



Adapting to Global Fragmentation Through Capacity-Led Regional Collaboration

- Building A Resilient Logistics Hub
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The Global Challenge:

Reliability and resilience now trump speed alone



THE OLD REALITY

Priority: Speed & Cost Efficiency

- Friction-free global trade assumption
- Just-in-Time inventory
- Focus on individual national assets



THE NEW REALITY

Priority: Reliability & Resilience

- Trade wars and geopolitical uncertainty
- Supply chain re-routing and friend-shoring
- Rising logistics costs and risk mitigation

Key Insight: The global economy is shifting. Logistics is no longer just about moving fast; it is about surviving shocks.

Africa's Strategic Reality:

Africa cannot afford the 'Infrastructure Trap' of uncoordinated competition

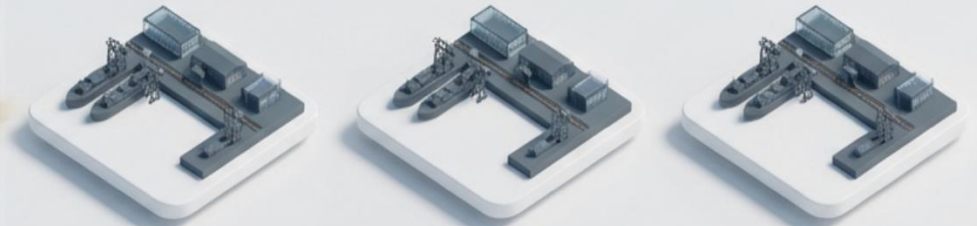
We cannot build our way out of this alone.

Infrastructure is capital-intensive and requires high utilisation to be financially viable.

Currently, many countries risk duplicating assets—building similar ports and airports in close proximity.

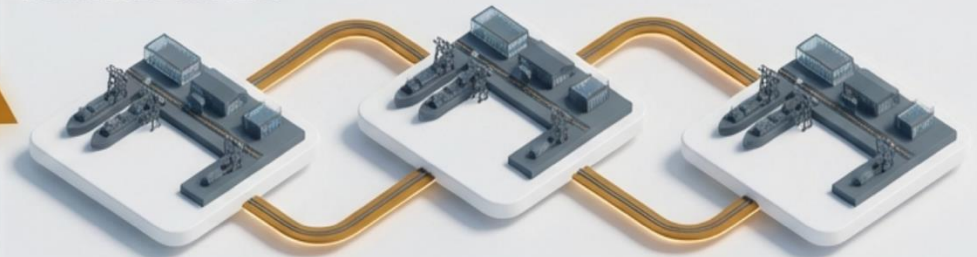
From Fragmentation to Optimization

SILOED ASSETS



High Cost / Low Utilisation

CONNECTED SYSTEMS



Shared Capacity / High Resilience

The Solution: A Capacity-Led Model Based on National Strengths



The solution is not always more concrete; it is better coordination. We must shift to a model that leverages existing assets rather than duplicating them.

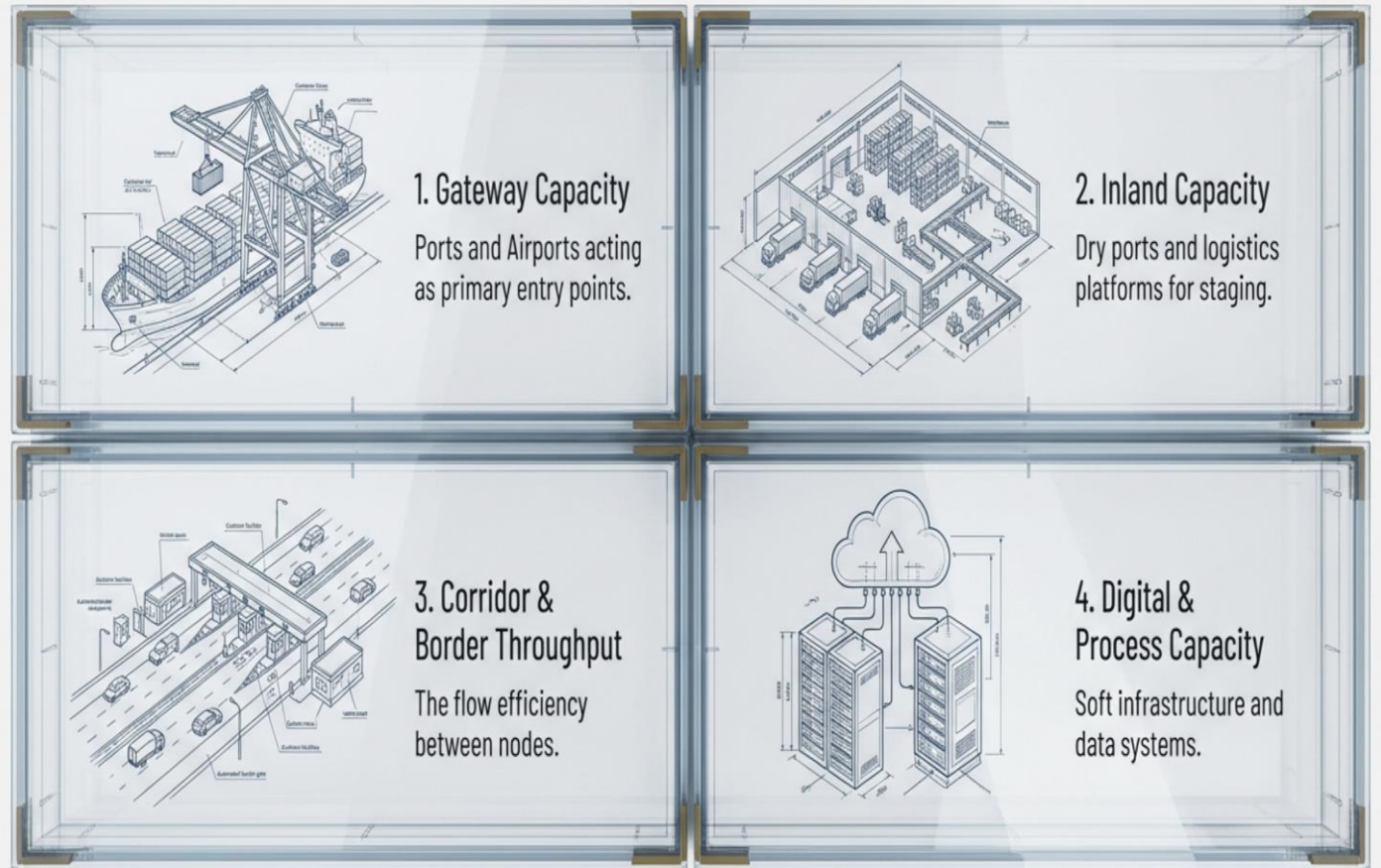
The Capacity-Led Model

What Capacity-Led Logistics Hubs Mean

The Big 4 analytical buckets:

- Gateway capacity (ports, airports)
- Inland capacity (dry ports, logistics platforms)
- Corridor & border throughput
- Digital & process capacity

Analysing the Ecosystem via The Big 4 Buckets



Different Blocs, Same Capacity Logic

- **Gateway-anchored systems**
- Ethio–Djibouti Rail Service | TAZARA (Dar es Salaam–Zambia)
- **Corridor-dependent systems**
- Central Corridor (CCTTFA) | Lobito Corridor (Angola–DRC–Zambia)
- **Multi-gateway diversification systems**
- Maputo Development Corridor | Namibia–Angola Joint Railways Coordination

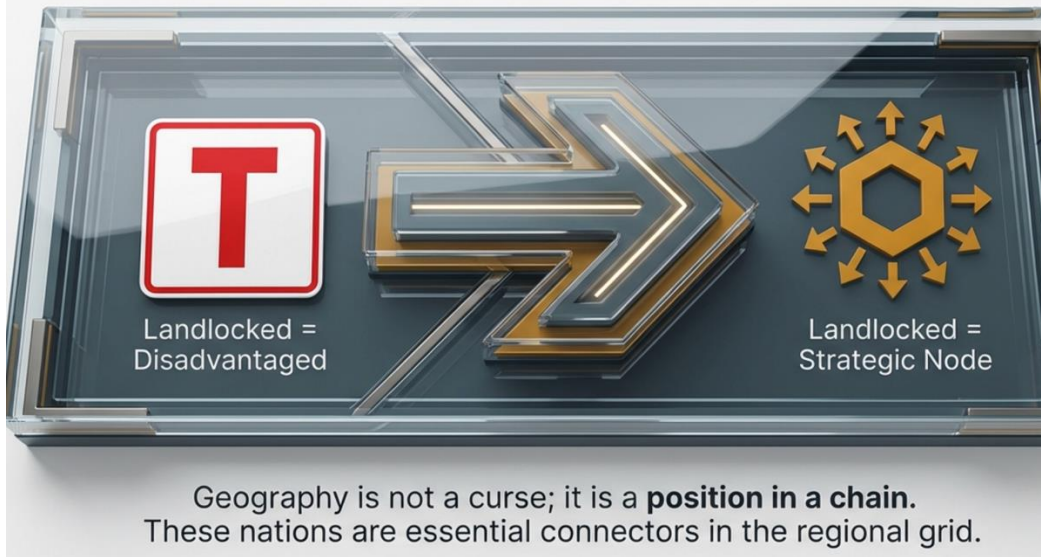
Regional Economic Blocs are the rightful Planning Units For Logistics:

Africa Already Has The Right Architecture- The 8 AU Recognised REC's:

- Arab Maghreb Union (UMA)
- Common Market for Eastern and Southern Africa (COMESA)
- Community of Sahel–Saharan States (CEN–SAD)
- East African Community (EAC)
- Economic Community of Central African States (ECCAS)
- Economic Community of West African States (ECOWAS)
- Intergovernmental Authority on Development (IGAD)
- Southern African Development Community (SADC)

Landlocked Countries as Strategic Nodes

Reframing the 'Landlocked' Narrative



Inland hubs act as critical aggregation and processing points



Inland Logistics Hubs

Managing flow, storage, and distribution efficiency.



Aggregation & Processing

Adding value to raw materials before transit.



Corridor Commercial Zones

Creating economic clusters along transport lines.

Why regional systems outperform national ones



Risk Reduction

Multiple gateways mean if one port fails, another takes the load. (Inter)



Shock Absorption

Corridor redundancy absorbs global disruptions.



Responsiveness

Regional collaborative systems respond faster than sovereign, isolated ones.



Skills & Lobbying

Facilitates transfer of skill sets and advancement through collective lobbying.

“Friendshoring doesn’t eliminate global trade — it reshapes it. Regions that can offer reliable, coordinated logistics systems become preferred partners.”

This is not theory. Governments are already executing.



The Way Forward: An African Renaissance

We will not compete by duplicating infrastructure, but by coordinating capacity.

Summary Checklist

- ✓ Global fragmentation is real.
- ✓ Resilience is essential.
- ✓ Capacity-led regional systems are the answer to shifting geopolitics.

At its core, this system is driven by sustainability and regional collaboration.

