

A port system without a logistics system

Why Nigerian cargo sits 21 days at port while Cotonou clears in four, and what an integrated platform would actually look like

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THE NUMBERS BEHIND THE GAP

21d

Avg. Nigerian port dwell time, 2025 (475% above global avg.)

92%

Inland freight moved by road; rail at 1.2%

73%

Of dwell time is documentation, not physical handling

+25%

Cargo throughput growth in 2025 alone (129.3M MT)

Nigeria built ports, but never built the integrated logistics ecosystem they need to function. Cargo arrives at Lekki and Apapa in line with global standards, then enters a system that moves it inland by road only, processes its paperwork by hand, and queues it through five regulatory agencies in series. The result is a 21-day dwell time, \$13.4 billion in road maintenance backlog, and a freight cost premium of 30 percent versus regional peers. The diagnosis below maps six structural gaps and sketches the integrated platform that would close them, drawing on the Jebel Ali, Tanger Med, and Singapore models.

EXECUTIVE SUMMARY

The gap is a system design problem, not a port problem

Nigerian cargo flows have grown 25% in the last year alone. The infrastructure that should move them has not.

Nigeria's maritime logistics gap is best understood as a missing integrated platform. Lekki Deep Sea Port, commissioned in April 2023, handles 40.6% of national cargo throughput using super-post-Panamax cranes. The port itself works. But the moment cargo lands, it enters a system designed to absorb friction at every link: 92% of inland freight moves by road, rail handles 1.2%, the National Single Window for customs documentation only launched its Phase 1 in March 2026, and the federal government's own road-maintenance backlog stands at ₦12 trillion. Vice President Shettima publicly committed in October 2025 to cutting cargo dwell time from 21 days to under 7 by end of 2026, a target that requires every link in the chain to compress simultaneously, not just port operations.

"73 percent of cargo dwell time is transaction dwell time. The primary bottleneck is not physical infrastructure alone; it is process inefficiency."

Wale Edun · Federal Minister of Finance, 2025

01. The dwell-time gap defines everything else · (03)

21 days vs Cotonou's 4. Process inefficiency drives 73% of the delay

02. Hinterland connectivity is the structural bottleneck · (04)

Rail at 1.2% modal share. Road at 92%. The Lagos-Kano corridor moves 39.6% of national tonnage on degraded asphalt

03. The cost premium is structural, not cyclical · (06)

Logistics costs 30% above regional peers. ₦12T road backlog. ₦100k checkpoint extortion per trip

04. Throughput is growing faster than the system can absorb · (07)

129.3M MT in 2025. Transshipment up 205.8% YoY. Capacity is being added; coordination is not

05. The maritime services and asset gap · (08)

Foreign shipping lines capture the value. Cabotage enforcement weak. Bunkering and ship repair underbuilt

06. The integrated platform, what it actually looks like · (09)

Port → rail → dry port → industrial zone, under one customs bond. Drawn from Jebel Ali, Tanger Med, Singapore

07. What it would take, and what it would unlock · (11)

Three preconditions, three milestones, one structural prize

01. THE DWELL-TIME GAP

Cargo sits in Nigerian ports five times longer than the regional benchmark

Twenty-one days at Apapa or Tin Can. Four days in Cotonou, six in Tema. The arithmetic of Nigerian trade competitiveness starts here.

Nigerian cargo dwell time averages 18 to 21 days in 2025, against a global benchmark of four days and regional peers Cotonou (4 days) and Tema (5 to 7 days). The Federal Ministry of Finance puts the gap at 475% above international norms. The federal government’s own response, announced by Vice President Shettima at the 2025 PEBEC Awards, targets sub-seven days by the end of 2026. Achievement of that target requires breaking apart the components of the delay rather than treating it as a single problem.

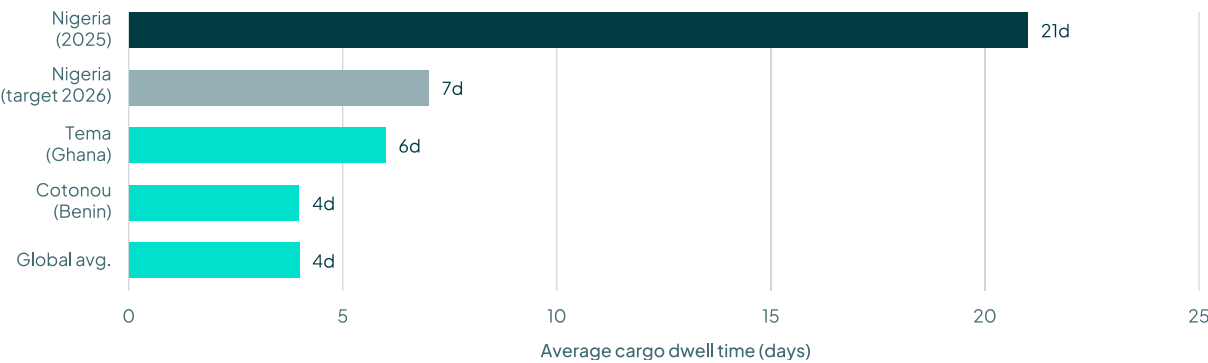


Figure 1 · The dwell-time gap is structural, not marginal. Nigerian cargo waits 21 days at port versus 4 in neighbouring Benin. Source: Federal Ministry of Finance, 2025; PEBEC port efficiency benchmarks.

Process, not concrete

The composition of the delay tells the operational story. Of the 21-day average, **73% is transaction dwell time**: documentation, customs processing, regulatory approvals from Customs, NAFDAC, SON, NPA, and the Nigeria Police. Only 27% of dwell time reflects physical cargo handling, terminal congestion, or vessel queues. Every importer dealing with Nigerian ports has watched a container clear handling in three days, then sit for two weeks waiting on a stamp. The bottleneck is sequential agency processing, not crane capacity.

The National Single Window (NSW), launched in Phase 1 in March 2026, is designed to attack exactly that 73% by harmonising documentation through a single digital portal. Whether it delivers depends on enforcement of interagency data sharing, a precondition that has historically been the system’s weakest point.

02. HINTERLAND CONNECTIVITY

Rail at 1.2%, road at 92%, the inland gap is the real constraint

Nigeria runs the most road-dependent inland freight system of any G20-aspiring economy. The cost shows up everywhere: in fuel, in insurance, in road repair, and in delivered prices.

The Nigerian Railway Corporation captures 1.2% of national freight tonnage. The remaining 92% moves by road, against an EU benchmark of roughly 50% road and 18% rail. Inland waterways, despite the Niger and Benue rivers running through the country’s length and width, account for 1.5% of freight. The structural reason is not geography but rolling stock: NRC currently runs 50 to 100 containers daily on the Lagos–Kano narrow-gauge line, against an installed capacity that, properly resourced, could move several thousand. Rail freight revenue grew 89.6% YoY in Q3 2024, but from a base of ₦412 million per quarter, small enough that the percentage flatters the absolute volume.

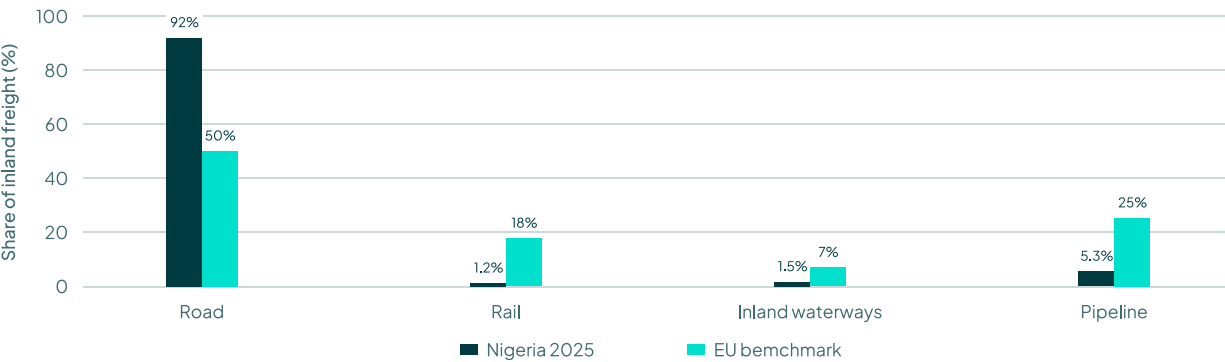


Figure 2 · The modal share gap is the largest in any major emerging-market economy. Nigerian inland freight is 92% road; the EU benchmark is 50%. Source: NRC, NBS, Eurostat 2024.

The Lagos–Kano corridor carries the system

A single corridor, Lagos to Kano, accounts for 39.58% of national freight tonnage. That corridor is exposed at every chokepoint already documented: bandit activity along the A2 above Kaduna, illegal checkpoints adding ₦50,000 to ₦100,000 per trip, night curfews limiting asset utilisation to 55% of capacity, and average truck speeds below 30 km/h. The freight cost arithmetic is brutal. NRC charges ₦7.10 per tonne–km for dry goods by rail. Road haulage costs range from ₦15.60 per km at long distances to ₦59.40 per km at short ones, between two and eight times the rail rate. Yet shippers continue to use road because rail rolling stock is unreliable, transit times are unpredictable, and last-mile connection from rail terminals to end customers does not exist.

Dry ports built, not used

Nigeria has built or commissioned at least seven inland dry ports: Kaduna, Kano, Funtua, Ibadan, Heipang (Jos), Isiala-Ngwa (Aba), and Maiduguri. Most operate at single-digit percentages of installed capacity. The reason is straightforward and structural: a dry port only works if cargo can be evacuated to it under bonded customs control, which requires seamless rail or sealed-truck movement from the seaport. Without the rail spur from Apapa operational at the necessary frequency, and without the customs bond regime extending inland, the dry ports become parking lots rather than alternative clearance points.

Nigeria operates a port system without a logistics system. Ports are entry points; the integrated logistics ecosystem behind them was never built.

Internal Framing · Revitau Leadership Review

Inland waterways: the unused asset

The Niger River runs from Kebbi in the northwest to the Atlantic at the Bight of Bonny. The Benue meets it at Lokoja. Together they offer roughly 4,000 km of potentially navigable inland waterway, used today at less than 7% of capacity. The National Inland Waterways Authority (NIWA) has dredged stretches between Onitsha, Lokoja, and Baro seasonally. But the absence of dedicated barge fleets, modern river ports, and reliable seasonal navigation dredging has kept the modal share negligible. Where it does work, such as the Onne-Onitsha route for petroleum products, it offers cost advantages of roughly 60% versus road equivalents.

What the inland system needs

- Apapa rail spur completion: direct rail evacuation from container terminals, not just truck out + train in
- Bonded corridor regime: extending customs bond from seaport to dry port without break of seal
- Rolling stock leasing market: private operators currently cannot finance wagons because of NRC monopoly assumptions operate
- Inland waterways concession: seasonal dredging contracted to a private operator with port-call service obligations

Each of these is solvable. None requires a green-field megaproject. All four together would shift inland freight modal share from 1.2% rail to 8 to 12% within five years, measurable through NRC's quarterly tonnage filings.

03. THE COST GAP

Logistics cost a 30% premium on top of regional peers

The premium is not a single line item. It compounds across documentation, haulage, demurrage, and informal extraction. Each is fixable; together they price Nigerian exporters out of African markets they should dominate.

The cost of clearing goods through Nigerian ports runs roughly 30% higher than regional peers, the figure cited directly by Vice President Shettima in October 2025. Nigeria's Logistics Performance Index (World Bank LPI) rank sits near 88th globally. Import logistics can cost three to five times comparable markets per container, depending on route and clearance complexity. The arithmetic translates directly into export competitiveness: Nigerian goods landed in Côte d'Ivoire, Ghana, or Cameroon carry a delivered-price premium that erases tariff advantages even under AfCFTA.

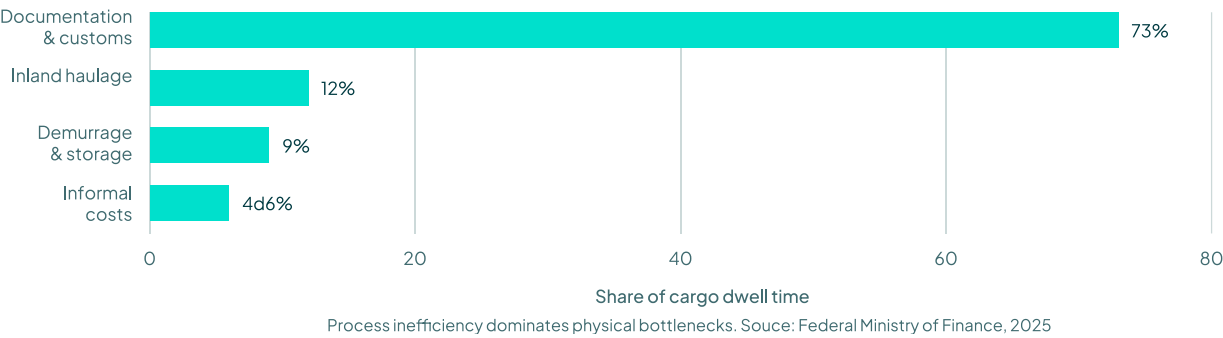


Figure 3 · Documentation dwarfs every other cost driver. 73% of cargo dwell time is process, not physical handling, demurrage, or informal costs. Source: Federal Ministry of Finance, 2025.

The four cost amplifiers

The cost premium decomposes into four amplifiers. **Documentation and customs** accounts for 73% of dwell time and the bulk of the cash cost: agent fees, demurrage during paperwork delays, and the cost of capital tied up in stranded inventory. **Inland haulage** adds 18 to 20% to delivered cost on the Lagos-Kano axis through diesel spikes, security escorts, and asset under-utilisation. **Demurrage and storage** accumulates at ₦200,000+ per container during the 2 to 7 day truck queues at Apapa. **Informal costs** add ₦50,000 to ₦100,000 per trip in checkpoint extraction along the major corridors. The naira depreciation from ₦460/USD to over ₦1,500/USD across 2024 then inflates every dollar-denominated cost (parts, fuel, insurance) into the system.

04. THROUGHPUT OUTPACING THE SYSTEM

Cargo growth is outrunning the system’s capacity to absorb it

Nigerian ports moved 129.3 million metric tons in 2025, up 24.8% on 2024. Transshipment volume tripled. The infrastructure to move that growth inland did not.

Nigerian Ports Authority data for 2025 shows total cargo throughput at 129.3 million metric tons, up from 103.6 million in 2024, a 24.8% annual increase that NPA Managing Director Dr. Abubakar Dantsoho called one of the most significant in Nigerian maritime history. Containerised volume crossed 2.1 million TEUs (up 25.7%). Vessel calls reached 4,477, up nearly 12%. Most striking, transshipment containers grew 205.8% YoY as Lekki Deep Sea Port began serving as a regional hub for West and Central African ports, Togo, Benin, Ghana, Cameroon.

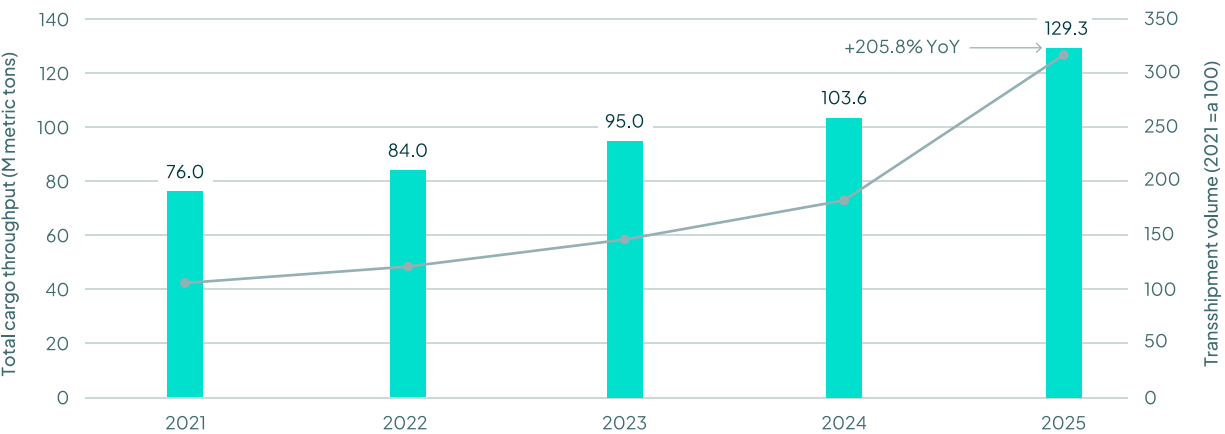


Figure 4 · Cargo throughput growth is accelerating, not levelling. The transshipment line shows Nigeria’s first emergence as a regional logistics hub, a role previously held by Lomé. Source: Nigerian Ports Authority 2025 annual report.

The capacity story is not just Lekki

The port concentration shift is structural. **Lekki Deep Sea Port handled 40.6% of national throughput in 2025**, against Tin Can 19.7%, Onne 19.1%, and Apapa 16.7%. Lekki and Onne now attract the largest vessels (gross registered tonnage of 55,712 and 53,022 respectively). For the first time in over a century, the Lagos Port Complex is not the dominant gateway. But the growth has nowhere to go inland: the Lagos–Kano narrow-gauge railway moves only 50 to 100 containers per day against the 2.1M TEU national handling. Every container Lekki adds either competes for Apapa-bound truck capacity or sits at port.

05. MARITIME SERVICES & ASSETS

Foreign shipping captures the value Nigerian trade generates

The fleet, the bunkering, the ship repair, the marine finance, the entire upstream of maritime trade is foreign-operated. Nigerian cargo pays in hard currency to foreign owners.

Nigeria operates one of the most import-dependent maritime trade economies in the G20-aspiring tier without a corresponding domestic shipping industry. Foreign shipping lines, Maersk, MSC, CMA CGM, Hapag-Lloyd, carry the overwhelming majority of containerised trade in and out of Nigerian ports. The Nigerian Cabotage Act 2003 was meant to reserve coastal trade for Nigerian-flagged vessels; in practice, ministerial waivers have made the Act largely aspirational. The result is that the freight rate paid by Nigerian importers and exporters flows almost entirely to foreign operators, leaving no domestic capital accumulation in the sector that handles 90% of national trade.

The four asset gaps

The asset weakness compounds across four categories. **Fleet age and ownership:** the Nigerian-flagged fleet is ageing and predominantly serves coastal oil-services rather than international containerised trade. **Bunkering infrastructure:** Nigerian ports lack the LNG, methanol, and emerging green-fuel bunkering capacity that the IMO 2030 decarbonisation rules will require, creating future risk of exclusion from compliant routes. **Ship repair:** the country has no major dry-dock facility able to handle post-Panamax vessels, despite hosting the largest oil-services fleet in West Africa. **Marine insurance and finance:** ship financing is almost entirely foreign, and the Nigerian P&I (protection and indemnity) market is rudimentary, forcing operators onto Lloyd's at premium rates.

Maritime insecurity is no longer the headline issue it was during the 2018–2020 piracy peak, but Nigeria still carries a residual risk premium in vessel insurance pricing.

International Maritime Bureau · 2025 Trend Note

Security: the gap that almost closed

The Gulf of Guinea piracy peak of 2018–2020 placed Nigerian waters on the list of most dangerous in the world. The Nigerian Navy's Deep Blue project, in operation since 2021, has reduced incidents in Nigerian waters by over 80%. Yet the residual insurance premium has been slow to come off vessel calls to Nigerian ports. The lag between operational improvement and market repricing is in itself a cost, perhaps 5 to 10% of vessel-call cost that should not still be there but is. The fix is diplomatic and informational, not operational: insurers need to see two more years of sustained improvement before the premium fully resets.

06. INTEGRATED PLATFORM

What an integrated logistics platform actually looks like

The diagnosis points to a platform: port → rail → bonded dry port → industrial zone, under one customs regime and one digital backbone. The model is not theoretical, Jebel Ali, Tanger Med, and PSA Singapore have all built it.

An integrated logistics platform is a single coordinated system in which cargo movement, customs clearance, and industrial transformation all happen inside one continuously-bonded perimeter, governed by one rule set and one digital platform. The cargo never breaks customs seal between port and final factory. The model looks the same in three places: **Jebel Ali / JAFZA** (Dubai), **Tanger Med / TMSA** (Morocco), and **PSA Singapore**. All three were deliberately engineered, and all three transformed their host economies’ competitiveness inside fifteen years.

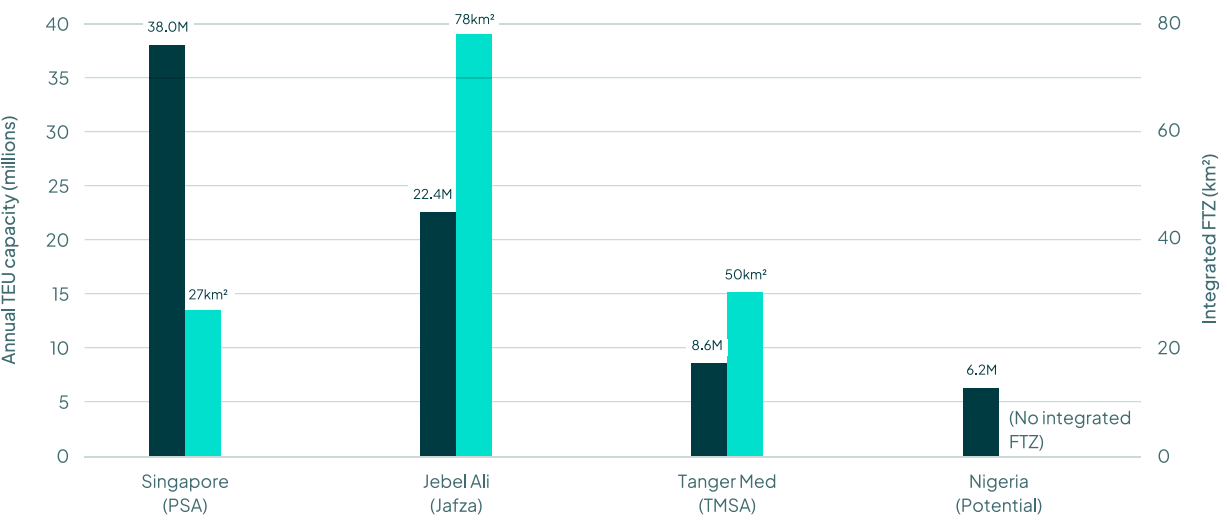
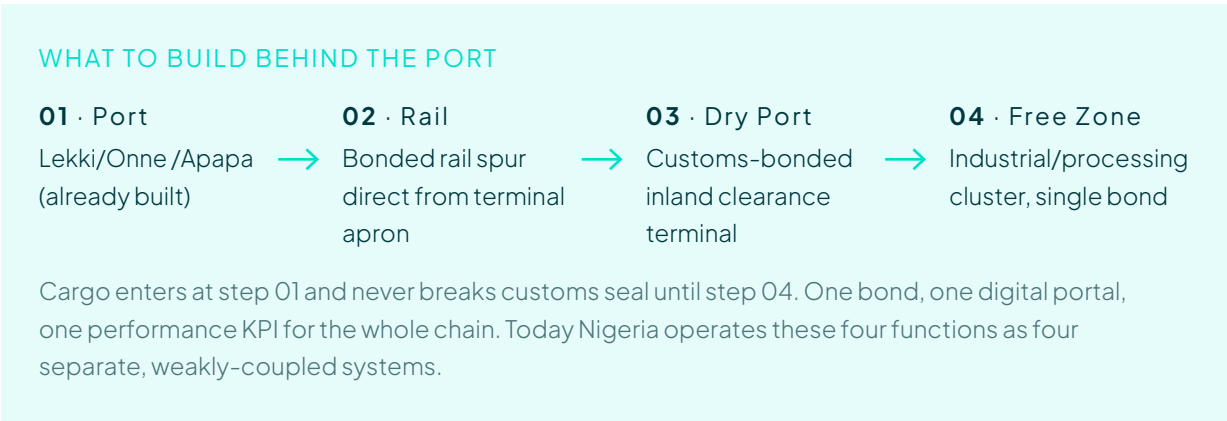


Figure 5 · The comparable platforms, and the Nigerian gap. Singapore handles 38M TEU, Jebel Ali 22.4M with a 78 km² integrated free zone. Nigeria has the port capacity (6.2M TEU current installed) but no integrated FTZ behind it.

Nigeria has the seaward capacity. What is missing is the landward stack behind it: the rail spur, the bonded corridor, the integrated free zone, the single digital trade portal. Each of the three working models (overleaf) shows the same architecture in different geographies. The build is not theoretical and not green-field. It is a sequence of integrations between assets that mostly already exist.

The integrated stack



Three working models, one architecture

Jebel Ali / JAFZA (Dubai). The Jebel Ali Free Zone sits directly beside Jebel Ali Port and Al Maktoum International Airport, all three connected under the Dubai Logistics Corridor as a unified customs bond. JAFZA covers 78 km² and hosts over 10,500 companies generating \$190 billion in trade value in 2024. Companies inside the zone get 100% foreign ownership, 50 years of zero corporate tax, and direct apron-to-warehouse cargo flow. The Dubai Trade digital portal integrates customs, free zone, and shipping lines through a single API. Nigerian importers handling cargo through Jebel Ali clear customs faster inside Dubai than they do at home.

Tanger Med / TMSA (Morocco). Tanger Med’s three integrated zones (Tanger Free Zone, Tanger Automotive City, and Renault Tangier-Mediterranean) sit behind a 8.6 million TEU port and host Renault, Stellantis, BYD, and over 1,000 other companies. The Moroccan automotive industry that did not exist in 2010 now exports €14 billion annually, almost entirely through this single integrated platform. The difference between Tanger Med and Nigerian alternatives is not the port quality, Lekki’s is comparable, but that the customs, rail, free zone, and industrial siting were planned and built as one project rather than negotiated piecemeal across decades.

PSA Singapore. PSA handles 38 million TEU annually through one of the most automated terminal systems in the world. The integration is digital-first: customs, port operations, and shipping all run through TradeNet, the world’s first national single window for trade, operational since 1989. Singapore’s physical free trade zones cover only 27 km² but their integration with the port and customs is complete. The Singapore lesson for Nigeria is not the scale but the sequencing: TradeNet preceded the physical expansions, not the other way around.

What Nigeria has, and what is still missing

- **Has:** Lekki Deep Sea Port (40.6% national share, super-post-Panamax). Onne capacity. Lagos-Ibadan standard gauge freight authorisation. NSW Phase 1 launched
- **Has, partially:** Lekki Free Zone (operational, but not customs-integrated with the port apron). Lagos-Kano narrow gauge (operational but undercapitalised)
- **Missing:** bonded rail spur from Lekki terminal apron. Customs bond extending Apapa → Kaduna → Kano dry port chain. Single digital trade portal at the Singapore TradeNet level (NSW Phase 1 is a start, not the destination)

07. WHAT IT WOULD TAKE

Three preconditions, three milestones, one structural prize

Building the integrated platform requires three preconditions to fall into place, none of which is a single ministry's gift to deliver. The federal trajectory addresses parts of each but does not yet treat them as a coordinated programme.

01. Single-entity coordination authority

The platform requires a single accountable owner across the port, rail, customs, free zone, and trade-portal layers. Today these sit under NPA, NRC, NCS, Lekki Free Zone Authority, and the Federal Ministry of Marine and Blue Economy respectively. The Tanger Med model places all of these under TMSA. Establishing a Nigerian equivalent is a 12-month legislative lift, not an infrastructure lift.

02. Bonded rail and trade-portal completion

The Lekki rail spur, the Apapa apron upgrade, and NSW Phase 2 (Port Community System layer) need to land within an 18 to 24 month window. None individually transforms the system; all three together do. Lagos-Kano rolling stock needs to triple from 50-100 to 300+ containers/day. Capital exists; the rolling stock leasing model is the missing piece.

03. Concession of inland dry ports and waterways

The seven existing inland dry ports (Kaduna, Kano, Funtua, Ibadan, Heipang, Isiala-Ngwa, Maiduguri) need to be operationally concessioned to private operators with port-call obligations and KPI-tied performance fees. Inland waterway dredging and barge operations need a similar concession structure.

The structural prize

Closing the dwell-time gap from 21 to 7 days, lifting rail modal share from 1.2% to 8-12%, and integrating four customs jurisdictions into one bond would compress Nigerian trade costs by an estimated 18 to 25%. On the 2025 base of ₦16 trillion in non-oil trade, that is **₦2.9 to ₦4.0 trillion in annual cost reduction**, capital that today flows to foreign shipping lines, demurrage, road maintenance, and informal extraction. The integrated platform is not a cost; it is the largest single recoverable economic rent in the Nigerian non-oil economy.

Revitau Strategy · Diagnostic & Architecture · April 2026

Sources: Federal Ministry of Finance (port efficiency briefing, 2025); Nigerian Ports Authority 2025 annual report; NBS rail transport Q4 2025; Vice-Presidential PEBEC remarks Oct & Dec 2025; NRC freight statistics; DP World / Jafza disclosures; Tanger Med Special Agency reports; PSA Singapore TradeNet documentation; Mordor Intelligence Nigeria Freight Market 2025-2031. Forward-looking figures are estimates based on cited sources, not investment guidance.