and electronic clearances
- Integrated payments and regulatory approvals

**Faster clearance. Less bureaucracy. Improved trade facilitation.**

## 3 CARGO VISIBILITY

See Every Move. Trust Every Step.



- Real-time tracking of shipments across all modes
- End-to-end visibility from origin to final destination
- Proactive alerts and milestone notifications
- Enhance transparency, security, and customer confidence

**Real-time visibility. Greater transparency. Stronger trust.**

## 4 PREDICTIVE ANALYTICS

Data Today. Better Decisions Tomorrow.



- Leverage data and AI to forecast demand, capacity, and disruptions
- Identify risks early and recommend optimal actions
- Improve capacity planning and resource allocation
- Support strategic decision-making and continuous improvement

**Smarter decisions. Lower risk. Higher performance.**

## KEY BENEFITS

-  Lower logistics costs and shorter lead times
-  Greater transparency and traceability
-  Improved efficiency and stakeholder productivity
-  Enhanced security and compliance
-  Data-driven sustainability and resilience
-  Better customer experience and business growth

## KEY ENABLERS

-  Robust Digital Infrastructure
-  Interoperable Systems
-  Data Standards & Governance
-  Cybersecurity & Data Protection
-  Policy & Regulatory Alignment
-  Skilled Digital Workforce
-  Public-Private Collaboration

**CONNECTED PLATFORMS. INTELLIGENT INSIGHTS. COMPETITIVE NIGERIA.**



**OUR COMMITMENT:** Investing in digital solutions that connect our logistics ecosystem, simplify trade, and power Nigeria's competitiveness in global markets.



# STRENGTHENING INDIGENOUS CAPACITY

Nigerian Talent. Nigerian Enterprises. Global Competitiveness.

Building strong, competitive, and sustainable indigenous capacity across the logistics value chain to drive economic growth, create jobs, and position Nigeria as a leading logistics hub in Africa.



**OUR GOAL**  
Develop world-class Nigerian logistics companies and professionals that compete globally and create lasting value locally.



## 1. SHIPPING




Own the Vessels. Control the Trade.



### KEY ACTIONS

-  Support indigenous shipping lines and vessel ownership.
-  Facilitate access to finance for fleet acquisition and operations.
-  Develop Nigerian seafarers and maritime professionals.
-  Promote participation in regional and global shipping alliances.

### WE WILL ACHIEVE

-  Increased Nigerian ownership of vessels
-  More foreign exchange retention
-  Stronger presence in regional and global trade



## 2. LOGISTICS OPERATORS




Efficient Operations. Local Expertise.



### KEY ACTIONS

-  Build operational excellence and digital capabilities.
-  Promote local ownership of transport and logistics fleets.
-  Encourage compliance with safety, quality, and sustainability standards.
-  Facilitate access to working capital and insurance.

### WE WILL ACHIEVE

-  More efficient and reliable logistics services
-  Greater local content in logistics operations
-  Competitive Nigerian brands across Africa



## 3. WAREHOUSING

Modern Facilities. Smarter Supply Chains.



### KEY ACTIONS

-  Invest in modern, technology-driven warehouses and cold chains.
-  Develop strategically located logistics parks and distribution centers.
-  Adopt warehouse management systems (WMS) and automation.
-  Promote green and energy-efficient warehouse solutions.

### WE WILL ACHIEVE

-  Better inventory management and reduced losses
-  Faster order fulfillment and lower costs
-  Stronger support for industrialization and trade



## 4. FREIGHT FORWARDING




Connect Globally. Deliver Seamlessly.






### KEY ACTIONS

-  Build expertise in global trade, compliance, and documentation.
-  Invest in digital freight forwarding platforms and e-freight solutions.
-  Strengthen partnerships with global logistics networks.
-  Develop a new generation of certified freight forwarding professionals.

### WE WILL ACHIEVE

-  Seamless end-to-end trade facilitation
-  Higher customer satisfaction and trust
-  Stronger position in global value chains


### CROSS-CUTTING ENABLERS

-  **SUPPORTIVE POLICIES**  
Consistent policies, incentives, and regulatory support.
-  **ACCESS TO FINANCE**  
Affordable financing and investment for growth.
-  **SKILLS & CAPACITY BUILDING**  
Continuous training and professional development.
-  **DIGITAL TRANSFORMATION**  
Embrace technology and innovation across the value chain.
-  **PUBLIC-PRIVATE PARTNERSHIPS**  
Stronger collaboration to unlock infrastructure and opportunities.

### THE OUTCOMES

-  Job creation and inclusive growth
-  Stronger regional and global competitiveness
-  Increased economic value retention in Nigeria
-  Resilient, sustainable, and future-ready logistics sector

### OUR COMMITMENT

 We are committed to building Nigerian enterprises, creating opportunities for our people, and delivering world-class logistics solutions that power Nigeria's prosperity.

 Build Local Champion Companies

 Grow Local Content

 Create Jobs & Wealth

 Compete Globally

 Proudly Nigerian

 BUILDING CAPACITY. BUILDING NIGERIA. BUILDING THE FUTURE.

 SHIPPING

 LOGISTICS OPERATORS

 WAREHOUSING

 FREIGHT FORWARDING

STRONGER TOGETHER. FARTHER TOGETHER.

# PRIORITY POLICY ACTIONS














**Bold Policies. Smart Regulation. Seamless Logistics.**

These priority actions will create an enabling environment, reduce costs, attract investment, and build a world-class logistics ecosystem that drives trade and economic growth for Nigeria.




**OUR VISION**  
A globally competitive logistics sector that connects Nigeria to the world and powers sustainable prosperity.

## 10 PRIORITY POLICY ACTIONS

<p><b>1</b></p> <p><b>STRENGTHEN REGULATORY FRAMEWORKS</b></p>  <ul style="list-style-type: none"> <li>Review and harmonize laws and regulations across all modes.</li> <li>Ensure clarity, stability, and predictability for investors.</li> <li>Enforce standards consistently and transparently.</li> </ul>  Greater investor confidence and compliance.	<p><b>2</b></p> <p><b>SIMPLIFY PROCESSES AND ELIMINATE DELAYS</b></p>  <ul style="list-style-type: none"> <li>Reduce bureaucratic bottlenecks.</li> <li>Adopt risk-based inspections.</li> <li>Fast-track clearance through automation and data sharing.</li> </ul>  Faster clearance, lower costs, and improved efficiency.	<p><b>3</b></p> <p><b>INVEST IN CRITICAL INFRASTRUCTURE</b></p>  <ul style="list-style-type: none"> <li>Prioritize ports, rail, roads, inland waterways, and dry ports.</li> <li>Bridge infrastructure gaps and last-mile connectivity.</li> <li>Plan and fund for maintenance and resilience.</li> </ul>  Reliable infrastructure for seamless movement.	<p><b>4</b></p> <p><b>ACCELERATE DIGITAL TRANSFORMATION</b></p>  <ul style="list-style-type: none"> <li>Expand Port Community Systems and Single Window.</li> <li>Promote e-payments, e-documents and data interoperability.</li> <li>Use digital tools for visibility and analytics.</li> </ul>  Transparency, visibility, and data-driven decisions.	<p><b>5</b></p> <p><b>PROMOTE PRIVATE SECTOR GROWTH AND COMPETITION</b></p>  <ul style="list-style-type: none"> <li>Encourage private investment and PPPs.</li> <li>Ensure fair competition and level playing field.</li> <li>Remove barriers to entry and expansion.</li> </ul>  More investment, innovation, and quality services.	<p><b>6</b></p> <p><b>BUILD SKILLS AND INDIGENOUS CAPACITY</b></p>  <ul style="list-style-type: none"> <li>Develop talent across shipping, logistics, warehousing, and freight forwarding.</li> <li>Support training, certification, and professional growth.</li> <li>Promote local content and enterprise development.</li> </ul>  Skilled workforce. Stronger local participation.	<p><b>7</b></p> <p><b>IMPROVE FINANCING AND INCENTIVES</b></p>  <ul style="list-style-type: none"> <li>Provide access to affordable financing for infrastructure and operations.</li> <li>Offer tax incentives for strategic investments.</li> <li>De-risk projects and crowd-in capital.</li> </ul>  Affordable capital and bankable projects.	<p><b>8</b></p> <p><b>ENHANCE SAFETY, SECURITY AND SUSTAINABILITY</b></p>  <ul style="list-style-type: none"> <li>Strengthen safety standards and enforcement.</li> <li>Secure the logistics corridor and assets.</li> <li>Promote green logistics and climate resilience.</li> </ul>  Safer operations and sustainable logistics.	<p><b>9</b></p> <p><b>STRENGTHEN INSTITUTIONS AND COORDINATION</b></p>  <ul style="list-style-type: none"> <li>Clarify mandates and reduce overlaps.</li> <li>Improve inter-agency coordination.</li> <li>Establish a national logistics coordination mechanism.</li> </ul>  Aligned actions and effective implementation.	<p><b>10</b></p> <p><b>EXPAND TRADE INTEGRATION AND MARKET ACCESS</b></p>  <ul style="list-style-type: none"> <li>Implement trade agreements and regional protocols.</li> <li>Improve cross-border facilitation.</li> <li>Position Nigeria as a logistics hub in Africa.</li> </ul>  More trade, regional leadership, global opportunities.
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### EXPECTED OUTCOMES

-  **LOWER LOGISTICS COSTS** and shorter lead times
-  **IMPROVED COMPETITIVENESS** and trade performance
-  **JOB CREATION** and inclusive growth
-  **INCREASED INVESTMENT** and private sector participation
-  **SUSTAINABLE AND RESILIENT LOGISTICS ECOSYSTEM**
-  **STRONGER REGIONAL AND GLOBAL CONNECTIVITY**

### CROSS-CUTTING ENABLERS

 <b>POLICY CONSISTENCY</b> Stable, predictable, and long-term policies.	 <b>DATA AND EVIDENCE</b> Decisions driven by quality data and insights.	 <b>STAKEHOLDER ENGAGEMENT</b> Continuous dialogue and public-private collaboration.	 <b>EFFECTIVE ENFORCEMENT</b> Laws, standards, and contracts enforced without compromise.	 <b>MONITORING &amp; ACCOUNTABILITY</b> Clear KPIs, regular reviews, measurable results.
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# INSTITUTIONAL REFORMS

**STRONG INSTITUTIONS.  
EFFICIENT LOGISTICS. PROSPEROUS NIGERIA.**

Building effective institutions and governance systems that enable a competitive, transparent, and resilient logistics sector.



**OUR VISION**

A world-class logistics ecosystem powered by strong institutions, good governance, and accountability.

## OUR REFORM AGENDA

**1 STRENGTHEN GOVERNANCE AND LEADERSHIP**

- Clarify mandates and institutional roles.
- Strengthen oversight and accountability.
- Promote merit-based leadership and professional management.

Better coordination. Clear accountability. Stronger results.

**2 STREAMLINE LAWS, POLICIES AND REGULATIONS**

- Review and harmonize laws and regulations.
- Eliminate overlaps, duplication and gaps.
- Ensure alignment with international standards and best practices.

Simpler rules. Lower compliance costs. Faster trade.

**3 IMPROVE INSTITUTIONAL COORDINATION**

- Establish formal coordination mechanisms across MDAs.
- Strengthen inter-agency information sharing.
- Align national, regional and local logistics strategies.

Aligned actions. Seamless processes. Greater impact.

**4 BUILD CAPACITY AND PROFESSIONALISM**

- Invest in skills, training and continuous development.
- Build specialist capacity in logistics, trade and regulation.
- Promote a culture of performance and ethics.

Skilled workforce. Better decisions. Higher productivity.

**5 DIGITALIZE AND AUTOMATE PROCESSES**

- Deploy digital systems across agencies and borders.
- Automate workflows and reduce manual interventions.
- Use data for decision-making, monitoring and evaluation.

Efficient processes. Real-time data. Better transparency.

**6 STRENGTHEN ACCOUNTABILITY AND TRANSPARENCY**

- Enforce performance management and reporting.
- Promote transparency in decision-making and spending.
- Strengthen anti-corruption measures and sanctions.

Higher trust. Reduced corruption. Stronger institutions.

### THE BENEFITS

- LOWER COSTS**  
Efficient institutions reduce delays and transaction costs.
- IMPROVED COMPETITIVENESS**  
Better policies and coordination boost trade performance.
- JOB CREATION**  
A stronger logistics sector creates more opportunities.
- SUSTAINABLE GROWTH**  
Good governance drives inclusive and resilient development.
- GLOBAL CONFIDENCE**  
Strong institutions attract investment and partnerships.

### CROSS-CUTTING ENABLERS

**POLITICAL WILL**  
Strong commitment from leadership at all levels.

**STAKEHOLDER ENGAGEMENT**  
Involve private sector, professionals and civil society.

**SUSTAINABLE FINANCING**  
Adequate resources for reforms and institutional capacity.

**DATA AND EVIDENCE**  
Use data and research to inform policies and track progress.

**MONITORING AND EVALUATION**  
Track performance and adapt for continuous improvement.

**OUR COMMITMENT**

We are committed to building strong, accountable, and future-ready institutions that unlock the full potential of Nigeria's logistics sector.

# PUBLIC-PRIVATE PARTNERSHIPS

**Stronger Together. Building Better Logistics.**

Public-Private Partnerships (PPPs) leverage shared expertise, resources, and innovation to deliver efficient, sustainable, and world-class logistics infrastructure and services for Nigeria.



## OUR VISION

A resilient and competitive logistics ecosystem delivered through effective partnerships between public and private sectors.

### WHY PPPs?

- Mobilize private investment to bridge infrastructure gaps.
- Improve efficiency, innovation, and service quality.
- Accelerate project delivery and reduce time-to-market.
- Optimize lifecycle costs and value for money.
- Share risks and responsibilities for better outcomes.
- Promote sustainability and environmental stewardship.

### PPP MODELS FOR LOGISTICS

 <b>BUILD-OPERATE-TRANSFER (BOT)</b>  Private partner finances, builds, and operates the asset for a defined period before transferring to government.	 <b>DESIGN-BUILD-FINANCE-OPERATE (DBFO)</b>  Private partner undertakes design, financing, construction, and operation under a long-term concession.	 <b>PUBLIC-PRIVATE JOINT VENTURE (JV)</b>  Public and private partners form a joint entity to finance, develop, and operate logistics assets or services.	 <b>MANAGEMENT &amp; OPERATIONS CONTRACT</b>  Private partner manages and operates existing infrastructure to improve performance and efficiency.	 <b>LEASE / AFFINITY / TOLL MODEL</b>  Private partner invests and operates assets through user fees, lease payments, or availability payments.
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### KEY BENEFITS

- Increased investment and infrastructure development
- Higher service quality and operational efficiency
- Risk sharing and improved risk management
- Job creation and skills transfer
- Sustainable and resilient logistics infrastructure
- Enhanced competitiveness and economic growth

### ENABLERS FOR SUCCESSFUL PPPs

- Strong legal and regulatory framework
- Bankable projects and clear structure
- Transparent procurement and competitive bidding
- Effective contract management
- Stakeholder engagement and communication
- Balanced risk allocation and incentives
- Monitoring, evaluation and accountability

### PPP PROJECT DEVELOPMENT PROCESS



### PRIORITY LOGISTICS SECTORS FOR PPPs

 PORTS AND TERMINALS	 RAIL AND INTERMODAL	 ROADS AND LOGISTICS CORRIDORS
 LOGISTICS PARKS AND DRY PORTS	 WAREHOUSING AND COLD CHAIN	 INLAND WATERWAYS AND JETTIES

 <b>OUR COMMITMENT</b> We are committed to transparent, accountable, and mutually beneficial partnerships that deliver lasting value to Nigeria and future generations.	 <b>TRANSPARENCY</b> Always	 <b>PARTNERSHIP</b> Together	 <b>PERFORMANCE</b> Excellence	 <b>SUSTAINABILITY</b> For Tomorrow	 <b>IMPACT</b> For Nigeria
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**STRONG PARTNERSHIPS.  
BETTER INFRASTRUCTURE.  
PROSPEROUS NIGERIA.**

# NATIONAL LOGISTICS RESILIENCE FRAMEWORK

— RESILIENT TODAY. PREPARED TOMORROW. STRONGER TOGETHER.

A coordinated approach to anticipate, withstand, adapt to, and recover from shocks and stresses—ensuring the continuity of logistics services that power Nigeria's economy and safeguard our people.



## OUR VISION

A resilient logistics ecosystem that is reliable, agile, and future-ready—supporting economic prosperity, national security, and sustainable development for Nigeria.

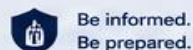
## THE FRAMEWORK PILLARS

### 1. ANTICIPATE Understand & Prepare



Anticipate risks and future disruptions through data, foresight, and planning.

- National risk assessments
- Scenario planning & horizon scanning
- Early warning systems
- Critical logistics mapping
- Business continuity planning



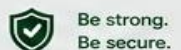
Be informed.  
Be prepared.

### 2. WITHSTAND Strengthen & Protect



Strengthen infrastructure, systems, and operations to withstand shocks and stresses.

- Resilient infrastructure standards
- Robust operations & maintenance
- Redundant routes & capacity
- Cybersecurity & data protection
- Safety, security & compliance



Be strong.  
Be secure.

### 3. ADAPT Respond & Adjust



Respond effectively and adapt operations to maintain critical logistics flows.

- Integrated incident response
- Real-time information sharing
- Flexible operations & rerouting
- Regulatory agility
- Public-private coordination



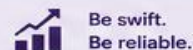
Be agile.  
Be coordinated.

### 4. RECOVER Restore & Stabilize



Restore services quickly and stabilize supply chains to minimize disruption impacts.

- Rapid restoration of assets & services
- Alternate supply chain activation
- Demand management
- Financial & insurance support
- Communication & stakeholder updates



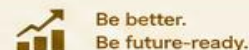
Be swift.  
Be reliable.

### 5. LEARN & IMPROVE Evaluate & Evolve



Learn from experience and continuously improve policies, systems, and capabilities.

- After-action reviews
- Performance evaluation
- Knowledge management
- Innovation & technology adoption
- Policy and framework updates



Be better.  
Be future-ready.

## CROSS-CUTTING PRINCIPLES



People  
at the Core



Equity &  
Inclusion



Sustainability &  
Climate Resilience



Innovation &  
Technology



Integrity &  
Accountability



Collaboration &  
Shared Responsibility

## FOCUS AREAS (CRITICAL LOGISTICS FUNCTIONS)



Ports &  
Terminals



Rail



Road  
Transport



Inland  
Waterways



Air Cargo



Warehousing  
& Logistics Parks



Freight  
Forwarding



Cross-Border  
Corridors

## RESILIENCE PERFORMANCE METRICS



Service Continuity  
(Availability)



Time to Recover  
(MTTR)



Disruption Impact  
(Cost & Time)



Supply Chain  
Visibility



Preparedness  
Index

## TOP SHOCKS & STRESSES



Natural Disasters  
(Floods, Storms)



Infrastructure  
Failure



Cyber  
Incidents



Security  
Threats



Health Crises



Global & Regional  
Supply Shocks



## OUR COMMITMENT

We commit to building a resilient logistics ecosystem that protects our economy, empowers our people, and secures Nigeria's future.



Prepared  
Together



Protect  
Together



Perform  
Together



Prosper  
Together



RESILIENT LOGISTICS.  
STRONGER NIGERIA.

# MEDIUM-TERM ACTIONS (3-5 YEARS)

**BUILDING CAPACITY. EXPANDING CONNECTIVITY. DRIVING COMPETITIVENESS.**

These medium-term actions will consolidate reforms, scale investments, and strengthen institutions to create an efficient, integrated, and resilient logistics ecosystem for sustainable economic growth.





## OUR VISION

A globally competitive logistics sector that connects Nigeria, creates jobs, attracts investment, and delivers inclusive and sustainable prosperity.

## OUR PRIORITY PILLARS

<p><b>1 INTEGRATED INFRASTRUCTURE EXPANSION</b></p>  <ul style="list-style-type: none"> <li>• Expand port capacity and modernize terminals.</li> <li>• Complete priority rail corridors and intermodal terminals.</li> <li>• Upgrade critical roads and logistics corridors.</li> <li>• Develop inland waterways and dry ports.</li> </ul>	<p><b>2 DIGITAL TRANSFORMATION AND AUTOMATION</b></p>  <ul style="list-style-type: none"> <li>• Scale Port Community Systems across all major ports.</li> <li>• Fully implement Single Window nationwide.</li> <li>• Enable real-time cargo visibility across the supply chain.</li> <li>• Automate customs, permits, and trade documentation.</li> </ul>	<p><b>3 INDUSTRY CAPACITY AND HUMAN CAPITAL</b></p>  <ul style="list-style-type: none"> <li>• Strengthen training for logistics professionals and operators.</li> <li>• Build capacity in warehousing, cold chain, and specialized logistics.</li> <li>• Promote certification and professional standards.</li> <li>• Support MSMEs and indigenous logistics enterprises.</li> </ul>	<p><b>4 REGULATORY AND INSTITUTIONAL REFORMS</b></p>  <ul style="list-style-type: none"> <li>• Deepen regulatory harmonization and simplification.</li> <li>• Strengthen institutions and clarify roles across the logistics chain.</li> <li>• Improve contract enforcement and dispute resolution.</li> <li>• Institutionalize performance management and accountability.</li> </ul>	<p><b>5 PRIVATE SECTOR GROWTH AND INVESTMENT</b></p>  <ul style="list-style-type: none"> <li>• Attract investment in logistics infrastructure and services.</li> <li>• Promote PPPs for priority projects and operations.</li> <li>• Develop logistics parks, free zones, and special economic corridors.</li> <li>• Support innovation and technology-driven logistics solutions.</li> </ul>	<p><b>6 RESILIENCE AND SUSTAINABILITY</b></p>  <ul style="list-style-type: none"> <li>• Strengthen climate-resilient infrastructure and operations.</li> <li>• Promote green logistics and energy efficiency.</li> <li>• Enhance disaster preparedness and business continuity.</li> <li>• Improve safety and security across the logistics ecosystem.</li> </ul>
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### KEY ENABLERS

-  Strong political will and policy continuity
-  Sustainable financing and innovative funding
-  Data-driven decision-making and analytics
-  Stakeholder collaboration and partnerships
-  Technology adoption and innovation
-  Environmental and social responsibility

### EXPECTED OUTCOMES BY YEAR 5

-  Lower logistics costs by 20–30%
-  Reduced cargo dwell time by 30–40%
-  Increased trade volume and competitiveness
-  Jobs created and skills strengthened
-  Improved infrastructure coverage and quality
-  Enhanced resilience and sustainability

## FOCUS AREAS AND KEY ACTIONS

<p><b>MULTIMODAL INTEGRATION</b></p>  <ul style="list-style-type: none"> <li>• Develop intermodal hubs.</li> <li>• Standardize operations and documentation.</li> <li>• Improve first/last-mile connectivity.</li> </ul>	<p><b>PORT AND TRADE FACILITATION</b></p>  <ul style="list-style-type: none"> <li>• Implement port process re-engineering.</li> <li>• Expand capacity for container, bulk, and RoRo.</li> <li>• Strengthen trade facilitation and border agency coordination.</li> </ul>	<p><b>LOGISTICS SERVICES DEVELOPMENT</b></p>  <ul style="list-style-type: none"> <li>• Expand warehousing and cold chain infrastructure.</li> <li>• Develop value-added logistics services and 3PL/4PL capabilities.</li> <li>• Encourage consolidation and scale among operators.</li> </ul>	<p><b>CORRIDOR AND REGIONAL CONNECTIVITY</b></p>  <ul style="list-style-type: none"> <li>• Prioritize and complete regional corridors.</li> <li>• Harmonize standards and transit procedures.</li> <li>• Strengthen cross-border infrastructure and cooperation.</li> </ul>	<p><b>DATA, RESEARCH AND INNOVATION</b></p>  <ul style="list-style-type: none"> <li>• Establish logistics data observatory.</li> <li>• Promote research, forecasting and scenario planning.</li> <li>• Support pilots and emerging innovations (IoT, AI, blockchain).</li> </ul>	<p><b>SAFETY, SECURITY AND COMPLIANCE</b></p>  <ul style="list-style-type: none"> <li>• Implement risk-based inspections and compliance.</li> <li>• Strengthen cybersecurity and data protection.</li> <li>• Promote a culture of safety and compliance.</li> </ul>
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## PHASED IMPLEMENTATION ROADMAP (3-5 YEARS)

<p><b>YEAR 1 FOUNDATION &amp; QUICK WINS</b></p>  <ul style="list-style-type: none"> <li>• Finalize policy and regulatory reforms.</li> <li>• Launch key digital platforms.</li> <li>• Start priority infrastructure projects.</li> <li>• Build capacity and stakeholder alignment.</li> </ul>	<p><b>YEAR 2 EXPANSION &amp; INTEGRATION</b></p>  <ul style="list-style-type: none"> <li>• Scale digital systems and data sharing.</li> <li>• Expand multimodal infrastructure.</li> <li>• Operationalize dry ports and logistics parks.</li> <li>• Strengthen institutional coordination.</li> </ul>	<p><b>YEAR 3 ACCELERATION &amp; OPTIMIZATION</b></p>  <ul style="list-style-type: none"> <li>• Increase corridor capacity and connectivity.</li> <li>• Deepen private sector participation.</li> <li>• Optimize operations and reduce bottlenecks.</li> <li>• Enhance service quality and reliability.</li> </ul>	<p><b>YEAR 4 COMPETITIVENESS &amp; SCALE</b></p>  <ul style="list-style-type: none"> <li>• Achieve full Single Window integration.</li> <li>• Expand value-added logistics services.</li> <li>• Grow exports and regional trade.</li> <li>• Strengthen performance and accountability.</li> </ul>	<p><b>YEAR 5 SUSTAINABILITY &amp; RESILIENCE</b></p>  <ul style="list-style-type: none"> <li>• Consolidate gains and ensure sustainability.</li> <li>• Strengthen climate and operational resilience.</li> <li>• Position Nigeria as a logistics hub in Africa.</li> <li>• Drive inclusive growth and job creation.</li> </ul>
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### OUR COMMITMENT

We will work together—government, private sector, and communities—to deliver these medium-term actions with excellence, transparency, and national pride.

 Collaborate Better

 Invest Wisely

 Deliver Efficiently

 Innovate Continuously

 Build a Stronger Nigeria



## STRONGER LOGISTICS. PROSPEROUS NIGERIA.

# LONG-TERM ACTIONS (5-10 YEARS)

## BUILDING A WORLD-CLASS, RESILIENT, AND SUSTAINABLE LOGISTICS ECOSYSTEM

### VISION 2035 AND BEYOND

These long-term actions will transform Nigeria's logistics sector into a globally competitive, innovation-driven, and sustainable ecosystem that drives inclusive growth, regional leadership, and national prosperity.




### OUR VISION

To be Africa's leading logistics hub—digitally connected, sustainably powered, and renowned for efficiency, reliability, and innovation.

### OUR 6 STRATEGIC PILLARS FOR THE FUTURE

**1** WORLD-CLASS INFRASTRUCTURE NETWORK



- Complete integrated multimodal transport corridors.
- Develop deep seaports, dry ports and smart inland terminals.
- Modernize airports and cargo hubs to global standards.
- Build resilient infrastructure for climate and disaster risks.

**2** DIGITAL LEADERSHIP AND SMART LOGISTICS



- Full digitalization of logistics ecosystem and trade processes.
- AI, IoT, blockchain and advanced analytics across the supply chain.
- Autonomous and smart logistics operations.
- Interoperable, data-driven national logistics platform.

**3** INDUSTRY TRANSFORMATION AND INNOVATION



- Build globally competitive logistics and supply chain industries.
- Promote R&D, innovation hubs, and logistics startups.
- Develop specialized logistics clusters and free trade zones.
- Foster local manufacturing of logistics equipment and solutions.

**4** SUSTAINABLE AND GREEN LOGISTICS



- Transition to low-carbon, energy-efficient logistics operations.
- Expand use of clean energy and green technologies.
- Promote circular economy and sustainable packaging.
- Protect ecosystems and build climate-resilient infrastructure.

**5** INCLUSIVE GROWTH AND HUMAN CAPITAL



- Develop world-class logistics talent and leadership pipeline.
- Promote gender inclusion and youth participation.
- Strengthen SMEs and integrate them into global value chains.
- Create quality jobs and drive regional development.

**6** REGIONAL LEADERSHIP AND GLOBAL INTEGRATION



- Position Nigeria as West Africa's logistics and trade gateway.
- Deepen integration with AfCFTA and regional corridors.
- Attract global investments and strategic partnerships.
- Build Nigeria into a global logistics brand of excellence.

### EXPECTED OUTCOMES BY YEAR 10

-  Lower logistics costs by 40-50%
-  Reduced cargo dwell time by 50-60%
-  2-3x increase in trade volume
-  Top 3 logistics performance in Africa
-  100,000+ quality jobs created
-  Significant reduction in carbon emissions
-  Stronger resilience to shocks and disruptions
-  Sustainable and inclusive economic growth

### CROSS-CUTTING ENABLERS

**STRONG GOVERNANCE AND INSTITUTIONS**  
Effective institutions, policy stability, and long-term planning.



**ENABLING POLICIES AND REGULATIONS**  
Future-ready laws, simplified processes, and regulatory agility.



**SUSTAINABLE FINANCING AND INVESTMENT**  
Innovative financing, PPP models, and green investment.



**STAKEHOLDER COLLABORATION AND PARTNERSHIPS**  
Government, private sector, academia, and communities working together.



**DATA, KNOWLEDGE AND INNOVATION**  
Evidence-based decisions, research, and continuous innovation.



**SAFETY, SECURITY AND RESILIENCE**  
Secure operations, risk management, and business continuity.



### FOCUS AREAS FOR LONG-TERM IMPACT

**SEAMLESS MULTIMODAL CONNECTIVITY**  
Integrated networks of sea, rail, road, inland waterways and air cargo.



**LOGISTICS HUBS AND ECONOMIC CORRIDORS**  
Strategic hubs and corridors fueling industrialization and trade expansion.



**ADVANCED LOGISTICS SERVICES**  
High-value, tech-enabled services across the entire supply chain.



**GLOBAL VALUE CHAIN INTEGRATION**  
Deep integration into global supply chains and export competitiveness.



**SUSTAINABLE COMMUNITIES AND ENVIRONMENT**  
Healthy communities and environment through responsible logistics.



**ECONOMIC DIVERSIFICATION AND PROSPERITY**  
Logistics as a driver of inclusive growth and national transformation.



### LONG-TERM IMPLEMENTATION ROADMAP (5-10 YEARS)

**PHASE 1 (5-6 YEARS)**  
**BUILD AND TRANSFORM**

- Complete key infrastructure projects and corridors
- Scale digital platforms and automation
- Strengthen institutions and skills
- Attract investment and partnerships

**PHASE 2 (6-8 YEARS)**  
**EXPAND AND INTEGRATE**

- Expand multimodal networks and hubs
- Deepen regional and global integration
- Grow logistics industries and services
- Drive innovation and sustainability

**PHASE 3 (8-10 YEARS)**  
**LEAD AND SUSTAIN**

- Achieve global competitiveness
- Lead regional trade and logistics
- Sustain growth with resilient, low-carbon logistics
- Deliver lasting impact for generations

**OUR COMMITMENT**  
Together, we will build a future-ready logistics ecosystem that connects Nigeria to the world and empowers every community.



 Collaborate Together

 Innovate Relentlessly

 Deliver Excellence

 Grow Sustainably

 Transform Nigeria

### SUCCESS DEPENDS ON

-  Strong political will and long-term commitment
-  Effective coordination and implementation
-  Private sector leadership and investment
-  Community engagement and inclusion
-  Continuous monitoring and adaptive management

**STRONGER LOGISTICS. STRONGER NIGERIA. PROSPEROUS GENERATIONS.**

# THE STRATEGIC OPPORTUNITY FOR NIGERIA

Positioned for Growth. Connected for Prosperity.

Nigeria stands at the crossroads of Africa and the world. By unlocking the full potential of logistics, we can drive economic transformation, create millions of jobs, strengthen competitiveness, and improve lives.



**OUR VISION**

To be Africa's leading logistics hub—seamlessly connecting people, businesses and markets through efficient, resilient, sustainable and innovative logistics services.



## WHY NIGERIA? A NATURAL LOGISTICS POWERHOUSE

 <p><b>STRATEGIC LOCATION</b> Gateway between Africa, the Atlantic and global markets.</p>	 <p><b>LARGE MARKET</b> Over 200 million people and a rapidly growing middle class.</p>	 <p><b>ABUNDANT RESOURCES</b> Rich natural resources and diverse economy across sectors.</p>	 <p><b>YOUTHFUL WORKFORCE</b> A dynamic, tech-savvy population ready to innovate and build.</p>	 <p><b>REGIONAL LEADERSHIP</b> A key player in ECOWAS, AfCFTA and regional value chains.</p>	 <p><b>UNAPPED POTENTIAL</b> Logistics costs are high—but the upside is transformational.</p>
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## UNLOCKING NIGERIA'S LOGISTICS FUTURE

 <p><b>BUILD THE FOUNDATION</b> Strengthen policy, institutions and enabling environment.</p>	 <p><b>INVEST IN MODERN INFRASTRUCTURE</b> Ports, rail, roads, dry ports, logistics parks and ICT.</p>	 <p><b>DIGITALIZE &amp; AUTOMATE</b> Leverage technology for visibility, efficiency and smarter decisions.</p>	 <p><b>DEVELOP PEOPLE &amp; CAPACITY</b> Skills, innovation, entrepreneurship and local content.</p>	 <p><b>PARTNER &amp; COLLABORATE</b> Public-private partnerships and regional &amp; global integration.</p>	 <p><b>DELIVER SUSTAINABLE IMPACT</b> Resilient, inclusive and environmentally responsible logistics.</p>
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### PRIORITY FOCUS AREAS

- Integrated multimodal transport and logistics corridors
- Port modernization and hinterland connectivity
- Logistics parks, dry ports and warehouse networks
- Digital platforms and single window ecosystem
- Logistics sector reforms and ease of doing business
- Safety, security and climate-resilient operations

### WHERE THE OPPORTUNITIES LIE

 MARITIME & PORTS	 RAIL & INTERMODAL	 ROAD & TRANSPORT	 WAREHOUSING & DISTRIBUTION	 AIR CARGO SERVICES	 DIGITAL & TECH SOLUTIONS	 GREEN & SUSTAINABLE LOGISTICS	 REGIONAL TRADE & CORRIDORS
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From Lagos to the world. From the North to the markets. A connected Nigeria is a prosperous Nigeria.

### THE PRIZE: TRANSFORMATIVE IMPACT

-  **\$50-\$100B+ GDP BOOST**  
Through lower logistics costs and increased trade.
-  **MILLIONS OF JOBS**  
Across transport, warehousing, digital and support services.
-  **COMPETITIVENESS & INDUSTRIALIZATION**  
Stronger supply chains, exports and local production.
-  **RESILIENCE & SECURITY**  
Stronger preparedness, reduced disruptions and losses.
-  **SUSTAINABLE & INCLUSIVE GROWTH**  
Greener logistics, reduced emissions and shared prosperity.

### WHAT SUCCESS LOOKS LIKE BY 2030+

- Top 40 on the World Bank Logistics Performance Index
- Logistics cost reduced to <10% of GDP
- Seamless movement of goods across all modes
- World-class ports, corridors and logistics hubs
- Thriving logistics businesses and innovation ecosystem
- Nigeria: The preferred logistics hub in Africa



**STRONGER LOGISTICS. STRONGER NIGERIA. PROSPEROUS GENERATIONS.**

 COLLABORATE TOGETHER

 INVEST WISELY

 DELIVER EXCELLENCE

 GROW SUSTAINABLY

 INNOVATE RELENTLESSLY

**THE TIME IS NOW. THE FUTURE IS OURS. LET'S BUILD IT TOGETHER.**

“THE STRAIT OF HORMUZ IS NOT MERELY A MIDDLE EAST PROBLEM; IT IS A REMINDER THAT NATIONS WITHOUT RESILIENT LOGISTICS SYSTEMS REMAIN VULNERABLE TO DISTANT SHOCKS.”



STRAIT OF HORMUZ



OUR RESPONSE




BUILD RESILIENT LOGISTICS. SECURE OUR FUTURE. PROSPEROUS NIGERIA.




THE FUTURE BELONGS TO NATIONS THAT CAN ANTICIPATE DISRUPTION, ABSORB SHOCKS, AND SUSTAIN THE FLOW OF TRADE.




FOR NIGERIA, LOGISTICS RESILIENCE IS NOT SIMPLY A TRANSPORT ISSUE— IT IS A STRATEGIC NATIONAL IMPERATIVE.




**RESILIENT LOGISTICS**  
Robust infrastructure.  
Efficient operations.



**SECURE SUPPLY CHAINS**  
Reliable networks.  
Assured availability.



**STRONGER ECONOMY**  
Lower costs. Higher productivity.  
Sustainable growth.



**NATIONAL SOVEREIGNTY**  
Reduced vulnerability.  
Greater control. Shared prosperity.



**PREPARE TODAY.**  
**PROTECT TOMORROW.**  
**PROSPER TOGETHER.**



# FROM EFFICIENCY TO RESILIENCE

A shift in mindset. A stronger future for Nigeria.



## OLD LOGIC:

“Concentrate cargo where infrastructure exists.”



FOCUS ON EXISTING HUBS



HIGH CONCENTRATION RISK



VULNERABLE TO DISRUPTIONS



## NEW LOGIC:

“Distribute cargo where resilience is required.”



DISTRIBUTE FOR RESILIENCE



BUILD SYSTEM STRENGTH



SUSTAIN GROWTH. SECURE PROSPERITY.



IT'S NOT JUST ABOUT MOVING MORE CARGO. IT'S ABOUT BUILDING A RESILIENT NIGERIA.



PEOPLE AT THE CENTER



PROSPERITY FOR ALL



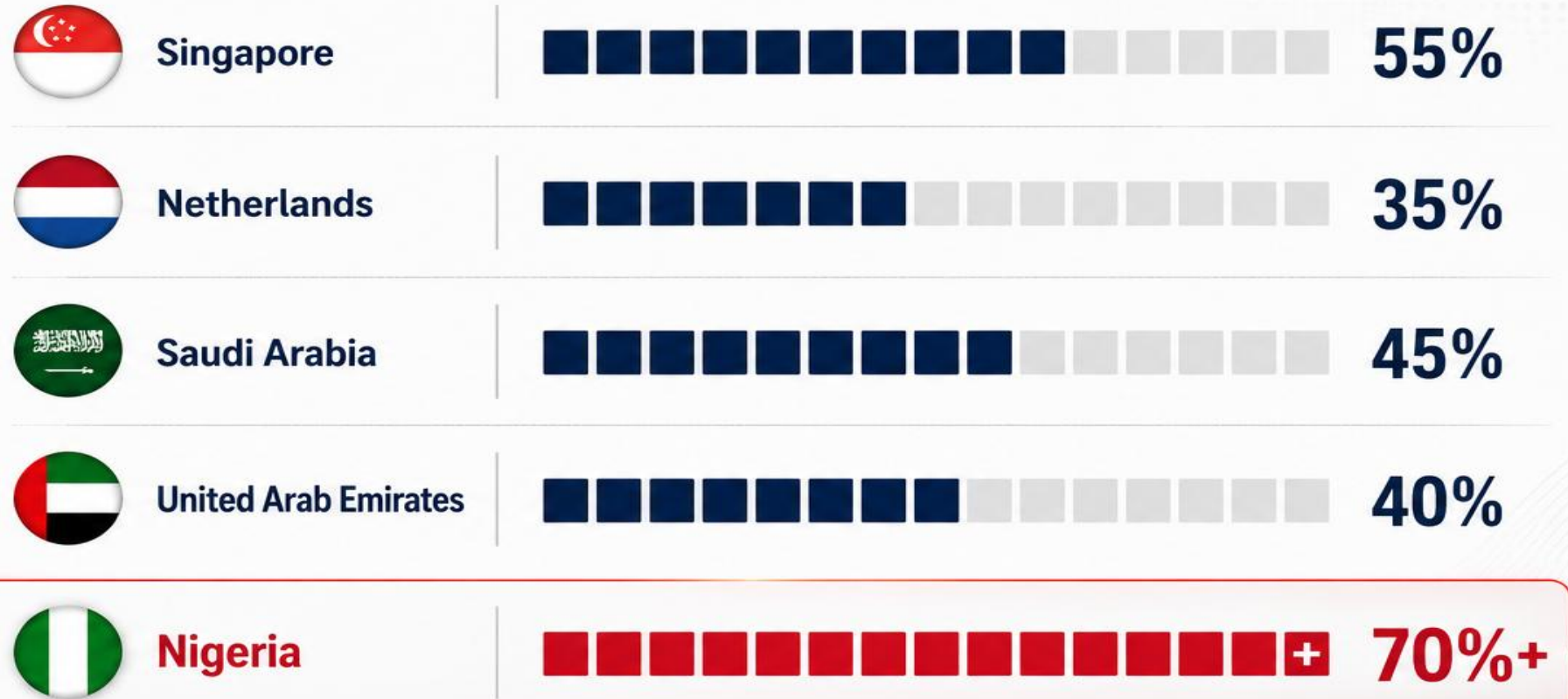
RESILIENCE BY DESIGN



A STRONGER NIGERIA

# GLOBAL BENCHMARK COMPARISON

## CARGO THROUGH LARGEST GATEWAY



Nigeria exhibits one of the highest cargo concentration profiles among major maritime economies.



Higher concentration reflects strong gateway dominance.



Stronger position, greater influence in global trade.



Opportunity to convert dominance into resilience.



Maximize potential. Build capacity. Lead the region.

# THE END OF PREDICTABLE GLOBALISATION

From an era of efficiency to an era of strategic resilience

FOR THREE DECADES, NATIONS OPTIMISED FOR EFFICIENCY.  
THE NEXT THREE DECADES WILL REWARD RESILIENCE.

## GLOBALISATION ERA 1990–2020



### Efficiency First

Just-in-time supply chains, hyper-globalisation, cost optimisation and global integration drive unprecedented growth.

## PANDEMIC SHOCK 2020



### System Shock

Borders close. Supply chains fracture. Demand patterns shift. Resilience is tested for the first time at global scale.

## UKRAINE WAR 2022



### Geopolitical Realignment

Energy markets disrupted. Sanctions reshape trade. Food and commodity security exposed. Friend-shoring begins.

## RED SEA CRISIS 2023–2024



### Trade Route Instability

Attacks on shipping. Rerouting around Africa. Freight rates surge. Insurance costs escalate. Chokepoint risk moves center stage.

## HORMUZ ESCALATION 2024+



### Energy Artery at Risk

20% of global oil flows through a single chokepoint. Global markets on edge. Volatility becomes the new normal.

## EMERGING ERA 2025 AND BEYOND



### Strategic Resilience

Nations invest in redundancy, diversification and industrial strength. Resilience defines competitiveness. Sovereignty becomes strategy.



The global economy is not becoming less connected. It is becoming more fragile.

### EXECUTIVE TAKEAWAY

“ THE GLOBAL ECONOMY IS MOVING FROM “JUST-IN-TIME” TO “JUST-IN-CASE.” ”

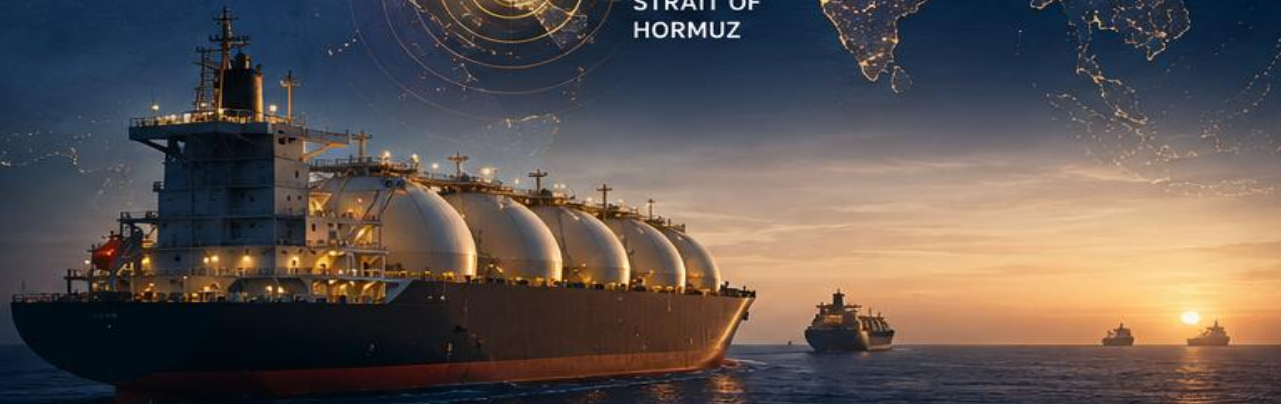


The winners of the next decade will be those who prepare for disruption before it happens.

# THE HORMUZ SHOCK

A localized flashpoint with global economic consequences.

The Strait of Hormuz is the world's most critical energy chokepoint. Any disruption—real, threatened or prolonged—reverberates across the global economy within days.



## WHAT MAKES HORMUZ INDISPENSABLE



**20-30%**

OF GLOBAL OIL TRADE

~20 million barrels per day transit Hormuz.



**~30%**

OF GLOBAL LNG TRADE

Key supplier flows from Qatar and UAE.



**100+ VESSELS**  
PER DAY ON AVERAGE

Crude, condensates, LNG and petroleum products.



**ENERGY ARTERY**  
TO THE WORLD

Asia, Europe and key emerging economies depend on this corridor.

“ When Hormuz is threatened, the world does not debate economics— it prices in risk. ”

## ECONOMIC IMPACTS OF A HORMUZ DISRUPTION



**ENERGY PRICE VOLATILITY**

Sharp spikes in oil and gas prices; inflationary pressures across economies.



**SHIPPING COST ESCALATION**

Freight rates surge, route diversions increase voyage distance and cost.



**INSURANCE PREMIUM INCREASES**

War risk premiums rise significantly; higher cost of trade.



**SUPPLY DELAYS**

Extended lead times, inventory strain and production slowdowns.



**INFLATION TRANSMISSION**

Higher energy and transport costs filter through to food, goods and services.



**GROWTH & MARKET SENTIMENT**

Investor confidence weakens; capital flows become more risk-averse.



**EXECUTIVE TAKEAWAY**

The Hormuz crisis is not about barrels alone. It is a stress test of the world's economic resilience and strategic dependencies.



# THE NEW MEASURE OF NATIONAL COMPETITIVENESS

The rules of competitiveness have changed. The measures must change too.

“ In an age of geopolitical fragmentation, resilience is becoming the **ultimate competitive advantage.** ”

OLD PARADIGM	EMERGING PARADIGM
<b>Cheap Labour</b> Cost arbitrage drives competitiveness.	<b>Supply Chain Resilience</b> Ability to withstand shocks and recover fast.
<b>Natural Resources</b> Endowments create advantage.	<b>Logistics Reliability</b> Consistent, predictable and trusted performance.
<b>Market Size</b> Large markets attract investment.	<b>Trade Corridor Security</b> Safe, open, and diversified access to markets.
<b>Cost Efficiency</b> Lower costs equal advantage.	<b>Infrastructure Redundancy</b> Multiple options. Built-in flexibility.
<b>Production Scale</b> Economies of scale drive growth.	<b>Strategic Adaptability</b> Anticipate change. Pivot with speed and agility.



## THE PILLARS OF COMPETITIVE RESILIENCE

**RESILIENT SUPPLY CHAINS**  
Diverse suppliers, local capacity and strategic stockpiles reduce vulnerability.

**RELIABLE LOGISTICS ECOSYSTEMS**  
Efficient ports, transport, digital systems and seamless operations.

**DIVERSIFIED TRADE CORRIDORS**  
Multiple routes and partners reduce exposure and increase strategic optionality.

**STRATEGIC INFRASTRUCTURE ADVANTAGE**  
World-class, future-ready infrastructure enables scale, speed and reliability.

**DIGITAL & DATA INTELLIGENCE**  
Real-time visibility, predictive analytics and scenario planning drive smarter decisions.

**INSTITUTIONAL AGILITY & GOVERNANCE**  
Clear policies, trusted institutions and agile governance unlock private sector dynamism.

# THE STRATEGIC QUESTION FOR NIGERIA

From reaction to readiness. From risk exposure to strategic advantage.



## NOT THE QUESTION

How does Nigeria respond to the Hormuz crisis?



## THE STRATEGIC QUESTION

What does the Hormuz crisis reveal about Nigeria's preparedness for the next global supply chain disruption?



“The next global disruption is not a matter of if, but when and how severe. Prepared nations endure. Prepared economies lead.”

## WHAT THIS MEANS FOR NIGERIA



### NATIONAL SECURITY

Supply chain disruptions can threaten energy access, food security and economic stability.



### ECONOMIC RESILIENCE

A resilient logistics ecosystem reduces vulnerability to external shocks and stabilizes growth trajectories.



### TRADE COMPETITIVENESS

Reliable corridors, efficient ports and integrated networks unlock Nigeria's potential as a regional and global hub.



### INDUSTRIAL TRANSFORMATION

Secure and efficient supply chains lower costs, attract investment and drive industrialization.



### NATIONAL LEADERSHIP

Supply chain sovereignty positions Nigeria as a strategic player in a fragmented and competitive world.



### THE IMPERATIVE

Nigeria must move from logistics dependence to supply chain sovereignty—building the resilience, redundancy and strategic depth to thrive in a volatile world.



### ABSORB SHOCKS

Withstand disruptions without systemic breakdown.



### SECURE FLOWS

Protect critical trade, energy and food supply corridors.



### SUSTAIN GROWTH

Maintain productivity, investment and jobs through uncertainty.



### LEAD THE FUTURE

Turn resilience into influence and opportunity.



The Hormuz crisis is a signal. **Nigeria's response will define its resilience. Its strategy will define its standing. Its readiness will define its future.**

# WHY NIGERIA CANNOT IGNORE HORMUZ

Global Chokepoint Risks and Nigeria's Energy & Logistics Exposure



GLOBAL DISRUPTIONS TRAVEL FASTER THAN SUPPLY CHAINS CAN RECOVER

## THE HORMUZ EFFECT



~20% of global oil consumption passes through Hormuz



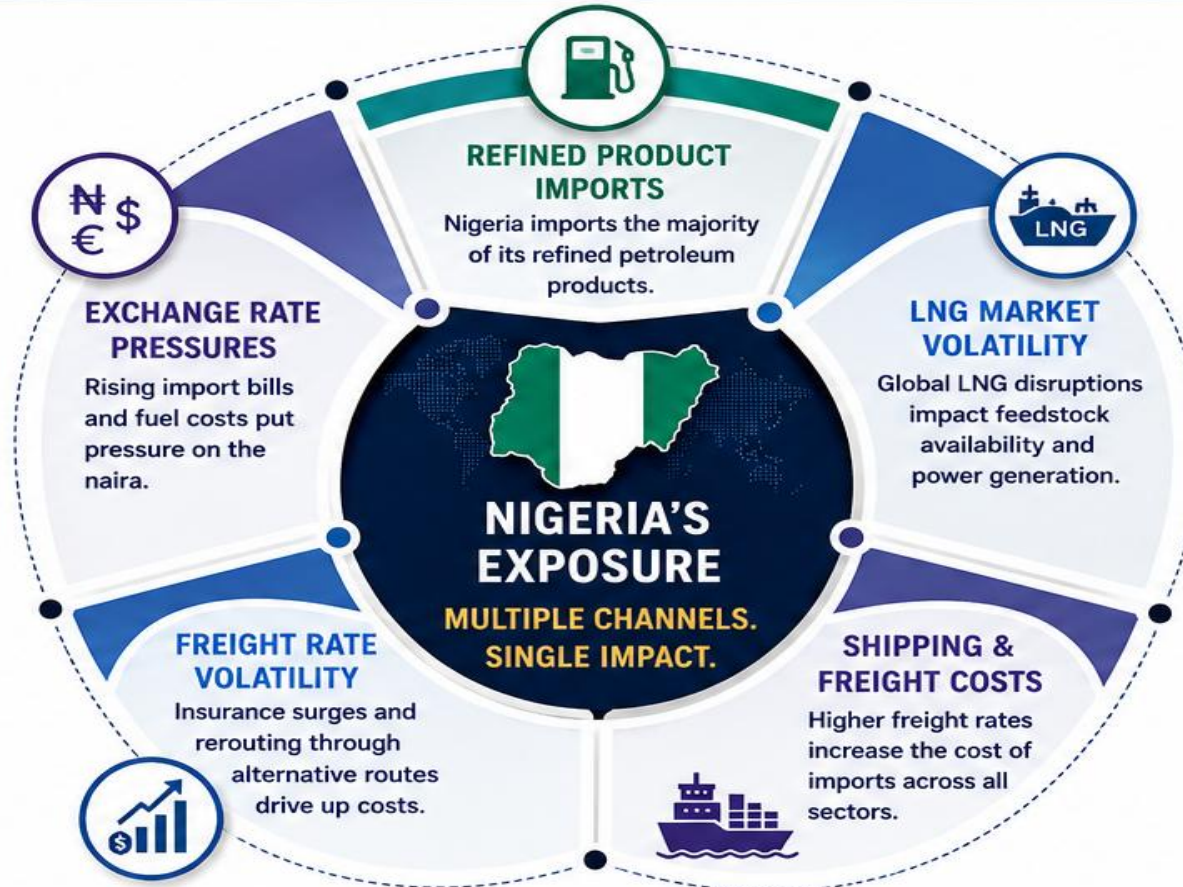
~25% of global LNG trade transits the corridor



Disruptions trigger volatility in energy, shipping and trade markets



Nigeria remains exposed through multiple supply-chain dependencies



## HOW A HORMUZ DISRUPTION REACHES NIGERIA



**FUEL SUPPLY PRESSURE**  
Higher domestic fuel prices and potential supply gaps.



**IMPORT DELAYS**  
Slower cargo movement, longer lead times, stockouts.



**INDUSTRIAL DISRUPTION**  
Higher input costs, reduced competitiveness, lower output.



**INFLATIONARY EFFECTS**  
Higher costs passed on to businesses and consumers.



**FX & FISCAL PRESSURE**  
Stronger demand for FX, higher subsidy & import bill.



**NIGERIA'S LOGISTICS VULNERABILITY IS A NATIONAL ECONOMIC SECURITY ISSUE**



Global chokepoint disruptions are no longer distant events. They are **transmission shocks** that directly affect Nigeria's energy security, trade competitiveness and economic resilience.

# NIGERIA'S MARITIME DEPENDENCY

How much of Nigeria's economy depends on uninterrupted global shipping?



**OVER 95%**  
of Nigeria's international trade moves by sea.

## THE BIG PICTURE



**95%+**  
of Nigeria's trade moves by sea



**80%+**  
of imports are seaborne



**100%**  
of refined products imported



**~90%**  
of LNG feedstock, imports & exports seaborne

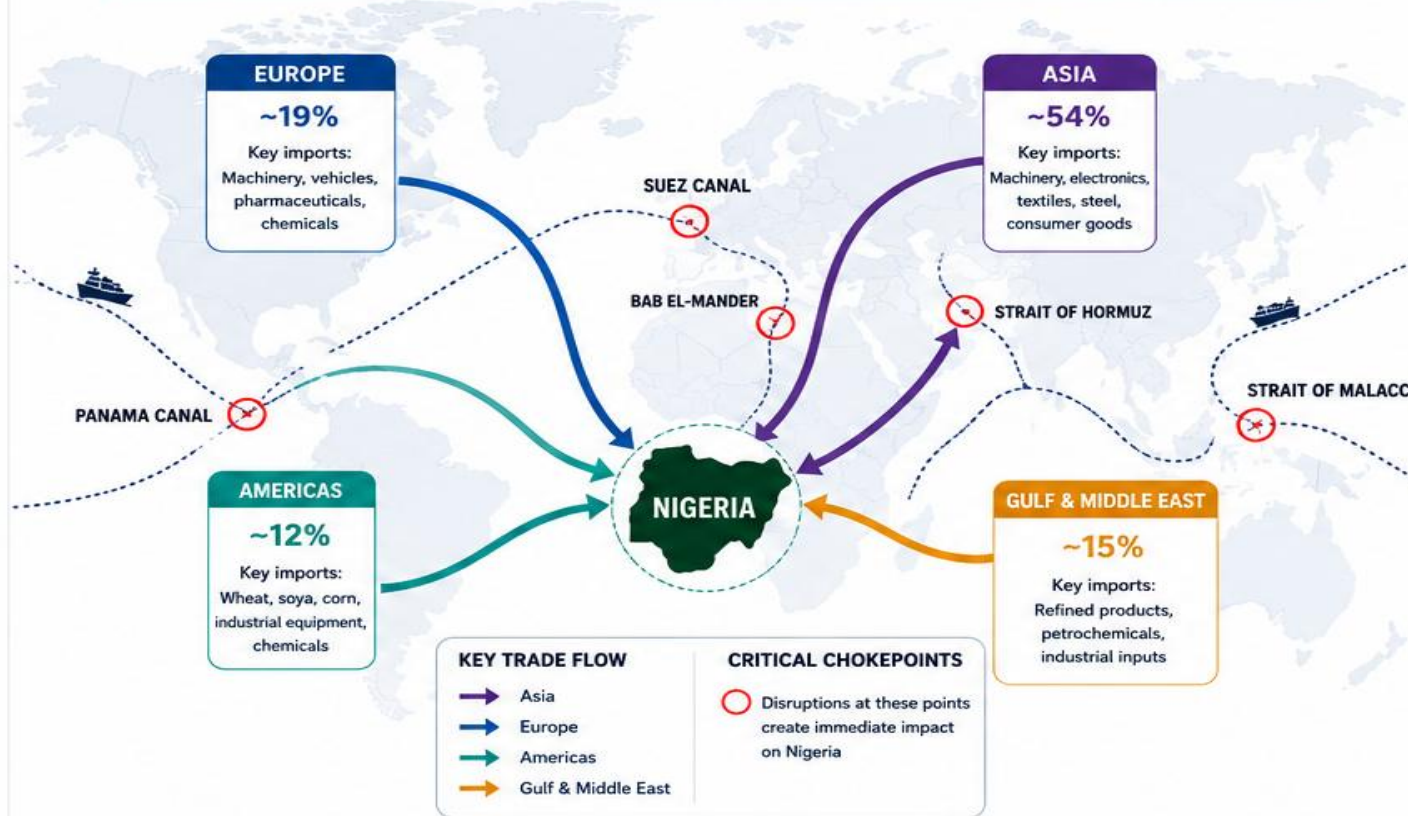


**~\$110B+**  
annual value of seaborne trade



**Millions**  
of jobs and livelihoods depend on uninterrupted sea trade

## NIGERIA IS CONNECTED TO THE WORLD – AND VULNERABLE TO IT



## NIGERIA'S ECONOMY: EXPOSED THROUGH MULTIPLE SECTORS



Fuel & Energy **100%**



Manufacturing Inputs **85–95%**



Food & Agriculture **70–80%**



Pharma & Healthcare **90%**



Construction Materials **80–90%**



Electronics & Technology **90%**



Retail & Consumer Goods **85–95%**



High dependence across core sectors creates systemic vulnerability.

## CRITICAL REALITY



Nigeria's growth, stability and prosperity depend on uninterrupted global shipping through a **few fragile maritime chokepoints**.

## A DISRUPTION ANYWHERE CAN MEAN:



Higher fuel prices



Import delays



Industrial slowdown



Inflation pressure



FX pressure



Economic stress

## THE STRATEGIC QUESTION

How much of Nigeria's economy depends on uninterrupted global shipping?



# NIGERIA'S LOGISTICS VULNERABILITY INDEX

A Five-Dimension Assessment of Systemic Exposure



Nigeria's logistics vulnerability is driven by concentration, dependence and limited redundancy across critical dimensions.



DIMENSION	WHAT IT MEASURES	CURRENT STATE	MATURITY SCORE (1-5)	VULNERABILITY LEVEL	KEY OBSERVATIONS
<b>PORT DEPENDENCE</b>	Degree of concentration of cargo traffic and reliance on a few ports and channels.	70%+ of seaborne cargo passes through Lagos ports (Apapa, Tin Can & Lekki).	1.8	<b>VERY HIGH</b>	Extreme concentration risk. Limited alternative deep-sea capacity and hinterland evacuation.
<b>ENERGY DEPENDENCE</b>	Reliance on imported refined products, LNG and global energy logistics.	~55% of refined products consumed are imported. LNG and crude exposed to global volatility.	2.4	<b>HIGH</b>	Exposed to global energy price shocks, shipping disruptions and FX volatility.
<b>TRANSPORT CONCENTRATION</b>	Dependence on limited modes and corridors for cargo evacuation.	~80% of freight moves by road; rail and inland waterways underutilized.	2.1	<b>HIGH</b>	Over-reliance on roads causes cost inflation, delays and corridor congestion.
<b>INFRASTRUCTURE REDUNDANCY</b>	Availability of alternative routes, ports, systems and backup capacity.	Limited redundancy in ports, corridors, storage and logistics infrastructure.	2.2	<b>HIGH</b>	Single points of failure across ports, roads, power and ICT systems.
<b>STRATEGIC RESERVES</b>	Buffer capacity in fuel, critical commodities and essential supplies.	Strategic reserves are sub-optimal across fuel, grains and key inputs.	2.0	<b>VERY HIGH</b>	Low national buffers increase vulnerability to external and internal shocks.

**KEY INSIGHTS**

- ✓ Nigeria's logistics system is vulnerable across all five critical dimensions.
- ✓ High concentration and low redundancy amplify the impact of global chokepoint disruptions.
- ✓ Improving maturity in each dimension is essential to build national logistics resilience.



**THE BOTTOM LINE**

Nigeria's logistics vulnerability is **HIGH**.

Building resilience requires deliberate investment in diversification, visibility and strategic reserves.

**Resilience is a competitive advantage.**

# LAGOS: NATIONAL ASSET OR NATIONAL SINGLE POINT OF FAILURE?

Lagos is Africa's maritime heartbeat—vital to the nation, vulnerable to disruption.

## THE LAGOS GATEWAY CLUSTER

Nigeria's Primary Maritime Gateway



## THE ENTIRE ECONOMY CONNECTS THROUGH LAGOS

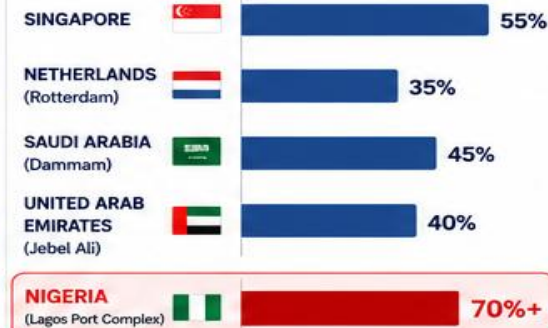


## POTENTIAL SHOCK EVENTS



## GLOBAL BENCHMARK COMPARISON

Cargo Through Largest Gateway (% of Total Seaborne Cargo)



Nigeria exhibits one of the highest cargo concentration profiles among major maritime economies.

## THE CONCENTRATION RISK CASCADE: FROM DISRUPTION TO NATIONAL IMPACT

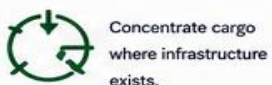


## RESILIENCE SCORECARD

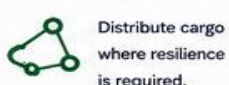


## STRATEGIC INSIGHT

### OLD LOGIC



### NEW LOGIC



## WHY THIS MATTERS

A disruption affecting Lagos does not remain a Lagos problem. It rapidly becomes:



## NIGERIA'S LOGISTICS REALITY

Lagos is not merely a port cluster. It is a strategic national asset whose resilience directly influences economic stability, trade competitiveness, and national security.

The objective is not to reduce Lagos' importance. The objective is to reduce Nigeria's dependence on Lagos as a single point of failure.



# LESSONS FROM LEADING MARITIME NATIONS

Resilience is engineered. Competitiveness is designed.



**THEME: LEADING NATIONS DO NOT RELY ON LUCK OR GEOGRAPHY – THEY BUILD RESILIENCE INTO THEIR SYSTEMS.**

## SINGAPORE

The Connectivity Powerhouse

- Strategic Positioning**
  - Turned location into the world's premier transshipment hub.
- Infrastructure Excellence**
  - World-class ports with deep draft, automation and 24/7 efficiency.
- End-to-End Visibility**
  - Nationwide digital visibility across ports, cargo and trade flows.
- Resilience by Design**
  - Diversified trade partners, robust BCP frameworks, and high redundancy.

**KEY TAKEAWAY** | Build global relevance through connectivity, reliability and trust.

## NETHERLANDS

The Port & Logistics Architect

- Integrated Ecosystem**
  - Port, industrial zones, logistics parks and hinterland connectivity.
- Multimodal Mastery**
  - Seamless integration of sea, rail, road and inland waterways.
- Future-Ready Infrastructure**
  - Investing early in energy transition, smart ports and sustainability.
- Public-Private Collaboration**
  - Strong governance and long-term national logistics strategy.

**KEY TAKEAWAY** | Orchestrate an integrated logistics ecosystem that scales.

## UNITED ARAB EMIRATES

The National Logistics Platform

- National Strategy, Global Reach**
  - A unified national logistics strategy with global hub ambitions.
- World-Class Free Zones**
  - Jebel Ali and other zones drive trade, value-add and re-export.
- Air-Sea Dual Power**
  - Integrated air and sea gateways expand global reach.
- Investment in Capacity**
  - Continuous investment in ports, logistics, digital and talent.

**KEY TAKEAWAY** | Align national vision, investment and infrastructure for scale.

## SAUDI ARABIA

The Transformation Nation

- Strategic Transformation**
  - Vision 2030 repositioning logistics as a growth and diversification engine.
- Port & Corridor Development**
  - Building global gateways and logistics corridors across the Kingdom.
- Regional Connectivity**
  - Connecting Asia, Africa and Europe through land and sea networks.
- Build Capabilities**
  - Developing national champions and localizing logistics capabilities.

**KEY TAKEAWAY** | Use logistics as a catalyst for diversification and competitiveness.

### COMMON LESSONS

Resilience is a strategic choice, not a reaction.

Diversification reduces risk and strengthens systems.

Digital visibility enables smarter, faster decisions.

Strong institutions and governance build credibility.

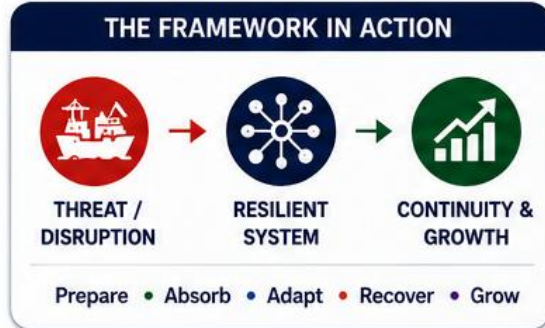
Human capital and partnerships power long-term advantage.

# STRATEGIC LOGISTICS RESILIENCE FRAMEWORK

Five Pillars for a Resilient, Competitive and Sovereign Nigeria



**A NATIONAL SYSTEM. FIVE PILLARS. ONE OUTCOME:** LOGISTICS RESILIENCE = NATIONAL COMPETITIVENESS



- ✓ Strategic commodity reserves
- ✓ Emergency logistics capacity
- ✓ Alternative trade routes
- ✓ National buffer stocks
- ✓ Crisis response readiness

- ✓ Policy harmonization
- ✓ Fast-track approvals
- ✓ Risk-based regulation
- ✓ Public-private collaboration
- ✓ Strong institutional alignment



- ✓ Diversified port network
- ✓ Robust port infrastructure
- ✓ Dry ports & logistics parks
- ✓ Digital port ecosystem
- ✓ Business continuity planning

- ✓ Secure fuel & gas supply chains
- ✓ Strategic storage & reserves
- ✓ Efficient distribution networks
- ✓ LNG & clean energy logistics
- ✓ Resilient energy corridors

- ✓ Real-time analytics
- ✓ National Freight Observatory
- ✓ Chokepoint intelligence
- ✓ End-to-end traceability
- ✓ Predictive risk management

**THE ULTIMATE OUTCOME**

- Economic Stability
- Energy Security
- Trade Competitiveness
- Industrial Growth
- National Security
- Sovereign Resilience

**STRONGER ECONOMY. SECURE FUTURE.**

**SUCCESS INDICATORS**

	Reduced Logistics Cost	↓
	Improved Trade Reliability	↑
	Reduced Lead Times	↓
	Increased Corridor Capacity	↑
	National Resilience Score	↑

**ENABLERS (FOUNDATIONS)**



“ RESILIENCE IS NOT A PROJECT. IT IS A NATIONAL CAPABILITY THAT CREATES COMPETITIVE ADVANTAGE FOR GENERATIONS. ”


**SECTION V**  
Building the Nigerian  
Resilient Logistics Ecosystem

# PILLAR 1: PORT SYSTEM RESILIENCE

**DIVERSIFYING GATEWAYS. REDUCING CONCENTRATION RISK. BUILDING NATIONAL RESILIENCE.**

A resilient Nigeria requires a network of complementary port gateways, connected to the hinterland and capable of sustaining trade during disruption.

**STRATEGIC OBJECTIVE**



Build a diversified, modern, and resilient port system that sustains trade, supports growth and strengthens national security.

- STRATEGIC PRIORITIES**
- DEVELOP WESTERN PORTS**  
Deepen, expand and modernize to handle growing cargo demand.
  - DEVELOP EASTERN PORTS**  
Unlock underutilized capacity to balance national trade flows.
  - BUILD INLAND DRY PORTS**  
Extend port services closer to production and consumption hubs.
  - DEPLOY PORT COMMUNITY SYSTEMS**  
Digitize processes, improve transparency and reduce dwell time.
  - ENHANCE PORT CONNECTIVITY**  
Strengthen road, rail and inland waterways linkages.



**THE ULTIMATE OUTCOME**



- Economic Stability
- Energy Security
- Trade Competitiveness
- Industrial Growth
- National Security
- Sovereign Resilience


**STRONGER ECONOMY. SECURE FUTURE.**

- DESIRED OUTCOMES**
- Reduced cargo concentration at single ports
  - Increased national port capacity and redundancy
  - Lower logistics costs and delays
  - Stronger trade resilience during disruptions
  - Balanced regional economic development

**THE RESILIENCE EFFECT**



**DESIGN PRINCIPLE**



No single port.  
No single corridor.  
No single point of failure.  
**One Resilient Network.**

## SECTION V

Building the Nigerian  
Resilient Logistics Ecosystem

# THE RESILIENCE ROADMAP

### FROM TODAY'S VULNERABILITIES TO TOMORROW'S ADVANTAGE

A phased pathway to a resilient, connected, competitive and sovereign logistics system.



#### OUR NORTH STAR

A Nigeria where logistics resilience underpins economic prosperity, national security and global competitiveness.

#### THE CHALLENGE

- High concentration.
- Weak connectivity.
- Systemic vulnerability.
- Rising costs.
- Lost opportunities.

01

#### STABILIZE (2025–2026)

- Decongest Lagos Ports
- Improve Port Operations and Efficiency
- Rehabilitate Critical Corridors
- Strengthen Data and Visibility
- Enhance Security and Risk Management

#### VULNERABLE TODAY

- Over 70% cargo through Lagos Port Complex
- Limited port redundancy
- Weak inland connectivity
- Fragmented systems
- Exposure to climate shocks and disruptions

02

#### DIVERSIFY (2026–2028)

- Develop Eastern Ports (Calabar, Warri, Onne)
- Build Inland Dry Ports and Logistics Parks
- Expand Multimodal Connectivity
- Promote Private Sector Participation
- Strengthen Regulatory and Policy Frameworks

03

#### INTEGRATE (2028–2030)

- Create a National Logistics Grid
- Integrate Ports, Rail, Roads, Inland Waterways
- Implement Smart Logistics Systems
- Harmonize Processes and Standards
- Deepen Regional and Global Integration

04

#### LEAD (2030 AND BEYOND)

- Position Nigeria as a Regional Logistics Hub
- Drive Export-Led Logistics Growth
- Leverage Digital and Green Innovations
- Build Climate-Resilient Infrastructure
- Achieve Logistics Sovereignty and Global Competitiveness

#### THE DESTINATION: A RESILIENT NIGERIA



Resilient to Disruptions



Connected for Growth



Competitive in Global Markets



Sovereign and Secure



Prosperous for and Nigerians

# THE NIGERIA LOGISTICS RESILIENCE STRATEGY

ONE VISION. SIX STRATEGIC ACTIONS. LIMITLESS IMPACT.

A COORDINATED NATIONAL PUSH TO BUILD A LOGISTICS SYSTEM THAT ENDURES, COMPETES AND LEADS.

16



**RESILIENT NIGERIA**  
CONNECTED. COMPETITIVE. SOVEREIGN.

**01 DIVERSIFY GATEWAYS**  
Unlock the potential of eastern, western and inland ports to reduce concentration risk and increase national capacity.

**02 STRENGTHEN CONNECTIVITY**  
Build and modernize roads, rails and inland waterways to create seamless cargo movement across the country.

**03 BUILD SMART LOGISTICS INFRASTRUCTURE**  
Invest in modern, digital and resilient infrastructure that enables visibility, efficiency and continuity.

**04 ENHANCE POLICY & REGULATION**  
Implement adaptive policies, streamline regulations and enforce standards that promote competitiveness and resilience.

**05 DRIVE DIGITAL TRANSFORMATION**  
Leverage technology, data and automation to improve decision-making, transparency and system agility.

**06 DEVELOP HUMAN CAPITAL & INSTITUTIONS**  
Build skilled talent and strengthen institutions to lead, innovate and sustain a world-class logistics ecosystem.

**THE IMPACT A NEW NIGERIA**

- RESILIENT TO DISRUPTIONS
- MORE COMPETITIVE IN GLOBAL MARKETS
- STRONGER ECONOMIC SOVEREIGNTY
- MORE JOBS. MORE PROSPERITY
- A LOGISTICS SYSTEM THAT POWERS A GREATER NIGERIA

**OUR FOUNDATION: COLLABORATION FOR IMPACT**

- FEDERAL & STATE GOVERNMENTS
- PRIVATE SECTOR & INVESTORS
- PORT OPERATORS & TERMINALS
- LOGISTICS SERVICE PROVIDERS
- ACADEMIA & RESEARCH
- COMMUNITIES & CIVIL SOCIETY
- INTERNATIONAL PARTNERS

THE DESTINATION:  
A PROSPEROUS, RESILIENT AND SOVEREIGN NIGERIA.




## SECTION V

Building the Nigerian  
Resilient Logistics Ecosystem

# IMPLEMENTATION ROADMAP FROM STRATEGY TO EXECUTION

A Phased Approach to Building a Resilient, Competitive and Sovereign Logistics System

 This roadmap translates our strategic pillars into time-bound actions with measurable outcomes.



### STRONG GOVERNANCE FOR DELIVERY



Presidential Oversight and High-Level Steering Committee



Clear Accountability and Performance Management



Transparent Reporting and Stakeholder Engagement



Adaptive Management and Continuous Improvement

### SUCCESS WILL BE MEASURED BY

- ✓ Reduced logistics costs
- ✓ Improved cargo dwell time and port efficiency
- ✓ Increased trade volumes and diversification
- ✓ Enhanced connectivity and multimodal share
- ✓ Stronger resilience and fewer disruptions
- ✓ Increased job creation and economic impact



*A deliberate plan. A coordinated effort. A resilient Nigeria. | Today's Actions. Tomorrow's Prosperity.*

# MEASURING WHAT MATTERS

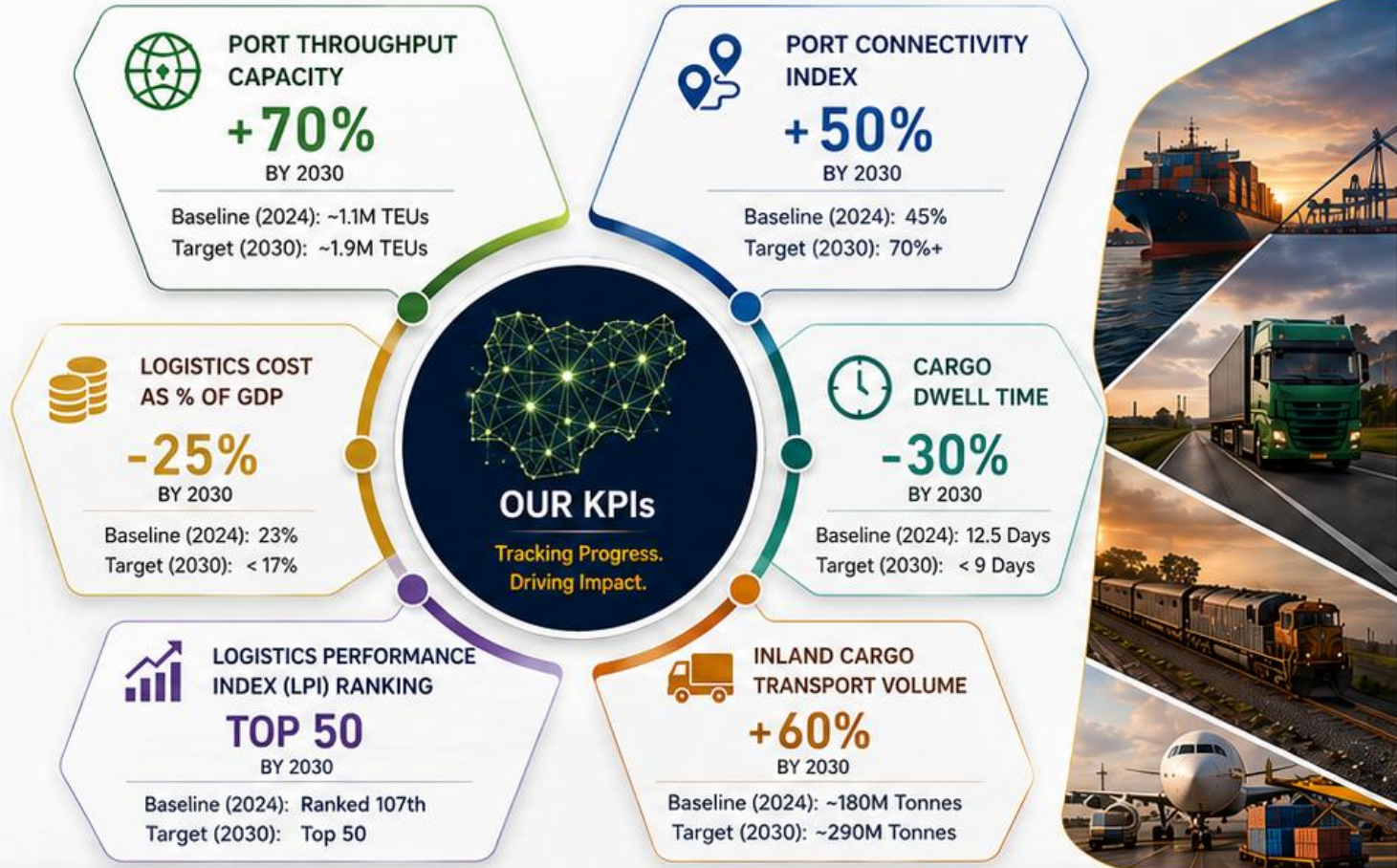
KEY PERFORMANCE INDICATORS (KPIs) FOR A RESILIENT NIGERIA

DATA-DRIVEN. ACCOUNTABLE. IMPACT-FOCUSED.

“ What gets measured, gets managed. What gets managed, gets improved. ”

## OUR STRATEGIC PILLARS

-  **01** DIVERSIFY GATEWAYS
-  **02** STRENGTHEN CONNECTIVITY
-  **03** BUILD SMART INFRASTRUCTURE
-  **04** ENHANCE POLICY & REGULATION
-  **05** DRIVE DIGITAL TRANSFORMATION
-  **06** DEVELOP HUMAN CAPITAL & INSTITUTIONS



## THE IMPACT


MEASURING PROGRESS. TRANSFORMING NIGERIA.

-  **STRONGER NATIONAL SECURITY & SOVEREIGNTY**  
Reduced dependence, greater resilience.
-  **INCREASED TRADE & GLOBAL COMPETITIVENESS**  
Better connectivity, bigger market access.
-  **JOBS, INCLUSION & ECONOMIC PROSPERITY**  
More opportunities, shared growth.
-  **SUSTAINABLE & CLIMATE-RESILIENT INFRASTRUCTURE**  
Greener corridors, lasting impact.
-  **A RESILIENT NIGERIA. A PROSPEROUS FUTURE.**  
Built today. Secured tomorrow.

## ENABLERS FOR SUCCESS

-  **STRONG POLITICAL WILL & LEADERSHIP**
-  **PUBLIC-PRIVATE COLLABORATION**
-  **EFFECTIVE POLICY & REGULATION**
-  **DATA, INNOVATION & TECHNOLOGY**
-  **SKILLED WORKFORCE & INSTITUTIONS**
-  **SUSTAINED INVESTMENT**

## OUR COMMITMENT

 We measure. We manage. We transform. For a resilient logistics ecosystem.



## SECTION V

Building the Nigerian  
Resilient Logistics Ecosystem

# STRATEGIC OUTCOMES: A RESILIENT NIGERIA, CONNECTED GLOBALLY

Turning Strategy into Prosperity. Delivering Impact for Generations.

“ Resilience is not the absence of challenges; it is the capacity to thrive despite them. ”

### OUR TRANSFORMATION JOURNEY



01

**STABILIZE**  
2025 – 2026

Build the Foundation  
for Reliability



02

**DIVERSIFY**  
2026 – 2028

Expand Capacity and  
Reduce Vulnerabilities



03

**INTEGRATE**  
2028 – 2030

Connect Systems  
and Optimize Flows



04

**LEAD**  
2030 & BEYOND

Drive Growth and  
Global Competitiveness



### OUR DESTINATION

A Resilient, Competitive  
and Sovereign Nigeria

### THE DIFFERENCE WE WILL MAKE



**Stronger National  
Security & Sovereignty**  
Secure supply chains.  
Reduced dependence.



**More Competitive  
Global Presence**  
Better connectivity.  
Greater market access.



**Jobs, Inclusion &  
Shared Prosperity**  
New opportunities.  
Stronger communities.



**Sustainable & Climate-  
Resilient Infrastructure**  
Greener corridors.  
Lasting impact.



**Efficient Operations**  
Lower Costs  
Reduced delays.  
Higher productivity.



**A Better Quality  
of Life for All**  
Reliable services.  
Improved livelihoods.

### OUR SUCCESS WILL BE MEASURED BY



Cargo Throughput  
**+70%**  
by 2030



Port Connectivity  
Index  
**+50%**  
by 2030



Cargo Dwell  
Time  
**-30%**  
by 2030



LPI Ranking  
**Top 50**  
by 2030



Logistics Cost  
as % of GDP  
**-25%**  
by 2030



CONNECTED TODAY. COMPETITIVE TOMORROW. PROSPEROUS ALWAYS.

# OUR PATH. OUR FUTURE.

A resilient logistics ecosystem is the backbone of a prosperous, competitive and sovereign Nigeria.

The time to act is now. The future is ours to build.



## KEY TAKEAWAYS



**Resilience is Our Foundation**  
Building systems that withstand shocks and adapt to change.



**Connectivity is Our Advantage**  
Integrated infrastructure unlocking trade, markets and opportunities.



**Innovation is Our Differentiator**  
Digitalization and data driving efficiency, transparency and growth.



**People are Our Strength**  
Investing in skills, institutions and partnerships to deliver impact.



**Action is Our Commitment**  
From strategy to execution—measurable results, lasting legacy.



## OUR VISION

“ *A connected, competitive and resilient Nigeria—where logistics power prosperity, strengthen sovereignty and elevate the lives of every citizen.* ”



STRONGER  
ECONOMY



SECURE  
NATION



PROSPEROUS  
PEOPLE



## OUR CALL TO ACTION



**LEAD WITH PURPOSE**  
Champion this vision at every level and in every decision.



**COLLABORATE FOR IMPACT**  
Stronger together—government, private sector, communities and global partners.



**INNOVATE FEARLESSLY**  
Embrace new ideas, new technologies and new ways of doing business.



**EXECUTE WITH EXCELLENCE**  
Turn plans into results. Measure progress. Deliver value.



**BUILD FOR GENERATIONS**  
Leave a legacy of resilience, prosperity and national pride.



TOGETHER, WE WILL BUILD  
**A RESILIENT LOGISTICS ECOSYSTEM  
THAT POWERS A GREATER NIGERIA.**



**RESILIENT**  
We build  
with strength.



**CONNECTED**  
We grow  
together.



**COMPETITIVE**  
We lead  
with excellence.



**SOVEREIGN**  
We stand  
with pride.



**PROSPEROUS**  
We thrive  
together.

Today's Actions. Tomorrow's Prosperity. A Legacy for Generations.

# LOGISTICS: A STRATEGIC NATIONAL CAPABILITY

Logistics is the connective tissue of the economy and the enabler of national security, prosperity and resilience.



When logistics is strong, the nation is strong.  
When logistics fails, the nation is vulnerable.

# LOGISTICS: A PILLAR OF NATIONAL POWER



# LOGISTICS PERFORMANCE INDEX (LPI): A MEASURE OF NATIONAL COMPETITIVENESS

## THE LPI BENCHMARKS

- Customs
- Infrastructure
- International Shipments
- Logistics Competence
- Tracking & Tracing
- Timeliness



Every 1-point improvement in LPI can increase trade by up to 2.5%

Source: World Bank, Connecting to Compete 2023

## LOGISTICS ENABLES SECTORS THAT DRIVE NIGERIA'S FUTURE

AGRICULTURE & FOOD SYSTEMS	ENERGY & NATURAL RESOURCES	INDUSTRY & MANUFACTURING	TRADE & COMMERCE	SERVICES & DIGITAL ECONOMY
<ul style="list-style-type: none"> <li>Efficient transport from farms</li> <li>Cold chain preservation</li> <li>Reduced waste</li> <li>Stable food supply &amp; prices</li> </ul>	<ul style="list-style-type: none"> <li>Secure movement of crude, LNG, products</li> <li>Pipeline, port and depot efficiency</li> <li>Strategic reserves management</li> </ul>	<ul style="list-style-type: none"> <li>Reliable inbound supplies</li> <li>Efficient outbound distribution</li> <li>Lower production costs</li> <li>Enhanced competitiveness</li> </ul>	<ul style="list-style-type: none"> <li>Efficient ports and corridors</li> <li>Multimodal connectivity</li> <li>Trade facilitation</li> <li>AfCFTA readiness</li> </ul>	<ul style="list-style-type: none"> <li>E-commerce fulfilment</li> <li>Last-mile delivery</li> <li>SMEs market access</li> <li>Jobs and innovation</li> </ul>

Strong logistics multiplies productivity across the entire economy.

## LOGISTICS IS NATIONAL SECURITY

A nation cannot be secure if it cannot move critical resources and respond effectively to threats and crises.

MILITARY MOBILITY	STRATEGIC STOCKPILES	BORDER SECURITY	EMERGENCY RESPONSE	CRITICAL INFRASTRUCTURE PROTECTION
Rapid deployment of forces, equipment and supplies.	Secure storage and distribution of critical commodities.	Effective logistics strengthens surveillance and control.	Timely delivery of relief materials saves lives.	Resilient logistics safeguards national infrastructure and continuity.

Logistics resilience is a force multiplier for national security.

## THE HORMUZ LESSON FOR NIGERIA

- Global chokepoints can disrupt supply chains overnight.
- Dependence without logistics resilience is a strategic risk.
- Supply chain sovereignty is built, not wished for.
- Resilient logistics is the foundation of a secure and prosperous Nigeria.



## BUILDING A RESILIENT NIGERIAN LOGISTICS ECOSYSTEM

<p><b>INVEST IN INFRASTRUCTURE</b> Ports, rail, roads, dry ports, ICDS.</p>	<p><b>DIGITALISE AND INNOVATE</b> Data, visibility, automation, intelligence.</p>	<p><b>REFORM POLICIES AND PROCESSES</b> Simplify, harmonise, facilitate trade.</p>	<p><b>BUILD CAPACITY AND TALENT</b> Skilled workforce drives performance.</p>	<p><b>PROMOTE SUSTAINABLE LOGISTICS</b> Green, safe and resilient operations.</p>
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STRONG POLICIES. STRATEGIC INVESTMENT. EFFECTIVE IMPLEMENTATION. A NATION THAT MOVES, PROGRESSES.

## THE CASE FOR RECOGNITION

Logistics must be recognised as critical national infrastructure and a core pillar of national development policy.

**RECOGNISE. PRIORITISE. INVEST. TRANSFORM.**

A resilient logistics ecosystem builds a stronger, safer, more prosperous Nigeria.



# LOGISTICS ENABLES SECTORS THAT DRIVE NIGERIA'S FUTURE

<h3>AGRICULTURE &amp; FOOD SYSTEMS</h3>  <ul style="list-style-type: none"> <li>• Efficient transport from farms</li> <li>• Cold chain preservation</li> <li>• Reduced waste</li> <li>• Stable food supply &amp; prices</li> </ul>	<h3>ENERGY &amp; NATURAL RESOURCES</h3>  <ul style="list-style-type: none"> <li>• Secure movement of crude, LNG, products</li> <li>• Pipeline, port and depot efficiency</li> <li>• Strategic reserves management</li> </ul>	<h3>INDUSTRY &amp; MANUFACTURING</h3>  <ul style="list-style-type: none"> <li>• Reliable inbound supplies</li> <li>• Efficient outbound distribution</li> <li>• Lower production costs</li> <li>• Enhanced competitiveness</li> </ul>	<h3>TRADE &amp; COMMERCE</h3>  <ul style="list-style-type: none"> <li>• Efficient ports and corridors</li> <li>• Multimodal connectivity</li> <li>• Trade facilitation</li> <li>• AfCFTA readiness</li> </ul>	<h3>SERVICES &amp; DIGITAL ECONOMY</h3>  <ul style="list-style-type: none"> <li>• E-commerce fulfilment</li> <li>• Last-mile delivery</li> <li>• SMEs market access</li> <li>• Jobs and innovation</li> </ul>
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 **Strong logistics multiplies productivity across the entire economy.**

# LOGISTICS IS NATIONAL SECURITY

A nation cannot be secure if it cannot move critical resources and respond effectively to threats and crises.

<h3>MILITARY MOBILITY</h3>  <p>Rapid deployment of forces, equipment and supplies.</p>	<h3>STRATEGIC STOCKPILES</h3>  <p>Secure storage and distribution of critical commodities.</p>	<h3>BORDER SECURITY</h3>  <p>Effective logistics strengthens surveillance and control.</p>	<h3>EMERGENCY RESPONSE</h3>  <p>Timely delivery of relief materials saves lives.</p>	<h3>CRITICAL INFRASTRUCTURE PROTECTION</h3>  <p>Resilient logistics safeguards national infrastructure and continuity.</p>
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 **Logistics resilience is a force multiplier for national security.**

## THE HORMUZ LESSON FOR NIGERIA

-  Global chokepoints can disrupt supply chains overnight.
-  Dependence without logistics resilience is a strategic risk.
-  Supply chain sovereignty is built, not wished for.
-  Resilient logistics is the foundation of a secure and prosperous Nigeria.



## BUILDING A RESILIENT NIGERIAN LOGISTICS ECOSYSTEM

 <p><b>INVEST IN INFRASTRUCTURE</b></p> <p>Ports, rail, roads, dry ports, ICDs.</p>	 <p><b>DIGITALISE AND INNOVATE</b></p> <p>Data, visibility, automation, intelligence.</p>	 <p><b>REFORM POLICIES AND PROCESSES</b></p> <p>Simplify, harmonise, facilitate trade.</p>	 <p><b>BUILD CAPACITY AND TALENT</b></p> <p>Skilled workforce drives performance.</p>	 <p><b>PROMOTE SUSTAINABLE LOGISTICS</b></p> <p>Green, safe and resilient operations.</p>
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A resilient logistics ecosystem builds a stronger, safer, more prosperous Nigeria.



**LOGISTICS IS NOT JUST A SECTOR.**



**IT IS A STRATEGIC NATIONAL ASSET.**



**A STRONGER LOGISTICS ECOSYSTEM. A STRONGER NIGERIA.**



## KEY TAKEAWAY

# NIGERIA'S LOGISTICS REALITY



“Lagos is not merely a port cluster.  
**It is a strategic national asset**

whose resilience directly influences economic stability, trade competitiveness, and national security.

”

## WHAT THIS MEANS FOR NIGERIA



### STRATEGIC IMPORTANCE

Gateway to Africa and the world.



### ECONOMIC IMPACT

Drives GDP growth, jobs and investment.



### NATIONAL SECURITY

Secures supply chains and critical flows.



### TRADE COMPETITIVENESS

Enhances export capacity and global relevance.



### SOCIAL WELL-BEING

Improves livelihoods and inclusion.



### SUSTAINABLE FUTURE

Builds resilience for generations.



RESILIENT  
CONNECTED  
COMPETITIVE  
SECURE



## OUR CALL TO ACTION

- ✓ Invest in infrastructure
- ✓ Reform policy & governance
- ✓ Strengthen institutions
- ✓ Embrace innovation
- ✓ Build partnerships
- ✓ Deliver resilience



A Resilient Lagos. A Prosperous Nigeria.  
**Stronger Logistics. Stronger Nation.**

*Together, we build*  
a Resilient Nigeria.



# LOGISTICS: THE INVISIBLE INFRASTRUCTURE OF NATIONAL POWER

Behind every strong economy, secure nation and resilient society is a logistics system that connects, enables and delivers.



## ECONOMIC GROWTH

- Enables trade, investment and job creation
- Lowers cost of doing business
- Improves productivity and competitiveness
- Drives industrialization and innovation



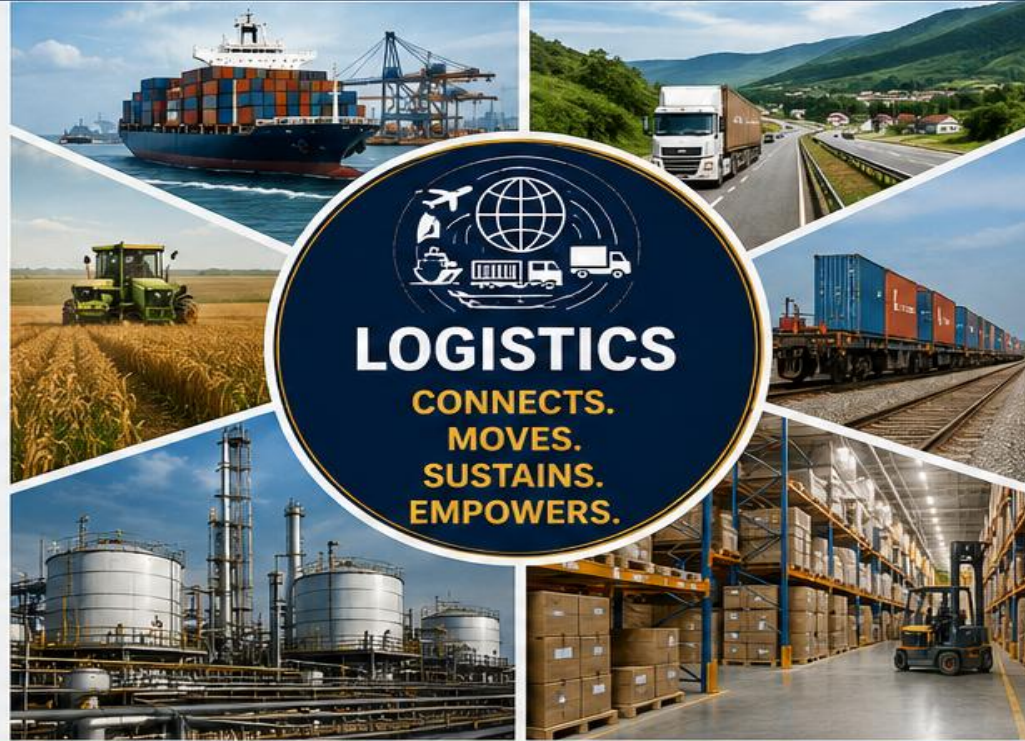
## FOOD SECURITY

- Moves food from farms to families
- Reduces post-harvest losses
- Ensures availability, affordability and stability of food supply
- Strengthens rural and market connectivity



## ENERGY SECURITY

- Ensures reliable supply of fuel and energy
- Supports import, storage and distribution of critical resources
- Strengthens strategic reserves and supply diversification
- Powers industries and households



## NATIONAL SECURITY

- Enables military mobility and rapid deployment
- Supports border security and surveillance
- Facilitates strategic stockpiles and critical supply chains
- Strengthens emergency and disaster response



## INDUSTRIAL COMPETITIVENESS

- Delivers raw materials to industries
- Moves finished goods to domestic and global markets
- Supports manufacturing growth and export competitiveness
- Reduces production and logistics costs



## GLOBAL COMPETITIVENESS

- Improves Logistics Performance Index (LPI)
- Enhances trade facilitation and connectivity
- Strengthens integration into global and regional value chains
- Attracts investment and builds international confidence

## LOGISTICS ENABLERS



**INFRASTRUCTURE**  
Ports, roads, rail, airports, dry ports



**DIGITALIZATION**  
Visibility, data, automation, intelligence



**POLICY & INSTITUTIONS**  
Enabling policies, regulation, coordination, public-private partnership



**SKILLED PEOPLE**  
Capacity, innovation and operational excellence



**SUSTAINABILITY**  
Green, safe and resilient logistics operations



**RISK & RESILIENCE**  
Redundancy, security, adaptability and business continuity



## THE BOTTOM LINE

A nation may have resources, but without logistics power, those resources remain locked. Logistics is the invisible infrastructure that turns potential into prosperity and ensures security, resilience and sustainable national development.



**STRONG LOGISTICS. STRONG NATION. RESILIENT TODAY. PROSPEROUS TOMORROW.**







**NATIONAL SECURITY**  
Strategic mobility,  
defence readiness and  
border protection



**FOOD SECURITY**  
Reliable supply chains  
from farm to market  
and reduced losses



**ENERGY SECURITY**  
Reliable and efficient  
energy supply  
across the nation




**LOGISTICS**  
The Strategic Enabler  
of National Power



**ECONOMIC GROWTH**  
Lower costs, higher  
productivity and  
job creation



**TRADE GROWTH**  
Competitive trade,  
export expansion and  
market access



**RESILIENCE**  
Strong, agile and  
adaptive supply chains  
for enduring prosperity



**LOGISTICS POWERS EVERY DIMENSION  
OF NATIONAL STRENGTH**



## RESOURCES

Responsible sourcing and efficient allocation of natural and strategic resources.



## PRODUCTION

Seamless movement of inputs to production and goods to market with efficiency.



## GOVERNMENT INSTITUTIONS

Policy, regulation and infrastructure that enable a strong logistics ecosystem.



# LOGISTICS

CONNECTS.  
MOVES.  
SUSTAINS.  
EMPOWERS.

## MARKETS

Connecting products to markets and customers locally, regionally and globally.



## COMMUNITIES

Improving lives by ensuring essential goods and services reach every community.



## GLOBAL TRADE

Efficient connections across borders that strengthen Nigeria's participation in global trade.



**LOGISTICS CONNECTS, MOVES, SUSTAINS AND EMPOWERS.**



# LOGISTICS: A STRATEGIC NATIONAL CAPABILITY



## RESOURCES

Reliable access to the raw materials that drive our economy.



## GOVERNMENT INSTITUTIONS

Strong policies and institutions that enable and regulate trade and movement.



## GLOBAL PARTNERS

Seamless collaboration and connections across borders to create shared prosperity.



## PRODUCTION

Efficient movement of inputs to production and goods to market with reliability and speed.



## MARKETS

Connecting goods to markets and customers locally, regionally and globally.



## COMMUNITIES

Improving lives by ensuring essential goods and services reach every community.



**LOGISTICS CONNECTS.  
MOVES. SUSTAINS. EMPOWERS.**



**When logistics is strong, the nation is strong.  
When logistics fails, the nation is vulnerable.**





# LOGISTICS ENABLES NIGERIA'S FUTURE ECONOMY



CONNECTING RESOURCES. POWERING SECTORS. BUILDING PROSPERITY.



## AGRICULTURE & FOOD SYSTEMS



- Farm transport
- Cold chain preservation
- Reduced waste
- Stable food supply



## ENERGY & NATURAL RESOURCES



- Crude and LNG movement
- Pipeline and port efficiency
- Strategic reserve management



## INDUSTRY & MANUFACTURING



- Reliable inbound supplies
- Efficient outbound distribution
- Lower production costs



## TRADE & COMMERCE



- Efficient ports and corridors
- Multimodal connectivity
- AfCFTA readiness



## DIGITAL ECONOMY



- E-commerce fulfilment
- Last-mile delivery
- SME market access



STRONG LOGISTICS. STRONG SECTORS. **STRONGER NIGERIA.**



# WHY LOGISTICS PERFORMANCE MATTERS

## KEY LPI DRIVERS



CUSTOMS



INFRASTRUCTURE



INTERNATIONAL SHIPMENTS



LOGISTICS COMPETENCE



TRACKING & TRACING



TIMELINESS



## BENEFITS OF HIGHER LPI SCORES



Lower trade costs



Faster market access



Stronger supply chains



Increased exports



More investment



Greater economic growth



Enhanced resilience



LOGISTICS PERFORMANCE IS A MEASURE OF **NATIONAL COMPETITIVENESS.**



# LOGISTICS: A PILLAR OF NATIONAL POWER



## ECONOMIC PROSPERITY

Trade, jobs,  
productivity



## FOOD SECURITY

Farm-to-market  
connectivity



## ENERGY SECURITY

Reliable fuel and  
energy supply



## NATIONAL SECURITY

Mobility and  
strategic readiness



## LOGISTICS COMPETITIVENESS

Lower costs and  
stronger supply chains

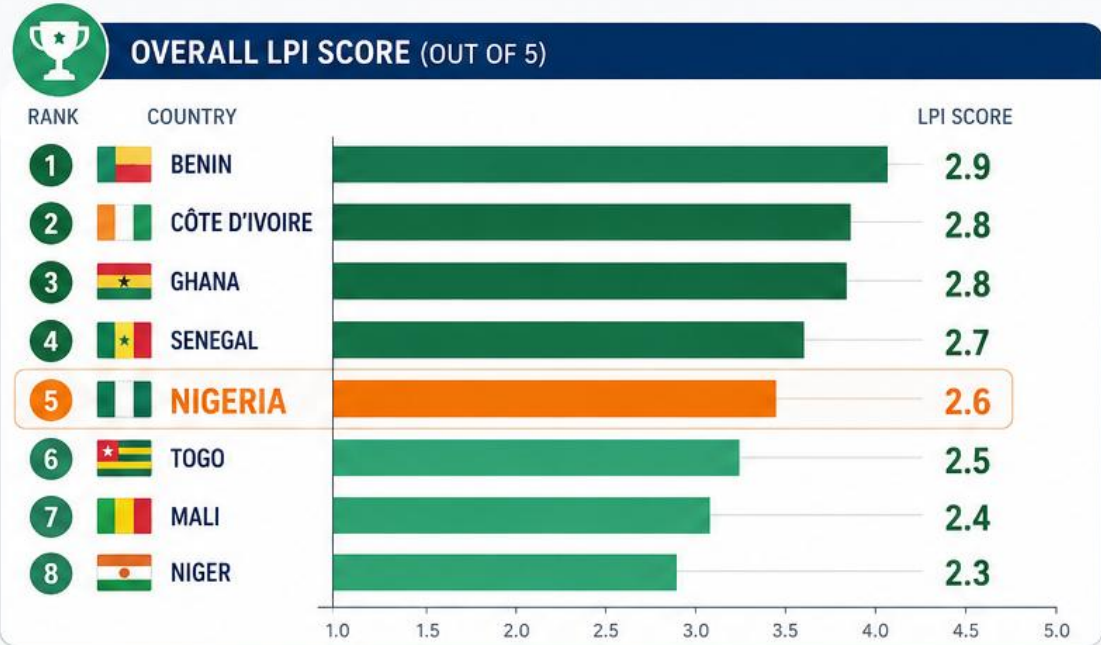


A RESILIENT LOGISTICS ECOSYSTEM  
DRIVES NATIONAL POWER AND PROSPERITY.



# NIGERIA ON THE WORLD BANK LOGISTICS PERFORMANCE INDEX (LPI) 2023

## NIGERIA VS OTHER WEST AFRICAN COUNTRIES



Nigeria's LPI score of **2.6** places it **5th** in West Africa, below the top performers but above the lower tier.



### WHAT IS THE LPI?

The Logistics Performance Index (LPI) measures countries' logistics performance across 6 key dimensions on a scale of 1 (low) to 5 (high).



**IMPLICATION:** To improve trade competitiveness and reduce logistics costs, Nigeria must close gaps in infrastructure, customs efficiency, and tracking & tracing to reach best-in-class performance.



# LOGISTICS

(NATIONAL STRATEGIC CAPABILITY)



CONNECTING RESOURCES.  
MOVING VALUE.  
SECURING THE NATION.  
EMPOWERING PROGRESS.



## ECONOMIC PROSPERITY

- Enables trade & investment
- Lowers logistics costs
- Drives productivity & industrial growth
- Creates jobs & shared value



## FOOD SECURITY

- Moves food from farms to families
- Reduces post-harvest losses
- Ensures availability & affordability
- Strengthens rural connectivity



## ENERGY SECURITY

- Ensures reliable supply of fuel & energy
- Supports strategic reserves
- Enables distribution & diversification
- Powers industries & households



## NATIONAL SECURITY

- Enables military mobility & rapid response
- Secures borders & critical supply chains
- Supports emergency & disaster response
- Protects critical infrastructure



## GLOBAL COMPETITIVENESS

- Improves LPI performance
- Enhances trade facilitation & connectivity
- Attracts investment
- Strengthens integration in global value chains

# NATIONAL RESILIENCE



STRONGER ECONOMY



SECURE FOOD FUTURE



RELIABLE ENERGY



SAFE & SECURE NATION



SUSTAINABLE PROSPERITY



# LOGISTICS SYSTEMS CAPABILITY THEORY (LSC)

A Systems–Institutional Capability Perspective on Logistics Performance

## 1. THEORY PREMISE

Logistics performance is determined not by individual assets alone, but by the integrated capability of the logistics system to mobilize, synchronize, govern, adapt and transform resources across networks. Logistics systems capability enables the reliable, efficient, safe, secure, resilient and sustainable flow of goods, services, information, knowledge and people to where they are needed.

### Core Proposition

Logistics Performance (LP) is a function of the level and maturity of Logistics Systems Capability (LSC).

$$LP = f(LSC)$$

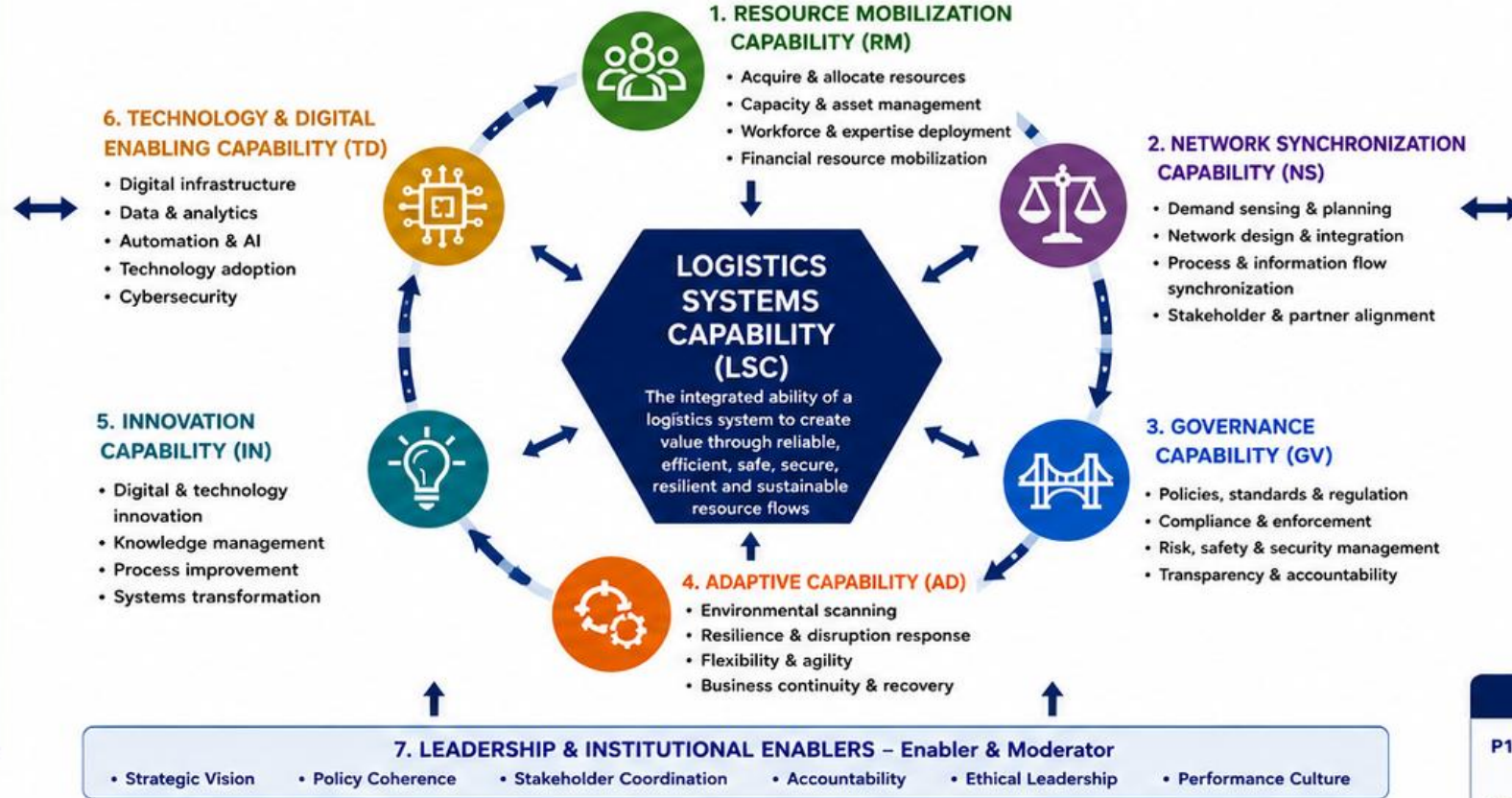
$$LSC = f(RM, NS, GV, AD, IN)$$

moderated by EC and GC

Where:

RM = Resource Mobilization Capability  
 NS = Network Synchronization Capability  
 GV = Governance Capability  
 AD = Adaptive Capability  
 IN = Innovation Capability  
 EC = Economic Context  
 GC = Global Connectivity

## 2. THE LOGISTICS SYSTEMS CAPABILITY (LSC!) FRAMEWORK



## 3. CONTEXTUAL INFLUENCERS (EXTERNAL ENVIRONMENT)

**ECONOMIC CONTEXT (EC)**

- Economic Stability
- Trade Structure
- Investment Climate
- Industrial Base

**GLOBAL CONNECTIVITY (GC)**

- Regional Integration
- Global Trade Links
- Participation in Value Chains
- Access to Markets

### LEGEND

→ Direct Influence  
 ↔ Two-way Interaction  
 - - - Moderating Influence  
 ···· Contextual Influence

## 5. KEY PROPOSITIONS

- P1:** Higher logistics systems capability leads to superior logistics performance.
- P2:** Systems with strong governance and resilience perform better under uncertainty.
- P3:** Capabilities interact synergistically; weakness in one capability constrains the whole system.
- P4:** Leadership and institutional enablers strengthen capability integration and outcomes.
- P5:** Continuous learning and innovation drive sustained capability growth over time.

## 4. LOGISTICS SYSTEMS PERFORMANCE OUTCOMES

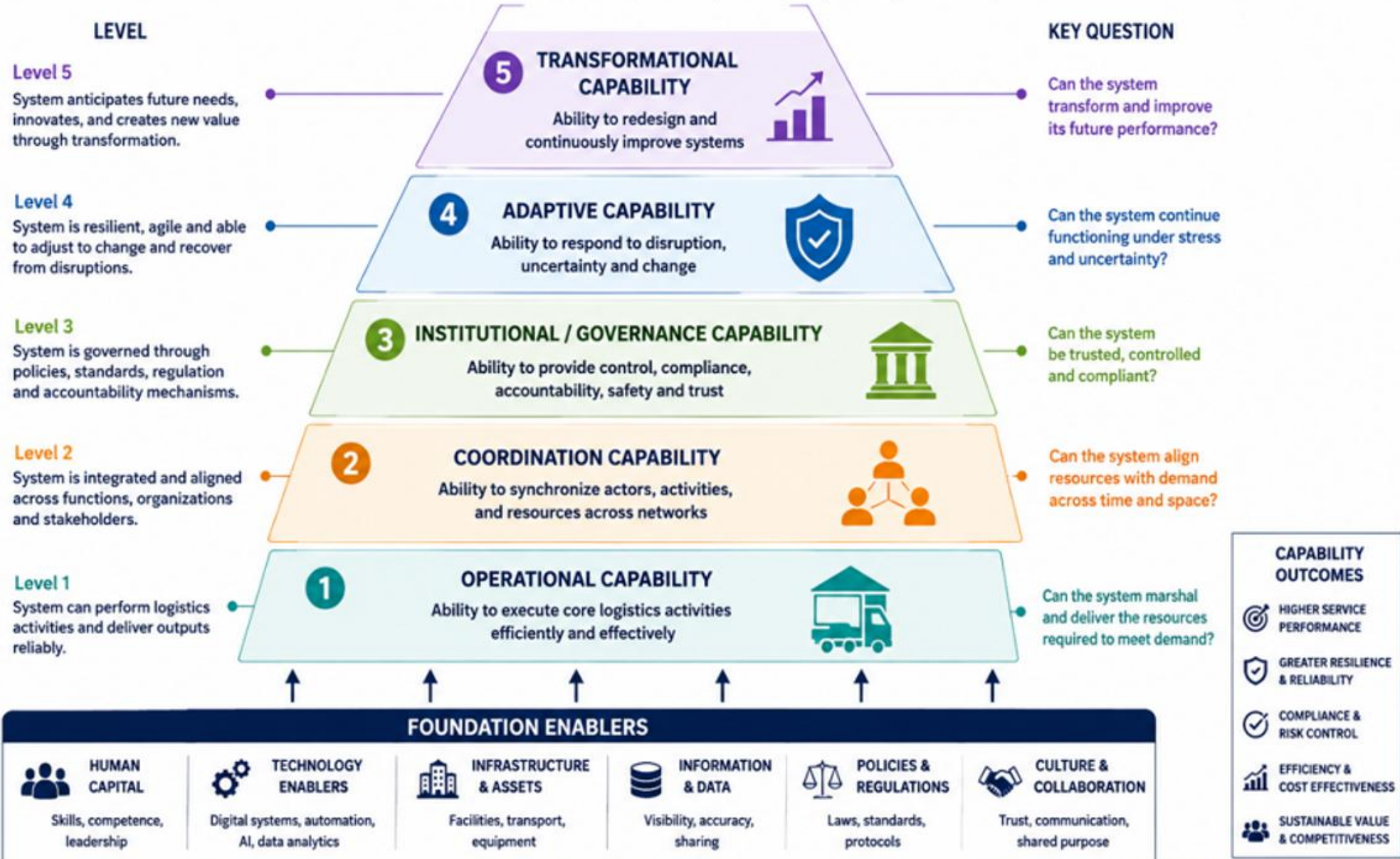


## THEORY IMPLICATION

The LSCT explains why countries and organizations with similar infrastructure can achieve different logistics outcomes. Differences in how systems mobilize resources, synchronize networks, govern operations, adapt to disruption and innovate create different levels of logistics performance, competitiveness and sustainable development.

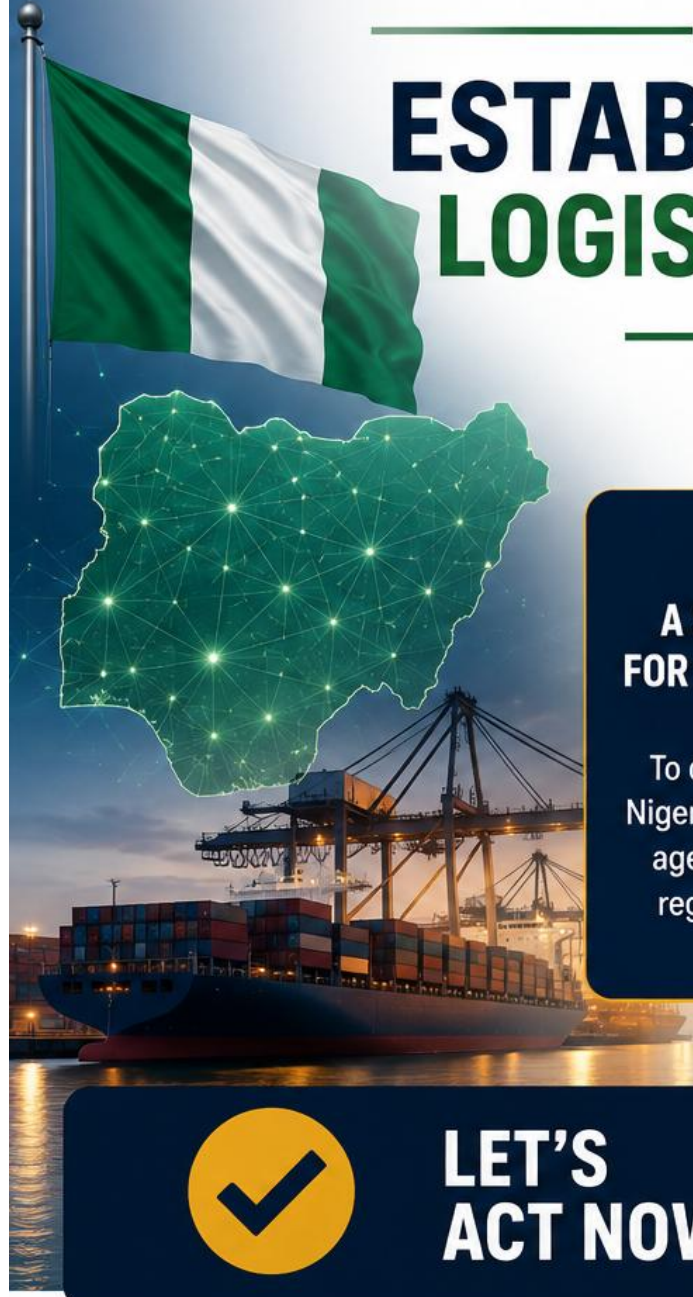
# THE LOGISTICS SYSTEMS CAPABILITY PYRAMID

A Hierarchical Model of Logistics Systems Capability Maturity



These Capabilities Working Together Determine the Overall Performance, Resilience and Value Creation of the Logistics System

# THE WAY FORWARD: ESTABLISH THE MINISTRY OF LOGISTICS AND SUPPLY CHAIN IN NIGERIA



## A STRATEGIC MINISTRY FOR A COMPETITIVE NIGERIA

To design, coordinate and drive Nigeria's logistics and supply chain agenda for national prosperity, regional leadership and global competitiveness.

### WHY NIGERIA NEEDS THIS MINISTRY



#### STRATEGIC COORDINATION

Unify policies and institutions to drive an integrated logistics and supply chain ecosystem.



#### ECONOMIC GROWTH

Reduce costs, boost trade, attract investment and create millions of jobs.



#### RESILIENCE & SECURITY

Strengthen national security and ensure continuity in times of disruption.



#### REGIONAL LEADERSHIP

Position Nigeria as West Africa's logistics hub and gateway to Africa.



#### SUSTAINABLE FUTURE

Promote green logistics, innovation and digital transformation.



**LET'S  
ACT NOW!**

A dedicated Ministry.  
**A connected Nigeria.**  
A prosperous future.



**ESTABLISH THE  
MINISTRY OF  
LOGISTICS AND  
SUPPLY CHAIN NOW.**

STRONG LOGISTICS. STRONG SUPPLY CHAINS. STRONGER NIGERIA.



# Thank You

TOGETHER, LET'S BUILD A RESILIENT,  
CONNECTED AND **PROSPEROUS NIGERIA.**



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STRONG LOGISTICS.  
STRONG SUPPLY CHAINS.  
**STRONGER NIGERIA.**

