Transit Corridors in Africa

Success Stories & Emerging Challenges

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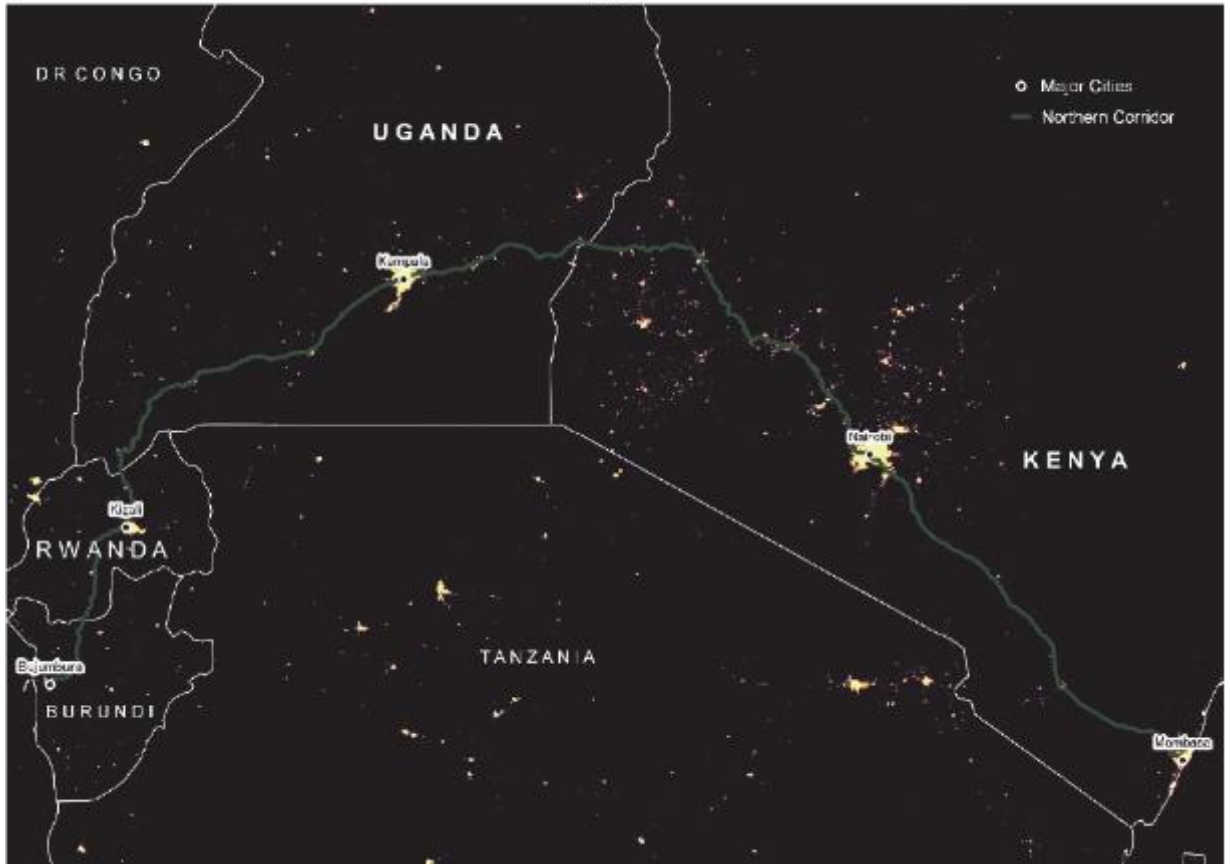
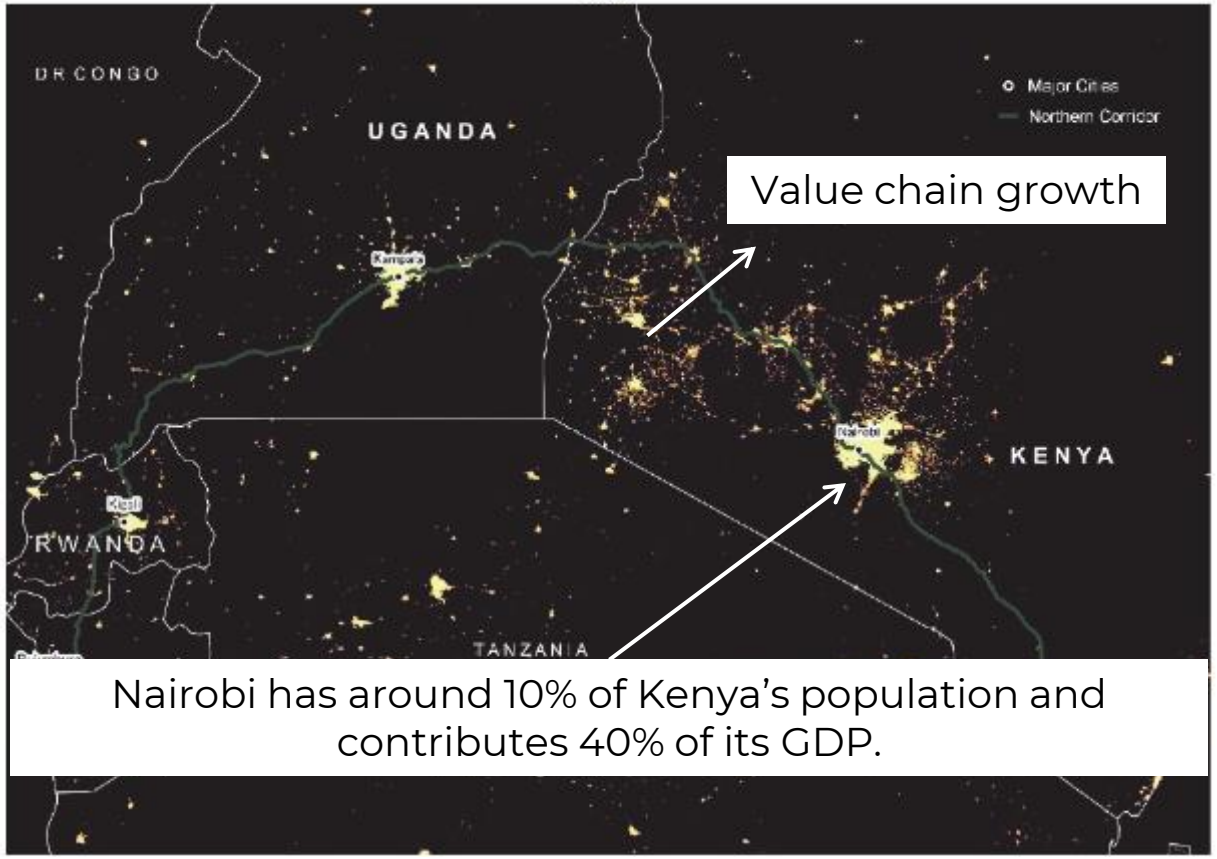
CORRIDORS KEY DRIVERS OF GROWTH- POPULATION AND DEVELOPMENT CONCENTRATION IS ALONG THE CORRIDORS

2012



2020



Source: JICA, Data Collection Survey on Corridor Development in Africa

Corridors as Systems — Infrastructure · Services · Institutions

INFRASTRUCTURE

- At Ports: Parking yards; Container terminals; Deepening of berths; Access roads;
- At Borders: Construction of border posts; access roads; IBM; capacity building
- Logistics facilities, Lakes Tanganyika & Kivu upgrades
- Greening: Asbestos removal, Solar installation, dust reducing equipment

DIGITAL SYSTEMS

- iCMS Kenya: Cutting clearance time
- TLIP : Reduction in trade time and cost at destination ports
- Regional electronic cargo systems
- Single window systems- Streamlining and cutting time.

INSTITUTIONS

- NCTTCA/CCTTFA: Northern and Central Corridor Authorities
- Corridor Transport Observatory monitoring
- Regional SPS/standards frameworks
- Cross-border trader support mechanisms

Key insight: Overall corridor performance is determined by its weakest link — TMA addresses all three layers simultaneously

IMPACT OF THE APPROACH

NORTHERN CORRIDOR

Mombasa → Uganda · Rwanda · Burundi · DRC · South Sudan

Serves 248 million people · 3.8 million sq. kilometers

8 days
Transit time reduction Mombasa→Malaba

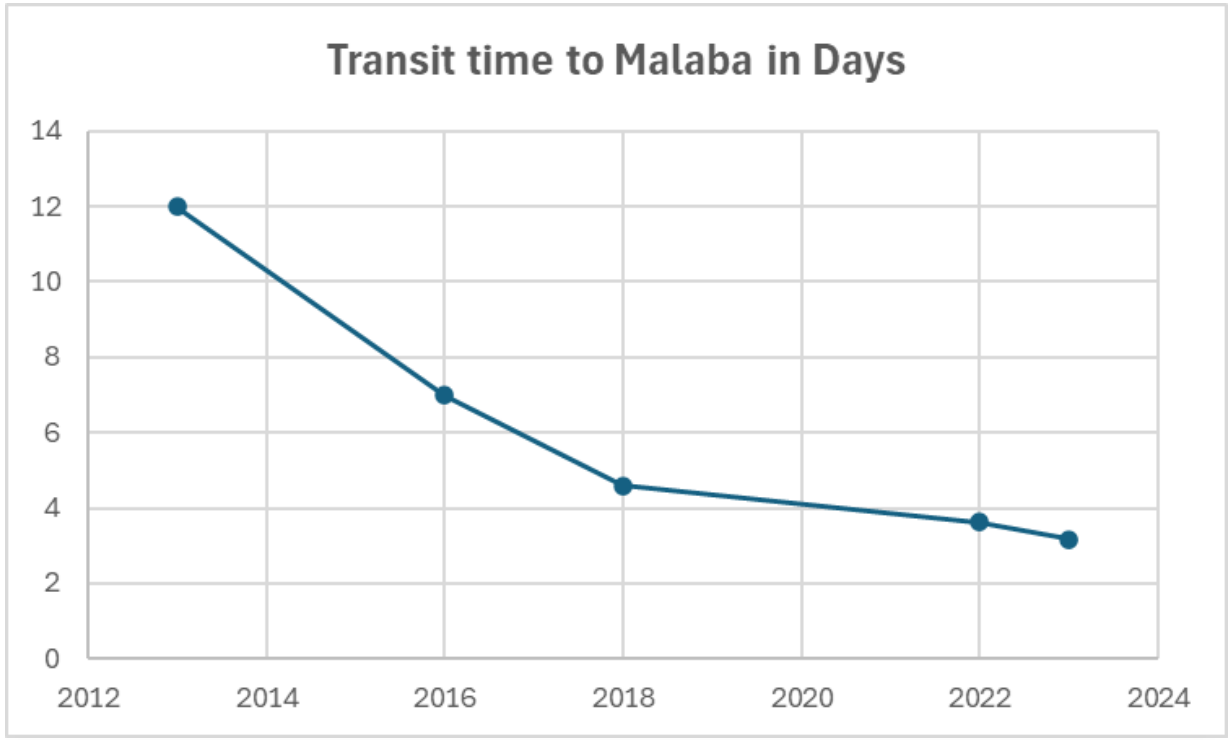
70%
Average OSBP crossing time reduced

75%
Reduction in transit time due to RECTS

$549 m
Annual increase in exports over 2010 baseline

$30
Return per $1 invested in trade facilitation

~3×
Mombasa port cargo growth 2010-2026



These gains and impacts however risk being eroded/ affected by persistent shocks; and interestingly- faster growth in trade/ transit volumes far outpacing growth in infrastructure and logistics capabilities. This calls for a new raft of reforms, different approaches.

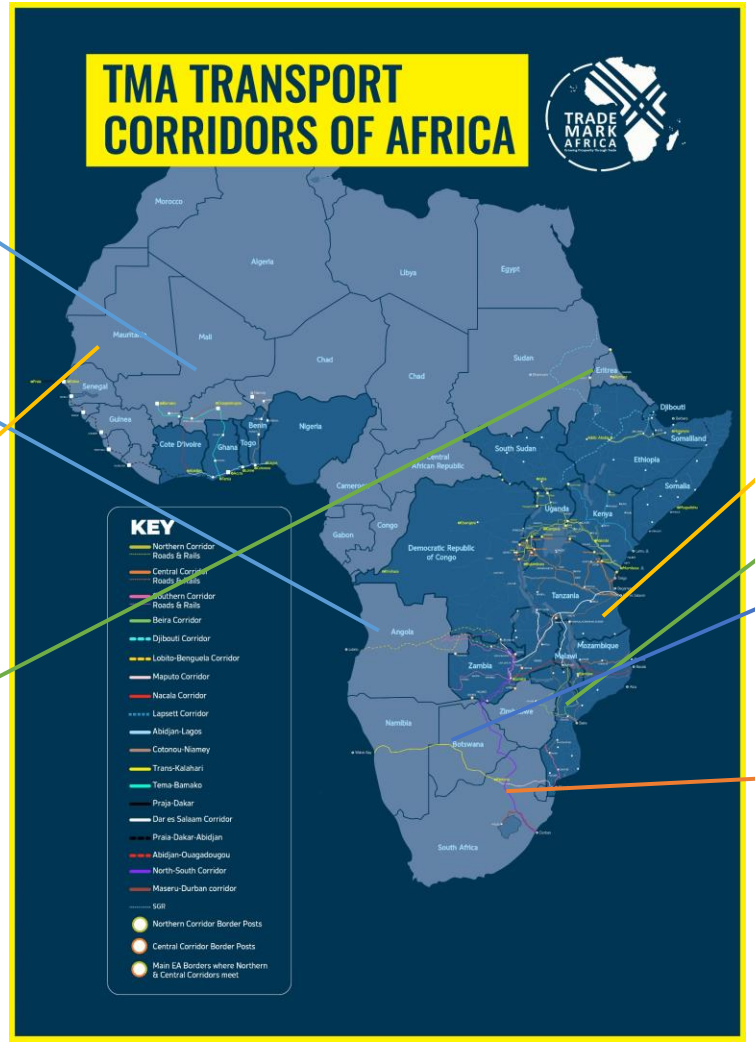
TMA WORKING ACROSS CORRIDORS IN AFRICA- EACH WITH THEIR OWN DYNAMIC

Abidjan Lagos Corridor : Intra regional trade focussed corridor

Lobito Corridor (Angola–DRC–Zambia): Aims to export copper and cobalt westward to the Atlantic.

Praia–Dakar–Abidjan Corridor : Working on prioritised nodes to increase intra-regional trade

Horn of Africa Corridors : Working on Djibouti, Dewel, Berbera and Lapsett corridors to diversify conduits of trade with Ethiopia



Dar Corridor- Links Copperbelt to Tanzania's Dar es Salaam port

Beira Corridor- Links copperbelt to port in Moz.

East West Corridor- Links SA, ZIM and Moz minerals to Maputo and Botswana, SA and Namibia minerals to Walvis Bay.

North South Corridor- Links copperbelt to port in SA (Richards Bay and Durban).

The corridors need to constantly adapt to changing dynamics

01 Geopolitical Reconfiguration

AGOA about to lapse and new tariff being imposed. China's FOCAC zero-tariff rollout reshapes trade geography. US/EU/Gulf rivalry over Lobito creates new leverage. Strait of Hormuz and a looming Red Sea crisis creates new risks but also opportunities (e.g. Lamu Port)

02 Climate & Compliance Barriers

EUDR, CBAM and stricter EU market rules mean corridors must deliver traceability, not just speed. African freight costs 75% above global average — climate-linked logistics costs rising further. Need for increased green corridor work: modal shift, carbon monitoring, resilient drainage.

03 Soft Infrastructure Gaps Remain

Soft infra bottleneck needs updating- technology led approaches to be tried to meet challenges of divergent transit regimes, regulatory fragmentation, NTBs, inconsistent SPS enforcement, trucking market monopolies. Need to better implement AfCFTA framework.

04 Fragility & Conflict Exposure

Corridors exposed to instability- DRC (M23), JNIM activity in Sahel etc. Corridor investment in fragile settings have several challenges. Security events cause rerouting costs and reduce corridor predictability for traders and investors.

Need significant Investments to meet Corridor Requirements

Rising Population and Economic Growth Impacting the Corridor

- The population along Corridors is rapidly increasing.
- Economic growth will lead to a higher rate of increase in cargo volumes than in the past.
- Existing infrastructure will face significant pressure due to rising demand.

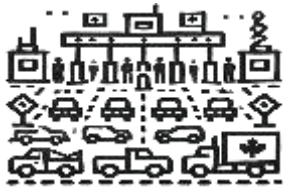
Improve rail utilisation on existing route and for transit

- Railways on most corridors has deteriorated significantly-with pockets of improvement
- Improve utilisation of rail on existing route. through better coordination between national railways and improvement of handling infrastructrure.

Enhancing road efficiency through EV trucking

- Road transport significant despite rail.
- Road infrastructure is costly – focus on reducing operating costs.
- EV trucking can lower transport costs and emissions.
- Strategic placement of charging points on corridors can enable EV operations.

Investments in borders required to keep transit times low

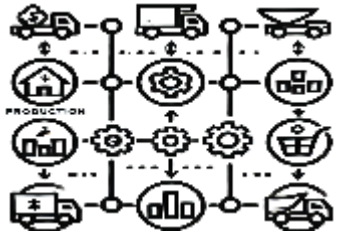


- Transit times on the corridor have started increasing, especially at borders.
- Investments in border infrastructure are needed to improve clearance times.
- Digitisation and automation of border processes can enhance efficiency.

Port needs short- and long-term interventions

- Current port capacity can handle present volumes due to recent investments.
- For Future cargo growth
  - ✓ Short-Term: Maximise process improvements through digitization and faster evacuation.
  - ✓ Long-Term: Developing new ports as a second hub for handling increased volumes.

Value chain development is a necessity



- Transport costs remain high due to Exports being only a small % of imports
  - ✓ Protect existing value chains (e.g., coffee, horticulture).
  - ✓ Develop new value chains to leverage excess transport capacity.
  - ✓ Shift horticulture exports from air to sea freight to reduce costs.

THE ROAD AHEAD- NO ONE SIZE FITS ALL

Each Corridor needs bespoke solution on the priorities below

DIGITAL INTEGRATION	GREEN CORRIDORS	FOOD SECURITY	FRAGILE CONTEXTS	PRIVATE SECTOR

Whether a corridor delivers real economic benefit is not primarily about geography - it's about the quality of the theory of change behind the investment. That is what TMA has spent 16 years getting right.

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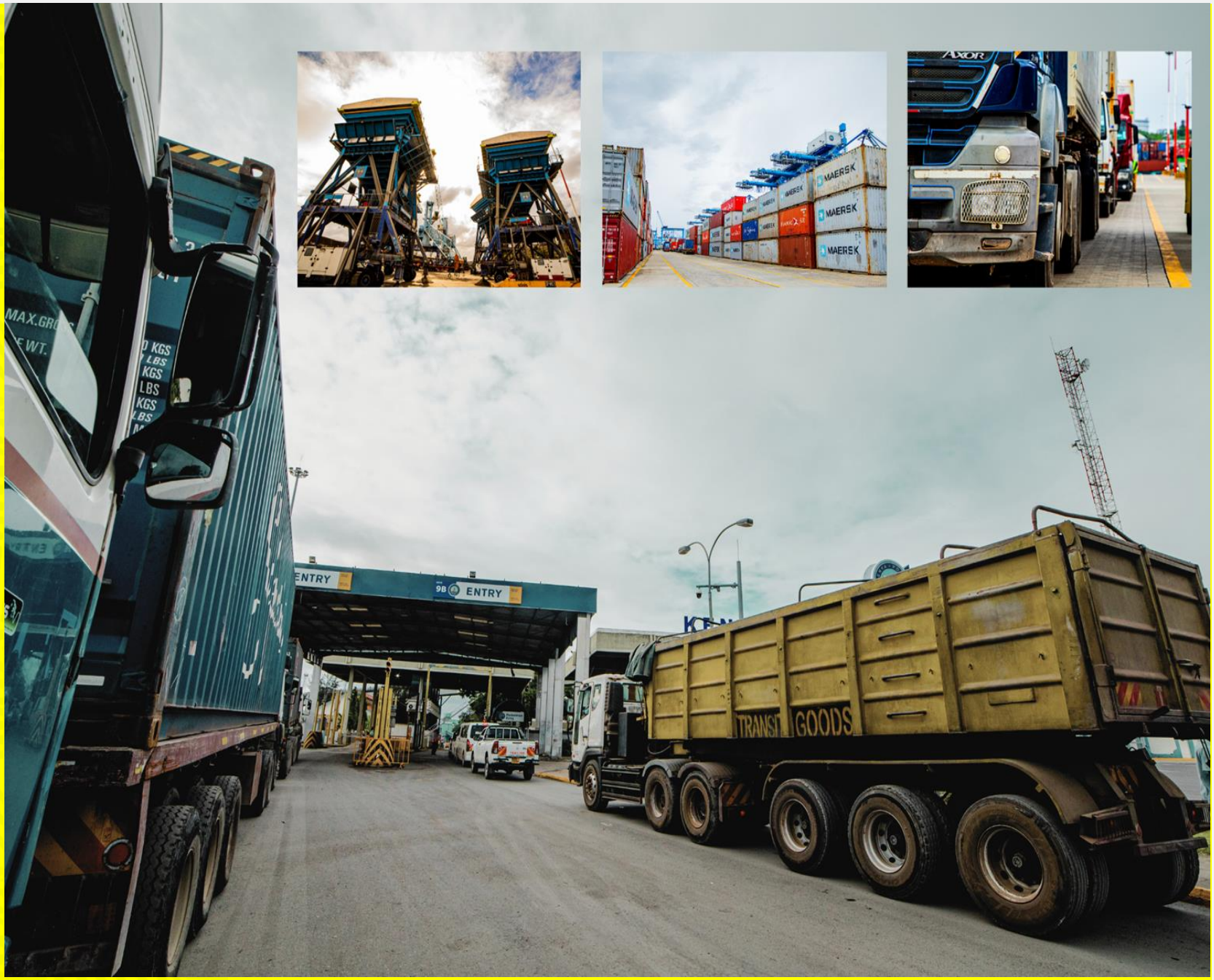
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