

MARITIME IN NIGERIA:

Conversations in 2026

Shaping Nigeria's **Maritime Performance, Policy Delivery,**
and **Competitiveness** in a pivotal year of reform.



⚓ Maritime Outlook

2026



Introduction

2026 as a hinge year

2026 opens as a decisive year for Nigeria's maritime sector. Key reforms have moved from policy statements to defined timelines, and stakeholders now assess progress by clearance time, cost, and reliability rather than announcements. The National Single Window, now in acceptance testing and publicly framed for a March 2026 go-live, sits at the centre of this shift.¹

Port infrastructure, trade facilitation, and trade growth dominate maritime conversations in 2026. Lekki Port's growing role has reopened competition for regional transshipment cargo, raising questions about Nigeria's ability to retain West Africa-bound trade. Security outcomes have improved, but war risk premiums remain elevated, keeping insurance pricing and routing decisions firmly in focus.

At the same time, rising exports and refinery-driven vessel activity are reshaping short-sea shipping dynamics and pressure on coastal logistics.

Taken together, these developments frame 2026 as a year where Nigeria's maritime reforms are tested by delivery and commercial outcomes rather than policy ambition alone. The focus has shifted to whether reforms translate into faster processes, lower costs, and more predictable operating conditions across ports, shipping, and trade.



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Trade Facilitation & Port Digitalisation

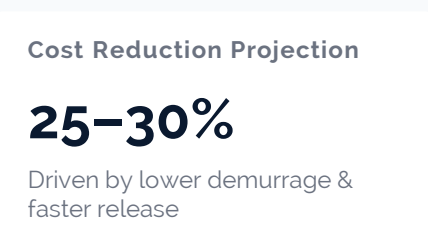
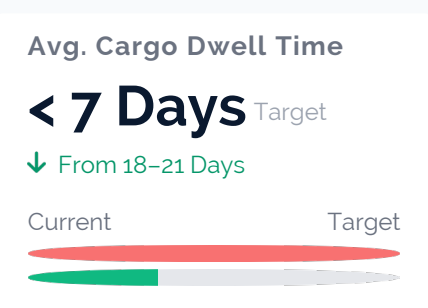
Digital overlay or real reform?

Trade facilitation is a central maritime conversation in 2026 as Nigeria's National Single Window is expected to enter operational use in the first quarter of the year, moving customs clearance and inter-agency approvals onto a single digital platform for the first time.² This transition makes 2026 a test of execution rather than policy design.

Government projections indicate that a fully functional National Single Window could reduce average cargo dwell time from 18–21 days to under seven days and cut export processing timelines to two or three days through single submission and automated approvals.³ These expectations are linked to broader customs modernisation, including integration of digital customs platforms and mandatory migration to the Authorised Economic Operator framework.⁴ Full adoption is also projected to reduce logistics and transaction costs by 25–30 percent, largely through lower demurrage exposure, fewer documentation delays, and faster cargo release.⁵

The primary risk lies in delivery. Early experience with customs digital tools has exposed system instability and downtime risks, raising concerns that congestion may shift from physical queues to digital bottlenecks.⁶ Digital gains also remain vulnerable to physical disruptions at ports, while the absence of a single harmonising statute⁷ and data protection obligations under the Nigeria Data Protection Act 2023 introduce legal and coordination risk.⁸ In 2026, trade facilitation reforms will be judged by measurable reductions in clearance time and cost, not platform availability alone.

Key Performance Targets



Reform Framework

Core System	National Single Window
Adoption Model	Mandatory AEO
Launch Target	Q1 2026 (March)

▲ Primary Execution Risk

System instability and downtime risks could shift congestion from physical queues to digital bottlenecks. Digital gains remain vulnerable to physical port disruptions and legal coordination gaps.

Port Infrastructure, Efficiency & Capital Investment

Lekki and the future of West African transshipment

Port infrastructure is a major conversation in 2026, but the focus has shifted from asset creation to operational performance. After years of congestion and underutilisation, stakeholders are assessing whether recent rehabilitation works and deep-sea port operations are delivering measurable efficiency gains rather than simply expanding capacity.

Major upgrades remain ongoing. The Federal Government has approved large-scale rehabilitation of Apapa and Tin Can Island ports to restore handling capacity and ease systemic bottlenecks, while renewed attention to eastern ports such as Warri, Port Harcourt, and Calabar aims to rebalance cargo flows away from Lagos. At the same time, Lekki Deep Sea Port has moved into steady operations and is handling larger vessels with faster turnaround, strengthening its position as a credible alternative gateway for containerised trade.

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Private capital continues to drive operational change. Terminal operators have invested in automation, scanners, yard equipment, and digital gate systems, helping to ease congestion, though compliance with these systems varies across ports and terminals. Eastern ports, particularly Warri, have recorded renewed cargo activity following security and operational improvements.

With these introductions, efficiency indicators showing early gains. Nigerian Ports Authority data points to growth in cargo throughput and export volumes, supported by improved vessel turnaround times at rehabilitated terminals. Investor sentiment is cautiously positive, supported by improved FX access and clearer policy direction from the Ministry of Marine and Blue Economy, though delays in establishing a port economic regulator and execution risks around greenfield projects remain live concerns.¹⁴



Regulatory & Institutional Reform

Coordination as commercial risk

Regulatory risk in Nigeria's maritime sector in 2026 is shaped less by the absence of laws and more by how existing powers are exercised across institutions. Industry reporting and stakeholder commentary consistently point to coordination and predictability as the main issues affecting approval timelines, tariff certainty, and compliance costs, rather than the volume of regulation itself.¹⁵

At the port level, this challenge is most visible in economic regulation. While several agencies play roles in port governance. The continued absence of a dedicated port economic regulator means that authority over port tariffs and economic oversight is split across multiple institutions, creating uncertainty around pricing decisions and enforcement and leading operators to factor regulatory delay into contracts and operations.¹⁶ Legislative efforts to establish a port economic regulator remain ongoing but incomplete.¹⁷

Nigeria's international maritime profile has strengthened, increasing pressure to address these domestic coordination gaps. The country's election to the International Maritime Organization Council for the 2026–2027 cycle signals renewed global confidence in its maritime governance and security framework.¹⁸ The practical test in 2026 is whether this credibility translates into more consistent regulatory practice and clearer institutional boundaries at home.

Similar coordination challenges are evident in cabotage policy, though the context is shifting. The disbursement phase of the Cabotage Vessel Financing Fund (CVFF) finally commenced in early 2026 with the launch of its application framework, ending more than two decades of administrative dormancy.¹⁹ This marks a significant policy milestone. However, the impact of the CVFF on Nigerian-owned tonnage will depend on how quickly financing translates into vessel acquisition and whether historical reliance on cabotage waivers is reduced in practice. Sector reporting indicates that waiver use had previously filled capacity gaps, and 2026 will test whether improved access to financing is matched by tighter waiver control and coordinated enforcement across agencies.²⁰

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Maritime Security & Risk Sustainability

Why risk perception still costs Nigeria

Maritime security outcomes in Nigeria have improved materially, but the commercial benefits of those gains remain limited. Piracy incidents in Nigerian territorial waters have fallen to zero in recent years, leading to Nigeria's removal from several international risk designations and public recognition of improved enforcement capacity.²¹ These gains have strengthened operational confidence, but they have not translated into lower costs for operators.²²

Despite improved security, Nigeria continues to pay substantial war risk insurance premiums. Industry reporting indicates that over the past three years, importers and shippers have paid more than \$1.5 billion in war risk premiums to international underwriters, reflecting a disconnect between actual incident levels and how risk is priced.²³ This cost continues to feed into freight rates, insurance terms, and routing decisions.

The persistence of these premiums is driven largely by risk perception. Global insurers and shipping lines continue to rely on historical classifications and broader Gulf of Guinea risk data, even as incident rates decline. Shipping lines also sometimes charter security vessels or pay for additional protection despite the absence of recent incidents, reinforcing higher cost structures.²⁴ In 2026, the key security conversation is no longer about patrol assets, but about recalibrating risk perception through sustained performance and targeted engagement with global underwriters.

The Cost of Perception

A persistent disconnect exists between actual incident levels (near zero) and how risk is priced (\$1.5bn in premiums), creating a structural cost disadvantage for Nigerian ports despite security improvements.

Security vs. Cost Paradox

Piracy Incidents (Nigerian Waters)

~ 0 Recent Years
✔ Material Improvement

Est. War Risk Premiums

> \$1.5 Bn
Paid to Int'l Underwriters (3-Year Total)
↑ Costs remain elevated

The Data Disconnect



Commercial Impacts

Freight	Inflated Rates
Insurance	Tighter Terms
Logistics	Defensive Routing

Trade Growth & Regional Competitiveness

Exports, logistics, and the Dangote effect

Trade growth remains a central maritime conversation in 2026, but competitiveness now depends on whether Nigeria can capture rising volumes through its ports and logistics system. Export growth alone is no longer sufficient. What matters is whether cargo moves efficiently, predictably, and at competitive cost.

Nigeria's seaborne exports strengthened through 2025, supported by foreign exchange reforms and increased output from large-scale producers, including the Dangote Refinery.²⁵ Official reporting points to double-digit export growth driven by refined petroleum products and non-oil goods, reinforcing Nigeria's role as a regional supplier rather than a pure importer.

The Dangote Refinery has become a defining factor in this shift. As fuel imports decline, Nigeria is increasingly supplying refined products to West and Central African markets. Industry reporting suggests the refinery could generate over 1,000 vessel movements annually, driving demand for short-sea and coastal shipping and placing pressure on indigenous vessel capacity and cabotage enforcement.²⁶

Regional trade under the African Continental Free Trade Area (ACFTA) is also expanding. Nigeria's exports to African markets grew significantly in 2025²⁷, but analysts consistently note that hub status depends on logistics integration.²⁸ Without efficient ports, customs processes, and inland connectivity, Nigeria risks exporting more while capturing less of the associated maritime value.

Key Growth Metrics

Export Trend (2025)

Double-Digit

Official Reporting

Driven by refined petroleum & non-oil goods

Dangote Refinery Effect

>1,000

Vessel Movements / Year

High impact on coastal logistics

Market Position Shift

Regional Supplier

From Pure Importer

Strategic Outlook

Driver	Refinery Output
Opportunity	ACFTA Hub Status
Requirement	Logistics Efficiency

Signals to Watch in 2026

Credibility in practice, not intent

The signals to watch in 2026 are practical. Sustained reductions in cargo dwell time, stable operation of digital systems, clearer tariff and regulatory coordination, gradual easing of war risk premiums, and increased utilisation of indigenous shipping capacity will indicate that reforms are taking root. Continued friction in these areas would suggest that structural bottlenecks remain unresolved.

Nigeria enters 2026 with stronger foundations than in previous reform cycles. Whether those foundations support durable competitiveness will depend less on new policy announcements and more on consistency, coordination, and delivery across institutions. The year will test not the intent of reform, but its credibility in practice.

2026 Performance Checklist

- **Dwell Time Trend:**
Is the reduction down to < 7 days sustained over Q1-Q2?
- **Digital Stability:**
Single Window system uptime and user acceptance rates.
- **Regulatory Clarity:**
Establishment of clear tariff coordination and economic regulator role.
- **Risk Pricing:**
Downward trajectory of war risk premiums matching incident data.
- **Indigenous Capacity:**
Effective CVFF disbursement and tighter waiver control.
- **Port Efficiency:**
Measurable gains in vessel turnaround time at rehabilitated terminals.

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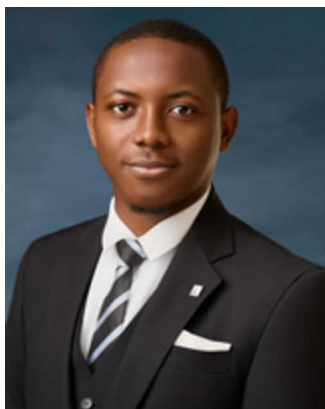
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