2023 Annual Report









WITH FREIGHT STATISTICS





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EXECUTIVE SECRETARY/CEO'S MESSAGE



AKUTAH PIUS UKEYIMA Esq., MON

Executive Secretary/CEO

As we reflect on the achievements of the year 2023, it is with great pride that I present the Nigerian Shippers' Council's Annual Report. This year has been pivotal in aligning our efforts with the "Renewed Hope" agenda championed by President Bola Ahmed Tinubu GCFR, which emphasizes economic growth, infrastructure development, security, and good governance. The Council's work in 2023 has been instrumental in driving forward these national priorities, particularly in the maritime and logistics sectors, which are critical to Nigeria's overall economic strategy.

Key Highlights of 2023:

1. **Strengthening Relationships with Regulated Service Providers**
   In line with President Tinubu's focus on good governance and economic reform, the Council has made significant strides in enhancing our relationships with key stakeholders. By fostering a cooperative regulatory environment through continuous dialogue and the establishment of Memoranda of Understanding (MoUs) with key stakeholders, we have created sustainable mechanisms for dispute resolution. This initiative directly supports the "Renewed Hope" agenda by promoting a business-friendly environment that encourages and supports private sector participation and investment.

2. **Infrastructure Development and Strategic Project Delivery**
   The successful commissioning of the Dala Inland Dry Port and the Funtua Inland Dry Port as a Ports and their designation as Ports of Origin and Destination are key achievements that resonate with the President's infrastructure development goals. These projects are crucial in decentralizing port operations, reducing congestion at seaports, and improving logistics efficiency, thus contributing to the broader goal of enhancing Nigeria's transport infrastructure. Our work in this area is a testament to the Council's commitment to supporting the nation's economic growth by providing critical infrastructure that facilitates trade and commerce.

3. **Advancing the Ease of Doing Business**
   Aligned with the "Renewed Hope" agenda's emphasis on economic growth and private sector engagement, the Council has continued to streamline processes and embrace digital solutions to improve the ease of doing business. The launch of our online registration portal for regulated port service providers is a significant step forward in modernizing the sector and making it more accessible and efficient for businesses, directly contributing to the national objective of creating a more competitive and investor-friendly economy.

4. **Institutional Strengthening and Workforce Development**
   Recognizing that a well-trained workforce is essential to achieving the goals of the "Renewed Hope" agenda, the Council with the support of H. E. Gboyega Oyetola CON, the Honourable Minister, Federal Ministry of Marine & Blue Economy, has invested heavily in human capital development. Through strategic retreats and targeted training programs, we have equipped our staff with skills and knowledge needed to drive the Council's objectives forward. This focus on institutional strengthening ensures that we are well-positioned to contribute to the broader national goal of building a more efficient and effective public service.

5. **Commitment to Corporate Social Responsibility**
   Reflecting President Tinubu's commitment to social welfare and poverty alleviation, the Council has actively engaged in corporate social responsibility initiatives throughout the year. From supporting healthcare facilities and educational institutions to engaging with the public through sensitization efforts, we have sought to extend our impact beyond the maritime sector, contributing to the well-being of communities across Nigeria.

As we look ahead, we remain committed to building on the solid foundation established in 2023, fully aligned with the "Renewed Hope" agenda. Our focus will continue to be on enhancing regulatory frameworks, driving infrastructure development, and ensuring that the Nigerian transport sector remains a vital contributor to the nation's economic growth and prosperity.

It is my honour to present the Nigerian Shippers' Council's 2023 Annual Report.

Preface

The Nigerian economy is classified as a mixed economy, with the maritime industry being a significant sector. Maritime trade has been pivotal to Nigeria's economic growth, accounting for approximately 95% of the country's international trade transportation. At an economic level, an efficient and effective maritime transport system is crucial for the development of a nation's markets, particularly in international trade, by transforming local markets into national, regional, and global hubs.

In recent times, global trends such as shifts in trading routes in the post-COVID era, the impact of geopolitical conflicts like the Russia-Ukraine war and the Israel-Hamas conflict on shipping routes and costs, and the opportunities presented by the African Continental Free Trade Agreement (AfCFTA), have significantly influenced the global shipping industry.

In response, and to fully capitalize on the maritime industry's potential, including the shipping sector, President Bola Ahmed Tinubu established the Ministry of Marine and Blue Economy in August 2023 to boost the industry's development and promote sustainable economic growth in Nigeria.

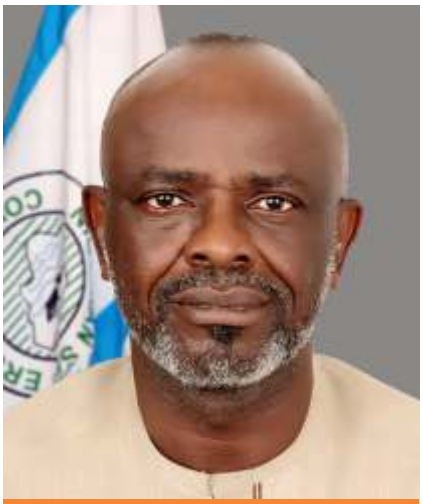
The Nigerian Shippers' Council, as the port economic regulator, plays a vital role in facilitating trade and protecting the interests of stakeholders within the maritime industry. In 2023, the Council diligently fulfilled its mandate, implementing policies and services that improved the efficiency and effectiveness of the maritime sector.

The Council's 2023 Annual Report details the significant progress made in contributing to the nation's economic development, enhancing services, and increasing stakeholder satisfaction. The report highlights the Council's achievements, collaborations, stakeholder engagements, and efforts in corporate social responsibility initiatives to support the less privileged in society.

Although, the Council faced several challenges, ranging from noncompliance of some service providers to the regulatory sanctions of the Council, to the delay in repealing the Nigerian Shippers' Council Act and Enactment of the Nigerian Shipping and Port Economic Regulatory Agency Bill and others. These challenges impacted our operations, leading to delays and necessitating strategic shifts. These experiences have provided valuable lessons and reinforced our resolve for continuous improvement.

We express our gratitude to various agencies at all levels of government, stakeholders, and players in the maritime industry for their support in fulfilling our mandate throughout the year. We seek your continued support in the years ahead, as we strive to build a maritime industry that serves as a hub in West and Central Africa.

We invite you to explore the NSC 2023 Annual Report, which showcases our achievements and outlines our vision for a more dynamic and competitive maritime sector in Nigeria. Thank you for being part of our journey, and we look forward to continued collaboration and success in the future.



O.B. ANIFOWOSE

DIRECTOR, STRATEGIC PLANNING & RESEARCH

Who We Are



The Nigerian Shippers' Council was established under Decree 13 of 1978, now known as the Nigerian Shippers' Council Act Cap. N133, Laws of the Federation of Nigeria 2004, with the primary mandate of safeguarding the interests of importers and exporters in Nigeria. It advises the government on critical aspects such as freight rates, shipment terms, vessel standards, port charges, transport availability, and other pertinent issues affecting the shipping industry.

The establishment of the Nigerian Shippers' Council in 1978 was influenced by UNCTAD's advocacy for the formation of Shippers' Councils globally, in response to challenges within the shipping industry highlighted by the United Nations Code of Conduct for Liner Conferences in 1965.

In 2006, Nigerian port operations were privatized through concession agreements with private terminal operators. This initiative aimed to improve operational efficiency, enhance port infrastructure, increase cargo throughput, and bolster safety and security measures. However, despite these efforts, persistent challenges such as unfair trade practices, inefficiencies among service providers, and gaps in regulatory oversight continued to impact the industry.

Recognizing these issues, stakeholders identified the lack of an Economic Regulator as a significant cause. Consequently, on February 20th, 2014, the Federal Government appointed the Nigerian Shippers' Council as the Interim Economic Regulator for Nigerian ports. This appointment, formalized as the Nigerian Shippers' Council (Port Economic Regulator) Order, 2015, aimed to establish a robust regulatory framework to enhance port efficiency, mitigate negative impacts from concessions, and maximize the benefits of Nigeria's port reform efforts.



VISION

To be the Foremost Economic Regulator Providing a Framework that Fosters Effective, Efficient and Competitive Service Delivery for Sustainable Growth in the Transportation Sector.

MISSION

I. Establish an Effective and Efficient Transport Economic Regulatory System that Advances the Rights and Interests of Stakeholders.

II. Ensure that the Nigerian Transport Sector Contributes Optimally to the Economic Growth of the Nation.

III. Develop and Sustain a Professional Workforce Driven by Knowledge and Technology for Consolidation and Sustainable Growth.





MANDATE

Establish an enabling environment for all stakeholders by instituting an efficient and effective economic regulatory system.



CORE VALUES

CITADEL

C — **Customer Focus and Stewardship**

I — **Innovation**

T — **Trust and Integrity**

A — **Adaptability and Value Diversity**

D — **Discipline and Accountability**

E — **Equity and Fairness**

L — **Leadership**

Functions

The statutory functions of the Council as contained in Decree 13 of 1978, now NSC Act Cap N133 LFN 2004 are to:

I. Provide a forum for the protection of the interest of shippers on matters affecting the shipment of imports and exports to and from Nigeria;
ii. Provide a forum for consultation between the conference and non-conference lines, tramp-owners, the Nigerian Ports Authority and the Government of the Federation on matters of common interest;
iii. Encourage the formation of Shippers' Associations all over the country;
iv. Liaise with the appropriate arms of the Government of the Federation and other organisations in assessing the stability and adequacy of existing services and make appropriate recommendations in that behalf
v. Advise the Government of the Federation, through the Minister, on matters relating to the structure of freight rate, availability and adequacy of shipping space, frequency of sailings, terms of shipment, class and quality of vessels, port charges and facilities and other related matters;
vi. Negotiate and enter into agreements with Conference Lines and non-Conference Lines, ship-owners, the Nigerian Ports Authority and any other bodies on matters affecting the interests of shippers;
vii. Consider the problems faced by shippers with regards to coastal transport, inland waterways transport and matters relating generally to the transportation of goods by water and advise Government on possible solutions thereto;
viii. Promote and encourage the study and research into problems affecting shippers in Nigeria;
ix. Arrange from time to time seminars and conferences on any matter relating to its functions in Nigeria;
x. To carry out such other activities as are conducive to the discharge of its functions under this Act.

As the Port Economic Regulator, the Council is mandated to also carry out the following functions:

i. Provide guidelines for tariff setting in order to guide against arbitrariness;
ii. Monitor and enforce standards of service delivery to ensure availability, accessibility, affordability, stability, predictability and adequacy of services;
iii. Encourage competition and guard against the abuse of monopoly and dominant market positions;
iv. Perform mediatory role among stakeholders;
v. Establish accessible and modern dispute resolution mechanism;
vi. Regulate market entry and exit;
vii. Promote efficiency in the provision of port services;
viii. Minimise high cost of doing business and prevent its inflationary effect on the Nigerian economy;
ix. Encourage private sector investment in the port sector;
x. Monitor and ensure compliance by all parties with the provisions of the Port Concession Agreements.

Services of the Council

01 Stakeholders /Industry Support Services

- Monitoring freight rates along the Nation's trading routes and providing accurate and timely data and other vital information for Shippers.
- Handling and resolving Shippers' complaints on shipping and trade matters such as excessive and arbitrary local shipping charge, short lading and non-delivery of goods, cargo losses, damage, marine insurance claims and non-refund of container deposits.
- Ensuring compliance of service providers in the transport and logistics industry with MoU's on tariffs, regulations, rules of conduct and other agreements entered into between them and the Council.

02 Stakeholders' Representation Services

- Negotiates and agrees with service providers on the quality of services and charges payable in accordance with local and international standards.
- Represents Shippers' interest in local and international shipping and trade-related fora and organizations.

03 Advocacy and Advisory Services

- Monitoring and advising on the general trends in both domestic and international commodity markets for the benefit of relevant stakeholders.
- Advocating the creation of a level playing field for both service provider and service consumers and the facilitation of seamless transportation of goods and services.
- Providing continuous assessment of the Ports, Shipping and Logistics environment against international benchmarks and standards to ensure conformity by service providers.
- Formation of Shippers' Association nation-wide to empower Shippers as a group for meaningful negotiations with providers of shipping services.

04 Research and Information Services

- Indicative freight rates and local shipping charges to the Nigeria Customs Service (NCS), Central Bank of Nigeria (CBN), Shippers and other Stakeholders.
- Border Information Centres: The BICs were established to guide Shippers at Nigerian trade borders, formalize trade, provide information to traders, reduce delays and costs, and guide shippers to comply with international conventions.
- The Council has a modern library at its Head Office, Lagos and seven (7) mini-libraries at the Coordinating Offices and Abuja Liaison Office.

05 Education and Enlightenment Services

- International Maritime Seminar for Judges.
- National Shipping Conference.
- Practical Maritime Dispute Resolution Seminar (in collaboration with Maritime Arbitrators Association of Nigeria).
- Seminars and Shippers' Clinics' at various locations in the country through the outstation to assist the Shippers in specific aspects of international trade such as Import Procedures, Bill of Lading, understanding of INCOTERMS, etc.

06 Regulatory Services

- Set, monitor and enforce standards of service delivery, ensure stability, accessibility and adequacy of services.
- Provide guidelines for the registration of regulated service providers specifying, among other things, the terms and conditions for the registration.
- Provides guidelines on tariffs and charges.
- Regulate market entry and exit.
- Monitor and ensure compliance by all parties, with the provisions of Port Concession Agreements.

Office Locations

To bring services to the doorstep of Stakeholders nationwide, the Council has its Head Office in Lagos, Liaison Office in Abuja and six (6) Zonal Coordinating Offices in the six (6) Geo-political zones of the Country. In addition, there are fourteen (14) Area Offices and two (2) Border Information Centres.

HEAD OFFICE
4, Otunba Ayodele Soyode Lane,
Apapa. P.M.B. 50617,
Ikoyi, Lagos

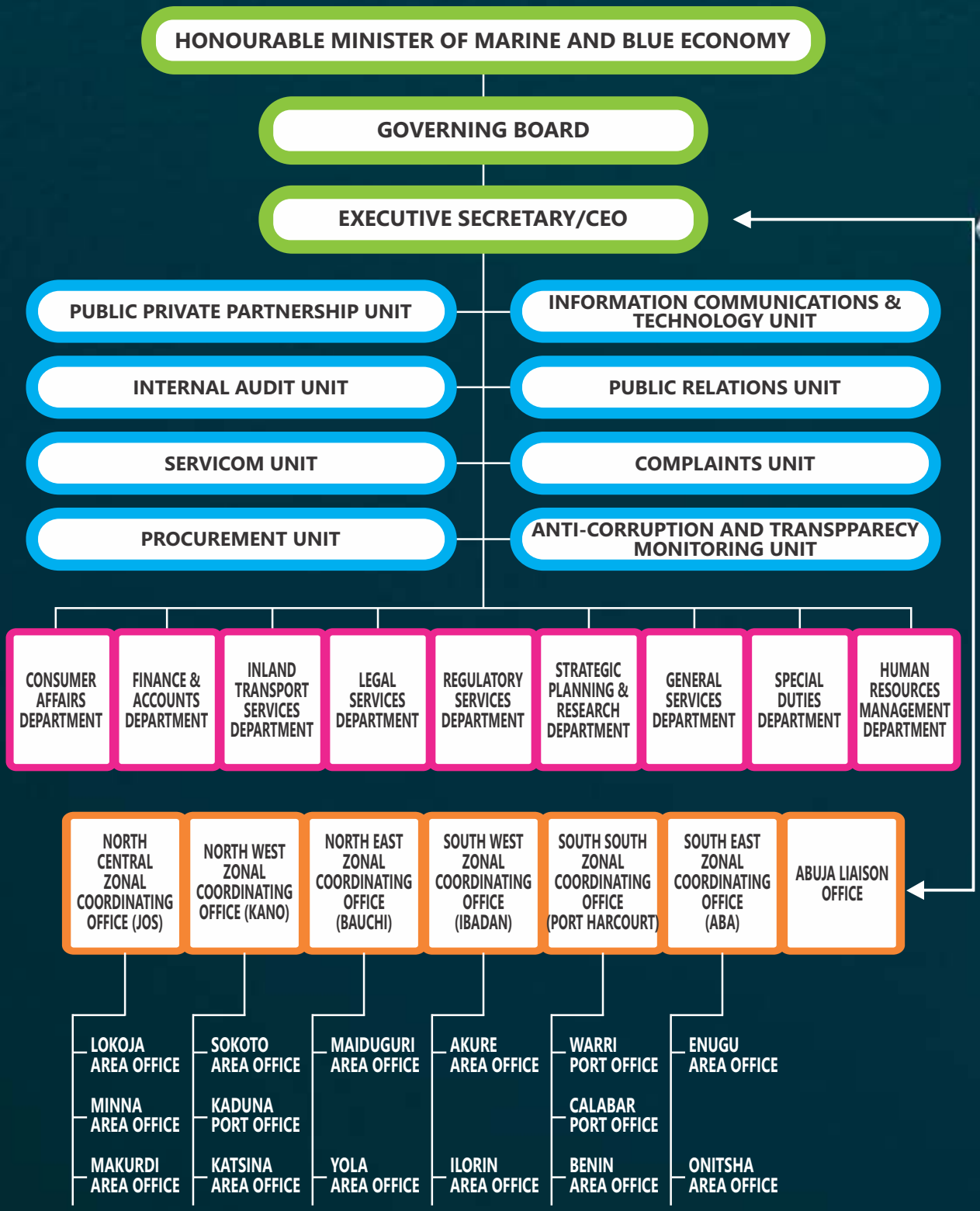
ABUJA LIAISON OFFICE
Shelter Plaza,
438, Michael Okpara Way,
Wuse Zone 5, Abuja.

Zonal Coordinating and Area Offices locations

S/N	Coordinating Offices	Area Offices	Areas Of Coverage
1.	**South-South Coordinating Office, Port Harcourt.** 32a, King Perekule Street, GRA Phase 2, Port Harcourt, Rivers State.	**Benin** - KY Plaza Opp. PZ Junction Sapele Road Benin City Edo State. **Calabar** - 3rd Floor, Henss Building Complex 24/26 Murtala Mohammed Highway, Calabar, Cross River State. **Warri** - No 5, Effurun/ Sapele Raod Warri, Delta State.	Akwa Ibom, Bayelsa, Cross River, Delta, Edo and Rivers States.
2.	**South-East Coordinating Office, Aba.** 25, Aba - Owerri Road, Aba, Abia State.	**Enugu -** No 2a Colliery Avenue GRA, Enugu, Enugu State. **Onitsha -** No 87 Upper New Market Road, Onitsha Anambra State.	Abia, Anambra, Ebonyi, Enugu and Imo States
3.	**South-West Coordinating Office, Ibadan.** 16B, His Grace Building, Opp. Oando Filling Station, Mokola Hill, Mokola, Oyo State.	**Akure** - 3rd Floor Bank of Agriculture Alagbaka, Akure. **Ilorin** - Ahmadu Bello Way Room 445-447 Governor Office, Ilorin.	Ekiti, Kwara, Ogun, Ondo, Osun and Oyo States.

4.	**North-East Coordinating Office, Bauchi.** 5, Ahmad Abdulkar Road, Bauchi, Bauchi State.	**Maiduguri -** 9/10 Kirikasama Road Opposite Unity Bank, Maiduguri. **Yola -** No 2 Mohammed Tukur Road Old GRA Jimeta, Yola, Adamawa State.	Adamawa, Bauchi, Borno, Gombe, Taraba, and Yobe States.
5.	**North-West Coordinating Office, Kano.** No 78, Bajekoli, Besides Shagalinku, Restaurant Off Zoo Road, Kano State.	**Kaduna** - Kaduna Inland Port Kachia Road, Kakuri, Kaduna State. **Katsina** - No 26 Hassan Usman Road GRA, Katsina State. **Sokoto** - No 1 Kano Road Opposite FIRS Office, Sokoto State.	Jigawa, Kaduna, Kano, Katsina, Kebbi, Sokoto and Zamfara States.
6.	**North-Central Coordinating Office, Jos.** Zaria Road, Opposite Federal Government College, By Road Safety.	**Lokoja -** Zone 8 Round About Before Meme Bridge, Lokoja, Kogi State. **Makurdi -** No 19 Railway By-Pass High-Level Makurdi, Benue State. **Minna -** Ladi Kwali Road Behind Zenith Bank, Tunga, Minna, Niger State.	Benue, Kogi, Nassarawa, Niger and Plateau States
7	**Border Information Centres** Seme-Krake Border Information Centre. Jibiya- Maradi Border Information Centre. Mfum-Cross River.		

Organogram


HONOURABLE MINISTER OF MARINE AND BLUE ECONOMY
GOVERNING BOARD
EXECUTIVE SECRETARY/CEO
PUBLIC PRIVATE PARTNERSHIP UNIT
INFORMATION COMMUNICATIONS & TECHNOLOGY UNIT
INTERNAL AUDIT UNIT
PUBLIC RELATIONS UNIT
SERVICOM UNIT
COMPLAINTS UNIT
PROCUREMENT UNIT
ANTI-CORRUPTION AND TRANSPPARECY MONITORING UNIT
CONSUMER AFFAIRS DEPARTMENT
FINANCE & ACCOUNTS DEPARTMENT
INLAND TRANSPORT SERVICES DEPARTMENT
LEGAL SERVICES DEPARTMENT
REGULATORY SERVICES DEPARTMENT
STRATEGIC PLANNING & RESEARCH DEPARTMENT
GENERAL SERVICES DEPARTMENT
SPECIAL DUTIES DEPARTMENT
HUMAN RESOURCES MANAGEMENT DEPARTMENT
NORTH CENTRAL ZONAL COORDINATING OFFICE (JOS)
NORTH WEST ZONAL COORDINATING OFFICE (KANO)
NORTH EAST ZONAL COORDINATING OFFICE (BAUCHI)
SOUTH WEST ZONAL COORDINATING OFFICE (IBADAN)
SOUTH SOUTH ZONAL COORDINATING OFFICE (PORT HARCOURT)
SOUTH EAST ZONAL COORDINATING OFFICE (ABA)
ABUJA LIAISON OFFICE
LOKOJA AREA OFFICE
MINNA AREA OFFICE
MAKURDI AREA OFFICE
SOKOTO AREA OFFICE
KADUNA PORT OFFICE
KATSINA AREA OFFICE
MAIDUGURI AREA OFFICE
YOLA AREA OFFICE
AKURE AREA OFFICE
ILORIN AREA OFFICE
WARRI PORT OFFICE
CALABAR PORT OFFICE
BENIN AREA OFFICE
ENUGU AREA OFFICE
ONITSHA AREA OFFICE



Management TEAM



RT. HON. EMMANUEL JIME

EXECUTIVE SECRETARY/CEO



I.A. EZEDINMA

DIRECTOR,
REGULATORY SERVICES



A.V. OKAM

DIRECTOR, HUMAN RESOURCE MANAGEMENT



G.E ONOJEDO

DIRECTOR, SOUTH-SOUTH ZONAL COORDINATING OFFICE



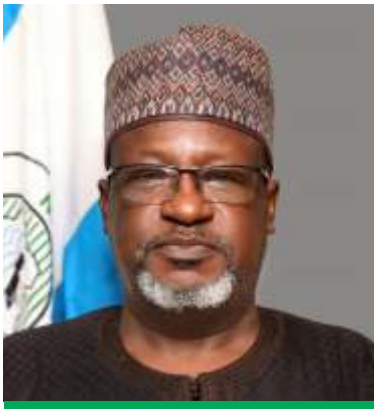
K. OTHMAN

DIRECTOR,
ABUJA LIAISON OFFICE



I.A. OKOLUE

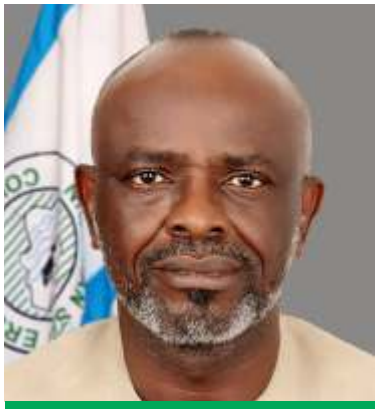
DIRECTOR,
INLAND TRANSPORT SERVICES



A.S. BASHIR

NORTH-WEST ZONAL COORDINATING OFFICE

Management TEAM



O.B. ANIFOWOSE

DIRECTOR, STRATEGIC PLANNING & RESEARCH



M.M. ZUBAIRU

DIRECTOR, SPECIAL DUTIES



M.C. OGBONNAH

DIRECTOR, SOUTH-EAST ZONAL COORDINATING OFFICE



A. U. YAZAH

DIRECTOR, NORTH CENTRAL ZONAL COORDINATING OFFICE



M. ABUBAKAR

DIRECTOR, NORTH-EAST ZONAL COORDINATING OFFICE BAUCHI



B. A. SALEH.

DIRECTOR, LEGAL SERVICES



M.O. FADIPE

DIRECTOR, SOUTH-WEST ZONAL COORDINATING OFFICE



P. EDUWA

DIRECTOR, GENERAL SERVICES



C.C. AGU

DIRECTOR, CONSUMER AFFAIRS



CHAPTER 01

REGULATORY AND OPERATIONAL SERVICES



1.1. KEY PERFORMANCE INDICATORS (KPIs) FOR CONTAINER TERMINALS IN LAGOS SEAPORT

The Nigerian Shippers' Council, conducted quarterly assessments to evaluate the operational performance of container terminals at Lagos Seaports. These assessments included comparing Global and Regional Averages to establish Recommended Standards for Nigerian ports.

The data obtained for the period are as follows:

Table 1: *World Average, Regional Average, Nigerian Average and Recommended Standards of KPIs for Nigerian Ports.*

Indicators	World Average	Regional Average	Recommended Standards for Nigerian Ports
Berth Occupancy	70%	60%	70%
Ship Turnaround Time	1 day	3 days	3 days
Crane moves per hour(mph)	40 mph	36 mph	36 mph
Cargo Dwell Time	7 days	13 days	13 days
Time Spent Atanchorage	1 hour	17 hours	8 hours
Truck Turnaround Time	20 minutes	1 hour	45 Minutes

Table 2: *2022 Key Performance Indicators (KPIs) for Container Terminals in Lagos*

KEY PERFORMANCE INDICATORS (KPIs) FOR TERMINALS IN LAGOS SEAPORT (JANUARY - DECEMBER) 2023					
Indicators	**PTML**	**TICT**	**PCHS**	**FIVE STAR LOGISTICS**	**APMT**
Berth Occupancy (%)	48	38	37	30	53.5
Cargo Dwell Time (DAYS)	16.5	18.3	18	9.25	20.7
Crane Move Per Hour (HOURS)	11	21.65	11.6	9.5	14.55
Ship Turn Around Time (DAYS)	1.19	2.3	2.43	2	1.16
Time Spent at Anchorage (HOURS)	2.3	Nil	3.9	7.5	7.2
Truck Turn Around Time (MINUTES)	26	133	22.7	215	142

Table 3: *2023 Key Performance Indicators (KPIs) for Container Terminal*

KEY PERFORMANCE INDICATORS (KPIs) FOR TERMINALS IN LAGOS SEAPORT (JANUARY - DECEMBER), 2022						
Indicators	PTML	TICT	PCHS	FIVE STAR LOGISTICS	APMT	EKO SUPPORT
Berth Occupancy (%)	40.25	43.73	50.10	39.00	38.75	82.50
Cargo Dwell Time (DAYS)	18.00	21.50	26.00	14.00	14.25	3.00
Crane Move Per Hour (HOURS)	11.00	26.35	34.50	8.50	13.13	12.00
Ship Turn Around Time (DAYS)	1.52	1.70	3.31	4.00	1.93	10.25
Time Spent at Anchorage (HOURS)	1.85	14.51	4.79	7.25	12.05	3.50
Truck Turn Around Time (MINUTES)	15.00	68.00	36.00	3114.00	104.75	12.25

Table 4: *2021 Key Performance Indicators (KPIs) for Container Terminal*

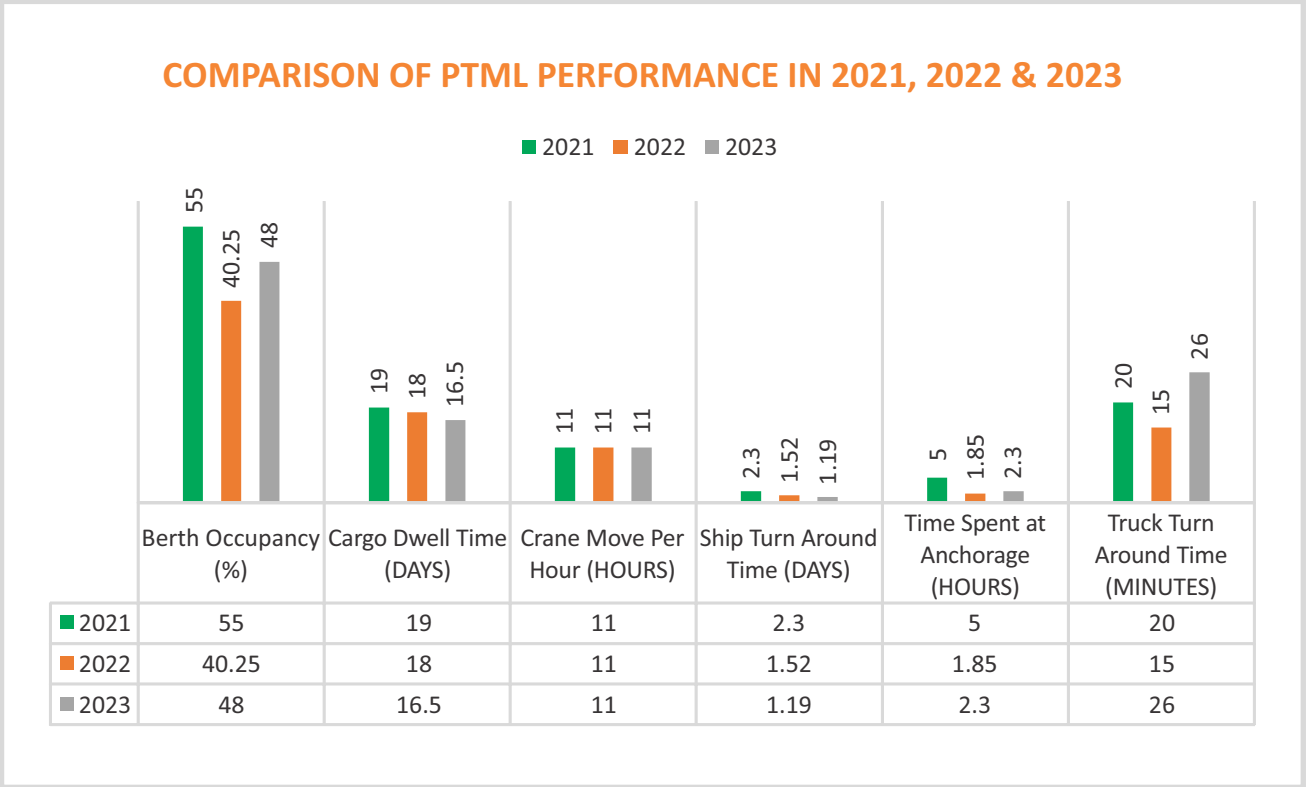
KEY PERFORMANCE INDICATORS (KPIs) FOR TERMINALS IN LAGOS SEAPORT (JANUARY - DECEMBER), 2021					
Indicators	APMT	FIVESTAR LOGISTICS	TICT	PTML	PORTS & CARGO
Berth Occupancy	58%	76%	75.00%	55.00%	68.27%
Ship Turnaround Time	2.5days	3days	2days	2.3days	4.4days
Crane moves per hour (mph)	25mph	22mph	12mph	11mph	11mph
Cargo Dwell Time	19days	10days	20days	19days	23days
Time spent at anchorage	20hrs	28.2hrs	48hrs	5hrs	9hrs
Truck Turnaround Time	1hrs	79hrs	72hrs	20mins	40mins

The Port and Terminal Multiservices Limited (PTML):

During the years 2021, 2022, and 2023, PTML demonstrated strong performance in berth occupancy, with average figures of 55%, 40.25%, and 48% respectively. This indicates consistent operational efficiency over the period reviewed.

Additionally, there were notable improvements in average cargo dwell time and ship turnaround time at PTML across the same years, reflecting enhanced efficiency in cargo clearance at the terminal. The average time spent at anchorage and truck turnaround time at PTML remained within the recommended standards for Nigerian ports throughout the period under review.

Overall, PTML has shown commendable performance during the period in question.



	Berth Occupancy (%)	Cargo Dwell Time (DAYS)	Crane Move Per Hour (HOURS)	Ship Turn Around Time (DAYS)	Time Spent at Anchorage (HOURS)	Truck Turn Around Time (MINUTES)
2021	55	19	11	2.3	5	20
2022	40.25	18	11	1.52	1.85	15
2023	48	16.5	11	1.19	2.3	26

Figure 1: *Comparison of PTML Performance in 2021, 2022 and 2023*

Tincan Island Container Terminal Ltd (TICT):

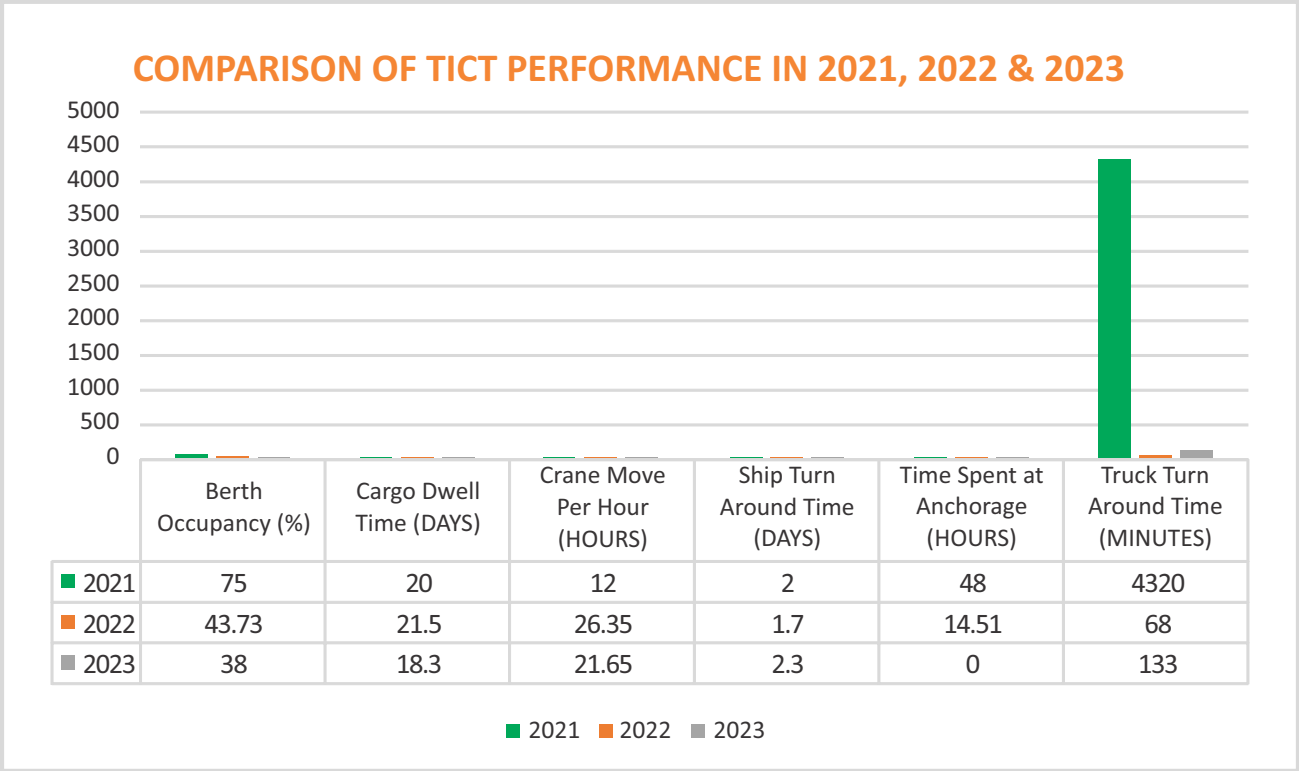
In the years 2021, 2022, and 2023, TICT's average berth occupancy figures were 75%, 43.73%, and 38% respectively. In 2021, the high berth occupancy suggests potential congestion issues, while in 2022 and 2023, the figures indicate underutilization of the berth, falling below recommended standards.

Regarding operational efficiency, the average cargo dwell time and ship turnaround time at TICT showed satisfactory performance throughout the period under review, indicating effective cargo clearance processes.

An analysis of anchorage time revealed a significant improvement at TICT in 2023, with ships no longer waiting at anchorage compared to 2021 and 2022. This improvement underscores enhanced terminal efficiency.

However, TICT's average truck turnaround time over the years exceeded the recommended Nigerian average. This can be attributed to the reconstruction of access roads in 2021 and ongoing traffic congestion on both port access roads and inside the ports in 2022 and 2023 respectively.

Overall, while TICT has demonstrated efficient cargo handling and improved anchorage management in recent years, efforts may be needed to optimize berth occupancy and reduce truck turnaround times to align with recommended standards.



	Berth Occupancy (%)	Cargo Dwell Time (DAYS)	Crane Move Per Hour (HOURS)	Ship Turn Around Time (DAYS)	Time Spent at Anchorage (HOURS)	Truck Turn Around Time (MINUTES)
2021	75	20	12	2	48	4320
2022	43.73	21.5	26.35	1.7	14.51	68
2023	38	18.3	21.65	2.3	0	133

Figure 2: *Comparison of TICT Performance in 2021, 2022 and 2023*

Ports and Cargo Handling Services (PCHS):

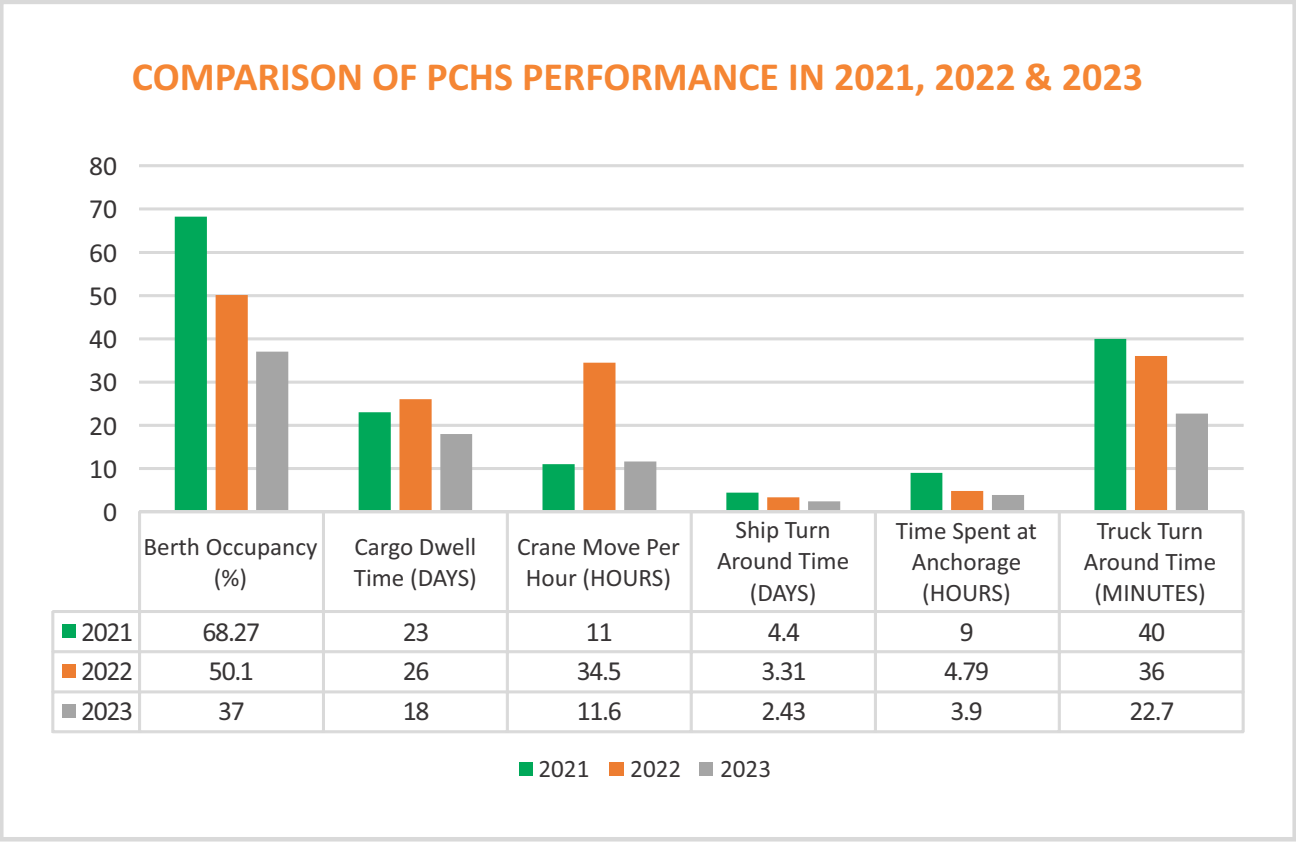
In the years 2021, 2022, and 2023, PCHS showed varying levels of berth occupancy, with average figures of 68.27%, 50.1%, and 37% respectively. Until 2023, the terminal maintained satisfactory performance, but in that year, the berth was underutilized, indicating a potential decrease in operational activity.

Regarding cargo handling, the average dwell time for cargo at PCHS in 2021, 2022, and 2023 exceeded the recommended Nigerian standard. This suggests delays in cargo clearance processes at the terminal during these years.

On a positive note, ship turnaround time and time spent at anchorage at PCHS demonstrated significant improvement over the review period, reflecting enhanced operational efficiency.

In terms of truck movement, PCHS maintained a fairly good average performance in cargo transportation by truck throughout the period under review.

In summary, while PCHS has shown efficiency improvements in ship operations and truck movement, efforts may be needed to optimize berth utilization and reduce cargo dwell times to align with recommended standards for Nigerian ports.



	Berth Occupancy (%)	Cargo Dwell Time (DAYS)	Crane Move Per Hour (HOURS)	Ship Turn Around Time (DAYS)	Time Spent at Anchorage (HOURS)	Truck Turn Around Time (MINUTES)
2021	68.27	23	11	4.4	9	40
2022	50.1	26	34.5	3.31	4.79	36
2023	37	18	11.6	2.43	3.9	22.7

Figure 3: *Comparison of PCHS Performance in 2021, 2022 and 2023*

Five Star Logistics Ltd:

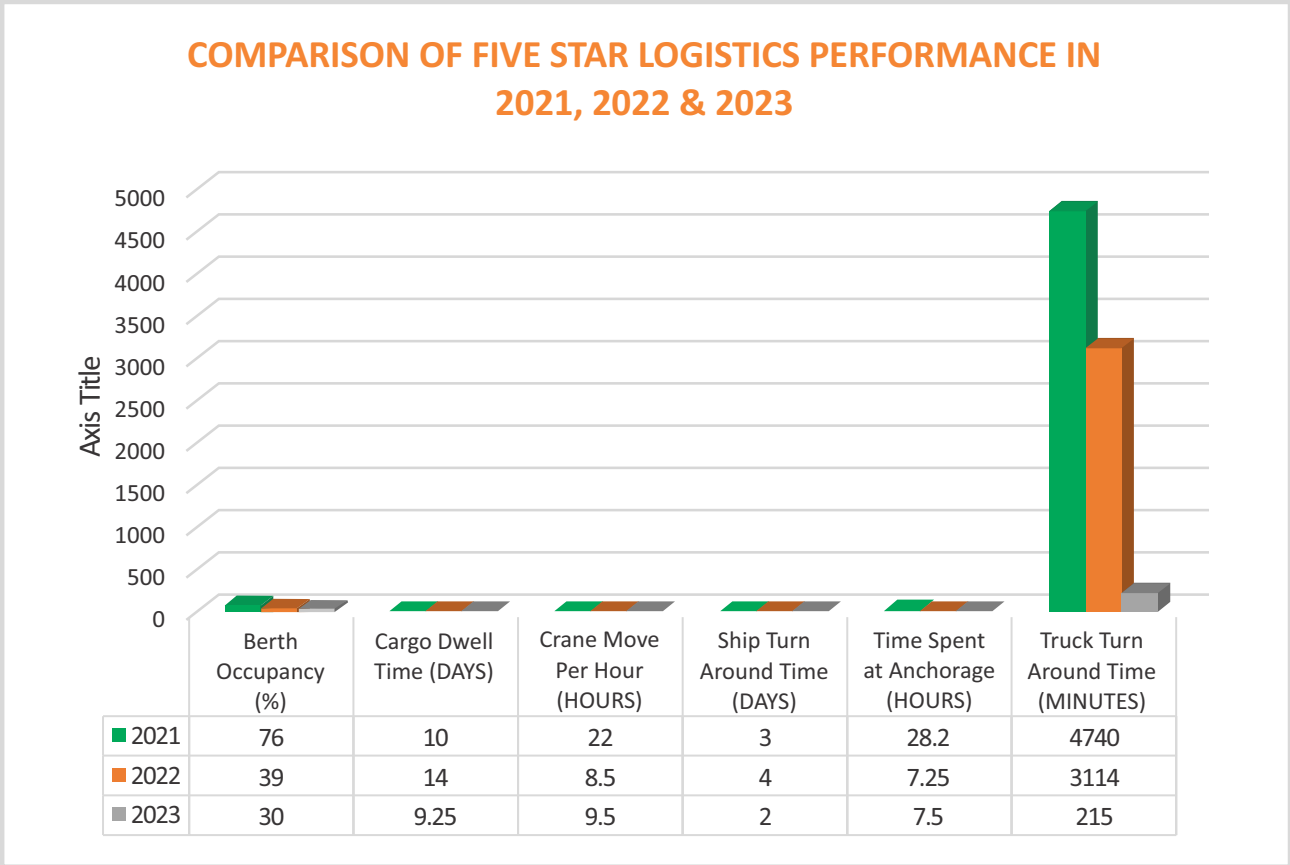
In the years 2021, 2022, and 2023, Five Star Logistics had average berth occupancy figures of 76%, 39%, and 30% respectively. The high berth occupancy in 2021 suggests potential congestion issues, while the lower figures in 2022 and 2023 indicate underutilization of the berth space compared to the recommended standards for Nigerian ports.

Regarding cargo operations, the average dwell time for cargo at Five Star Logistics in 2021, 2022, and 2023 was relatively fair, indicating efficient clearance processes at the terminal.

There were notable improvements in ship turnaround time and time spent at anchorage at Five Star Logistics over the review period, highlighting enhanced terminal efficiency in these aspects.

In terms of truck operations, Five Star Logistics demonstrated fairly good performance in the movement of cargo by truck throughout the period under review.

In summary, while Five Star Logistics has shown efficiency in cargo clearance, ship operations, and truck movement, there is room to optimize berth utilization to better align with recommended standards for Nigerian ports, especially considering the underutilization observed in recent years.



	Berth Occupancy (%)	Cargo Dwell Time (DAYS)	Crane Move Per Hour (HOURS)	Ship Turn Around Time (DAYS)	Time Spent at Anchorage (HOURS)	Truck Turn Around Time (MINUTES)
2021	76	10	22	3	28.2	4740
2022	39	14	8.5	4	7.25	3114
2023	30	9.25	9.5	2	7.5	215

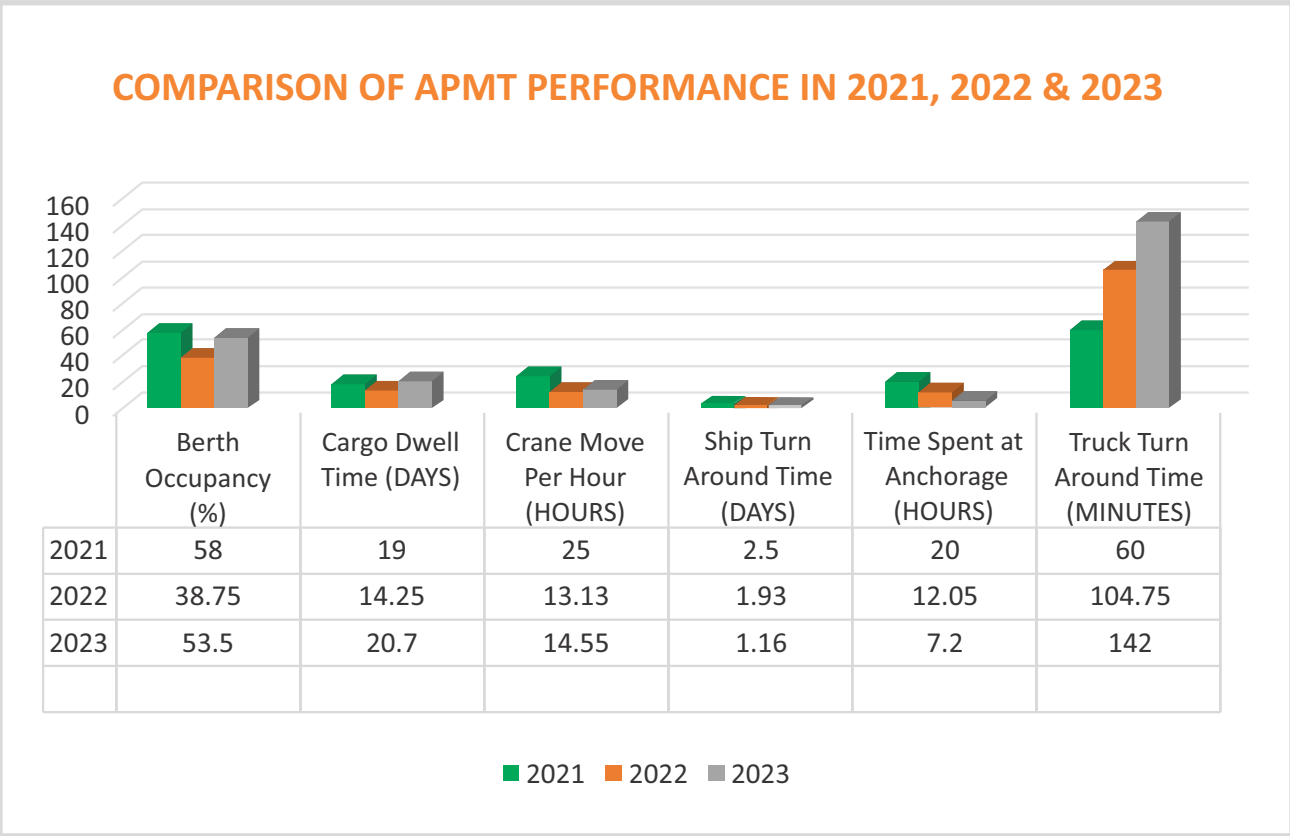
Figure 4: *Comparison of FIVE STAR LOGISTICS Performance in 2021, 2022 and 2023*

APM Terminals:

APM Terminals, Apapa has demonstrated commendable performance in berth occupancy, ship turnaround time, and time spent at anchorage, consistently meeting or exceeding Nigerian recommended standards over the years.

However, the average cargo dwell time and truck turnaround time at APM Terminals, Apapa have not met the recommended Nigerian standards in the years 2021, 2022, and 2023. This suggests that there have been delays in cargo clearance processes and truck movement within the terminal during this period.

In summary, while APM Terminals, Apapa has maintained efficient operations in terms of berth management and ship handling, efforts may be needed to improve cargo dwell time and truck turnaround time to align with the recommended standards for Nigerian ports.



	Berth Occupancy (%)	Cargo Dwell Time (DAYS)	Crane Move Per Hour (HOURS)	Ship Turn Around Time (DAYS)	Time Spent at Anchorage (HOURS)	Truck Turn Around Time (MINUTES)
2021	58	19	25	2.5	20	60
2022	38.75	14.25	13.13	1.93	12.05	104.75
2023	53.5	20.7	14.55	1.16	7.2	142

Figure 5: *Comparison of APMT Performance in 2021, 2022 and 2023*

1.2. NIGERIAN AVIATION HANDLING COMPANY (NAHCO) & SKYWAY AVIATION HANDLING COMPANY (SAHCO) CARGO STATISTICS AT MURTALA MUHAMMED INTERNATIONAL CARGO AIRPORT IKEJA, LAGOS

Table 5: *NAHCO & SAHCO Import Cargo Throughput in Kilograms (kg), 2023*

COMPANY	IMPORT			
	Q1 (Kg)	Q2(Kg)	Q3(Kg)	Q4(Kg)
NAHCO	11,895,155.10	12,624,459.72	12,000,481.00	11,100,572.00
SAHCO	14,725,205.00	10,795,280.00	12,700,862	12,374,753
	26,620,360.10	23,419,739.72	24,701,343.00	23,475,325.00

Table 6: *NAHCO & SAHCO Export Cargo Throughput in Kilograms (kg), 2023*

COMPANY	EXPORT			
	Q1 (Kg)	Q2(Kg)	Q3(Kg)	Q4(Kg)
NAHCO	2,869,127.10	3,310,856.00	4,302,362.00	4,970,983.00
SAHCO	3,193,523	4,239,043	4,985,478	5,800,635
	6,062,650.10	7,549,899.00	9,287,840.00	10,771,618.00

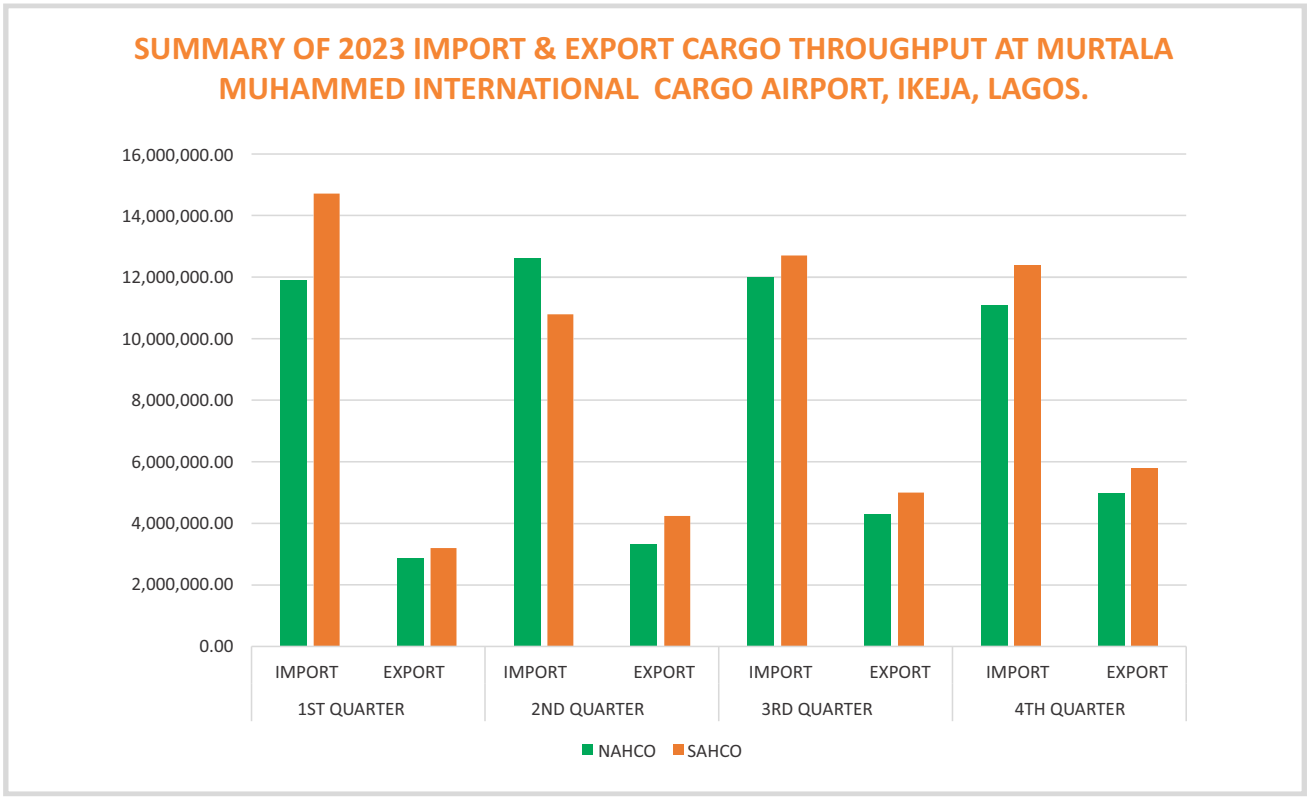


Figure 6: *Summary of Import and Export Cargo Throughput*

1.3. PORT PERFORMANCE EVALUATION FOR KADUNA INLAND DRY PORT (KIDP)

The Council conducted an analysis on a scale of 1 to 10 ratings of Key Performance Indicators in the KIDP. The analysis showed positive rankings for Import Traffic and Clearance Processes, while Container Export Traffic recorded very poor performance due to ginger diseases. The absence of rail transportation significantly affected the overall dry port performance, contributing to an unfavorable balance of trade or trade deficit

Table 7: *KIDP Performance Evaluation Indicators*

	INLAND DRY PORT PERFORMANCE EVALUATION INDICATORS	KEYWORDS	% ACHIEVED
1	CONTAINER TRAFFIC IMPORT	**CTI**	90
2	CONTAINER TRAFFIC EXPORT	**CTE**	10
3	TRUCK TURN AROUND TIME	**TWT**	80
4	AVERAGE CLEARANCE PERIOD	**ACP**	80
5	AVERAGE EXAMINATION TIME	**AET**	90
6	DELAYS	**D**	90
7	RAIL TRANSPORT	**RT**	0

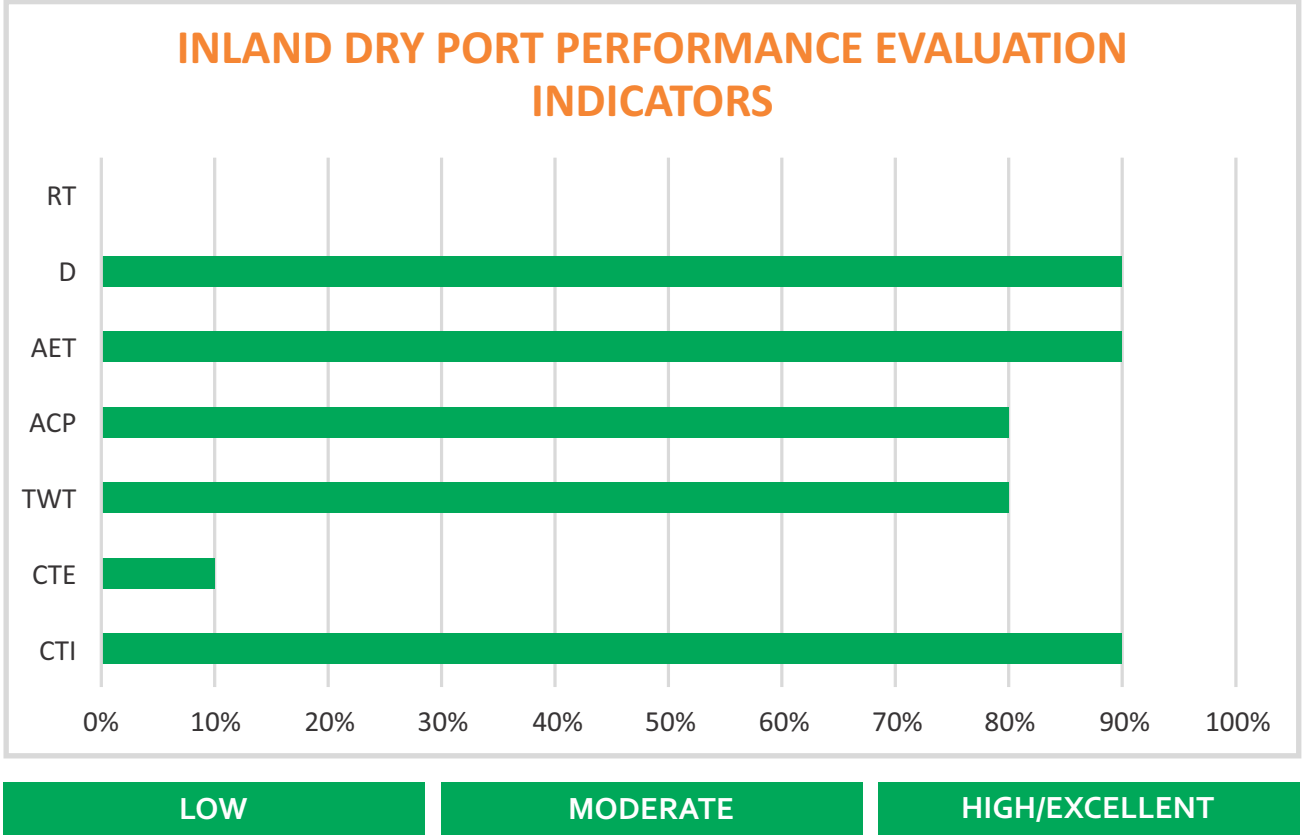


Figure 7: *KIDP Performance Evaluation Indicators*

1.4. STAKEHOLDERS' ENGAGEMENTS

The Council embarked on a series of engagements and interventions to advocate for stakeholders' interests. These initiatives encompassed partnerships with government and private organisations, the signing of Memoranda of Understanding (MoUs), the launching of Operational Manuals and coordination of activities among shippers' associations.

1.4.1. HOSTED THE 9TH AFRICAN SHIPPERS' DAY

The Council, hosted the 9th African Shipper's Day in partnership with the Union of African Shippers Council (UASC), under the theme "African Continental Free Trade Agreement: A veritable Platform for African Shippers to Mainstream into Global Trade" at Oriental Hotel, Victoria Island, Lagos, from 16th to 18th January, 2023.

This event was designed to foster an exchange of ideas and experiences among Shippers' Organizations in the West and Central African Sub-region. It served as a platform for stakeholders to exhibit their products and services and facilitated networking opportunities among shippers and stakeholders from various African countries.

The Shippers Day was officially inaugurated by the Hon. Minister of State for Transportation, Prince Ademola Adewale Adegoroye, representing the President and Commander-in-Chief of the Federal Republic of Nigeria.

1.4.2. SENSITIZATION PROGRAMME ON THE ROLE OF THE BORDER INFORMATION CENTRE (BIC) IN CROSS BORDER TRADE

The Council convened a sensitization program on the function of Border Information Centers in Cross Border Trade. This initiative aimed to educate cross-border traders and government agencies operating within and around the Mfum/Ekok Joint Border Post (JBP) on the crucial role of Border Information Centers in fostering and facilitating cross-border trade. The program sought to enable traders to conduct their business formally and assist border agencies in delivering their services in accordance with statutory regulations, thereby enhancing cross-border trade efficiency.

1.4.3. SENSITIZATON OF STAKEHOLDERS ON THE ONLINE PORTAL FOR REGISTRATION OF REGULATED PORT SERVICE PROVIDERS AND USERS

The Council organized a sensitization program aimed at promoting and educating stakeholders on the benefits of registration. This initiative attracted key stakeholders within the maritime industry in Port Harcourt, Warri and Calabar.

To strengthen stakeholders' comprehension of the registration procedures and

guidelines, every attendee received copies of a handbook. This handbook acts as a comprehensive resource, offering detailed information and step-by-step instructions for navigating the online portal and successfully completing the registration process.

1.4.4. SENSITIZATION PROGRAM ON CONSUMER RIGHTS AND RESPONSIBILITIES IN THE PORT AND SHIPPING SECTOR

The Council, in collaboration with the Federal Competition and Consumer Protection Commission (FCCPC), held a sensitization program on Consumer Rights and Responsibilities in the Port and Shipping Sector. This initiative followed the signing of an MOU between NSC and FCCPC, establishing a Joint Implementation Committee (JIC) aimed at enhancing consumer protection in the Maritime Industry.

The program focused on educating stakeholders, particularly shippers and freight forwarders, about their rights and responsibilities within the port and shipping industry, emphasizing the delivery of quality services, efficiency, and safety in cargo handling.

Following the sensitization sessions, both agencies' management are urged to support the NSC/FCCPC Joint Implementation Committee in addressing identified sector gaps and developing a comprehensive manual on the rights and responsibilities of service providers and users in ports and shipping.

1.4.5. SENSITIZATION WORKSHOP ON THE AWARENESS CREATION FOR PROFESSIONAL ORGANIZATIONS AND STAKEHOLDERS IN TRADE

The Council, in collaboration with the ECOWAS Commission, organized a workshop for professional organisations and stakeholders. The primary objective of the program was to raise awareness about the elimination of Non-Tariff Barriers (NTBs) through the ECOWAS Trade Obstacles Alert Mechanism (TOAM).

TOAM operates through an online reporting system supported by an interagency network. This enables businesses to promptly submit queries or obstacle reports to public sector agencies, receive timely responses, and stay informed about queries submitted by other operators regarding specific products or countries.

The following recommendations were made:

- That Council should conduct an enlightenment program to educate stakeholders on how to eliminate Non-Tariff Barriers via TOAM.
- That Council should expedite the establishment of additional Border Information Centers to facilitate trade.

1.4.6. STAKEHOLDERS' ENLIGHTENMENT ON KEY REFORMS OF THE PRESIDENTIAL ENABLING BUSINESS ENVIRONMENT COUNCIL

The Council, in collaboration with the Presidential Enabling Business Environment

Council (PEBEC), hosted a multi-agency enlightenment program on the key reforms of PEBEC under NAP 7.0 for Agro-Export. The objective was to educate industry stakeholders about PEBEC's reforms under the National Action Plan 7.0 (NAP 7.0) aimed at improving agro-export in Nigeria. The program provided a platform for participants to address challenges in Agro-Export trade and propose practical solutions aligned with PEBEC's goals.

Key recommendations from the program included:

- That Council should collaborate with relevant agencies in the export ecosystem to streamline their processes and establish clear timelines.
- That Council should present harmonized processes with timelines to PEBEC to secure Service Level Agreements from agencies involved in the export ecosystem. These agreements would serve as operational tools to ensure a smooth export process.

1.4.7. SEMINAR ON BEST PRACTICES IN AGRICULTURAL PRODUCTS EXPORTATION: SUCCESS STORIES OF EXPORTS FROM EDO STATE

A one-day seminar themed "Best Practices in Agricultural Products Exportation: Success Stories of Exports from Edo State" was organized by the Council.

The objectives of the seminar were:

- To showcase agricultural products in Edo State and their potential for export.
- To share success stories of agricultural product exporters in international trade.
- To foster active participation from stakeholders in creating a conducive environment for agricultural exports.

The seminar drew participation from 120 attendees representing various government agencies and the private sector. The Nigerian Export Promotion Council (NEPC) and Central Bank of Nigeria (CBN) delivered presentations, while both the state government and private sector conveyed goodwill messages.

1.4.8. SENSITIZATION PROGRAMME/PRESENTATION OF OPERATIONAL MANUAL FOR INLAND DRY PORTS(IDPs) IN NIGERIA

A one-day Stakeholders' Sensitization Programme and Presentation of the Operational Manual for the Inland Dry Ports in Nigeria was organised by the Council at various locations (Katsina and Abia) in the country. The purpose of the program was to raise awareness about the IDP Project in the state, encourage stakeholder participation, and educate them on the economic significance of the project for both the state and the nation.

1.4.9. MEETING WITH THE ECONOMIC COMMUNITY OF WEST AFRICAN STATES (ECOWAS) DIRECTORATE OF TRADE

The Council, representing the interests of Nigerian shippers and stakeholders,

deemed it crucial to engage with ECOWAS to address concerns raised by stakeholders. This meeting took place at the Commission's Directorate of Trade, River Plaza, in Abuja on 16th May 2023. The objective of the session was to explore avenues for enhancing trade relations among importers and exporters within the West African corridor.

1.4.10. MEETING WITH ASSOCIATION OF MARITIME TRUCK OWNERS (AMATO).

The Council, following a fact-finding survey on haulage rates and an analysis of field data, organized a meeting with the Association of Maritime Truck Owners on March 7, 2023. The purpose of the meeting was to present the analyzed haulage rates and solicit further discussions and input from stakeholders. Hauliers were urged to review the proposed rates document and provide feedback, considering the current economic conditions, before the rates are finalized with relevant stakeholders.

Several key outcomes emerged from the meeting. It was determined that under the CEMA Act, any defaulting cargo should be seized along with its means of conveyance. It was also noted that delays in overtime cargo evacuation are typically caused by the Federal High Court's gazetting process, which must occur before cargoes can be auctioned. Furthermore, the need for collaboration among relevant agencies to sensitize shippers on specific issues was recognized. The Council emphasized the importance of having representation at periodic Customs stakeholder meetings and highlighted the need for greater synergy among government agencies to prevent frequent blockage and re-examination of cleared containers.

1.4.11. MEETING WITH THE AREA COMMANDER OF THE NDLEA, APAPA COMMAND

The Council was visited by the National Drug Law Enforcement Agency (NDLEA), Apapa Command, which introduced its new Commander who assumed office on February 14, 2023. The visit aimed to strengthen the already positive relationship between the two organizations.

As a result of the visit, several collaborative measures were agreed upon. The NDLEA will extend its War on Drug Abuse (WADA) to include the Council, and both organizations will work together on workplace education concerning drug-related issues. Additionally, with the Council being assigned as the executor of the International Cargo Tracking Note (ICTN), it was recognized that collaboration between the two agencies is crucial in combating the influx of drugs through Nigerian ports.

1.4.12. MEETING AT NIMASA RESEARCH CENTER ON BALLAST WATER REGULATION.

The Council participated in a meeting with the NIMASA taskforce, which is responsible

for regulating ballast water and other types of spillage activities in Nigeria. The meeting, which also included representatives from the Nigerian Ports Authority, MAN Oron, NIWA, and STOAN, focused on ways to manage the impact of ballast water discharge without contaminating Nigerian waters.

As a result of the discussions, several measures were established to address ballast water contamination. The agency set up a laboratory for testing water to determine its chemical composition. It was decided that ballast water should be disposed of at least two hundred miles from territorial waters to ensure it can be contained and to prevent contamination. Additionally, an emergency response team, well-equipped to handle cases of oil spillage, was to be established.

1.4.13. TRIPARTITE MEETING WITH WEST AFRICAN ROAD TRANSPORT UNION AND ASSOCIATION OF NIGERIAN CUSTOMS LICENSE AGENTS

The Council organized a tripartite meeting at the Border Information Centre on February 8, 2023, to address complaints from the West African Road Transport Union (WARTU) regarding harassment by security operatives along the Agbara-Seme axis. The meeting, which was held in two sessions with the relevant associations, highlighted that WARTU members were concerned about their share of the N65, 000 paid for Escort/Pass and were prepared for peaceful negotiations. In contrast, the Chairman of ANCLA was unwilling to allocate any amount to WARTU.

As outcomes of the meeting, the Council was instructed to take several actions. First, NSC should write to the Council for the Regulation of Freight Forwarding in Nigeria (CRFFN) to confirm whether ANCLA (Seme) had been authorized to collect the N65, 000 payment for Escort/Pass.

Additionally, the Council should organize a meeting with stakeholders and security operatives to address the issues of extortion and harassment along the corridor. The Council was also directed to invite officers from the Independent Corrupt Practices and Other Related Offences Commission (ICPC) to the meeting to reinforce anti-corruption measures to the security operatives.

Furthermore, the Council was tasked with arranging an enlightenment workshop at Seme for border agencies and stakeholders, considering Nigeria's membership in the African Free Trade Area and ECOWAS.

1.4.14. MEETING WITH MARITIME WORKERS UNION OF NIGERIA (MWUN) AND EMPLOYERS IN THE SHIPPING SECTOR

The Council convened a meeting with the Maritime Workers Union of Nigeria (MWUN) and employers in the shipping sector on March 16, 2023. This meeting was called in response to a directive from the Federal Ministry of Transportation, which instructed the Council to address a complaint regarding employers in the shipping

sector refusing to negotiate minimum standards (NJIC) for the shipping labor industry. The Hon. Minister required the Council to provide specific recommendations by March 17, 2023.

Following extensive discussions, the meeting reached several resolutions. It was agreed that MWUN and the Shipping Companies would resume negotiations regarding employees' conditions of service. The earlier Employers Association, which had been used for negotiations before 2008, would be revived as a platform for these discussions. Additionally, the joint negotiation committee of Shipping Companies and MWUN was scheduled to reconvene on April 13, 2023.

The Council agreed to co-opt two officers to observe and provide guidance during these meetings.

Furthermore, the NSC was tasked with inquiring about the registration and status of the Shipping Companies/Shipping Agencies, Clearing, and Forwarding Employers Association with the Ministry of Labour and Productivity.

1.4.15. MEETING WITH NIMASA, MARITIME WORKERS UNION OF NIGERIA (MWUN) AND SEAPORT TERMINAL OPERATORS OF NIGERIA (STOAN)

The Council presented its stance at the meeting regarding the reintroduction of Onboard Tally Clerks and Security on vessels, a service that had been discontinued by the Nigerian Ports Authority in 2015. The Council submitted a letter expressing its position to sustain the suspension of these services, citing concerns that reintroducing them would lead to additional costs for cargo clearance.

1.4.16. MEETING WITH COUNCIL OF MARITIME TRANSPORT UNION & ASSOCIATION (COMTUA)

The Council held a meeting with the Council of Maritime Transport Union & Association (COMTUA) on March 8, 2023 to discuss the proposed haulage rates derived from a recent fact-finding survey conducted by the Council. The meeting aimed to review the proposed rates and gather inputs from the Association prior to the final validation.

During the session, stakeholders were briefed on the survey exercise, including the factors considered during the data analysis that led to the proposed haulage rates. The need to revise the existing rates in light of current economic realities was also emphasized. Haulers were encouraged to review the proposed haulage rates document and provide any feedback before the rates are validated with relevant stakeholders. Additionally, stakeholders shared their challenges, including issues with the newly introduced call-up system.

1.4.17. THE 11TH ENLARGED NATIONAL FOCAL POINT MEETING

The Council was invited to attend the 11th Enlarged National Focal Point stakeholders meeting On March 15, 2023 by the Federal Ministry of Industry, Trade and Investment (FMITI) in collaboration with the Nigerian Office for Trade Negotiations (NOTN). The purpose of the meeting was to update the Committee Members on recent protocol developments. During the meeting, several key decisions were made concerning the Nigerian Office for Trade Negotiations (NOTN).

1.4.18. WORKING VISIT TO THE NEW COMPTROLLER OF NIGERIA CUSTOMS SERVICE, SEME COMMAND

The Council paid a courtesy visit to the new Comptroller of Customs Seme Command on 7th February, 2023 at ECOWAS building Seme to brief him on the activities of the Council's and it's Border Information Centers.

As a result of the meeting, it was agreed that the Council should establish a Border Information Centre at the Idi-Iroko Border in Ogun State. This new centre is intended to provide services to cross-border traders and stakeholders utilizing the land border.

1.4.19. WORKING VISIT TO THE CUSTOM COMPTROLLERS OF APAPA AND PTML AREA COMMANDS

The Council paid a working visit to the Customs Area Comptroller (CAC) of Apapa and the CAC of PTML to familiarize with the newly appointed CACs of both area commands, strengthen the relationship between the Nigerian Customs Service and the Council, and address some challenges faced by service providers in the maritime sector. The discussions focused on several key issues, including the need to eliminate delays in cargo clearance, ensure prompt evacuation of overtime cargoes in line with CEMA timelines to free up terminal space, address the proliferation of bonded terminals in residential areas, promote export for revenue generation, and collaborate on educating shippers to improve compliance levels. Additionally, it was noted that truck drivers should not be penalized for false declarations of goods, as they are merely the delivery means.

The outcomes of the visit included a conclusion that the CEMA act mandates that defaulting cargoes should be seized along with their means of conveyance. It was also established that delays in evacuating overtime cargoes are often due to the time required for the Federal High Court to gazette the cargoes, which is necessary before auctioning. The need for collaboration among relevant agencies to sensitize shippers on specific topics was emphasized. It was agreed that the Council should have representation at periodic Customs stakeholder meetings and that a synergy among government agencies is essential to harmonize operations and prevent issues such as repeated blockage and re-examination of containers that have already been cleared.

1.4.20. LAUNCHING OF ONLINE PORTAL FOR REGISTRATION OF REGULATED PORT SERVICE PROVIDERS AND USERS.

The Council launched an online portal for the Registration of Regulated Port Service Providers and Users. The launch event took place at the NSC Training Room on Friday, 16th June, with the objective of promoting the use of the online portal and creating awareness among stakeholders. The event was attended by key stakeholders from the maritime industry.

1.4.21. MEETING WITH FREIGHT FORWARDERS ON DRAFT MINIMUM SERVICE STANDARD FOR FREIGHT FORWARDING OPERATION

The Council developed a draft minimum service standard for freight forwarding activities operating in Nigeria to streamline the operations/activities of freight forwarding in the Nigerian ports. The engagement was held on Tuesday, 8th August, 2023.

The outcome of the engagement revealed a need for further discussions with the Council for the Regulation of Freight Forwarding in Nigeria (CRFFN) to harmonize the minimum service standard for freight forwarding operations across the country. An official letter has been dispatched to the freight forwarding groups requesting their input on the draft standards.

1.4.22. MEETING WITH NIGERIAN RAILWAY CORPORATION (NRC) MoU IMPLEMENTATION COMMITTEE.

The Council held a meeting with the Nigerian Railway Corporation on February 16, 2023 to refine the draft Memorandum of Understanding (MoU) regarding the movement of cargo by rail to the Inland Dry Ports (IDPs).

During the meeting, the draft MoU was thoroughly reviewed, and necessary corrections were made. The discussion highlighted the need for NRC's support and collaboration in connecting rail sidings to the upcoming IDPs to facilitate the smooth evacuation of cargoes. Additionally, it was reported that security measures, including surveillance systems, had been installed and rehabilitation work had begun on the Aba–Port Harcourt and Jos–Bauchi rail corridors.

The meeting also addressed the need to define and discuss the inclusion of NRC Terminals in the MoU more precisely during its review. The Council agreed to share the procedures and guidelines for prospective IDP developers with NRC.

1.4.23. MEETING OF NSC AND FRSC MoU IMPLEMENTATION COMMITTEE.

The NSC/FRSC MoU Implementation Committee held a meeting on July 13, 2023 to

advance the implementation of the Memorandum of Understanding (MoU) between the two organizations and finalize discussions on the signing of the revised MoU.

During the meeting, it was decided that Lagos would replace Ibadan as the Maritime Hub for the proposed Stakeholders' Sensitization Rallies. Additionally, the FRSC agreed to coordinate with the Council to determine a suitable date and venue for the signing ceremony of the revised MoU. The FRSC also committed to providing the Council with access codes for the RTSSS once it is operational.

1.4.24. FEDERAL MINISTRY OF TRANSPORTATION COMMITTEE ON GUIDELINES AND OPERATING PROCEDURE FOR BARGE OPERATION IN NIGERIA.

This Committee was set up by the Federal Ministry of Transportation (FMT) to formulate Guidelines and Regulations for Barge Operation in Nigeria. This committee consists of the NSC, NIMASA, NIWA, NPA and Barge Operators Association of Nigeria. The SOPs for Barge Operations were submitted which was harmonized and awaiting validation by the Honorable Minister of Transportation.

1.4.25. SHIPPERS' ASSOCIATION ACTIVITIES

i. **Meeting With Oyo State Shippers' Association:**
The South West Zonal Office, Ibadan called a breakfast meeting of the Oyo State Shippers' Association on Thursday 28th September 2023. The meeting was held to resuscitate the Association which last held its meeting two (2) years back after the death of the Association's President. During the meeting, the old executives were dissolved by the general house while the Steering Committee was put in place, they are to work within six (6) months to prepare for the election of the new executives. The meeting was a mammoth turnout of genuine shippers.

ii. **Meeting with Ondo State Shippers' Association:**
The Council was represented at the meeting of the Executives of the Ondo State Shippers' Association held on Thursday 14th September 2023. The meeting enumerated the Association's plan and budget towards the preparation for their upcoming Annual General Meeting and also welcomed the new Director (SWZ) to the State. They urge the Council to participate in the development of the Deep Sea in the State.

iii. **Meeting with Abuja Shippers' Association:**
The First Quarter General Meeting of Abuja Shippers' Association was successfully held on 23rd March, 2023. The meeting recorded a satisfactory attendance and participation. The aim of the meeting was to discuss on the prevalent issues/challenges affecting members of the association and how to mitigate these issues in line with ease of doing business.

In the course of the meeting, a resolution for the NSC to initiate a roundtable

meeting between members of the Abuja Shippers' Association and some Embassies in order to foster a healthy and mutual relationship with their nationals was passed. An additional resolution to have a roundtable with some commercial banks to discuss challenges relating to forex and loan assessment procedures for the Shippers' Association was equally passed.

iv. Meeting with Osun State Shippers' Association:

The Association held their monthly meeting on 16th February and 30th March 2023 which included briefs from the Zonal Coordinator on; The 9th African Shippers' Day tagged "African Continental Free Trade Agreement: A Veritable Platform for African Shippers' to Mainstream into Global Trade" held at Oriental Hotel, Lagos on 16th – 18th January 2023.

- The newly assented Bill on International Cargo Tracking Note (ICTN)
- The enlightenment seminar on "Vehicles Transit Area" at Akure, Ondo State.

v. Meeting with Kwara State Shippers' Association:

The Association held their quarterly meeting on 21st March 2023 which included a brief from the ZC (SWZ) on the Key points of VTAs and the feasibility study carried out on the proposed sites at Jebba by a team of Consultant and NSC.

The members of the association expressed their displeasure at the change in site of the VTA from Aiye-nkorin to Jebba. In light of this, the Investment of Kwara State Government (Harmony Holdings) promised to liaise with the State Government on abandoned Cargo Airport Terminal and the shifting of VTA site from Aiye-nkorin to Jebba.

vi. Meeting with Ekiti State Shippers' Association:

The Association held their quarterly meeting on the 29th March 2023 which and discussed the following issues:

- The need for the Association to hold their Annual General Meeting
- Association Land Matter
- Membership Drive
- Need for NSC to visit the Ministry of Commerce, Ministry of Transport and on-going Cargo Airport Project at Ado Ekiti.

vii. Meeting with Delta State Shippers' Association:

The Delta State Shippers' Association (DELSA) held its general meeting within the period under review. The Association also intimated the office that the Association had been invited by Sealink Promotional Company Limited to participate in a proposed meeting with technical partners of Port of Antwerp Bruges on Wednesday, 5th of April, 2023. The purpose of the meeting would be to discuss modalities to bridge maritime logistics infrastructure gaps towards inland waterways, and facilitating costal connectivity for intra-coastal trade in Delta State.

1.5. STAKEHOLDERS' ENGAGEMENT GALLERY








GOVERNMENT HOUSE, MAIDUGURI
GOVERNMENT HOUSE, MAIDUGURI
BORNO STATE




NIGERIAN SHIPPERS' COUNCIL
WELCOMES YOU
ONLINE PORTAL FOR THE REGISTRATION
of Regulated Port Service Providers and Users


Breakfast Meeting
















AT 50




NIGERIAN SHIPPERS' COUNCIL


WELCOME TO DAY 2




USAID


ABUJA INT'L TRADE FAIR 2023
www.shipperscouncil.gov.ng






MARITIME



















CHAPTER 02

SERVICE RELATIONSHIP MANAGEMENT



2.1. COMPLAINTS HANDLING

The Council in fulfilling its role in supporting stakeholders and the industry, is responsible for handling and resolving Shippers' complaints related to shipping and trade issues. These include excessive and arbitrary local shipping charges, short landing and non-delivery of goods, cargo losses, damage, marine insurance claims, and non-refund of container deposits.

In 2023, the Council continued to address a range of stakeholders' complaints, working to maintain an enabling environment for practitioners in the maritime sector.

2.1.1. ANALYSIS OF STAKEHOLDERS COMPLAINTS HANDLED FOR YEAR 2023

1. Analysis of Amount Saved

The data provided includes amount saved or recovered from this intervention in 2023, in Nigerian Naira (₦) and also in US Dollars (USD) respectively.

Table 8a: *2023 Total amount saved*

AMOUNT SAVED (₦)	AMOUNT SAVED (USD)
₦ 349,290,462.00	$ 35,058.02

2. Analysis on Status of Complaints

The data includes counts of different statuses of complaints handled:

Table 8b: *2023 Status of Complaints handled*

STATUS	Count of STATUS	% Count
On-going	144	55%
Resolved	99	38%
Closed	21	8%
Grand Total	**264**	**100%**

These numbers show the distribution of complaint statuses. It's important to note that majority of complaints are ongoing, which might indicate the need for focused resolution strategies or resource allocation.

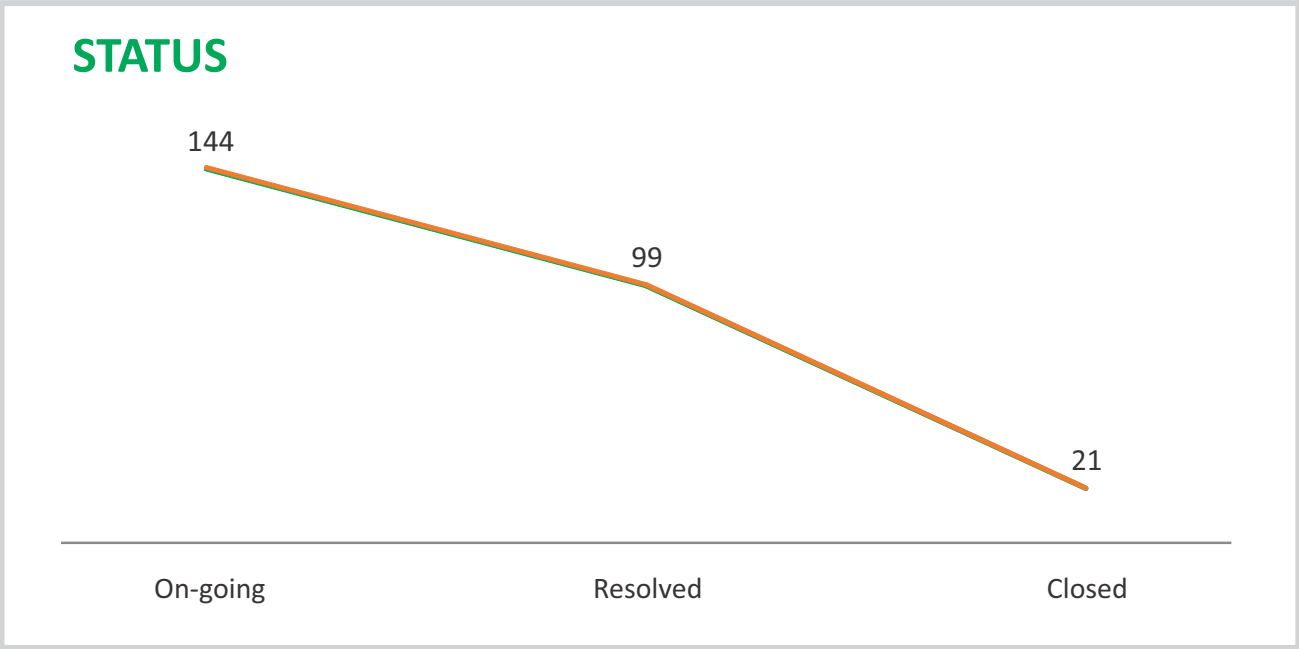


Figure 8: *2023 Status of Complaints handled*

3. Complained Against Analysis

This section details the counts of complaints against different entities:

Table 9: *2023 Cases handled by groups Complained against*

COMPLAINED AGAINST	Count of Complaints	% of Count
Shipping Companies & Shipping Agents	139	53%
Seaport Terminal Operators	72	27%
Import And Export Companies	22	8%
Government Agencies	17	6%
Freight Forwarders	5	2%
Foreign Seller/Buyer	3	1%
Truck Transit Park	3	1%
Groupage Companies Bonded Terminals & Bonded Warehouses	3	1%
Grand Total	**264**	**100%**

This breakdown highlights which sectors face the most complaints. Shipping companies and seaport terminal operators are prominent, indicating potential areas for regulatory or operational improvement.

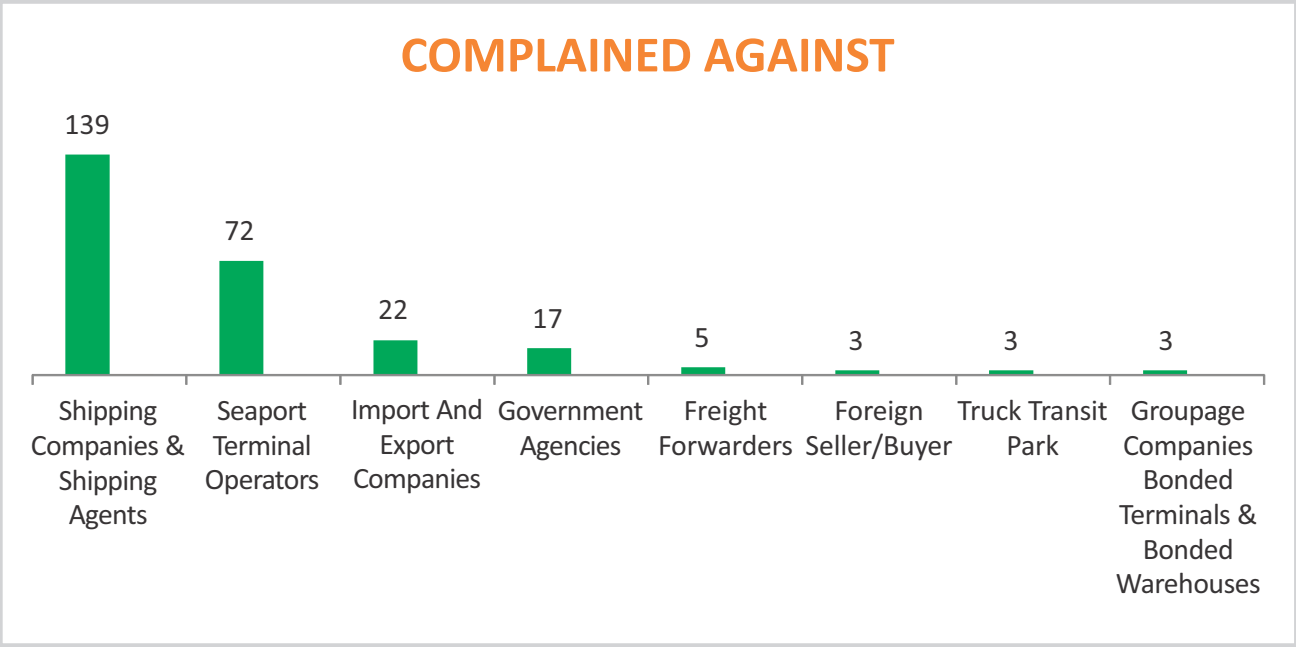


Figure 9: *2023 Group Complained Against*

4. Complainants Analysis

This section shows who is filing the complaints:

Table 10: *2023 cases handled by group of Complainants*

COMPLAINANTS	Count of Complaints
Import and Export Companies	188
Shipping Companies	29
Legal Firms	18
Freight Forwarders	10
Terminal Operators	8
Government Agencies	8
Truck Owners	3
Grand Total	**264**

Import and export companies (Shippers) constitute the largest group of complainants, suggesting issues related to logistics and international trade are prevalent

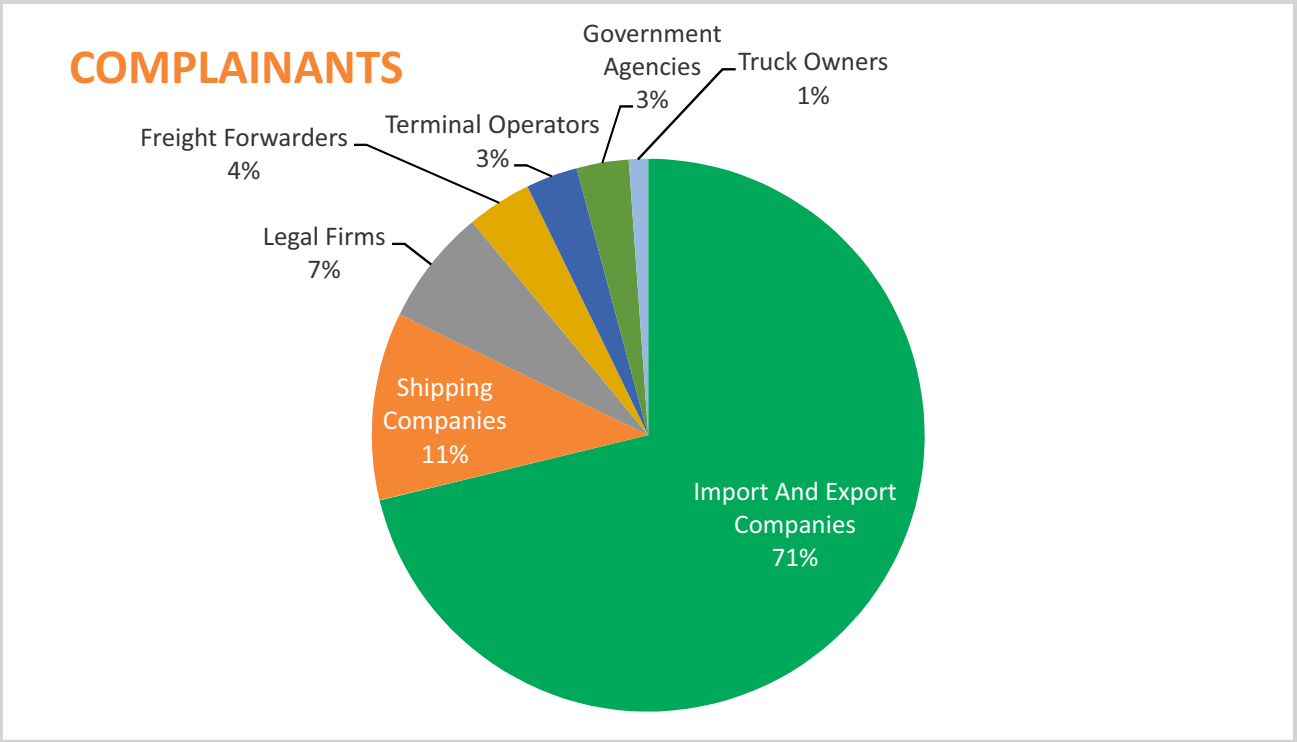


Figure 10: *2023 Group of Complainants*

Table 11: *2023 Disposition of Stakeholders Complaints*

	Disposition of Complaints handled				
Year	Complaints Handled	Resolved	Outstanding	A. Amount saved (N)	B. Amount saved (USD)
2018	231	83	148	225,824,805	
2019	453	114	388	363,004,119	
2020	648	109	509	35,940,582	
2021	668	211	457	1,567,512,759	
2022	415	126	231	203,546,709	
2023	264	99	165	349,290,462	35,058

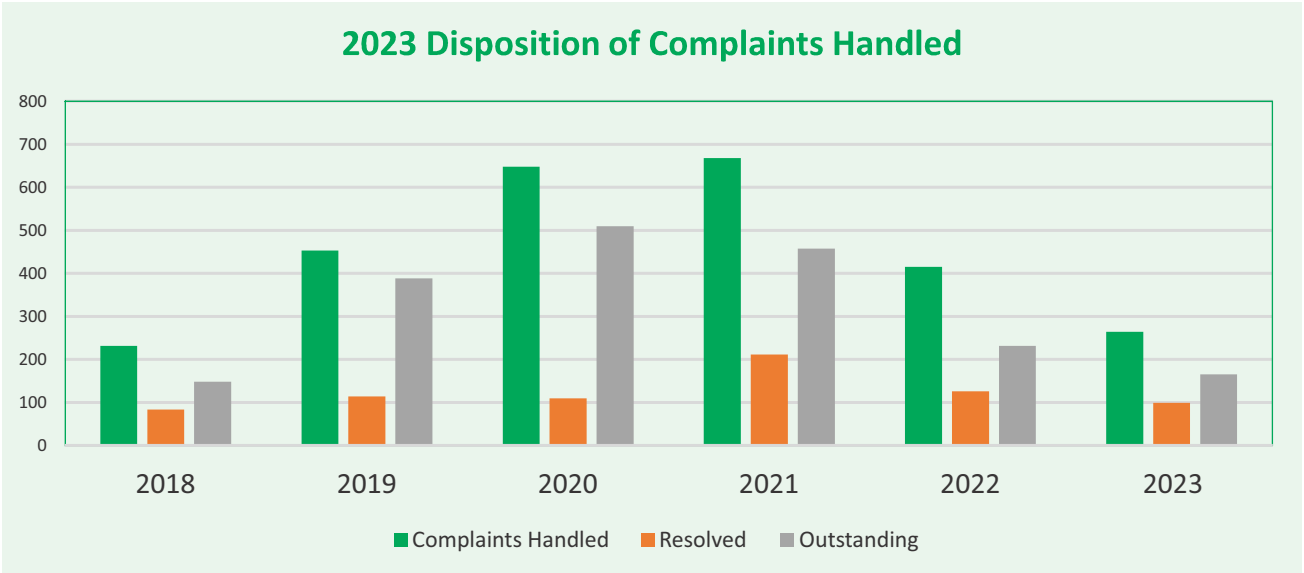


Figure 11: *2023 Disposition of Stakeholders' Complaints*

2.2. PRODUCTION OF IN-HOUSE PUBLICATION: THE FORUM

The Council produced THE FORUM a publication intended to apprise internal staff of activities of the Council and bridge the information gap within the Council. It covers all happenings and accomplishments of the Council as it involves staff and stakeholders in the Maritime Industry.

The Forum was converted to an online magazine to enable wider reach and also drive paperless policy of the Council.

2.3. PRODUCTION OF IN HOUSE TV PROGRAM: THE SHIPPER

The Council produced THE SHIPPER, a thirty (30) minute weekly programme that airs on TVC every Tuesday at 8:30pm and on NTA 2 Channel 5 every Saturday at 9:30am.

This is intended to apprise internal and external stakeholders of activities of the Council and the Maritime Industry in Nigeria and across the world. It contains comprehensive and in-depth reports about various activities and events.

2.4. SPONSORED RADIO PROGRAM: "MARITIME TODAY"

The Council continued in its sponsorship of the radio programme "Maritime Today" on Lagos Traffic Radio 96.1FM, aired every Wednesday and Saturday by 9:15 am and 10:15am respectively.

The programme features staff of the council and industry experts from both local and international sectors, who provide, insights on diverse issues.

2.5. CORPORATE SOCIAL RESPONSIBILITY

The Council regularly carryout Corporate Social Responsibility (CSR) initiatives to give back to the less privilege in the society and its environment.

Various items such as books, food stuff, hospital beds, waterproof mattress, blankets, rechargeable/standing fans, rechargeable lamps, refrigerators, solar deep freezers, washing machines, pressing irons, aluminium kettles, treated mosquito nets, large size towels, 5.5kva generators, burners, cooking pots, frying pans amongst others were distributed during the period under review.

The beneficiaries of the CSR items were:

- Children's Home and Kofan Marusa Maternal and Child Health Care, Katsina,

- State Hospital, Ede, Osun State
- Government Secondary School Ugbugbu, Benue State
- Government Secondary School, Bangshika, Adamawa State
- Ughelli Primary Health Centre, Ughelli South LGC, Delta State
- Apapa Junior High School, Lagos State
- Ansar ud deen Girls College Itire, Lagos State
- Community Secondary School, Ifite-Ogwari, Anambra State
- St Joseph Orphanage Home, Owerri, Imo State
- Epe General Hospital, Epe, Lagos State



Figure 12: *Epe General Hospital, Epe, Lagos State*



Figure 13: *Children's Home and Kofan Marusa Maternal and Child Health Care, Katsina*



Figure 14: *Community Secondary School, Ifite-Ogwari, Anambra State*



Figure 15: *Government Secondary School, Bangshika, Adamawa State*

2.6. SERVICOM ACTIVITIES

The SERVICOM Unit is a Federal Government initiative conceived to promote effective and efficient service delivery.

SERVICOM helps in raising a professional, productive and highly motivated workforce and continuously maintained this through various activities and tools which include the following:

2.6.1. IMPACT ASSESSMENT OF THE COUNCIL'S SERVICE DELIVERY TO ITS STAKEHOLDERS

The council regularly conducts impact assessments activities aimed at engaging stakeholders through interviews and surveys to get feedback on the effects of Councils services.

The exercise provides firsthand information on the perceived effectiveness of the Council in performing its statutory functions to its stakeholders and the impact on their businesses of its stakeholders and making service delivery and enables the Council make informed decision on areas that require improvements/continuous.

The Council visited the under-listed stakeholders in the period under review:
Harlink investment Limited, Apapa, Lagos
Hopegate Multi-Concepts Limited, Apapa, Lagos
Bethedward Nigeria Limited, Apapa, Lagos
CMA/CGM DELMAS (NIG), Apapa, Lagos
Neatman Industry limited, Apapa, Lagos
Itas Global Ventures Limited, Kogi state.
Timothy Idowu Aiyedero, Kogi state.
Lafresh Loafs & Confectionary, Kogi State
Kogi Chamber of Commerce, Industry, Mines & Agriculture
Rajans-Best Ventures, Kogi State
The Shippers Association of Benue state
Dojo Pottery Limited, Benue state



***Figure 16: SERVICOM** unit staff carrying out Impact Assessment with CGM CMA Delmas in October, 2023*

2.6.2. CROSS FUNCTIONAL COLLABORATION

The Council conducted an in-house sensitization programme for the cleaning personnel of the Council with the theme "Issues of work Ethics". The programme aimed at ensuring the cleaning personnel adequately understands the quality of service expected from them in delivering their services to the Council.



***Figure 17:** Cross functional collaboration*

2.6.3. PROFESSIONALISM WEEK

The Council's 2023 professionalism week with the theme"Pursue, Acquire, Innovate."took place from 20th to 24th August 2023. During the programme, the following papers were presented:

1. Pursue, Acquire, innovate - Ms. B. Thompson (Assistant Director SERVICOM)
2. Emerging Trends in Information Communication Technology (ICT)- Mr. Benjamin Ivwighreghweta (Deputy Director, ICT)
3. Motivation in the work place by Hajiya Karimatu Othman - (Director, Abuja Liaison Office
4. Plan Your Retirement - James Kyoun Gaiya (Assistant Director, Insurance and Pensions)



Figure 18: *Professionalism Week*

2.6.4. CUSTOMER SERVICE WEEK 2023

The Council participated in the annual international service week celebration, which creates an avenue to appreciate staff for their diligence in customer services delivery. The one-week celebration is usually celebrated with a lot of fanfare in the Council.



Figure 19: *Customer Service Week*

2.6.5. AWARDS

The Council in its bid to inspire and recognize the dedication of its staff, launched a series of awards aimed at celebrating exceptional contributions and achievements. The quarterly Punctuality Award is presented to individual staff members and bus routes who consistently show reliability and timeliness emphasizing the value of a dependable workforce.

Additionally, the esteemed CEO's Annual Service Award (CASA) are given to individuals who demonstrated outstanding service and commitment throughout the year, acknowledging their crucial role in the organization's success. These awards not only highlight the hard work of the staff but also serve as a motivational tool to encourage ongoing excellence and engagement within the team.



Figure 20: *Punctuality Award*



Figure 21: *CASA Award*

CHAPTER 03

CORPORATE PLANS & ADMINISTRATION





3.1. STRATEGIC MANAGEMENT RETREAT FOR MANAGEMENT STAFF

The Council held its 2023 Strategic Management Retreat from January 26th to 29th, 2023, at Conference Hotel in Abeokuta, Ogun State. With the theme "Team Building: A Pillar for Sustainable Growth," the event aimed to review the Council's 2022 performance, identify challenges and propose improvements, and develop 2023 Key Performance Indicators (KPIs) for various NSC departments and offices. The retreat featured presentations on team bonding, emotional intelligence, SWOT analysis of the Council, and the benefits of diversity and inclusion.

The 2023 Strategic Management Retreat concluded with several key resolutions aimed at improving the Council's efficiency and effectiveness. Notably, it emphasized enhancing team building and conducting a mid-year review of the strategic plan to assess implementation progress. The Council committed to addressing challenges to its operations, fostering emotional intelligence among management staff, and preparing officers for life after service with pre-retirement training.

To reflect its regulatory functions, a name change for the NSC was proposed. Furthermore, staff redeployment and regular training on Port Economic Regulations were advocated for enhanced productivity. A comprehensive communication and branding strategy review and policy framework for container demurrage and detention were also recommended. Lastly, collaboration across departments was encouraged for major programs, and a committee was proposed to drive the implementation of the retreat's resolutions.

3.2. OPERATIONAL RETREAT FOR MIDDLE MANAGERS

The Council in ensuring the effective implementation of its Strategic Plan, organised a 3-day operational retreat for middle-managers on grade levels 12-14 from 21st September to 23rd September, 2023 at Orchid Hotels Limited, Lekki, Lagos.

The retreat was held to discuss the role of middle management in strategy implementation, present the outcomes of previous retreats, and foster team bonding. The event included paper presentations, group exercises, and interactive sessions aimed at personal and career development. Participants identified major challenges hindering the Council's effectiveness and proposed solutions to overcome them.

The Operational Retreat highlighted the crucial role of middle management in implementing strategic plans and achieving the Council's objectives. The retreat focused on improving interdepartmental cooperation, aligning Council programs with strategic goals, enhancing inclusivity, and reducing bureaucratic bottlenecks. Key resolutions included fostering innovation, promoting inclusivity, and developing robust succession management strategies.

Recommendations emphasized establishing cross-functional teams, implementing collaborative software, and initiating regular interdepartmental meetings. Additionally, the retreat stressed the importance of middle management involvement in decision-making and strategic implementation, calling for improved communication, international training opportunities, and enhanced staff welfare. The retreat concluded with a commitment from middle management to advance the Council's agenda through continuous self-development and collaboration with senior management.





Figure 22: *Cross section of participants at Operational Retreat for Middle Managers*

3.3. NIGERIAN SHIPPERS' COUNCIL SPECIAL RETREAT FOR CASCADING SIGNED MINISTERIAL PERFORMANCE BOND

The Honourable Minister of Marine and Blue Economy, His Excellency Adegboga Oyetola, cascaded performance bonds to agencies in the ministry in line with the presidential priorities and focus areas of the President Bola Ahmed Tinubu-led administration. Each agency was there after tasked with cascading their targets to their direct reports and developing scorecards for 2024, aligning with the Government Performance Management System guidelines.

Accordingly, the Council held a 2-day Special Retreat themed Strengthening Economic Regulation of the Marine and Blue Economy for Sustainable Development from 14th December 2023 to 15th December, at Four Points by Sheraton, Lagos, to develop its 2024 Performance Scorecard which includes the cascaded Presidential Priorities, the Council's Operational Priorities, and Service-Wide Objectives.

At the retreat, delegates comprised of the Executive Secretary of the Council, Akutah Pius Ukeyima Esq. MON and heads of departments, units and zones, agreed to the 2024 Performance Scorecard for the Council as well as the responsibilities of the departments, units and zones, in delivering it.



Figure 23: *Nigerian Shippers Council Special Retreat for Cascading Signed Ministerial Performance Bond*

3.4. HUMAN CAPACITY DEVELOPMENT

The Council as part of its commitment to regularly strengthen the skills, abilities, and knowledge base of its employees for improved organizational effectiveness and efficiency, carried out various categories of training programmes during the period under review. These programmes included foreign and local workshops, seminars, conferences and targeted at achieving specific developmental goals of both the Council and its employees.

3.4.1. TRAINING PROGRAMMES

Table 12: *Training Programmes*

Training types	No of participants	No of training programmes
International	34	11
Local/Customised	454	49
In-house	698	14
Professional programmes	86	18

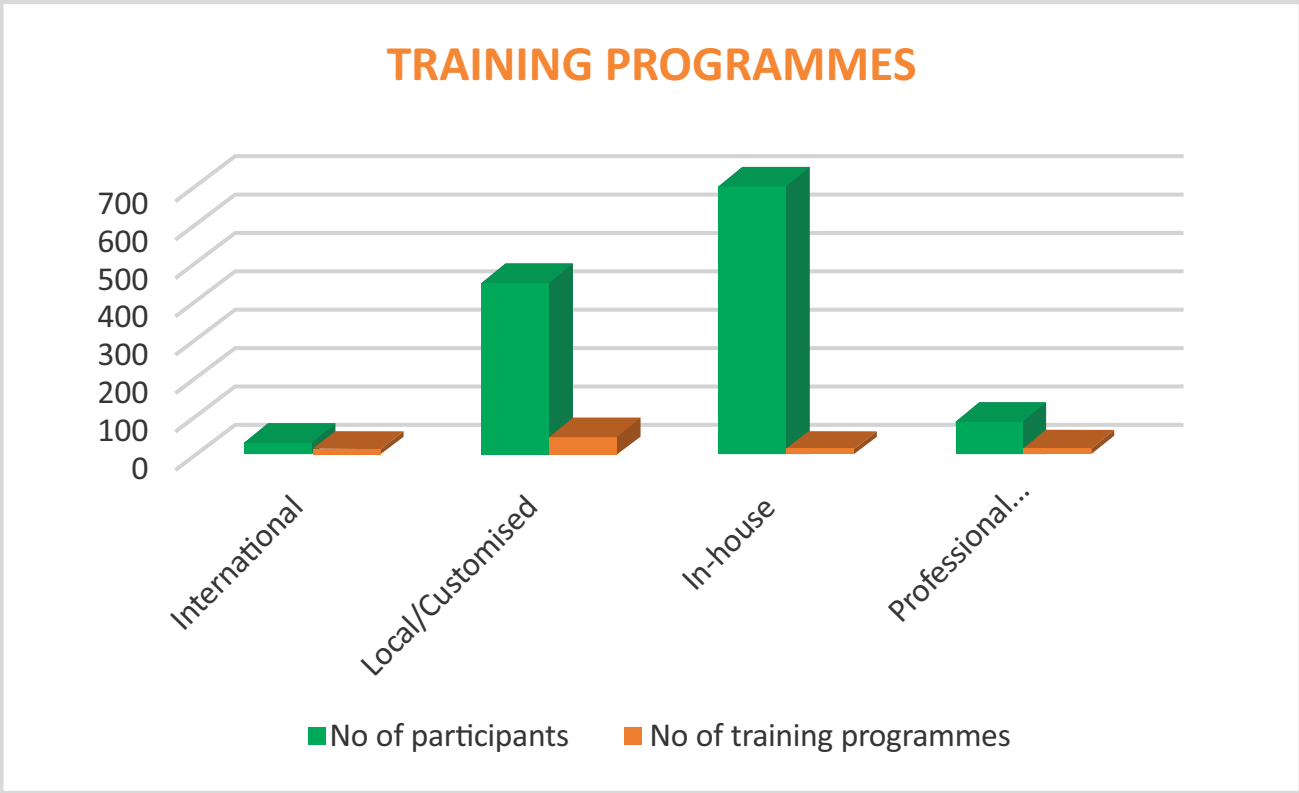


Figure 24: *Training Programmes*

3.4.2. STAFF STRENGTH

The council had a staff strength of four hundred and twenty – two (420) personnel in 2023. This was made up of:
Male = 263
Female = 158

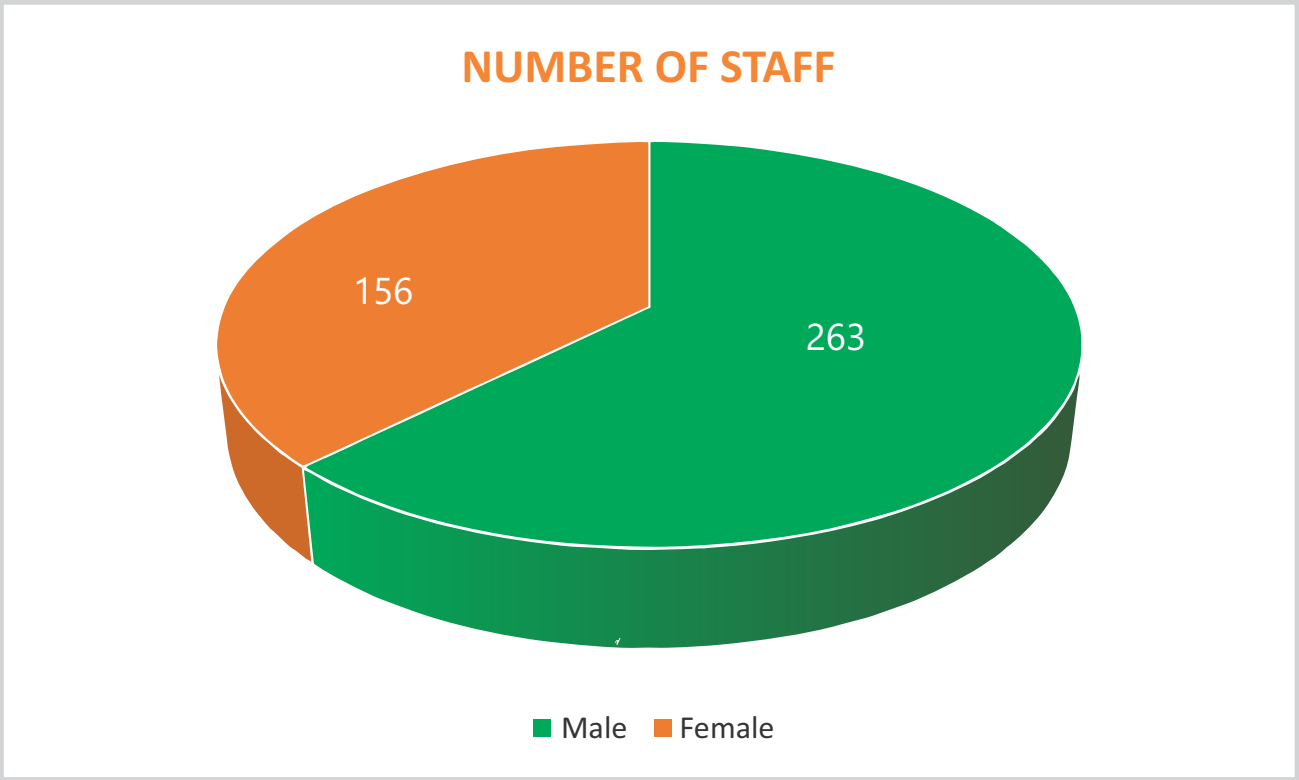


Figure 25: *Number of Staff*

3.4.3. EMPLOYEE RELATION AND WELFARE SERVICES

Send Off ceremony: the Council organized retirement send-off ceremony for seven (7) Officers who retired from the service of the Council in the year 2023.



Figure 26: *Employee Relation and Welfare Services*

3.4.4. MEDICAL SERVICES

The Council provided the following medical services

- Treatment of staff and dependents.
- Carried out preventive and promotive health programmes on:
  1. Your back, your wellness and productivity
  2. Kidney health for all.
  3. A Cancer overview with emphasis on breast and prostate cancers
- Provided medical services during all major Council programmes.



Figure 27: *Health Awareness Programs*



CHAPTER 04

FINANCIAL & INVESTMENT SERVICES



4.1. INSURANCE AND RISK MANAGEMENT

The Council indemnified its staff and assets against any adverse occurrence in form of death, theft, accident etc. in line with Federal Government directives through the National Insurance Commission (NAICOM).

The classes of insurance undertaken were:

- Group Life Assurance Scheme (GLA)
- Group Personal Accident Insurance Scheme (GPA)
- Motor Vehicle and Motorcycles Insurance
- Plants All Risk and Computer Insurance (Public Liability)
- Fire and Burglary Insurance

4.2. PENSION FUND ADMINISTRATION AND MANAGEMENT

The Council effectively managed the Staff Pension Scheme in line with the Pension Reform Act, 2014 and Pre-Act Pensioners.

It ensured prompt monthly payments of Pension to Council's pensioners, remittances of Employer/Employee Contributory pensions to the appropriate Pension Fund Administrators (PFAs). There are no outstanding pensions both in the old and the contributory pensions.

4.3. STAFF HOUSING SCHEME

The Council implemented a Staff Housing Scheme to assist its staff to own their personal houses by funding the initial equity contribution of 30% of the total cost of the property which is a requirement by the Mortgage Institutions for the purpose of mortgage loans.

4.4. KADUNA INLAND DRY PORT CONTAINER TRAFFIC FROM JANUARY TO DECEMBER 2023

4.4.1. IMPORT PERFORMANCE RATINGS

The Kaduna Inland Dry port in the months of June, October, November and December recorded highest container traffic due to end of the year festive period while April recorded low traffic as a result of inflation and high forex rates.

The import container traffic flows are also shown on quarterly basis, given a total of four thousand, three hundred and seventy-two with slight increase in the fourth quarter of 2023. This is a positive development in spite of lack of rail cargo transportation to the KIDP.

Table 13: *Import Performance Ratings of the Kaduna Inland Dry Port*

S/N	QUARTERS	PERIOD	TRAFFIC
1	1st Quarter	Jan - March	**920**
2	2nd Quarter	April - June	**1,026**
3	3rd Quarter	July - September	**1,153**
4	4th Quarter	Oct- December	**1,273**
TOTAL			**4,372**

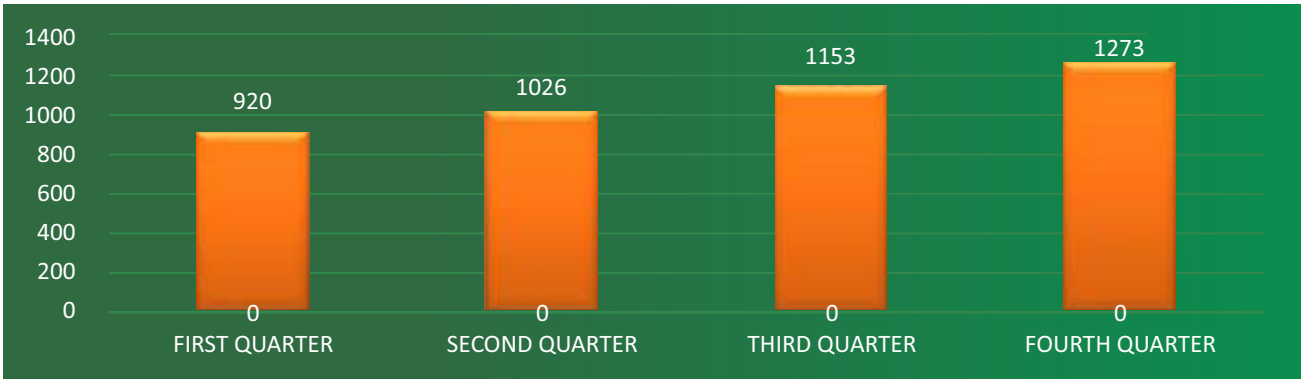


Figure 28: *Import Performance Ratings of the Kaduna Inland Dry Port*

4.4.2. EXPORT PERFORMANCE RATINGS

The Kaduna Inland Dry Port from January to December 2023 recorded only two (2 – 20' Teus) exports as a result of high haulage cost of bringing goods to KIDPL. Below is a graph indicating the poor performance of export trade in the year 2023:-

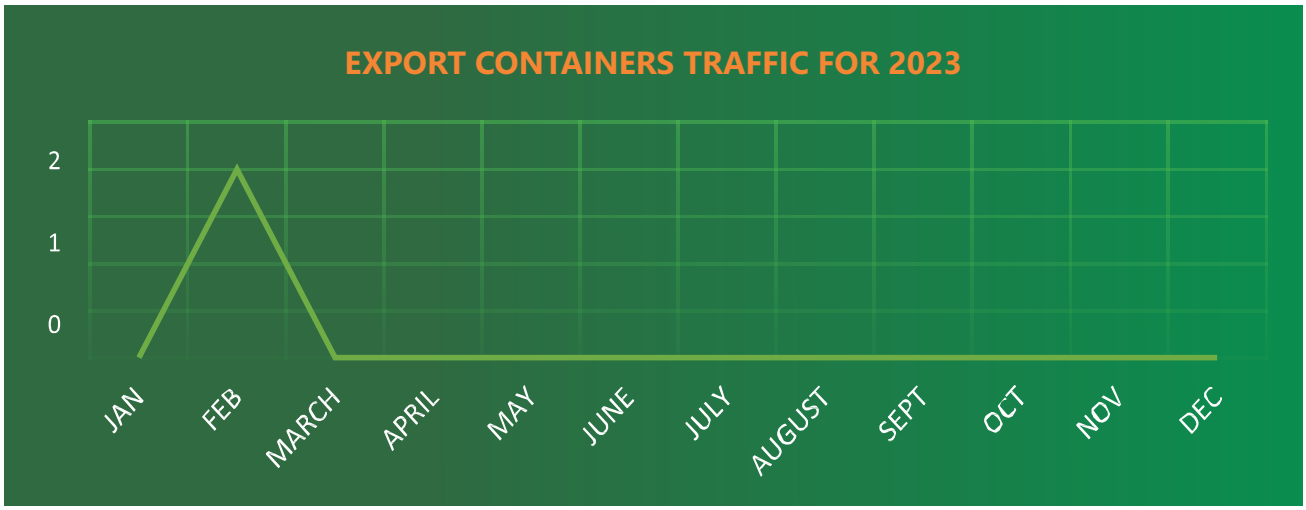


Figure 29: *Export Containers Traffic for 2023*

Most agricultural products are grown outside of Kaduna metropolis and therefore farmers prefer to transport their products to Lagos directly due to cost and ease of export than using KIDP. One of the major export products, ginger, suffered setback due to 'strange disease' that destroyed all the ginger crops in the whole of northern region

4.5. PROMOTION OF THE DEVELOPMENT OF TRANSPORT INFRASTRUCTURE

The Council coordinated the implementation of the development of Inland Dry Port (IDP) and Vehicle Transit Area (VTA) projects in line with the Infrastructure Concession Regulatory Commission (ICRC) establishment Act 2005 and the National Policy on Public Private Partnership (PPP).

Some of the Projects were:

4.5.1. COMMISSIONING OF DALA INLAND DRY PORT

The Council facilitated the commissioning of Dala Inland Dry Port (IDP) on the 30th January, 2023 by His Excellency President Muhammadu Buhari, GCFR at the Dala IDP premises in Dala, Kano State having been fully completed.

The IDP project will reduce congestion at the seaports, minimize cost of transporting cargo to hinterland as well as transit cargoes to landlocked countries and bring shipping services to the door step of shippers across in the state and its environs.





Figure 30: *Commissioning of Dala Inland Dry Port*

4.5.2. DECLARATION OF FUNTUA INLAND DRY PORT AS PORT OF ORIGIN AND DESTINATION

The Council facilitated the declaration of Funtua Inland Dry Port as a Port of Origin and Destination by the Honourable Minister of Transportation, Alhaji Mu'azu Jaji Sambo on the 2nd of February, 2023 in Funtua, Katsina state. The commissioning of the Inland Dry Port is scheduled for 2024



Figure 31: *Declaration of Funtua IDP as Port of Origin and Destination*



Figure 32: *Declaration of Funtua IDP as Port of Origin and Destination*

4.5.3. SITE INSPECTION TOUR OF THE PROPOSED IDP AND VTA IN GUSAU, ZAMFARA STATE

The Council carried out a site inspection visit of the proposed IDP and VTA in Gusau, Zamfara State on 9th March, 2023. This was in response to the Zamfara State Government's request for the Council's assistance in the development of an Inland Dry Port (IDP) and a Vehicle Transit Area (VTA) within its state capital in Gusau, Zamfara.

The proposed sites for the facilities were inspected and certified viable for the establishment of the infrastructure.

4.6. BIDDERS' CONFERENCE FOR THE CONCESSION OF THE LOKOJA VEHICLE TRANSIT AREA (VTA)

The Council in partnership with the Federal Ministry of Transportation, (FMT), organized a one-day Bidders' Conference for the concession of the Lokoja Vehicle Transit Area (VTA), on the 22nd of February, 2023 at the Stonehedge hotel, Abuja.

The event which was organized in compliance with the Public Private Partnership (PPP) policy, was aimed at educating and enlightening prospective investors on all the required information they need to make a capital investment as well as provide a level playing ground for all prospective investors.

4.7. INSPECTION VISIT TO THE PROPOSED INLAND DRY PORT SITE AT PAPALANTO, OGUN STATE

Following the receipt of a letter from the Federal Ministry of Transportation requesting the Council to comment on a proposal made by Ogun State Government to develop Inland Dry Ports at Kajola/Papalanto, Ogun State, the Council embarked on an inspection visit to the proposed site from 16th to 17th June, 2023.

An on-the- spot assessment of the proposed site was carried out in conjunction with officials of relevant Ogun State Ministries and MDAs.

4.8. VISIT BY THE ES/CEO TO THE EXECUTIVE GOVERNOR OF BORNO STATE, PROF. BABAGANA ZULUM

The Executive Secretary/CEO met with His Excellency, Prof. Babagana Umara Zulum, the Executive Governor of Borno State, along with representatives from Migfo Nigeria Ltd, the concessionaire, on Saturday, June 24, 2023. The purpose of the meeting, held at the governor's office in Maiduguri, was to advance discussions on the establishment of one of the Council's Legacy Inland Dry Port Projects in the state, specifically the Jauri-Maiduguri Inland Dry Port (IDP).

4.9. VISIT TO IBADAN INLAND DRY PORT (IIDP)

The Council in company of Officers from the Light House Marine & Allied lead by its Chief Executive Officer, paid a guided site visit to Inland Container Depot (ICD), Erunmu, Ibadan, Oyo State on 17th April 2023. The visit was for the Light House Marine & Allied to partner with Catamaran Logistics, the Concessionaire to ICD Erunmu, in order to executive the Erunmu ICD Project to completion or to out rightly purchase the project from Catamaran Logistics.

4.10. MEETING OF THE PROJECT STEERING COMMITTEE ON THE DEVELOPMENT OF THE BENIN RIVER PORT

The Council attended a meeting on January 24, 2023, at the request of the Permanent Secretary of the Federal Ministry of Transport (FMT). The purpose of the meeting was to refine the concession procurement arrangements for the Benin River Port project and address the project's deadline.

During the meeting, the Project Steering Committee for the Benin River Port Development was inaugurated. The Committee committed to meeting on weekends and public holidays to keep the project on track. Despite these efforts, the project faces challenges, including frequent vandalism of rail tracks that impedes efficient cargo movement to the Inland Dry Ports (IDPs) and a tight project timeline. The meeting concluded with a decision to await the report from the Project Development Team. This report will guide the Committee's next steps and facilitate the transition from the Outline Business Case (OBC) to the Full Business Case (FBC).







CHAPTER 05

GUIDELINES & PROCEDURES

5.1. REGISTRATION AS REGULATED SERVICE PROVIDER

In line with the Council's role as the Economic Regulator of Nigerian Ports, all regulated service providers are required to register with the Council. To complete the registration process, please visit www.shipperscouncil.gov.ng and download the registration form for regulated service providers, or visit any NSC office to obtain the form.

Regulated Service Providers include:

- Nigerian Ports Authority (NPA)
- Seaport Terminal Operators
- Shipping Companies and Agencies
- Off Dock Terminal Operators
- Cargo Consolidators
- Logistics Service Providers
- Freight Forwarders and Clearing Agents
- Inland Container Depot Operators
- Stevedoring Companies
- Council for the regulation of Freight Forwarding in Nigeria and
- Any other Port Service Provider or user.

5.2. PROCEDURE TO REQUEST FOR INFORMATION

Stakeholders can request for information by submitting such request in writing to the Council through the following means:

NSC email address: info@shippersCouncil.gov.ng; nsc@shippersCouncil.gov.ng. Or

The Executive Secretary/CEO
Nigerian Shippers' Council
4, Otunba Ayodele Soyode Lane,
Apapa, Lagos.

Or

Nigerian Shippers' Council zonal offices:

- North-East Zonal Coordinating Office
  bauchi@shippersCouncil.gov.ng
  +234 8062896500

- North-West Zonal Coordinating Office
  kano@shippersCouncil.gov.ng
  +234 8037803719

- North-Central Zonal Coordinating Office
  jos@shippersCouncil.gov.ng
  +234 8033396927

- South-East Zonal Coordinating Office
  aba@shippersCouncil.gov.ng
  +234 8098128195

- South-South Zonal Coordinating Office
  ph@shippersCouncil.gov.ng
  +234 8028196696

- South-West Zonal Coordinating Office
  ibadan@shippersCouncil.gov.ng
  +234 8023208182

- Abuja Liaison Office
  abuja@shippersCouncil.go.ng
  +234 8033203733

The request should state the verifiable address and phone number(s) of the applicant.

5.3. PROCEDURE FOR REGISTRATION OF USERS OF SHIPPING SERVICES

The requirement for registration, depending on the type of membership, shall include:

- Certificate of incorporation
- Certificate of registration of the business name
- Copy of Bill of Lading for a most recent transaction
- Copy of Certificate of Registration with Nigerian Export Promotion Council (Exporter)

The categories of membership include:

- Corporate: Trade Group/Associations (Commodity Groups, Chambers of
- Commerce, Recognized Business Groups)
- Business Names (Own name, Partnerships)
- Public Agency (Federal/State/Local Government, Organisations, Parastatals,
- Companies, etc.)
- Associate (Potential Shippers, Clearing and Forwarding Companies, Insurance
- Companies, Banks, Law Firms, etc.)
  i. The registration form can be downloaded from the NSC website: www.shippersCouncil.gov.ng or obtained from NSC offices.
  ii. Application letter for membership should be addressed to the ES/CEO of NSC with a duly filled form and the required documents.
  iii. Acknowledgement is sent to the applicant while the application is forwarded to the Consumer Affairs Department of NSC for processing.
  iv. The application will be verified, and a confidential visit is conducted to the office

premises of the applicant.

v. After a satisfactory confidential visit to the premises and verification of the relevant documents, an approval letter will be issued to the applicant.

vi. After the above, the certificate of membership will be issued to the applicant.

5.4. PROCEDURE FOR COMPLAINTS HANDLING

5.4.1. Written Complaints

Where a port user or regulated service provider has any complaint or claim relating to the loss, damage, quality of services or infringement of rights at the ports, the following procedure shall be applicable:

i. Complaints shall be sent to NSC electronically through an email to:
complaints@shippersCouncil.gov.ng.
WhatsApp no: +234818 888 8895.
Mobile no: 0818 888 8895, 0703 584 6468
Or
A written request to:
The Executive Secretary/CEO
Nigerian Shippers' Council,
4, Otunba Ayodele Soyode Lane,
Apapa, Lagos.

ii. The ES/CEO will forward the complaint to the Complaints Unit for processing.

iii. After the review of the complaint, the complainant will be given an acknowledgement within 24 hours.

iv. Investigation of the complaint will commence within 48 hours with immediate action towards resolving the complaint.

v. The outcome will be communicated to the complainant within seven (7) days after receiving the complaint.

5.4.2. Complaint through the Port Service Support Portal (PSSP)

i. The complainant is expected to send the request through the Port Service Support Portal (www.pssp.ng).

ii. The complainant will receive acknowledgement for submitting the complaint.

iii. Notification will be sent to the relevant Department of the Council.

iv. The Department will send the complaint to the appropriate agency to resolve the matter.

5.5. PROCEDURES/GUIDELINES FOR CLAIMS CONCERNING LOSS OR DAMAGE TO CARGO

Obligations expected from the complainant:

i. Complaints should be forwarded through the Port Service Support Portal or in writing.
ii. Complaints Desk Officers of Organisations in the industry must be accessible when needed.
iii. Complainants must not withhold useful information.
iv. Complaints must be made only for legal and genuine business transactions.
v Information supplied by complainants must be accurate and backed with necessary documentations.

5.6. PROCEDURE FOR CLAIMS CONCERNING LOSS OR DAMAGES ON EXPORT AND IMPORT CARGO

In accordance with Section 67 of the Insurance Act 2003, all imported goods into Nigeria must be insured with a Nigerian-registered insurer. Therefore, all laws, contracts, or instruments related to the importation of goods must be interpreted in compliance with the requirements of the Insurance Act 2003.

A claimant seeking compensation for damage or loss of cargo imported into Nigeria should:

i. Give immediate notice in writing to the Insurance Company.
ii. Insist on a cargo loss Joint-Survey of the goods and take photographs of the damaged goods with Shipping Companies, Terminal Operators or Other Providers of Transport Services.
iii. Provide full documents as stated at the back of the Marine Certificate (including Bill of Lading front stamped from the Bank).
iv. Provide total estimates of loss incurred (after the Joint Survey).
v. Show salvage amount, if different from total loss amount of cargo.
vi. Make a Claim against any negligent Third Party such as Shippers Agents, Master of the vessel, Terminal Operators, Road Transporters, etc. and hand over copies of such claims to the Insurer.
vii. Contact Nigerian Shippers' Council at its Head Office or any of the Zonal
viii. Coordinating Offices or Area Offices for assistance.

5.7. ALTERNATIVE DISPUTE RESOLUTION (ADR)

The Council provides Alternative Dispute Resolution to Providers and Users of Shipping Services by playing a mediatory role in resolving disputes.

5.8. PROCEDURE FOR BENCHMARKING OF TARIFFS, RATES AND CHARGES AT THE PORT

The Nigerian Shippers' Council periodically releases guidelines and notices on Tariffs, Rates, and Charges and sets the minimum and maximum levels of applicable tariff at Nigerian Ports. Consequently, the Council does the following:

i. Observe and take into consideration prevailing local and global economic trends affecting the Port Industry and the market.
ii. Request every Regulated Service Provider to file its Operating Tariffs, Rates and Charges.
iii Publish from time to time all Tariffs, Rates and Charges levied by Regulated Service Providers.

5.9. PROCEDURE FOR MONITORING

The NSC shall, in writing, authorize any of its officials or appoint external inspectors to exercise on its behalf the powers of monitoring as follows:

i. To investigate the activities of a regulated service provider, a non-regulated service provider and any port user concerning compliance in line with existing guidelines, regulations and laws.
ii. Enter the premises of any affected Regulated Service Provider to:
    - Inspect and make copies of extracts from books, records, documents or other information storage system;
    - Demand the production of and inspect the relevant license, permit, certificate or authority;
    - Shall obtain a warrant before the entry into premises of any affected person who is not a Regulated Service Provider or User of Port Services.

5.10. PROCEDURE FOR ENFORCEMENT

Any person who fails to comply with the provisions of the Nigerian Shippers' Council (Port Economic) Regulations, 2015, or who contravenes any of its provisions, guidelines made under it, or any relevant legislation in the provision or use of port and related services, shall be deemed to have committed an offence.

Such an individual shall be subject to appropriate sanctions, which may include:

- Private warning;
- Public warning;
- Suspension of operations and sealing of premises for a specific period, which shall in the opinion of the Council be deemed to be reasonable;
- Blacklisting; or
- De-registration and revocation of the operating license.

5.11. GUIDELINES AND PROCEDURES FOR THE CONFIRMATION OF REASONABLENESS OF DEMURRAGE PAYMENTS.

As a condition for remitting proceeds from demurrage and detention by Shipping Agents, the Central Bank of Nigeria (CBN) requires that Shipping Agents obtain confirmation from the Council in accordance with the Revised Foreign Exchange Manual effective from August 1, 2018.

The Council advises that any application or request for confirmation must adhere to the following guidelines:

1. Shipping Agents

Shipping Agents cannot submit applications directly to the Council. Instead, they must apply through the commercial bank where their accounts are held. The commercial bank will then submit the application to the Council on behalf of its clients.

i. Applicants should note that the Council will only consider the demurrage and detention fee, excluding any other charges.

ii. Applications must be accompanied by a duly completed and approved Form A.

iii. Applicants are advised that all relevant invoices attached to the request should contain the following details:
- Actual times of arrival and departure of the vessel
- Demurrage free days
- Billable days
- Size/type of container
- Bill of Lading number
- Invoice Number
- The rate per day
- Container Number
- Voyage Number
- Agreement between Principal and Shipping Agent

iv. All invoices attached to the application must be final invoices for the transaction. Therefore, provisional invoices will be withheld until the transaction is completed.

v. Applicants must bear in mind that the Council will study all invoices attached to the application to ensure that the requested amount is in line with approved charges, as only these will be confirmed.
Furthermore, submitted invoices should be accompanied by a spreadsheet summary. A template of the spreadsheet can be obtained from the Secretary of the Committee for Confirmation of Demurrage.

vi. Applicants should endeavour to authenticate the invoices with the company's Managing Director's stamp and signature or of any Authorised officer.

vii. Applications would be treated on a "first come, first served" basis within 15 working days for each month's invoice.

2. Commercial Banks

i. Commercial banks should ensure that all applications comply with the above details before forwarding them to the Council.
ii. The amount and month(s) or period for which the request is being made should be indicated in the Bank's application to the Council.
iii. Commercial Banks should endeavour to consult the Secretary of the Committee to confirm demurrage for advice and guidance before submitting their applications at the Executive Secretary's Office.
iv. Commercial Banks and Applicants should note that they might be regularly consulted on issues about the application in the confirmation process. As such, they are expected to identify a contact person for each request for that purpose.

5.12. GUIDELINES ON SETTING AND MODIFICATION OF TARIFFS, RATES AND CHARGES FOR SERVICE PROVIDERS IN THE NIGERIAN PORT SECTOR

The Guidelines outline the requirements and procedures that Service Providers must follow when proposing new tariffs or requesting future tariff adjustments from the Council. These Guidelines will serve as the basis for evaluating and assessing such proposals.

1. Requirements:

I. All applicants for tariff approval request must be registered with the NSC, pursuant to Section 4(1) of the Nigerian Shippers' Council (Port Economic) Regulations 2015.
ii. Tariffs, Rates and Charges for every service shall be submitted to the NSC for consideration and approval.
iii. All approval requests must comply with any price floors or caps determined by the NSC.
iv. Justification for tariff request and financial performance.
v. Cost structure for previous and current year.
vi. Future income projections.

2. Procedure for Requests:

i. All tariff requests shall be addressed to the Executive Secretary/CEO
ii. On receipt of application, NSC shall acknowledge the letter within 3 working days
iii. Where tariff adjustment is requested:
    a. In the case of the Port Regulator, it shall cause to be issued notice of intent, specifying the justifications for the adjustment to the service provider(s) at least thirty (30) working days before the commencement of the new tariff.
    b. In the case of the service provider, it shall notify the Port Regulator stating the reason(s)/justification(s), at least thirty (30) days before the commencement of negotiations.

iv. The NSC shall verify the submissions within two (2) weeks based on the documents received from the applicant.
v. Where there are observed inconsistencies with the application submitted, the NSC may require further clarifications from the service provider to enable processing of the application or reject same with reasons.
vi. In such a situation, the NSC shall communicate to the applicant, the rejection within three (3) working days.
vii. Where the tariff is recommended by the NSC, the service providers should create necessary awareness before implementation.
viii. NSC shall publish the approved tariffs/charges/rates/fees on its website and if need be, the print media seven (7) days after approval has been officially granted and fourteen (14) days before the commencement of the next tariff regime.

3. General

i. All charges shall be denominated in local currency in accordance with government's extant financial rules, regulations and guidelines.
ii. All Service Providers shall file with the NSC annually, existing tariffs and/or any adjustment for services showing all rates and charges including the terms and conditions for free and reduced charges of any service.
iii. Nigerian Shippers' Council shall continue to provide the platform for mediation and resolution of disputes involving providers and users of port services in accordance with its statutory powers. Setting of Tariffs, Rates and Charges under this Guideline shall be in collaboration with stakeholders to arrive at a decision that will be acceptable to all parties.
iv. The NSC shall communicate its decision within forty-five (45) working days from date of receipt of the application.
v. In processing all tariff requests, the NSC shall at all times, comply with the provisions of the Nigeria Data Protection Regulations 2019 (NDPR).









APPENDIX

This report contains valuable data and indicators essential for enhancing trade efficiency, economic growth, and global competitiveness.

This report provides key data analyzed to enable the NSC and policymakers understand and assess the country's performance against global standards; thereby, ensuring that the maritime sector remain aligned with international norms and sustainable practices.

The data for this 2023 report were sourced from the UNCTAD portal (https://unctadstat.unctad.org), the data repository of the United Nations Conference for Trade and Development.

1. NIGERIA MARITIME PROFILE 2021 - 2022

1.1 MARITIME KEY FIGURES 2021 - 2022

Table 1: NIGERIA MARITIME KEY FIGURES 2021-2022

NIGERIA		
MARITIME KEY FIGURES		
Merchandise Trade (Millions current US$)	98,873	123,427
Container Port Throughput (TEU)	1,528,520	1,566,109
Fleet-National Flag (Thousands DWT)	4534	4,930
Fleet–Ownership (Thousands DWT)	6,674	4,974
Number of Port Calls	4,102	-------
Number of Seafarers	25,610	25,610
GDP (Millions current US$)	459,031	475,059
GDP Growth Rate	-1.79 %	+3.25 %

Source: UNCTAD DATA CENTRE

1.2 PORT CALLS AND PERFORMANCE

Table 2: Port calls, time spent in ports, vessel age and size in 2021 and 2022

	Number of Arrivals		Median time in port (days)		Avg age of vessels		Avg size (GT) of vessels		Avg cargo carrying capacity (DWT) per vessel		Avg container carrying capacity (TEU)		Maximum size (GT) of vessels	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
All ships	4 102	..	3.59	..	15	..	32 838	..	37 677	..	3 672	..	149 367	..
Liquid bulk carriers	1 370	..	3.17	..	16	..	21 762	..	34 507	..	..	..	63 758	..
Liquefied petroleum gas carriers	188	..	2.05	..	10	..	19 109	..	22 372	..	..	..	48 425	..
Liquefied natural gas carriers	254	..	1.36	..	12	..	108 212	..	85 355	..	..	..	149 367	..
Dry bulk carriers	657	..	6.97	..	12	..	33 500	..	59 089	..	..	..	107 374	..
Dry breakbulk carriers	575	..	4.30	..	22	..	8 421	..	10 872	..	..	..	66 870	..
Roll-on/ roll-off ships	240	..	..	..	13	..	53 412	..	22 93	..	..	..	72 269	..
Container ships	818	..	3.92	..	15	..	38 575	..	..	..	3 672	..	66 399	..
Passenger ships	..	..	..	..	15	..	..	..	..	..	..	..	..	..

Source: *UNCTAD DATA CENTRE*

1.3. NATIONAL FLEET - Carrying Capacity by Type of Ship

Table 3: Nigeria National Fleet Carrying Capacity by Type of Ship

(Thousands DWT)	2005	2010	2015	2020	2021	2022
Total fleet	691.0	989.4	4 232.6	4 534.0	4930.0	4974.0
Oil tankers	606.0	750.4	707.9	1 178.0	1240.0	1288.0
Bulk carriers	13.0	13.2	0.0	0.0	0.0	0.0
General cargo	30.0	19.2	19.0	30.9	30.9	37.6
Container ships	..	..	0.0	0.0	0.0	0.0
Other types of ships	42.0	206.7	3 505.8	3 325.2	3659.1	3648.1

Source: *UNCTAD DATA CENTRE*

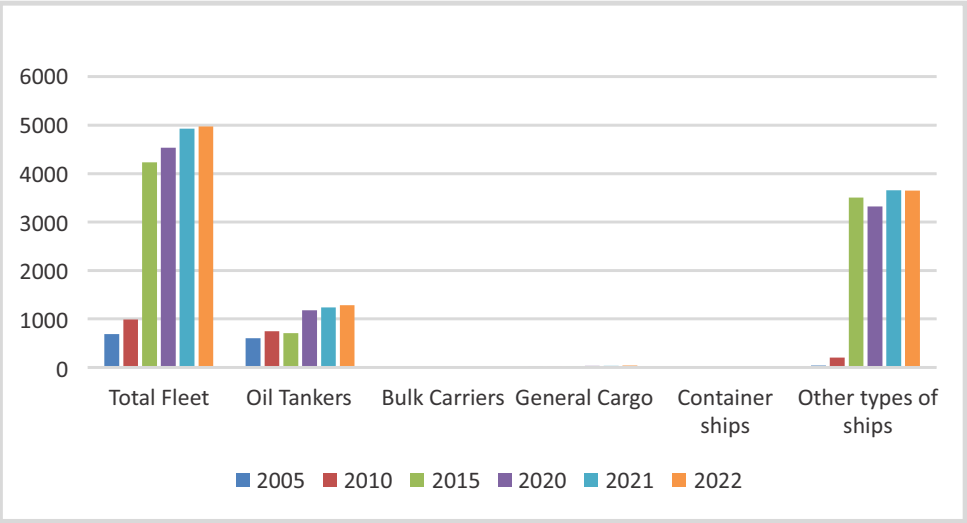


Figure 1: *National Fleet*

+0.7%
Fleet Growth rate in 2022

1.4 INTERNATIONAL MERCHANDISE TRADE 2022

Table 4: Nigeria International Merchant Trade

Total Merchandise (millions of US$)	2005	2010	2015	2020	2021	2022
Merchandise exports	50467	84000	50216	35634	46932	63075
Merchandise imports	20754	44235	44700	55390	51941	60351
Merchandise trade balance	29713	39765	5516	-19757	-5008	2724
	Source: UNCTAD DATA CENTRE					

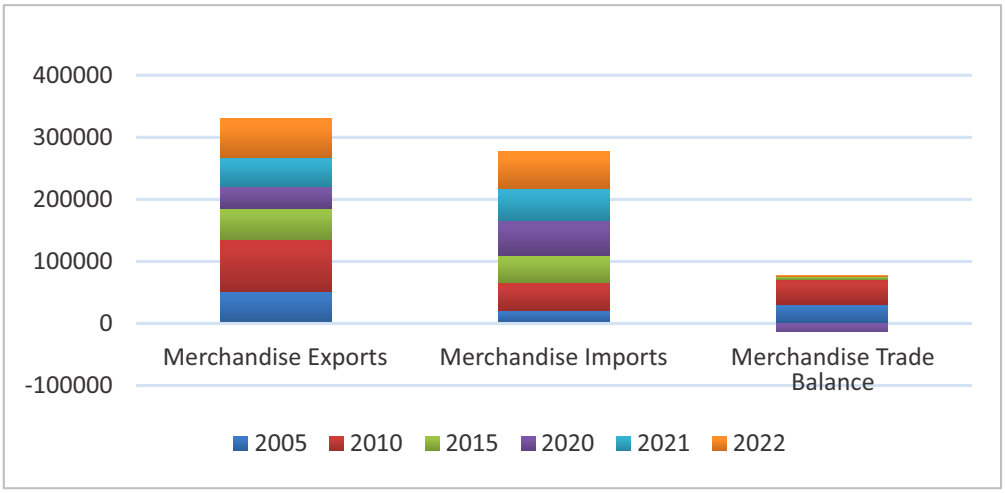


Figure 2: *Nigeria International Merchandise 2022*

+34.6%
Merchandise exports Growth rate 2022

1.5 INTERNATIONAL TRADE IN TRANSPORT SERVICES

Table 5a: International Trade in Transport Services

Services exports by main category *(as % of total service)*	2005	2010	2015	2022
Transport	74.6	63.9	57.2	41.6
Travel	3.0	18.5	12.8	23.2
Other Services	22.3	17.6	30.0	35.2

Source: *UNCTAD DATA CENTRE*

Table 5b: International Trade in Transport Services

Total trade in transport services *(millions of $USD)*	2005	2010	2015	2022
Transport services export	1 338	1 970	1 808	2 023
Transport services import	2 816	8 505	7 735	8 798
Transport services trade balances	-1 478	-6 536	-5 927	-6 775

Source: *UNCTAD DATA CENTRE*

-10.6%
Transport services exports growth rate in 2022

1.6 TOP 5 PARTNERS IN 2022 (exports, millions of US$)

Table 6: Top 5 Trade Partners in 2021	
PARTNER	**EXPORTS (Millions of USD)**
India	11378
Spain	7350
France	4275
The Netherlands	4238
United States of America	3929
Source: *UNCTAD DATA CENTRE*	

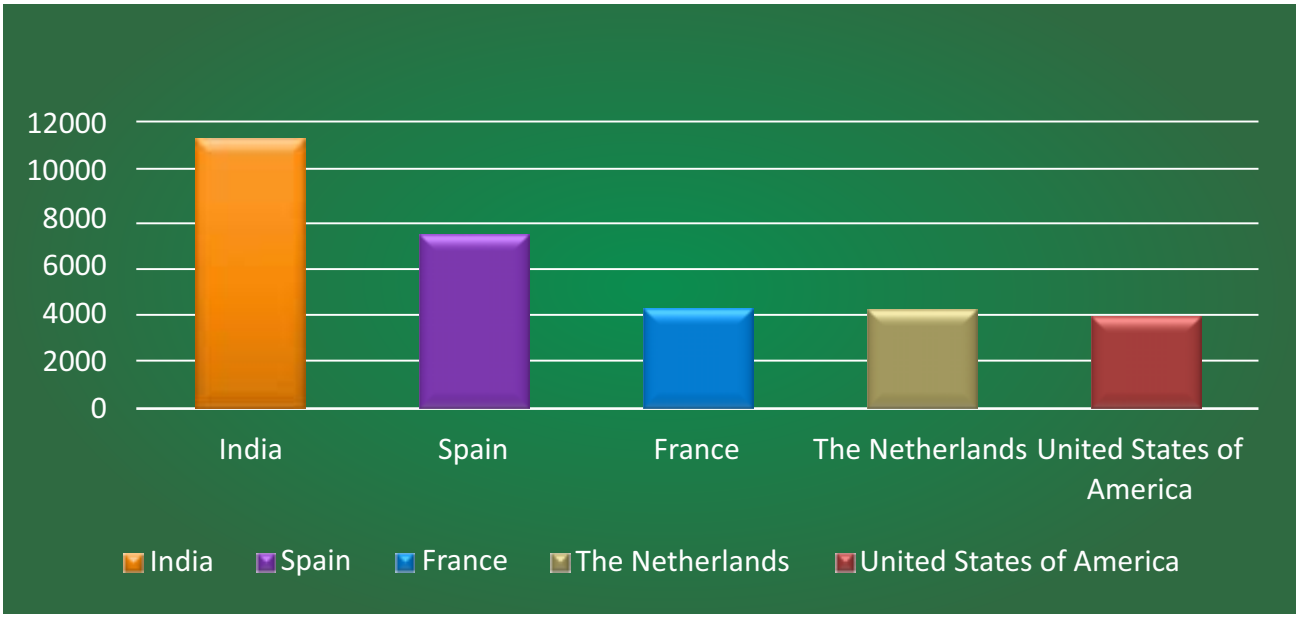


Figure 3: *Top 5 Trade Partners*

1.7 NIGERIA EXPORT STRUCTURE BY PRODUCT GROUP IN 2022

Table 7: Export Structure	
PRODUCTS	**PERCENT (%)**
Fuel	92
Manufactured Goods	4
Other	4
Source: *UNCTAD DATA CENTRE*	

Table 8: World Share in Maritime Indicators

MEASURE	% SHARE
Population	2.74
Coastline (KM)	0.19
Gross Domestic Product (US$)	0.47
Merchandise Export US$	0.25
Merchandise Import US$	0.23
National Flag Fleet (DWT)	0.23
National Flag Fleet (US$)	0.55
Fleet Ownership (DWT)	0.35
Fleet Ownership (US$)	0.47
Seafarer Supply (Officers)	1.04
Seafarer Supply (Ratings)	1.61
Container Port Throughput (TEU)	0.20
Port Calls (Container Ships)	-
Port Calls (Liquid Bulk Carriers)	-
Port Calls (Dry Break Bulk)	-
Port Calls (Dry BulK)	-
Port Calls (LPG)	-
Port Calls (LNG)	-

Source: *UNCTAD DATA CENTRE*

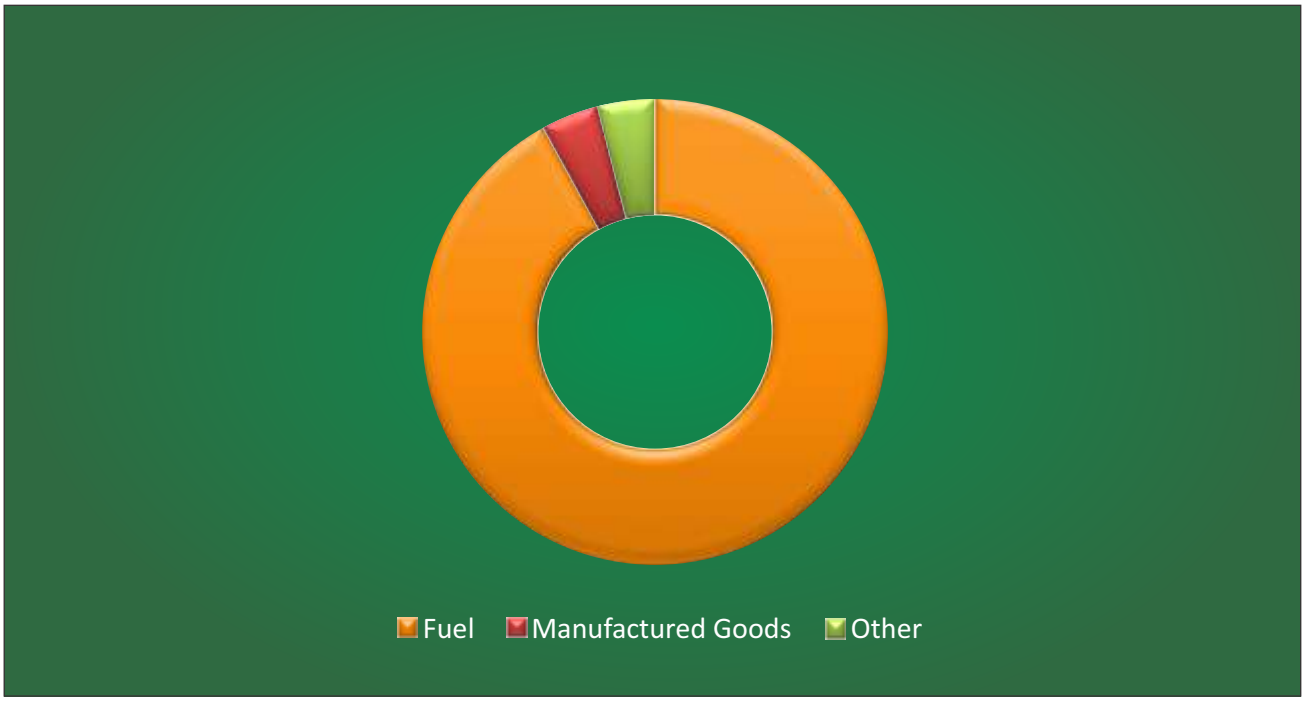


Figure 4: *World Share in Maritime Indicators*

1.8 NIGERIA WORLD SHARES IN MARITIME INDICATORS FOR 2022

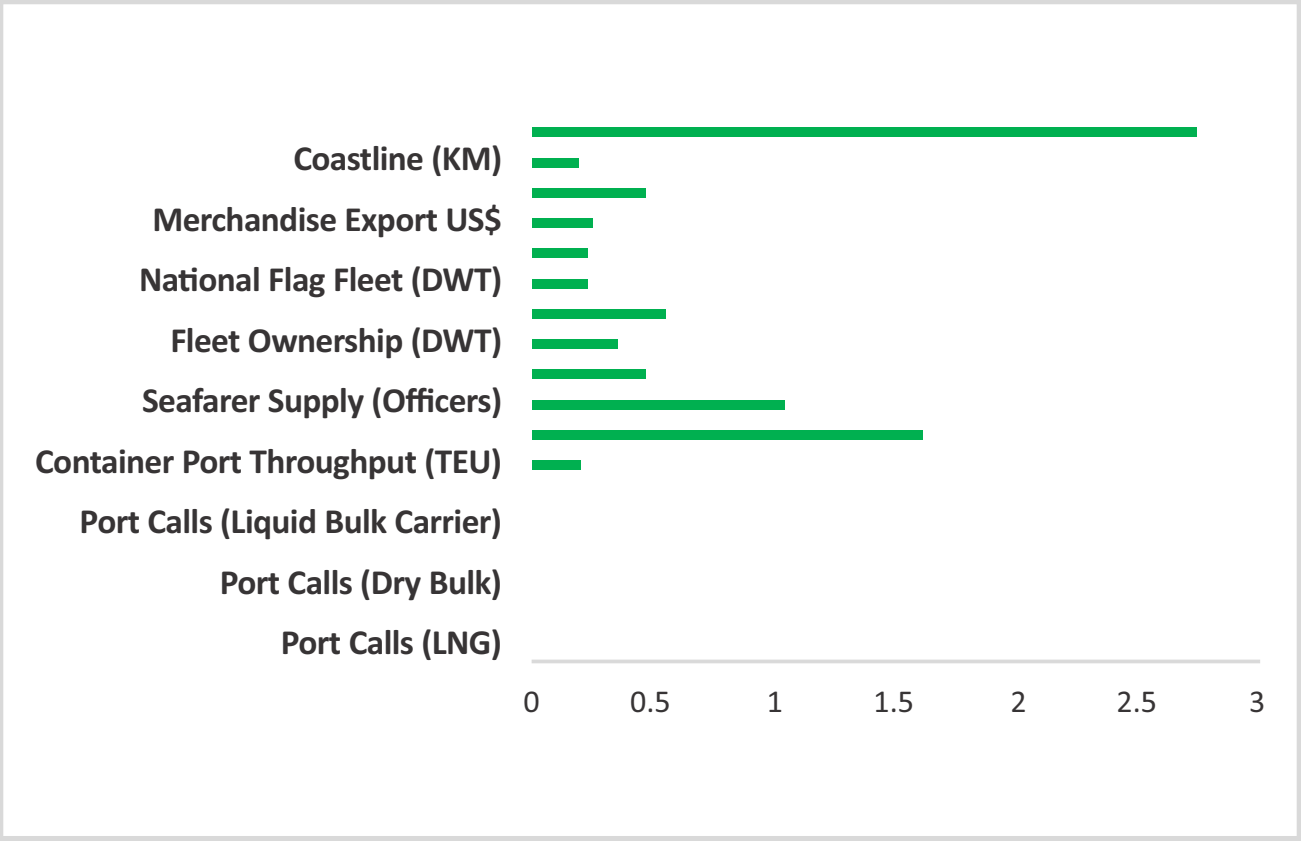


Figure 5: *Maritime World Shares for Nigeria in 2022*

1.9 LINER SHIPPING CONNECTIVITY

1.9.1 Bilateral Connectivity index of Nigeria - Top 10 partners in Q1 2021 Can only take values between 0 (minimum) and 1 (maximum)

Table 9: Bilateral connectivity index	
Partner	**Connectivity Index**
China	0.305
Ghana	0.300
Spain	0.299
Singapore	0.295
Togo	0.293
Malaysia	0.293
Belgium	0.288
Benin	0.288
Cote d'Ivoire	0.286
Italy	0.286
Source: *UNCTAD DATA CENTRE*	

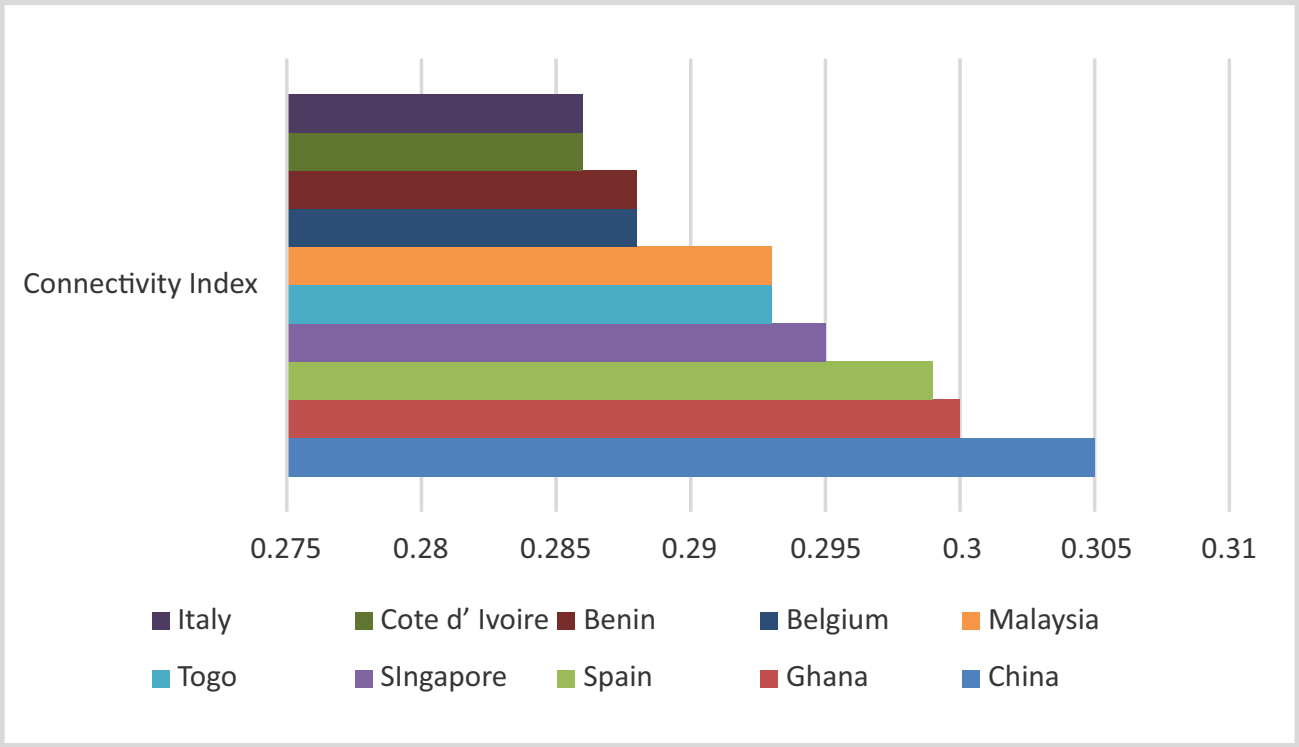


Figure 6: *Bilateral Connectivity Index*

1.9.2 Nigeria Liner Shipping Connectivity Index

Average Q1 2023 = 100
(2006 – 2022)

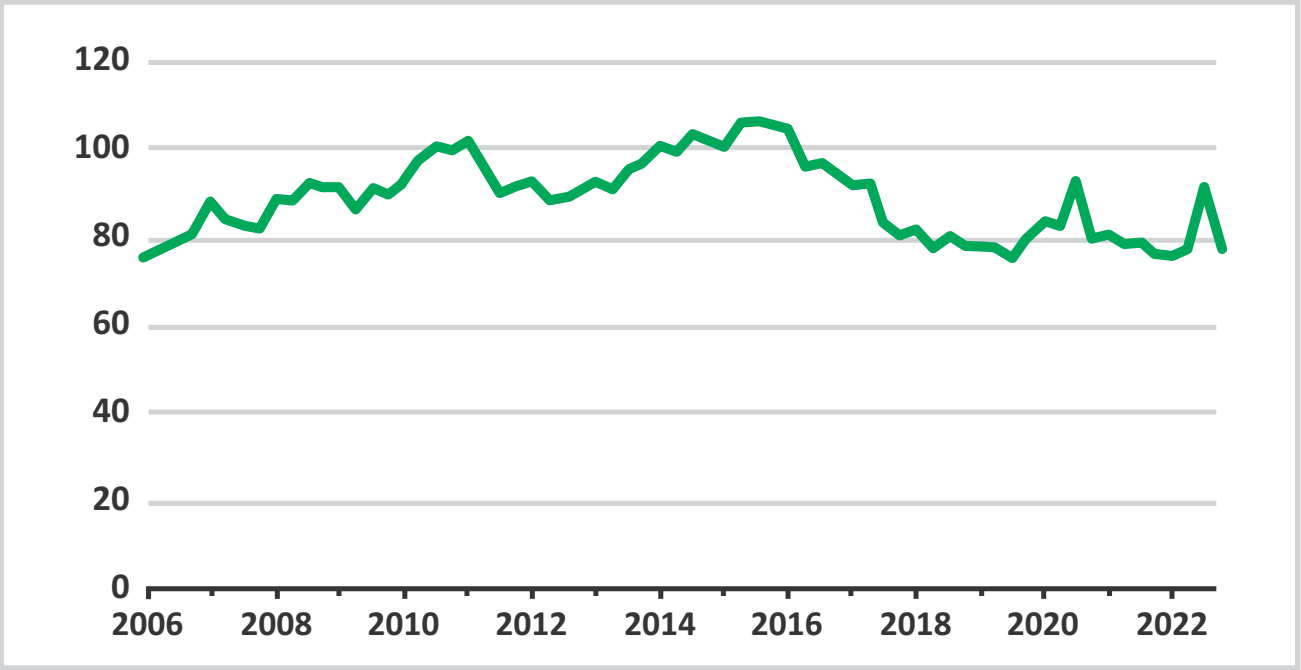


Figure 7: *Nigeria Liner Shipping Connectivity Index*

1.9.3 Port Liner Shipping Connectivity Index - Top 5 Nigeria Ports in 2022

Average Q1 2023 = 100

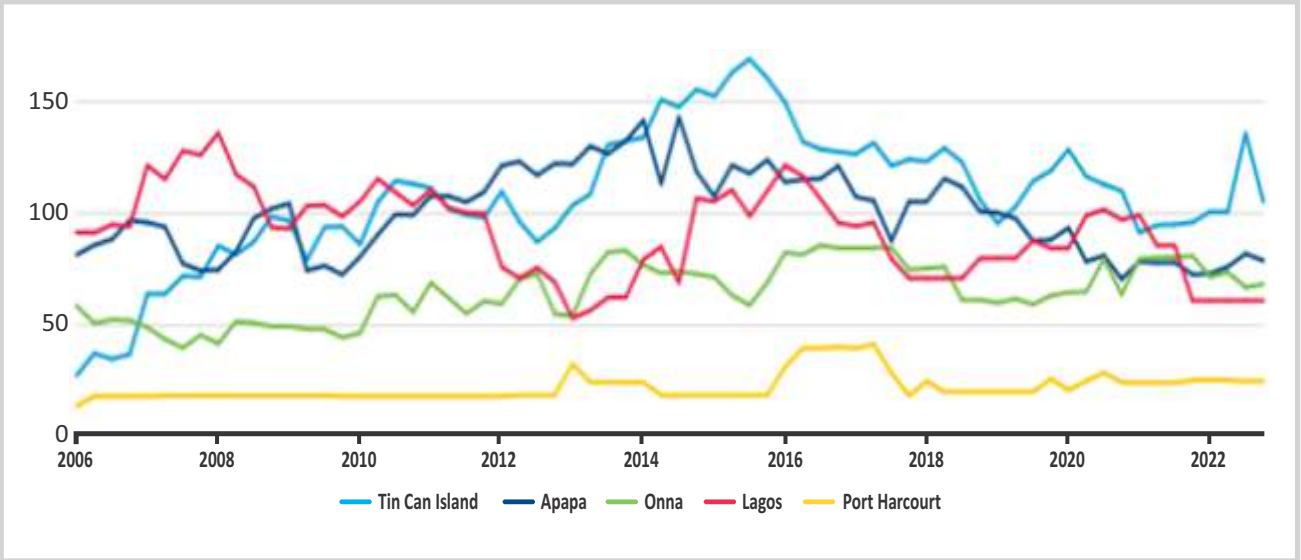


Figure 8: *Port Liner Shipping Connectivity Index - Top 5 Nigeria Ports in 2022*
Note: *Tincan and Apapa Ports are the most connected ports in Nigeria.*

1.10 PERFORMANCE IN SHIPPING AND MARITIME TRADE: NIGERIA AND NEIGHBOURING MARITIME ECONOMIES

1.10.1 TOTAL TRADE (ANNUAL IMPORT): NIGERIA AND NEIGHBOURING MARITIME COUNTRIES (Millions USD)

Table 10: Total Trade (Annual Import)

	2014	2015	2016	2017	2018	2019	2020	2021	2022
Benin	3,828	2,561	2,872	3,494	4,375	3,932	3,555	4,678	4,975
Cameroon	7,553	6,045	5,206	4,796	5,656	6,583	5,521	6,981	7800
Ghana	14,600	13,465	12,920	12,647	13,134	13,411	12,429	13,629	14,654
Nigeria	58,300	44,700	35,532	31,273	43,007	55,257	35,740	51, 941	53,614
Togo	2,526	2,336	2,261	1,874	2,116	2,091	2,252	2,632	2900

Source: *UNCTAD DATA CENTRE*

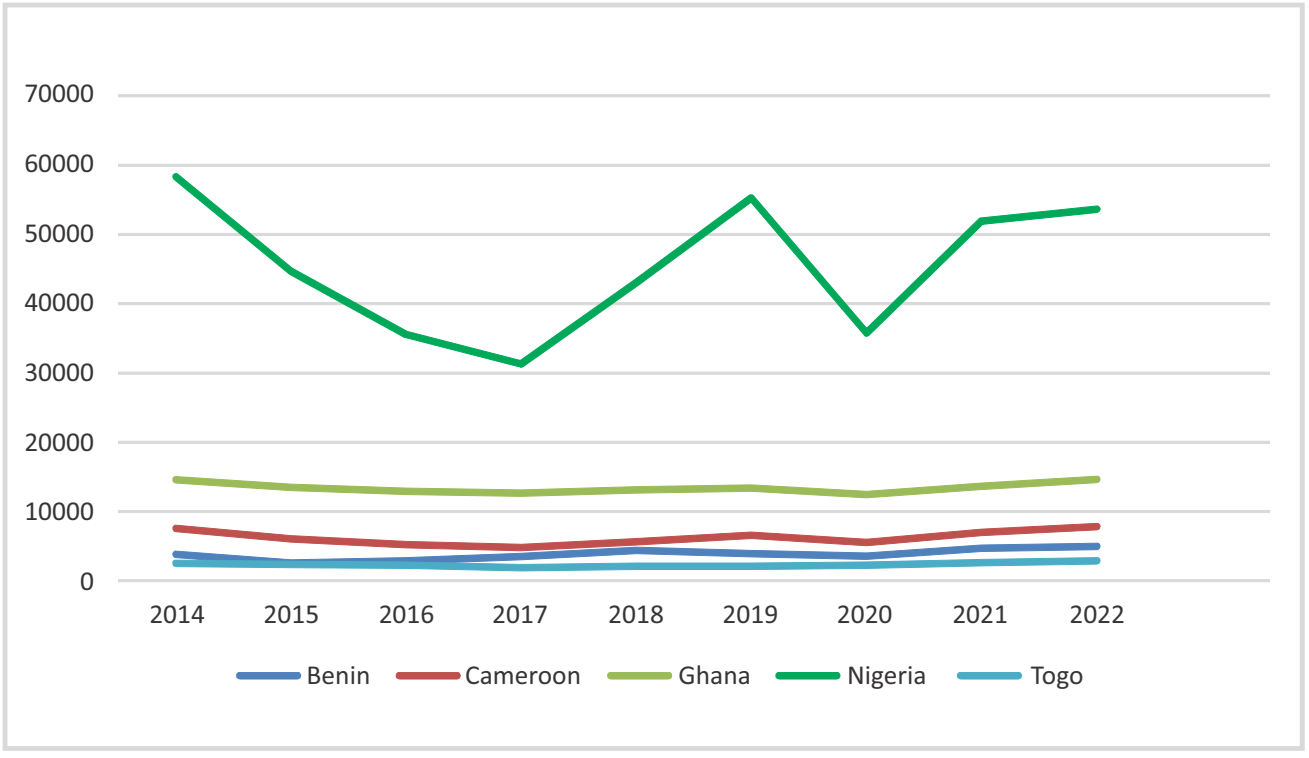


Figure 9: *Total Trade (Annual Import) - Nigeria and Neighbouring Competing Maritime Economics*

1.10.2 TOTAL TRADE (ANNUAL EXPORT): NIGERIA AND NEIGHBOURING MARITIME COUNTRIES (MILLIONS USD)

Table 11: Total Trade (Annual Export)

	2015	2016	2017	2018	2019	2020	2021	2022	2023
Benin	1,682	1,774	2,216	3,344	3,052	2,996	3,642	3,566	4,071
Cameroon	4,058	3,305	3,233	3,803	4,084	3,132	4,317	5,900	-
Ghana	10,321	11,138	13,835	14,943	15,668	14,472	14727	17,494	15,868
Nigeria	50,216	33,302	44,468	60,547	62,531	35,634	46,871	63,075	57,890
Togo	1,011	1,036	1,016	1,080	1,055	979	1,060	1,348	1,434

Source: *UNCTAD DATA CENTRE*

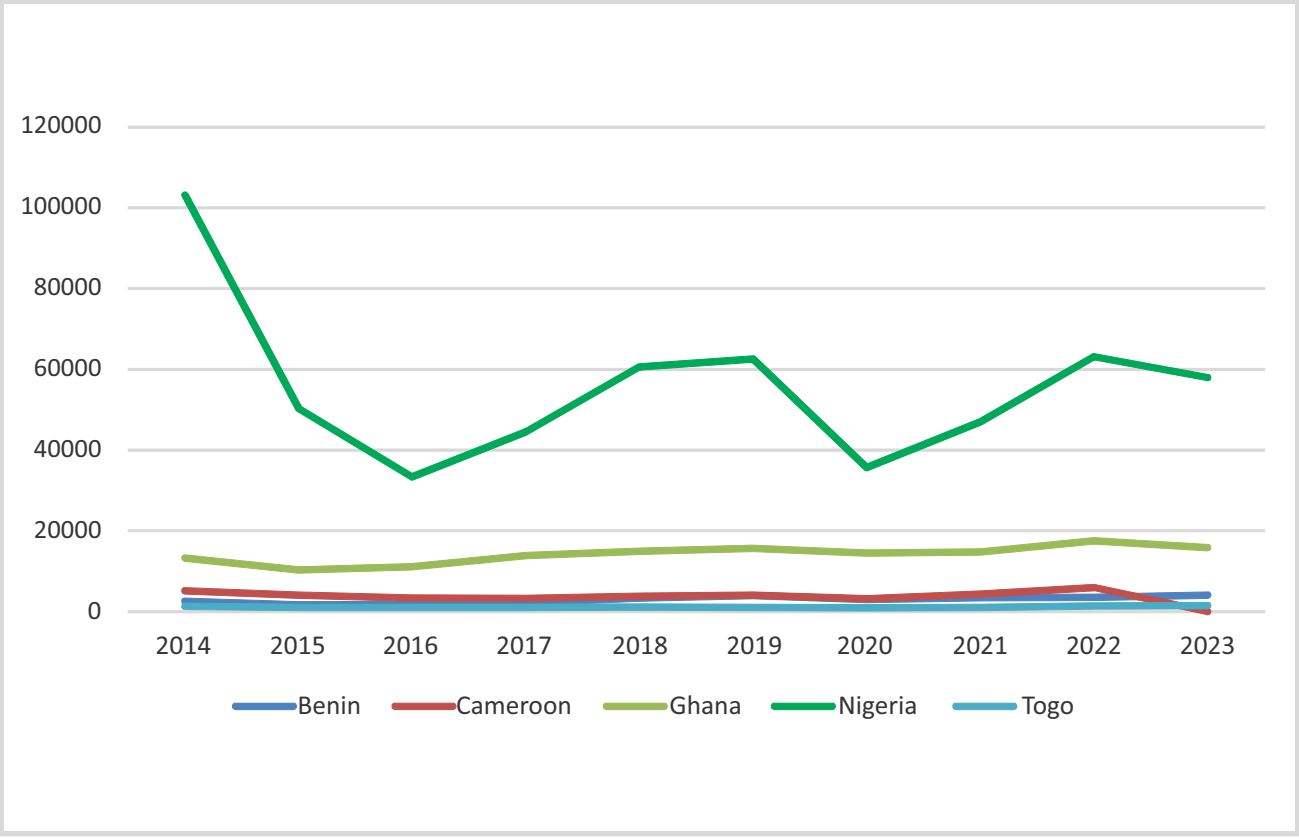


Figure 10: *Total Trade (Annual Export): Nigeria and Neighbouring Competing Maritime Economics*

1.10.3. CONTAINER PORT THROUGHPUT: NIGERIA AND NEIGHBOURING MARITIME COUNTRIES (TWENTY-FOOT EQUIVALENT UNIT. (TEU))

Table 12: Container Port Throughput: Nigeria and Competing Maritime Economy

	2015	2016	2017	2018	2019	2020	2021	2022
Cameroon	336,412	334,984	387,000	360,992	397,024	395,872	-	-
Ghana	900,000	954,700	1,009,400	1,063,000	1,100,205	1,050,696	1,604,724	1,244,254
Nigeria	1,400,000	1,404,000	1,408,000	1,560,000	1,484,000	1,528,520	1,566,109	1,566,109
Togo	380,800	380,800	1,193,800	1,395,700	1,500,611	1,725,270	1,986,131	1,952,879
Source: *UNCTAD DATA CENTRE*								

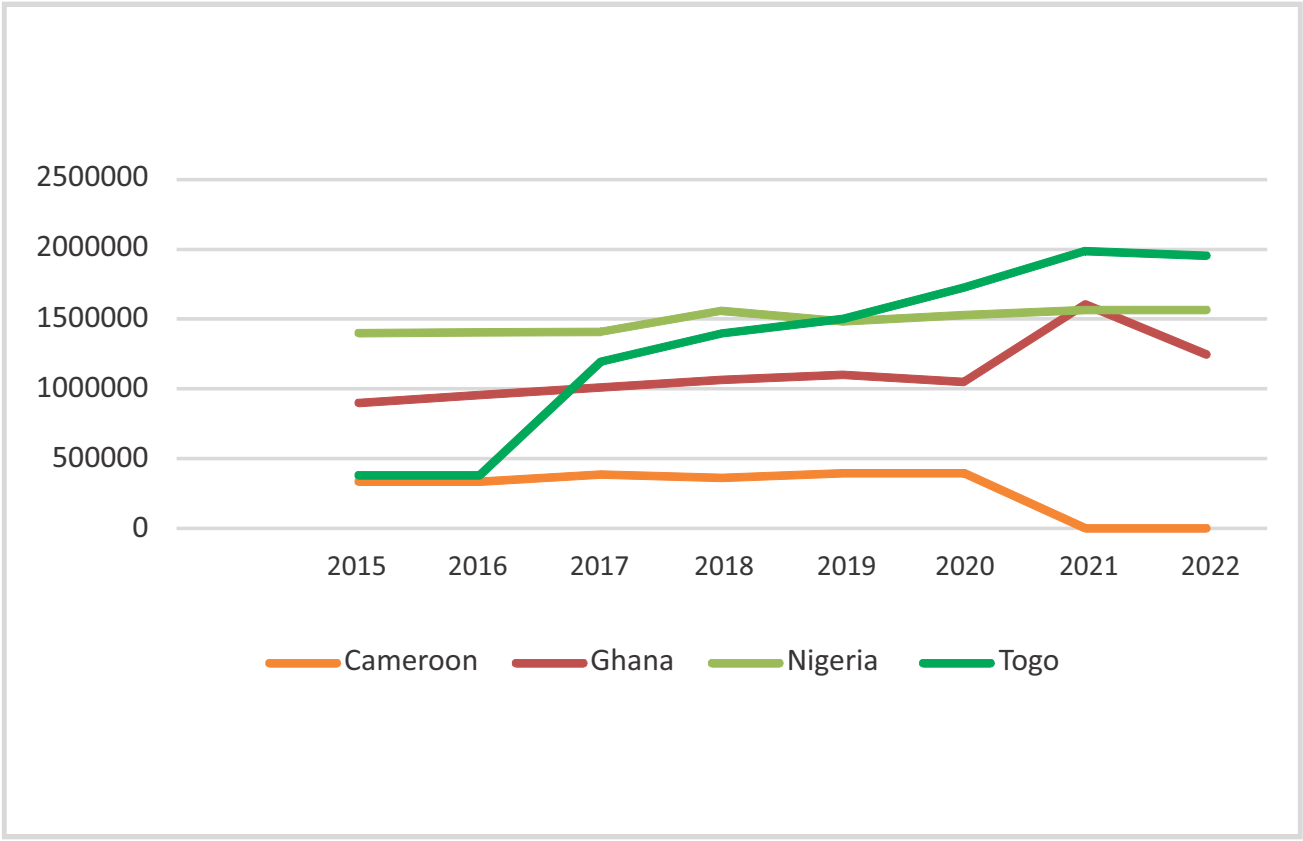


Figure 11: *Container Port Throughput: Nigeria and Neighbouring Competing Maritime Economies*

1.10.4 MERCHANT FLEET BY FLAG OF REGISTRATION AND BY TYPE OF SHIP: NIGERIA AND NEIGHBOURING COUNTRIES

Table 13: MERCHANT FLEET BY FLAG OF REGISTRATION AND BY TYPE OF SHIP: NIGERIA AND NEIGHBOURING COUNTRIES

	2017	2018	2019	2020	2021	2022	2023
BENIN							
Total fleet	1	1	1	1	1	2	1
Oil tankers	0	0	0	0	0	0	0
Bulk carriers	0	0	0	0	0	0	0
General cargo	0	0	0	0	0	0	0
Container ships	0	0	0	0	0	0	0
Other types of ships	1	1	1	1	1	2	1
CAMEROON							
Total fleet	438	445	563	1076	2750	4982	7228
Oil tankers	0	0	112	228	1758	3936	5979
Bulk carriers	0	0	0	52	90	78	56
General cargo	5	8	16	87	93	126	237
Container ships	0	0	0	0	36	0	0
Other types of ships	433	437	435	709	773	842	955
GHANA							
Total fleet	40	40	39	40	42	44	45
Oil tankers	8	8	8	8	8	8	8
Bulk carriers	0	0	0	0	0	0	0
General cargo	11	11	11	11	12	12	14
Container ships	0	0	0	0	0	0	0
Other types of ships	21	22	21	22	22	23	23
NIGERIA							
Total fleet	3939	3995	4402	4534	4930	4974	5907
Oil tankers	720	705	1073	1178	1240	1288	2075
Bulk carriers	0	0	0	0	0	0	0
General cargo	31	31	31	31	31	38	38
Container ships	0	0	0	0	0	0	0
Other types of ships	3188	3259	3298	3325	3664	3652	3794
TOGO							
Total fleet	1665	1502	1597	1555	2102	2599	2254
Oil tankers	453	392	373	302	921	1467	1184
Bulk carriers	271	117	75	75	12	12	12
General cargo	823	862	1006	1027	992	935	939
Container ships	14	18	23	35	49	66	50
Other types of ships	104	113	121	117	111	117	118

Source: *UNCTAD DATA CENTRE*

MERCHANT FLEET BY FLAGS OF REGISTRATION AND TYPE OF SHIP: NIGERIA AND NEIGHBOURING COUNTRIES

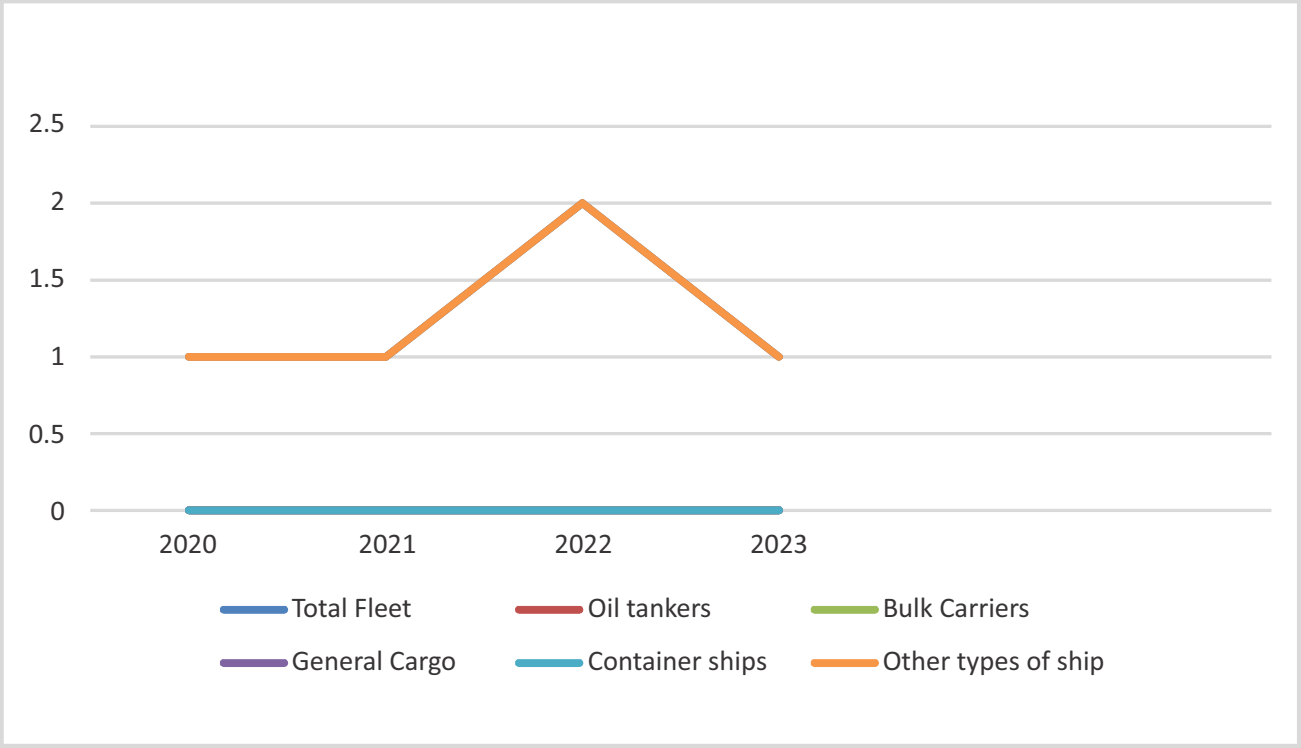


Figure 12.1: *Benin Republic*

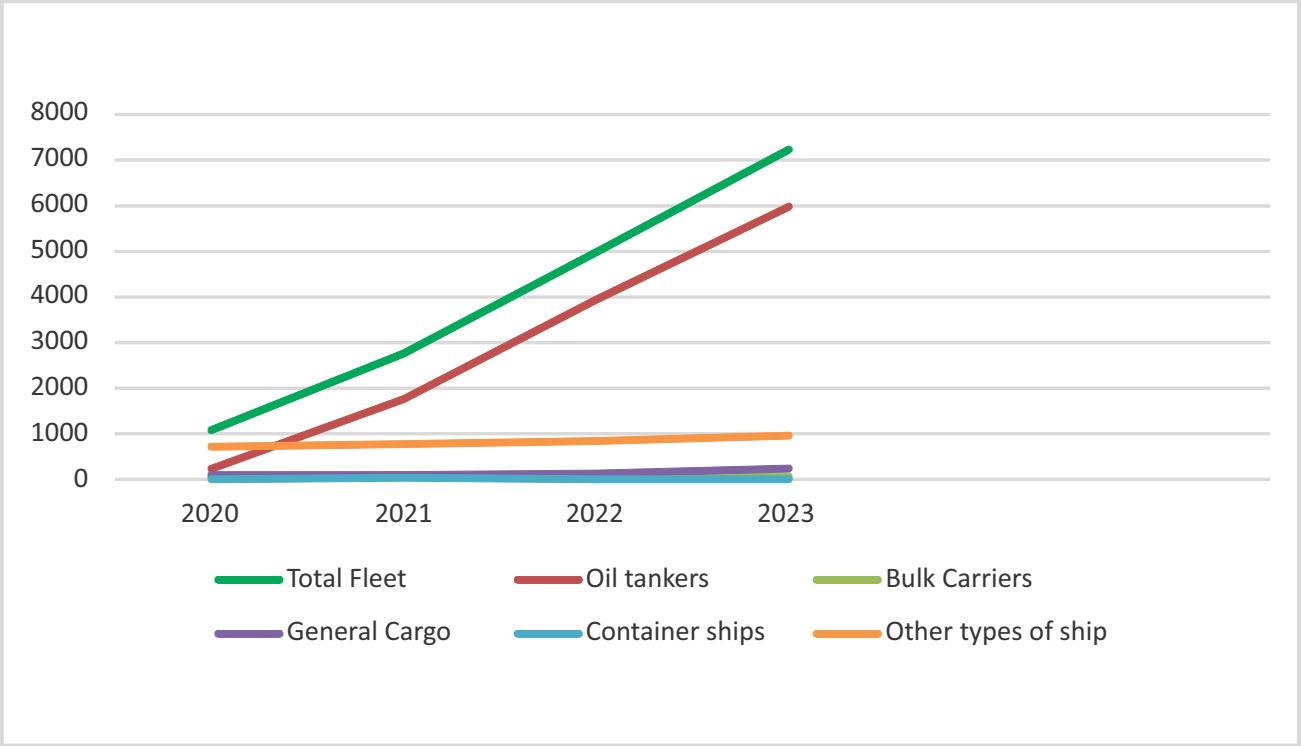


Figure 12.2: *Cameroon*

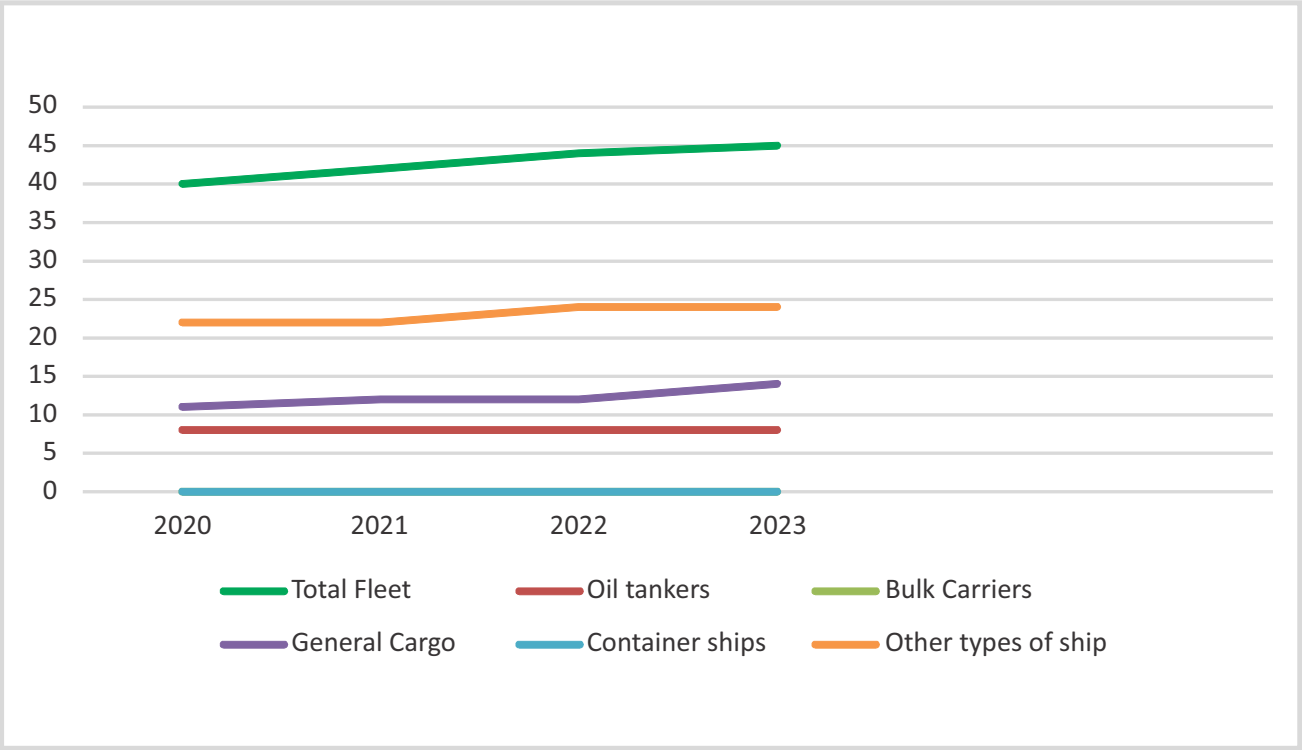


Figure 12.3: *Ghana*

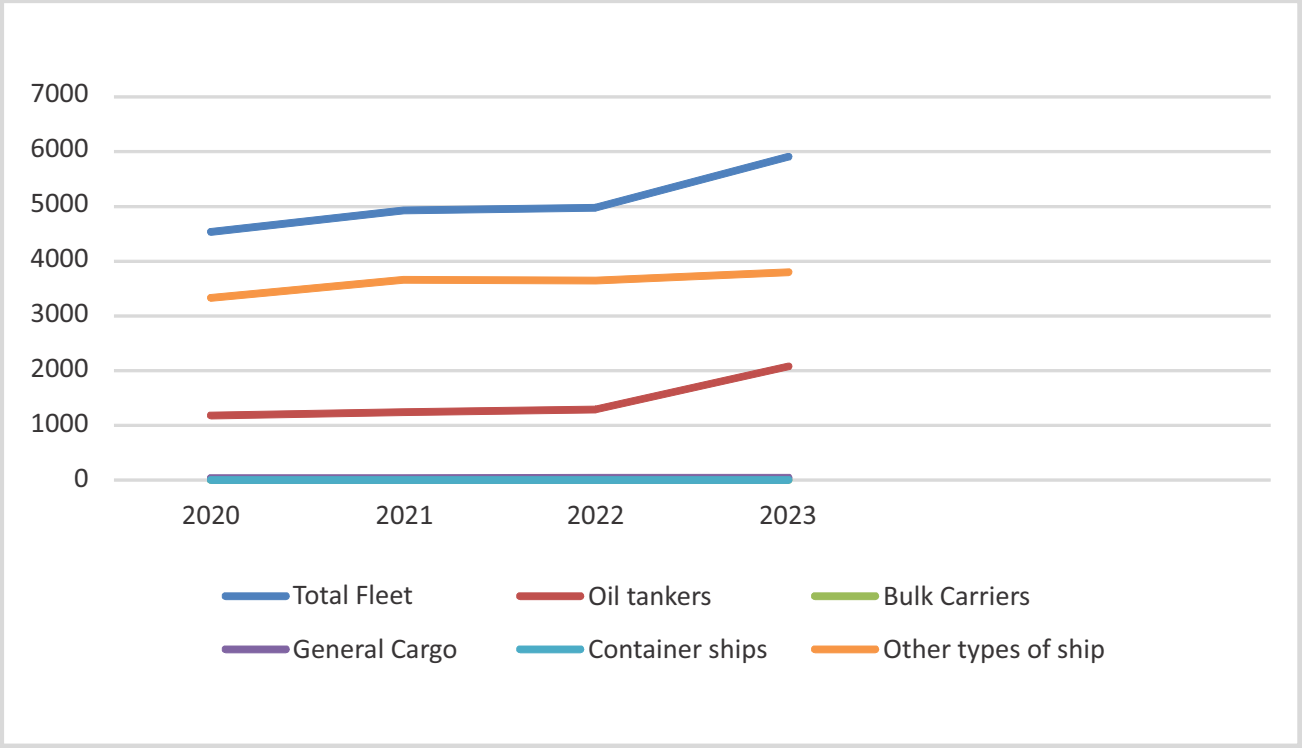


Figure 12.4: *Nigeria*

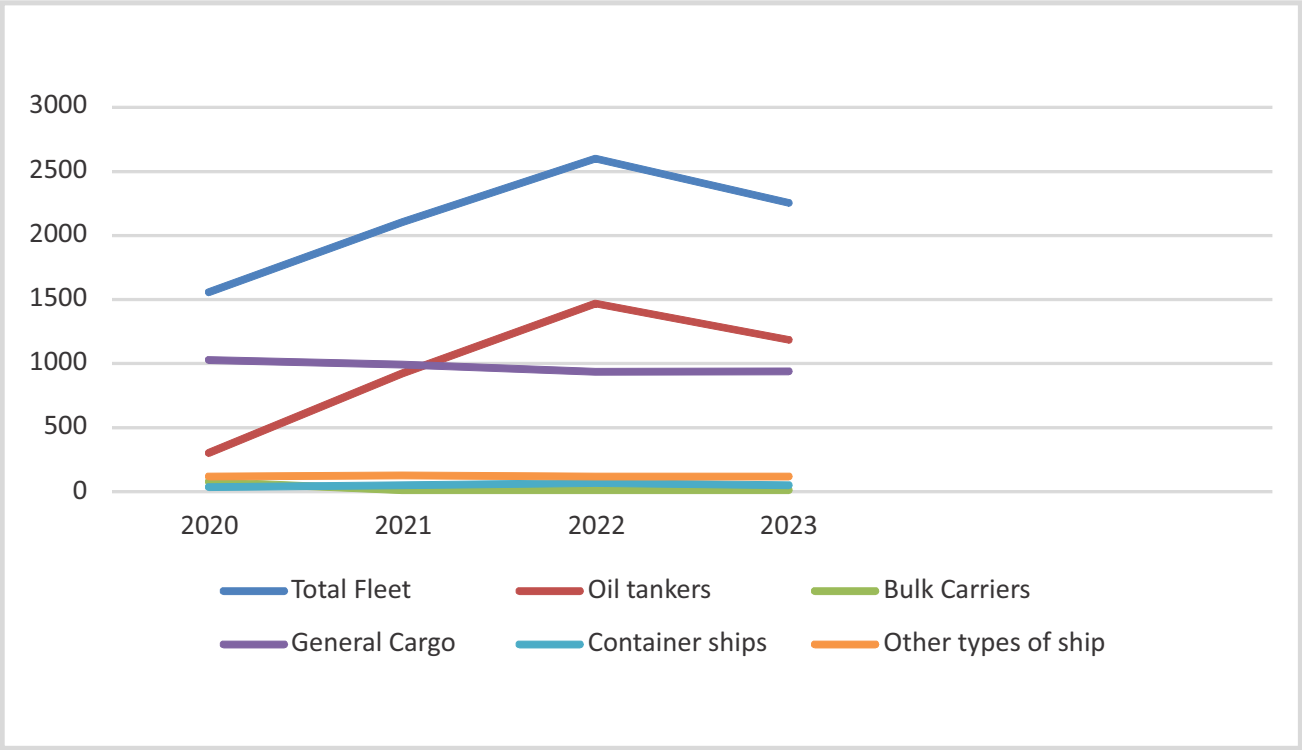


Figure 12.5: *Togo*

1.10.5. SEAFARER SUPPLY, QUINQUENNIAL, 2015 AND 2021 NIGERIA AND SELECTED NEIGHBOURING COUNTRIES

Table 14: SEAFARER SUPPLY, QUINQUENNIAL, 2015 AND 2021 NIGERIA AND SELECTED NEIGHBOURING COUNTRIES

	2015 ABSOLUTE VALUE			2021 ABSOLUTE VALUE		
	OFFICERS	RATINGS	TOTAL	OFFICERS	RATINGS	TOTAL
Benin	0	0	0	6	10	16
Cameroon	97	77	174	883	1,310	2,193
Ghana	139	136	275	38	60	98
Nigeria	1998	3762	5760	8,953	16,657	25,610
Togo	350	478	828	350	478	828

Source: *UNCTAD DATA CENTRE*

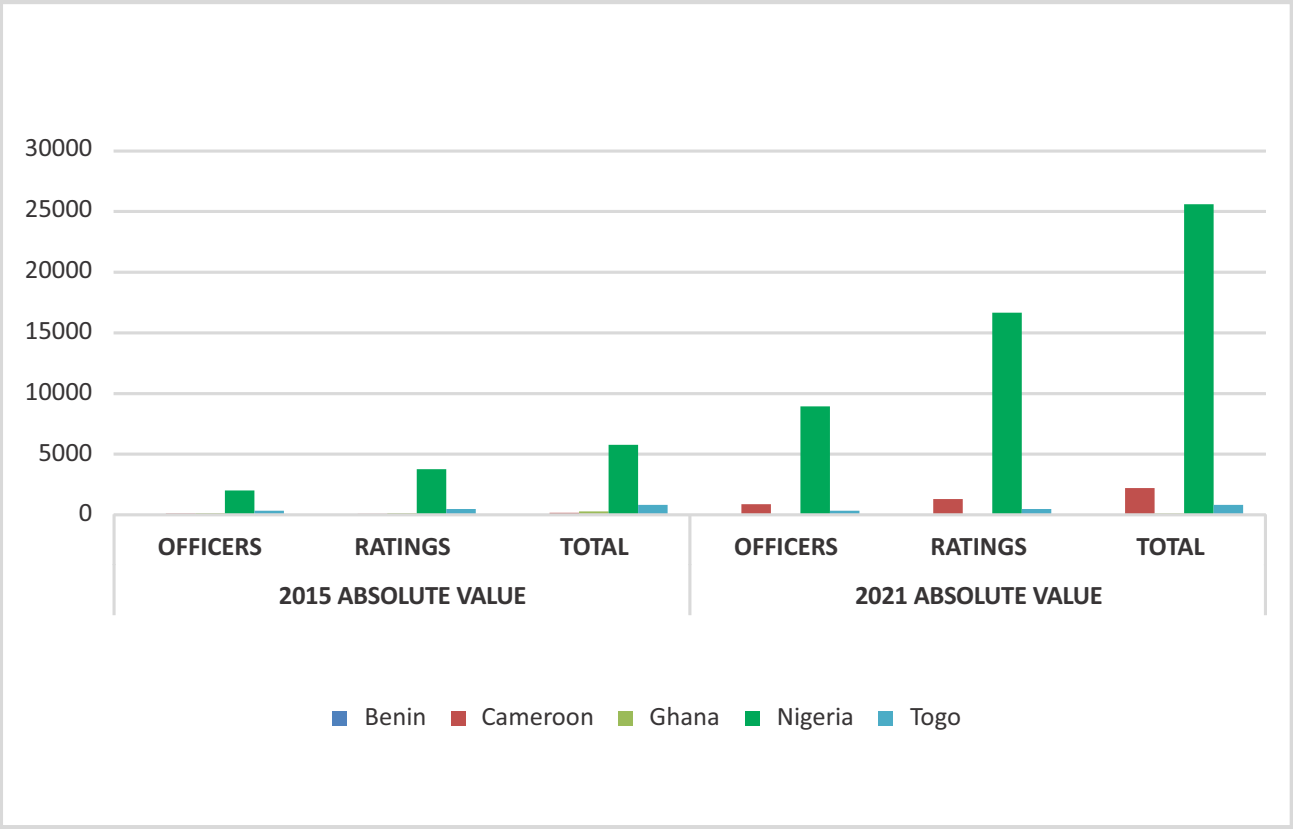


Figure 13: *Seafarer Supply, Quinquennial, 2015 and 2021*

1.10.6. LINER SHIPPING CONNECTIVITY INDEX, QUARTERLY - NIGERIA AND NEIGHBOURING COUNTRIES

Table 15: LINER SHIPPING CONNECTIVITY INDEX, QUARTERLY -NIGERIA AND NEIGHBOURING COUNTRIES 2021-2023

	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022
Benin, Cotonou	18.1	17.4	17.3	17.9	17.7	18.0	18.1	25.2	18.2	20.7	20.7	20.4	19.0	19.1
Cameroon, Douala	14.2	12.9	14.6	14.4	14.0	13.8	14.1	12.3	12.4	14.0	13.9	14.4	14.1	14.2
Cameroon, Kribi	19.9	19.8	10.5	10.5	10.5	10.4	13.2	14.3	14.4	14.6	15.6	15.7	13.7	13.7
Ghana, Takoradi	10.3	7.5	9.5	7.8	9.3	9.4	7.7	5.3	7.0	6.8	6.8	6.7	6.7	6.2
Ghana, Tema	18.7	18.4	18.4	18.6	34.8	35.0	37.3	38.5	38.8	38.9	36.9	36.0	36.4	35.6
Nigeria, Apapa	15.2	15.2	15.0	14.3	14.4	14.7	13.2	14.0	13.4	13.8	13.8	13.8	13.4	13.5
Nigeria, Calabar	1.7	1.7	1.7	1.7	1.0	1.0	1.0	1.0	1.0	1.0	..	..	..	..
Nigeria, Lagos	10.8	10.8	10.8	12.7	12.6	12.6	13.9	15.5	13.9	15.3	12.9	12.9	10.3	10.3
Nigeria, Lekki	..	..	..	..	..	2.2	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1
Nigeria, Onne	11.4	11.3	11.9	11.7	11.6	11.6	12.9	20.5	12.8	13.8	13.9	13.9	13.9	12.9
Nigeria, Port Harcourt	2.4	2.4	2.4	2.4	5.1	2.8	4.7	4.7	4.4	4.4	4.4	4.4	4.9	4.9
Nigeria, Tin Can Island	16.3	15.6	15.9	16.7	16.9	17.4	16.7	16.5	16.3	15.3	16.8	16.8	15.6	15.8
Nigeria, Warri	1.7	1.7	1.7	1.7	..	..	..	..	..	..	..	..	..	..
Togo, Lome	33.6	34.7	33.1	33.3	34.6	35.2	36.5	36.5	36.6	37.4	36.1	35.8	36.4	36.2

Source: *UNCTAD DATA CENTRE*

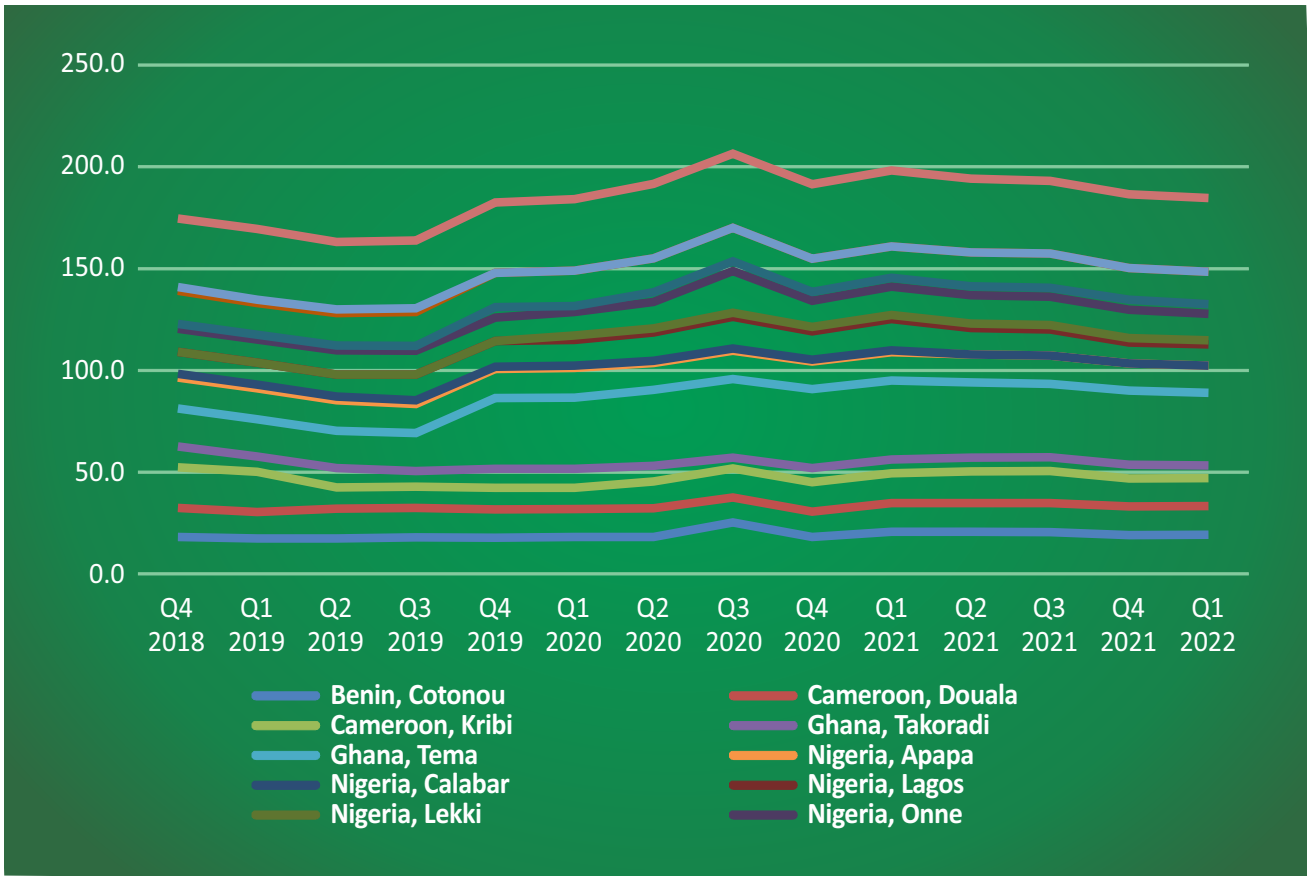


Figure 14: *Liner Shipping Connectivity Index, Quarterly-Nigeria and Neighbouring Countries 2018-2022*

1.10.7 2021 PORT CALL AND PERFORMANCE STATISTICS: TIME SPENT IN PORTS, VESSEL AGE AND SIZE NIGERIA AND NEIGHBOURING COUNTRIES

Note: At the time of research and data collection for this report, there were no no available data for the 2022 & 2023 Port Calls and Performance* for Nigeria, Benin, Togo, Ghana, and Cameroon.

Table 16: 2021 PORT CALL AND PERFORMANCE STATISTICS

	Median time in port (days)	Average age of vessels	Average size (GT) of vessels	Maximum size (GT) of vessels	Average cargo carrying capacity (dwt) per vessel	Maximum cargo carrying capacity (dwt) of vessels	Average container carrying capacity (TEU) per container ship	Maximum container carrying capacity (TEU) of container ships
Benin								
All ships	1.51	14	35,656	161,233	29,723	319,029	3,900	5,800
Liquid bulk carriers	1.99	12	23,999	161,233	40,320	319,029	..	..
Liquefied petroleum gas carriers	0.96	13	21,083	27,546	24,015	29,590	..	..
Liquefied natural gas carriers	..	..	..	..	..	..	..	..
Dry bulk carriers	8.31	12	28,053	36,416	47,990	64,049	..	..
Dry breakbulk carriers	2.11	19	8,923	23,856	11,916	38,209	..	..
Roll-on/ roll-off ships	..	12	54,586	72,269	23,211	32,246	..	..
Container ships	1.19	13	40,713	66,526	..	..	3,900	5,800
Passenger ships	..	..	..	..	..	..	..	..
Cameroon								
All ships	2.60	15	22,635	87,697	27,045	113,500	2,730	8,540
Liquid bulk carriers	2.49	13	12,292	64,452	19,436	113,500	..	..
Liquefied petroleum gas carriers	..	..	..	..	..	..	..	..
Liquefied natural gas carriers	..	..	..	..	..	..	..	..
Dry bulk carriers	6.19	12	26,953	38,238	46,016	66,614	..	..
Dry breakbulk carriers	2.58	18	10,680	31,164	12,979	48,500	..	..
Roll-on/ roll-off ships	..	17	48,258	57,449	22,654	27,965	..	..
Container ships	1.92	15	28,861	87,697	..	..	2,730	8,540
Passenger ships	..	..	..	..	..	..	..	..

Ghana								
All ships	1.51	14	33,171	153,733	29,859	88,272	4,401	15,000
Liquid bulk carriers	1.95	13	20,476	40,343	33,183	69,697	..	..
Liquefied petroleum gas carriers	2.38	13	19,065	27,546	21,067	29,590	..	..
Liquefied natural gas carriers	..	..	..	..	..	..	..	..
Dry bulk carriers	4.59	11	29,747	39,327	51,210	66,832	..	..
Dry breakbulk carriers	1.09	23	8,213	66,870	9,288	88,272	..	..
Roll-on/roll-off ships	..	11	59,857	76,420	24,207	32,246	..	..
Container ships	1.21	13	46,187	153,733	..	..	4,401	15,000
Passenger ships	..	..	..	..	..	..	..	..
Nigeria								
All ships	3.59	15	32,208	149,367	37,677	208,480	3,672	5,800
Liquid bulk carriers	3.17	16	21,762	63,758	34,507	114,129	..	..
Liquefied petroleum gas carriers	2.05	10	19,109	48,425	22,372	58,811	..	..
Liquefied natural gas carriers	1.36	12	108,212	149,367	85,355	99,025	..	..
Dry bulk carriers	6.97	12	33,500	107,374	59,089	208,480	..	..
Dry breakbulk carriers	4.30	22	8,421	66,870	10,872	71,955	..	..
Roll-on/ roll-off ships	..	13	53,412	72,269	22,903	32,246	..	..
Container ships	3.92	15	38,575	66,399	..	..	3,672	5,800
Passenger ships	..	..	..	..	..	..	..	..
Togo								
All ships	1.51	17	35,979	153,733	31,910	70,402	3,661	15,000
Liquid bulk carriers	2.13	14	23,618	36,210	39,052	64,834	..	..
Liquefied petroleum gas carriers	1.20	15	19,880	27,546	22,937	29,590	..	..
Liquefied natural gas carriers	..	..	..	..	..	..	..	..
Dry bulk carriers	3.49	12	27,878	36,544	48,136	70,402	..	..
Dry breakbulk carriers	1.69	25	8,450	23,856	11,761	38,167	..	..
Roll-on/ roll-off ships	..	15	49,069	72,269	21,996	27,965	..	..
Container ships	1.33	18	39,663	153,733	..	..	3,661	15,000
Passenger ships	..	..	..	..	..	..	..	..

Source: *UNCTAD DATA CENTRE*

2. PERFORMANCE IN INTERNATIONAL MERCHANT TRADE

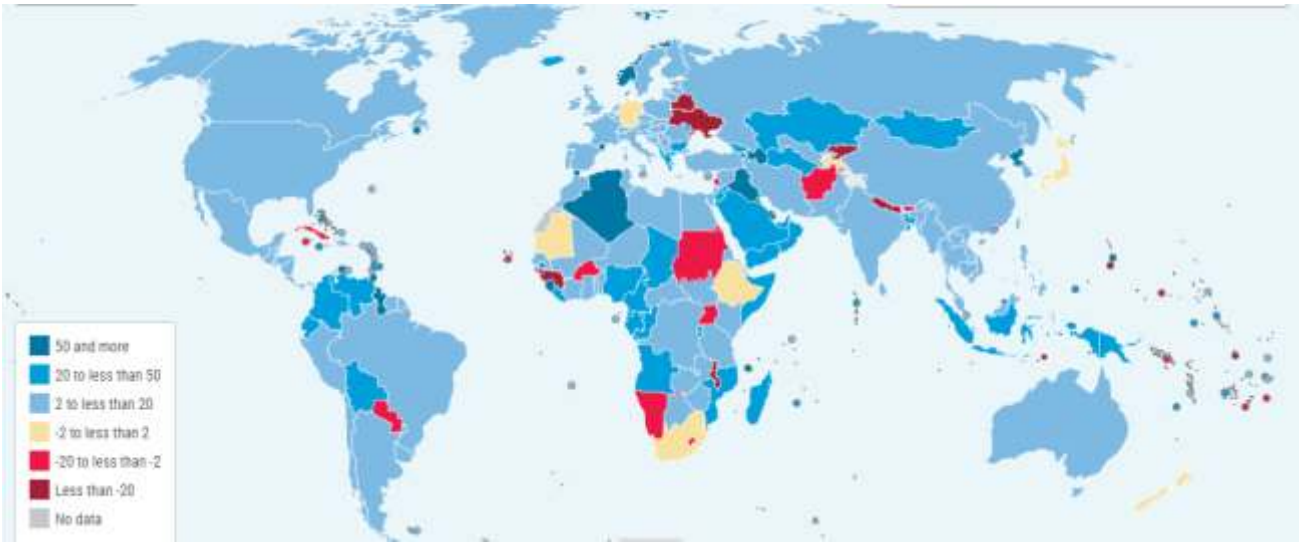


Figure 15: *World Merchandise Exports growth rate*

After two years of consecutive decline due to the Covid-19 pandemic, the global merchandise exports amounted to $24.9 trillion in 2022, which was $2.5 trillion higher than in the previous year, signalling a 11.4% increase. However, this growth slowed significantly by 0.8% in 2023 due to various economic challenges such as high inflation, elevated interest rates, and the Russia – Ukraine war, which affected key economies, particularly in Europe and North America.

Despite the trade challenges faced in 2023, experts believe that the outlook for 2024 indicates a likely rebound, supported by recovery in critical sectors and regions, with a growth rate of 3.3% forecasted.

Table 17: World Merchandise Exports (Trillions of USD)

Year	Global Export (Trillions of USD)
2013	18.9
2014	19.0
2015	16.6
2016	16.0
2017	17.7
2018	19.6
2019	19.0
2020	17.7
2021	22.3
2022	24.9
2023	23.8

Source: UNCTAD DATA CENTRE

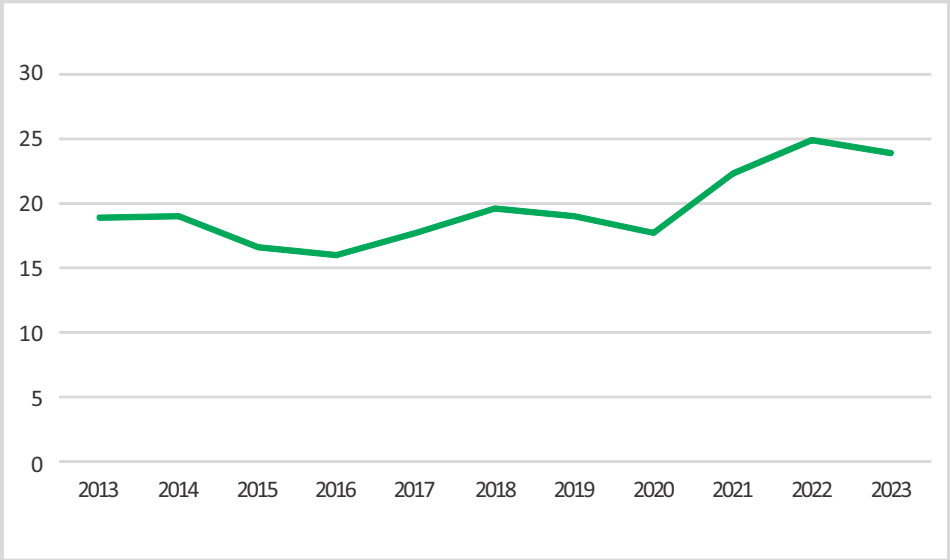


Figure 16: *World Merchandize Exports*

2.1 Merchandise trade annual growth rates

Overall, trade performances across regions and economies gave a mixed result. As seen in the table below, trade growth slowed in developed economies like Europe and North America due to economic pressures, while developing regions, particularly Africa and Americas, continued to see growth, though at a reduced pace.

Table 18: Merchandise: Total trade growth rates, annual (Percentage)

Group of Economies	EXPORTS			IMPORTS		
	Value (Billions of Dollars)		Annual Growth Rate (%)	Value (Billions of Dollars)		Annual Growth Rate (%)
	2021	2022	*2022*	2021	2022	*2022*
World	22 366	24 926	*11.4%*	22 603	25 670	*13.6%*
Developed economies	12 431	13 683	*10.1%*	13 360	15 291	*14.5%*
Developing economies	9 935	11 243	*13.2%*	9 243	10 379	*12.3%*
Developing economies : Africa	569	665	*16.9%*	619	736	*18.9%*
Developing economies : Americas	1 210	1 415	*16.9%*	1 268	1 540	*21.4%*
Developing economies : Asia and Oceania	8 156	9 163	*12.3%*	7 356	8 103	*10.2%*

Source: *UNCTAD DATA CENTRE*

Developing economies registered a considerable increase in their trade surplus in 2022 for the second consecutive year over developed economies. The largest export increases were observed in African and American developing economies, with exports rising by 16.9%. This was followed by developing economies in Asia and Oceania who had 12% growth. Developed economies experienced a rise of over 10 percent.

For imports, developing economies in the Americas led with a 21.4% increase, followed by African developing economies with an 18.9%. In contrast, imports in developing Asia and Oceania grew by a more modest 10.2 percent.

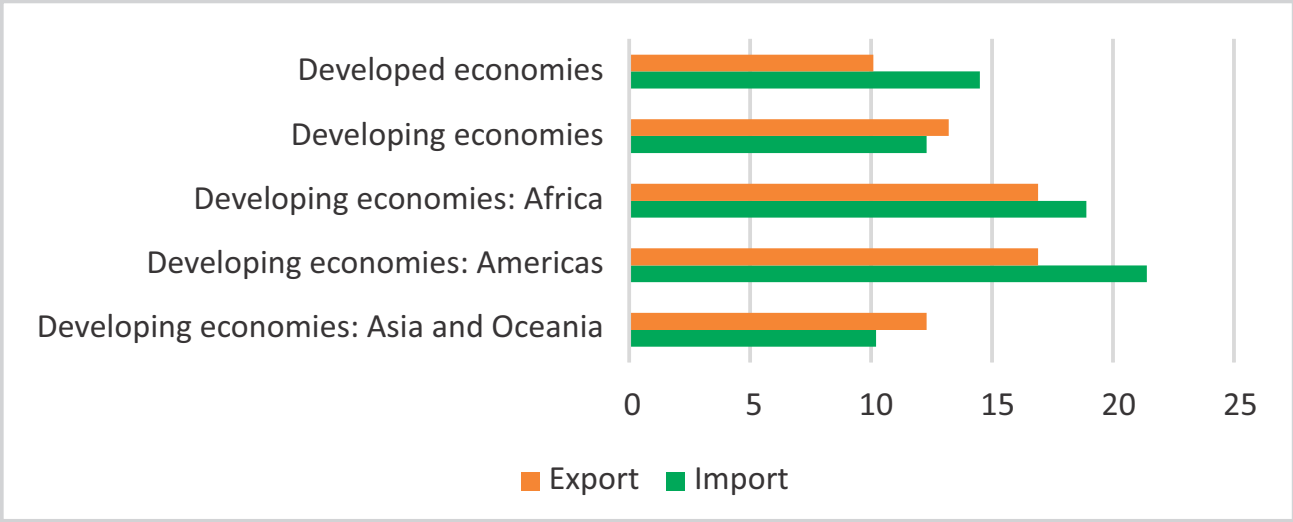


Figure 17: *Merchandise trade annual growth rates, 2022 (Percentage)*

2.1.1 Leading exporters and importers in developing economies: Africa in 2022

Table 19a: Exporters: (Ranked by value)			
Country	**Value (Billions of $)**	**Share in World total (%)**	**Annual Growth Rate (%)**
South Africa	123	0.49	-0.5
Nigeria	63	0.25	34.6
Algeria	61	0.24	58.0
Angola	51	0.21	48.7
Egypt	49	0.20	19.7

Source: *UNCTAD DATA CENTRE*

Table 19b: Importers: (Ranked by value)			
Country	**Value (Billions of $)**	**Share in World total (%)**	**Annual Growth Rate (%)**
South Africa	136	0.53	19.5
Egypt	86	0.33	17.0
Morocco	72	0.28	23.7
Nigeria	60	0.24	16.3
Algeria	39	0.15	4.2

Source: *UNCTAD DATA CENTRE*

3.0 INTERNATIONAL TRANSPORT INDICATORS

3.1 World Liner Shipping Connectivity.

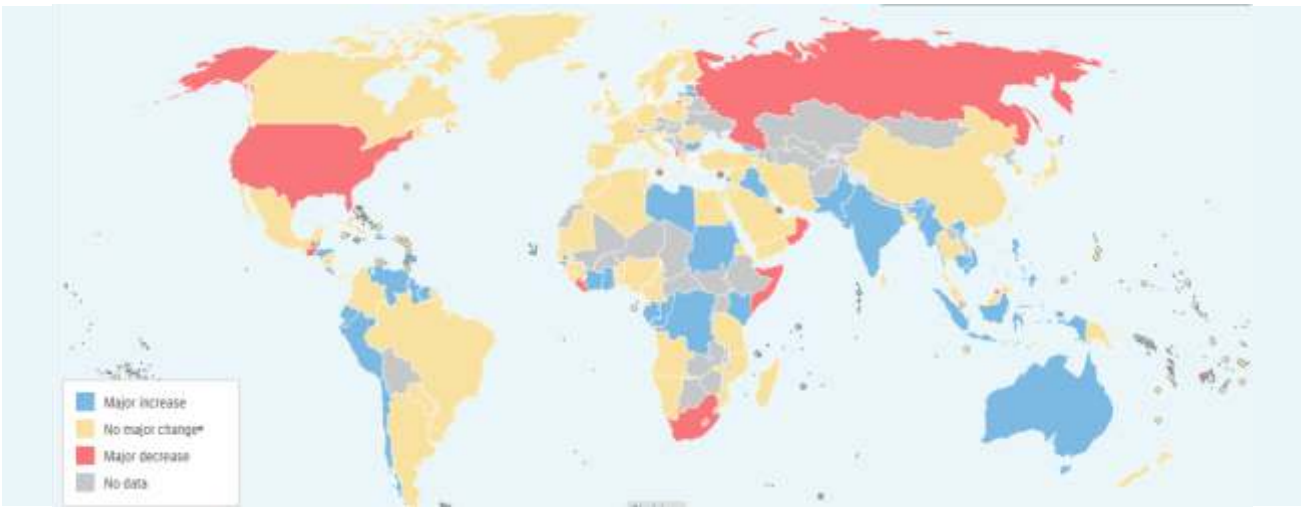


Figure 18: *World Liner Shipping Connectivity*

The Global Liner Shipping Connectivity Index for 2023 indicates that China ranks highest in terms of shipping connectivity, reflecting its strong integration into the global liner shipping network. Other highly connected countries include South Korea, Singapore, Malaysia, and the United States. Notable regional leaders are Spain and the Netherlands in Europe, Panama and Colombia in Latin America and the Caribbean, Egypt and Morocco in Africa, and Sri Lanka and India in Southern Asia.

Amongst the 30 best-connected ports, twenty (20) were in Asia, nine (9) in Europe and one (1) in Africa - Tanger Med, Morocco. One of the least connected continents in terms of shipping was South America, with Panama and Colombia scoring close to 50 points and Brazil falling short of 40.

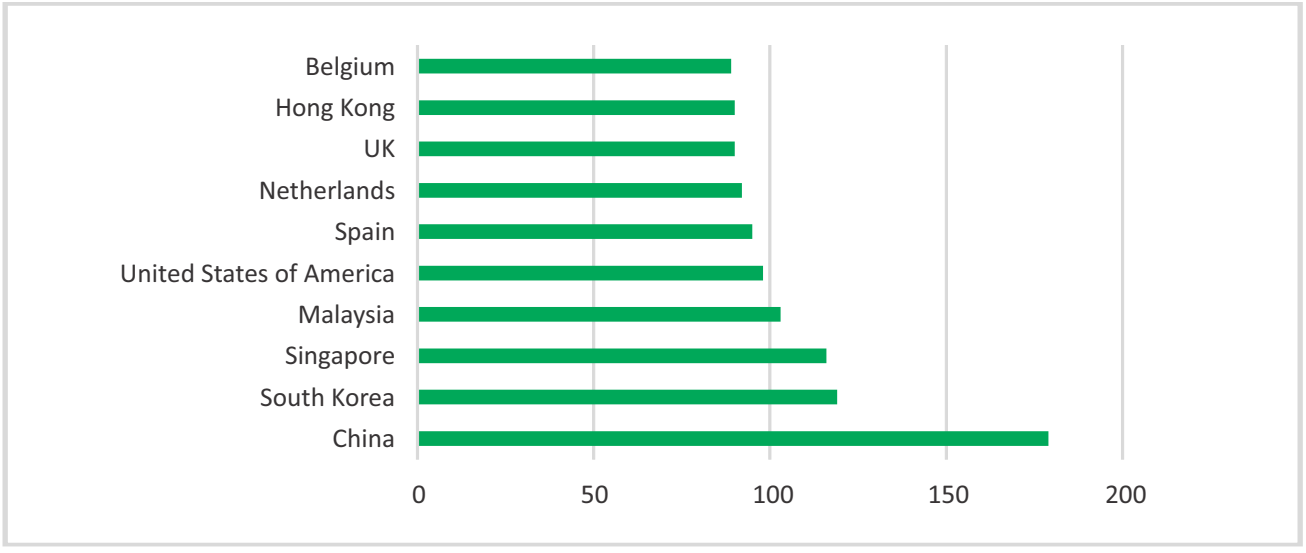


Figure 19: *2023 Line Shipping Connectivity Index (Top 10 Economies)*

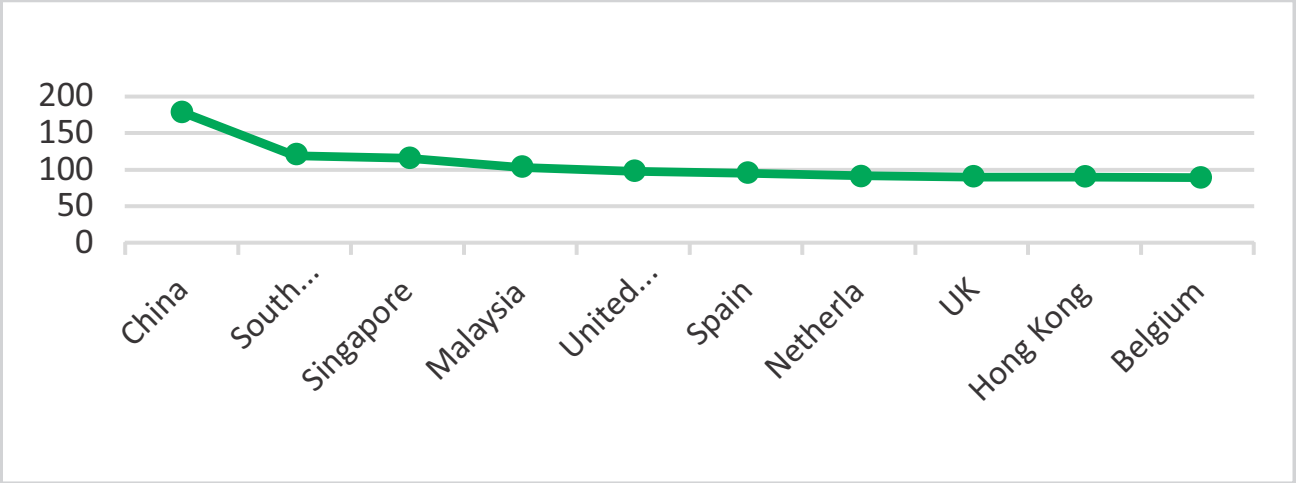


Figure 20: *Liner shipping connectivity index - Top 10 Economies (China Q1 2006=100)*

3.1.1 World Container Traffic

In 2021, global ports handled 851.1 million TEUs, marking a 7% increase from 2020. This growth continues a long-term trend, with container throughput rising by 43% over the past decade, up from 593.8 million TEUs in 2011. The only interruption to this trend occurred in 2020, due to the COVID-19 pandemic. Ports in the developing economies of Asia accounted for 59% of the global port container traffic. In contrast, the share of container traffic handled by ports in developing regions of America and Africa was much smaller, at 7% and 4%, respectively. China has the world's largest container ports in Shanghai and Hong Kong.

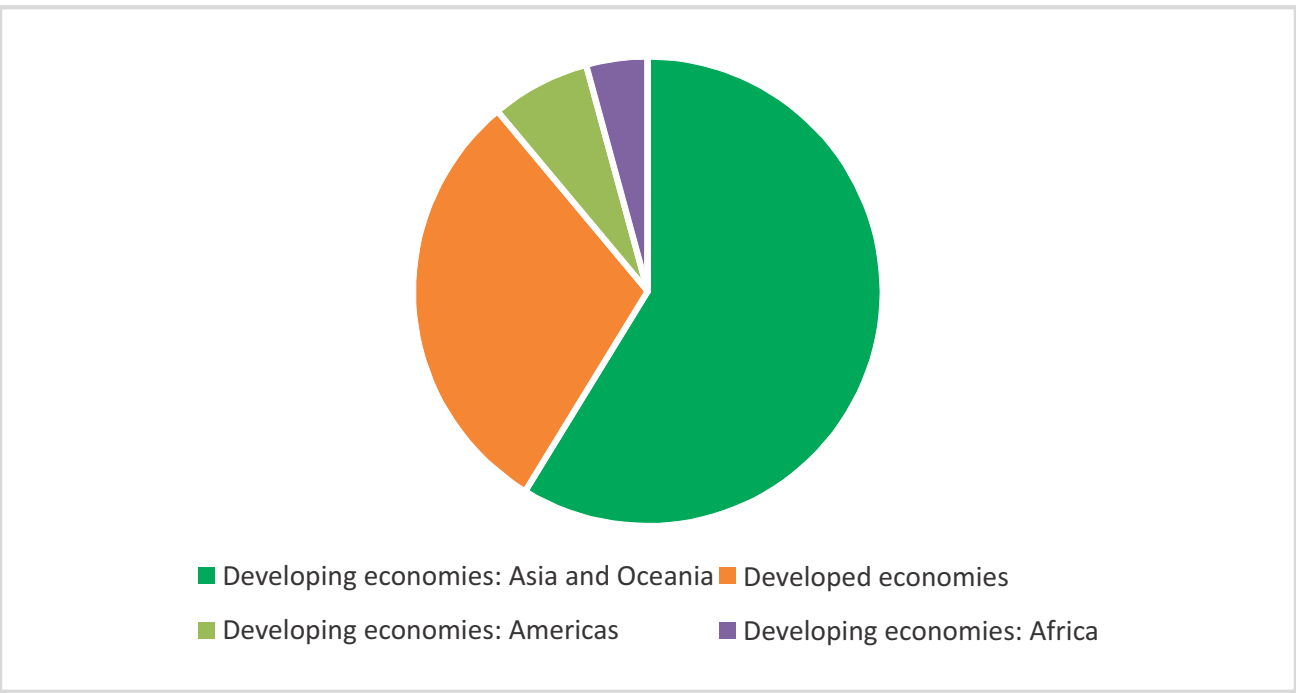


Figure 21: *World Container Port Throughput, 2021 (Millions of 20-Foot Equivalent Unit)*

3.1.2 Time at Port by Market Segment in the Top 10 Economies by Port Calls 2022.

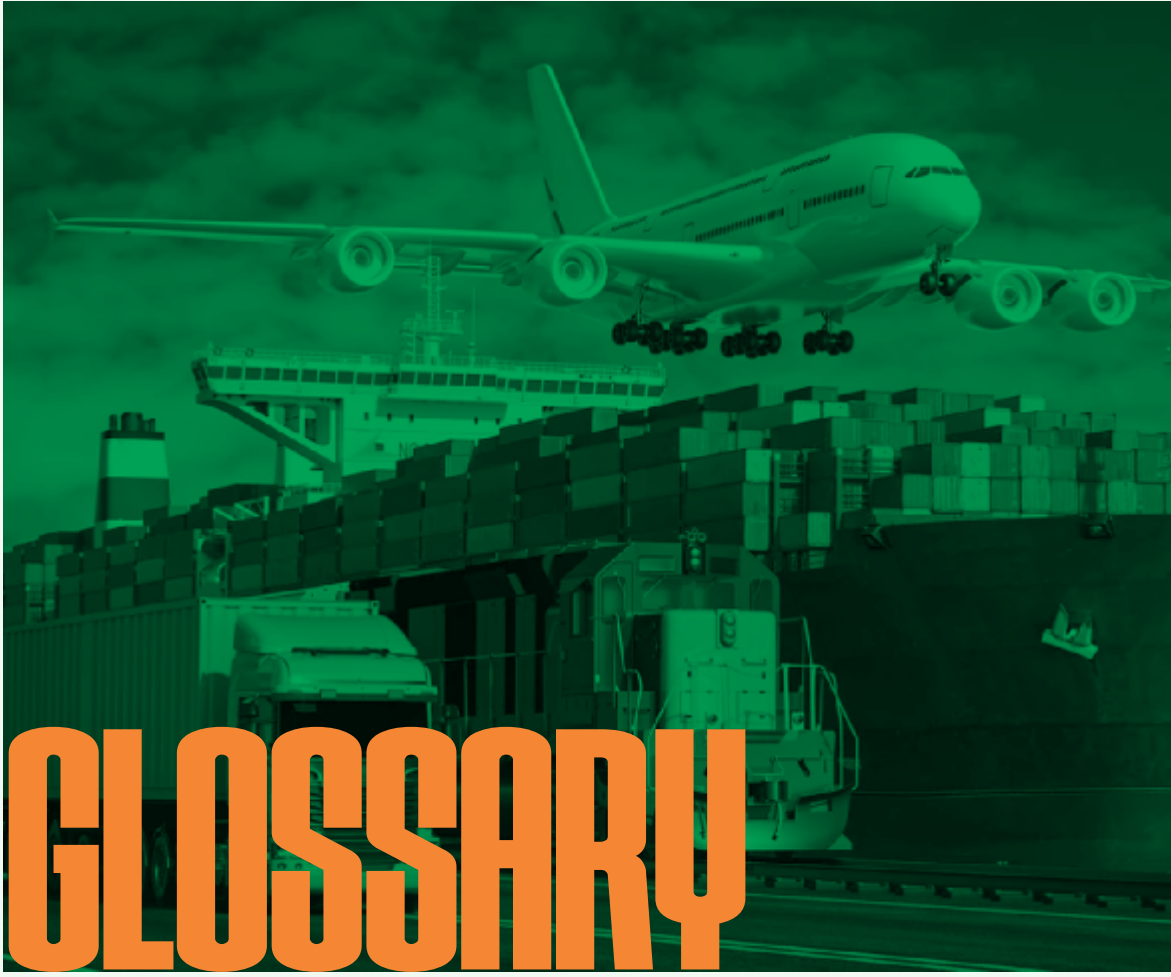
World Port Calls.

In 2022, there were 4.6 million port calls globally. Norway recorded the highest number of port calls, with cargo-carrying ships spending a median time of 10 hours at Norwegian ports. Norway's ports saw over 806, 165ships arrive and depart.

TABLE 20: Global Port Calls by Market Segment in the Top 10 Economies by Port Calls 2022.

Economy		Number of Port Calls	Median time at port (days)						
			All Market Segments	Liquid bulk	Container ship	Dry Breakbulk	Dry bulk	LPG Carriers	LNG Carriers
1	Norway	806 165	0.4	0.6	0.3	0.3	0.8	0.8	0.3
2	Japan	289 069	0.4	0.3	0.3	1.1	0.8	0.3	1.0
3	United States of America[a]	261 039	1.7	1.6	1.4	2.0	2.5	1.8	1.3
4	Italy	237 195	1.3	1.3	1.0	1.9	4.3	1.5	2.4
5	China	236 429	1.1	1.1	0.7	1.6	2.1	1.0	1.2
6	Turkey	213 717	1.3	1.2	0.7	1.5	3.9	1.2	1.2
7	Indonesia	196 575	1.3	1.3	1.0	1.2	2.8	1.1	1.4
8	United Kingdom	182 312	1.2	1.1	0.8	1.5	2.8	1.1	1.2
9	Greece	171 703	0.8	0.6	1.0	1.1	0.5	0.9	1.0
10	Spain	137 190	0.9	0.9	0.7	1.2	2.0	1.0	1.0

Source: *UNCTAD DATA CENTRE*



GLOSSARY

ADR- Alternative Dispute Resolution
AfCFTA - African Continental Free Trade Agreement
AMATO- Association of Maritime Truck Owners
ANCLA- Association of Nigerian Customs License Agents
CAC - Customs Area Comptroller
CASA- CEO's Annual Service Award
CBN- Central Bank of Nigeria
CEMA Act- Customs and Exercise Management
COMTUA- Council of Maritime Transport Union & Association
CRFFN- Council for the Regulation of Freight Forwarding in Nigeria
CSR- Corporate Social Responsibility
ECOWAS- Economic Community of West African States
FCCPC- Federal Competition and Consumer Protection Commission
FMITI- Federal Ministry of Industry, Trade and Investment
FMT- Federal Ministry of Transport
FRSC- Federal Road Safety Corps
GLA - Group Life Assurance Scheme
GPA- Group Personal Accident Insurance Scheme
ICPC- Independent Corrupt Practices and Other Related Offences Commission
ICRC- Infrastructure Concession Regulatory Commission
ICTN- International Cargo Tracking Note
ICT- Information Communication Technology
IDP – Inland Dry Port
INCOTERMS-International Commercial Terms
JBP- Joint Border Post
JIC- Joint Implementation Committee
KIDP-Kaduna Inland Dry Port
KPIs- Key Performance Indicators
MAN Oron – Maritime Academy of Nigeria
MoU- Memorandum of Understanding







MWUN - Maritime Workers Union of Nigeria
NACHO-Nigerian Aviation Handling Company
NAICOM - National Insurance Commission
NAP 7.0- National Action Plan 7.0
NCS- Nigerian Customs Service
NDLEA- National Drug Law Enforcement Agency
NDPR - Nigeria Data Protection Regulations 2019
NEPC-Nigerian Export Promotion Council
NIMASA - Nigeria Maritime Administration and Safety Agency
NIWA- National Inland Waterways Authority
NJIC-National Joint Industrial Council
NOTN- Nigerian Office for Trade Negotiations
NPA - Nigerian Ports Authority
NRC- Nigerian Railway Corporation
NTBs - Non-Tariff Barriers
PCHS- Ports and Cargo Handling Services
PEBEC- Presidential Enabling Business Environment Council
PFAs – Pension Fund Administrators
PPP- Public Private Partnershipn
PTML - Port and Terminal Multiservices Limited
RTSS- Road Transport Safety Standardization Scheme
SAHCO- Skyway Aviation Handling Company
SOPs- Standard Operating Procedures
STOAN- Seaport Terminal Operators of Nigeria
TICT- Tincan Island Container Terminal Limited
TOAM – Trade Obstacles Alert Mechanism
UASC - Union of African Shippers' Council
UNCTAD - United Nations Conference on Trade and Development
VTA- Vehicle Transit Area
WADA- War on Drug Abuse
WARTU- West African Road Transport Union











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