Rebalancing Africa's economic geography

Dry ports and the rise of Corridor 2.0 infrastructure systems

Series	Jade Advisory Policy · Volume 1
Publication type	Policy paper
Geographic focus	West and Central Africa
Thematic focus	Infrastructure · Trade corridors · PPPs · AfCFTA
Date	May 2026
Publisher	Jade Advisory

AUTHORS

Mondher Khanfir	Senior Economic Advisor, Tunisia Africa Business Council
Houyem Rais	Finance Expert · Senior Consultant, Jade Advisory
Mohamed Amine Sdiri	Infrastructure Expert · Partner, Jade Advisory
Khaled Amri	Infrastructure Expert · Managing Partner, Jade Advisory

WITH THE PARTICIPATION OF

Régis Helliot	Senior Airports and Ports Expert, Independent
Borhene Dhaouadi	Architect & Urban Expert, DTA International
Amine Dhaouadi	Architect, DTA International

SUGGESTED CITATION

Khanfir, M., Rais, H., Sdiri, M. A., & Amri, K. (2026). Rebalancing Africa's economic geography: dry ports and the rise of Corridor 2.0 infrastructure systems. With the participation of B. Dhaouadi & A. Dhaouadi (DTA International) and R. Helliot. Jade Advisory Policy Series, Volume 1. Jade Advisory.

DISCLAIMER

The findings, interpretations and recommendations expressed in this publication are those of the authors and Jade Advisory. They do not necessarily reflect the official views or policies of any government, public authority, multilateral institution, development partner or client referenced herein, including the African Continental Free Trade Area (AfCFTA), the Economic Community of West African States (ECOWAS), the Economic and Monetary Community of Central Africa (CEMAC), the World Bank, the International Monetary Fund or any national customs, port or transport authority cited.

Statistical data, traffic projections and cost figures presented in this paper draw on Jade Advisory's internal corridor market assessments, customs records from the Port of Abidjan (PAA), the Port Autonome de Douala (PAD), the Port of San Pedro (PASP), and macroeconomic forecasts from the IMF World Economic Outlook. These figures are illustrative and intended to support strategic and policy discussion; they do not constitute legal, financial or investment advice and should not be relied upon for transactional decisions.

Executive summary

Dry ports in Africa must be reframed from inland logistics facilities into strategic nodes of integrated Corridor 2.0 systems, where transport, energy, digital infrastructure and industrial ecosystems converge. This shift is essential to move beyond transit efficiency and toward value creation, regional integration and economic resilience under the African Continental Free Trade Area (AfCFTA).

Despite growing corridor traffic across West and Central Africa, most systems remain structurally extractive: raw materials are exported, finished goods are imported, and limited value is captured inland. At the same time, intra-African trade remains low (14–16 percent - UNCTAD, Key Statistics and Trends in Trade Policy, 2023), highlighting the gap between infrastructure expansion and economic transformation. Dry ports, when designed as multi-functional platforms, can bridge this gap by combining customs, multimodal logistics, value-added services and productive activities within a single inland hub.

This repositioning carries strong geopolitical implications. Concentration of trade flows in coastal gateways creates systemic vulnerabilities — logistical, economic and climate-related. By redistributing logistics, inventory and industrial functions inland, dry ports contribute to a more balanced territorial development and strengthen the economic sovereignty of hinterland and landlocked countries.

From a policy perspective, the central challenge is not only to mobilize capital, but to structure bankable infrastructure ecosystems. Traditional logistics assets generate limited and volatile revenues, constraining private investment. In contrast, Corridor 2.0 dry ports operate through diversified revenue models, combining logistics services, industrial land use, and digital coordination platforms. This integrated approach enhances financial viability and enables more effective use of blended finance instruments.

KEY MESSAGES — THREE POLICY PRIORITIES

Integrated corridor governance: harmonizing customs, regulatory frameworks and data systems across countries to ensure end-to-end performance.

Productive adjacency: linking dry ports to industrial zones, agro-processing and SME ecosystems to anchor value creation inland.

Multimodal and digital integration: prioritizing rail-road interfaces and interoperable data systems as core infrastructure components.

In this framework, dry ports emerge not as auxiliary logistics assets, but as instruments of structural transformation, capable of converting corridors into competitive, resilient and investable economic systems.

This shift is especially relevant in West and Central Africa, where seaports are expanding, inland demand is rising, and landlocked economies depend on a limited set of external gateways. Corridor demand already exists on routes such as Dakar–Bamako, Douala/Kribi–Ngaoundéré–N'Djamena, Abidjan–Ouagadougou and Abidjan–Lagos. Yet the missing link remains inland transformation. Too many corridors still export raw materials, import finished goods and absorb logistics friction in between.

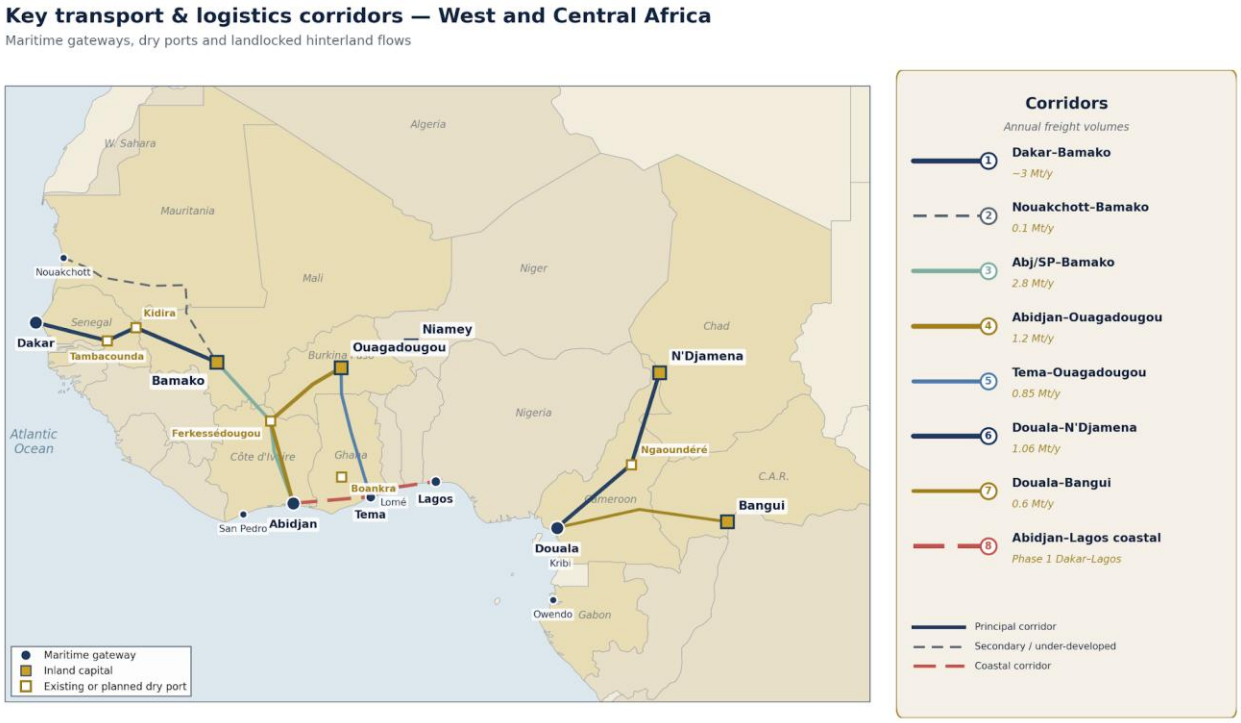

Figure 1. Key transport and logistics corridors — West and Central Africa.

The next generation of dry-port strategy must therefore combine four functions in one place: customs and clearance, multimodal transfer, value-added logistics, and productive activity. Where those functions are integrated, a dry port becomes more than an inland terminal: it becomes a territorial anchor for competitiveness.

Corridor 2.0 dry ports should also be planned as territorial anchors integrating land value capture. By linking its functions with housing, training, health and local services, they can support new intermediate cities and more balanced regional development.

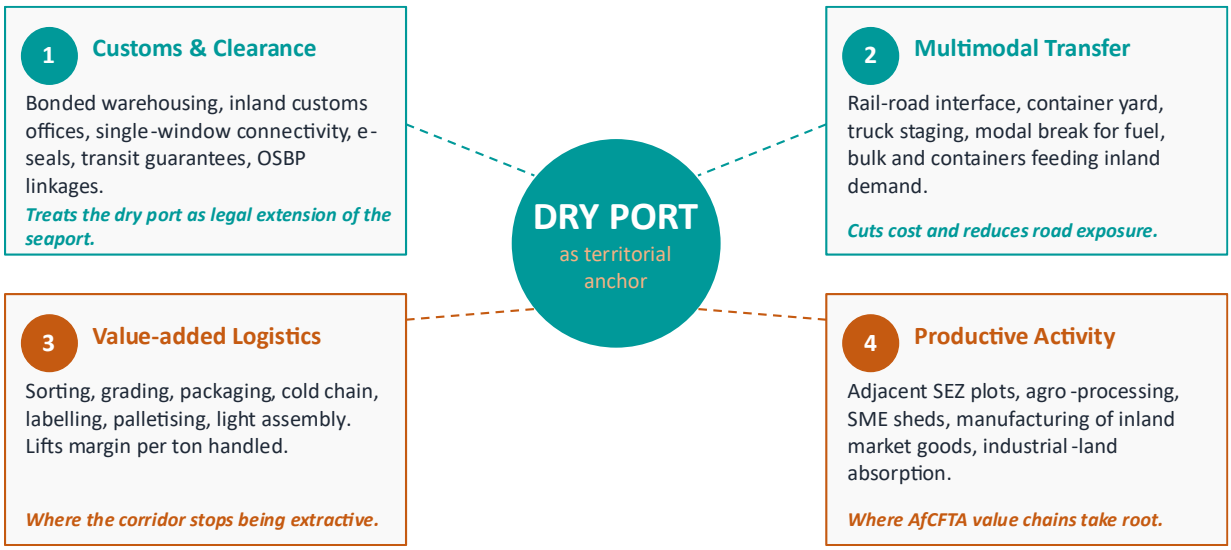

Figure 2. The four functions of a modern dry port.

This policy paper draws on Jade Advisory's internal corridor market assessments (Senegal–Mauritania, Chad, the Central African Republic, Cameroon, Côte d'Ivoire, Burkina Faso, Ghana and Gabon) and on AfCFTA, ECOWAS, CEMAC and World Bank work to set out where the African dry-port agenda should go between 2026 and 2030.

I. The paradigm shift: from logistics to industrialization

The move from a transport corridor to a productive trade corridor rests on a simple premise: flow alone does not create enough value. A corridor becomes development-enhancing only when cargo is sorted, aggregated, processed, standardized, packaged, certified, financed and redistributed closer to the hinterland markets it serves. Three pillars structure that transition.

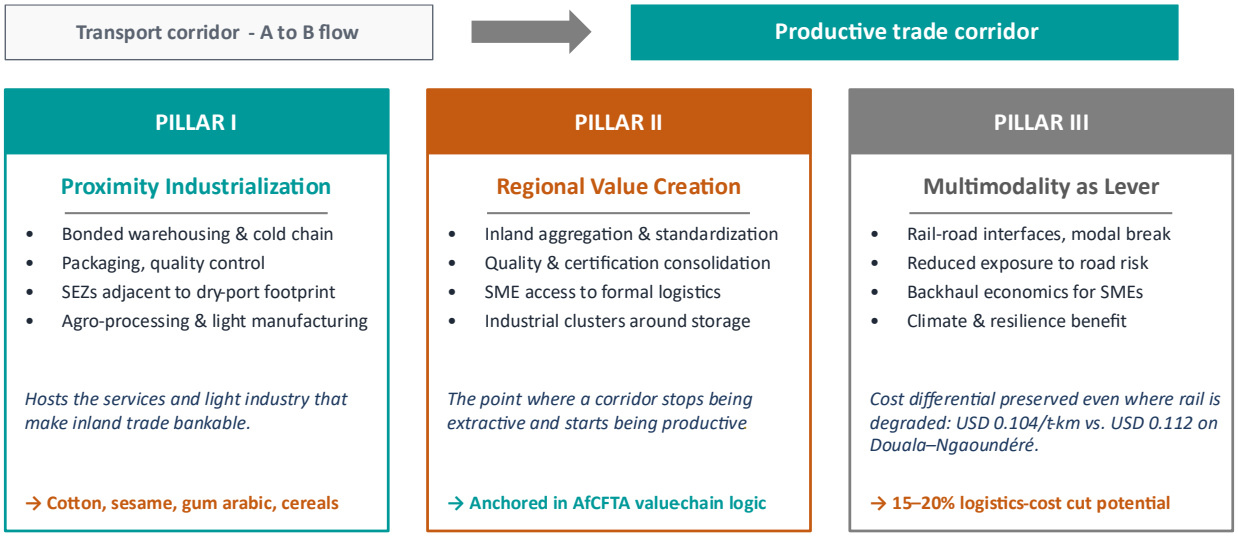

Figure 3. Three pillars of the paradigm shift.

1. **Proximity industrialization.** Dry ports should not only receive trucks and containers; they should host the services and light industry that make inland trade bankable. In practice, that means bonded warehousing, cold chain, packaging sheds, quality-control services, truck maintenance, fuel logistics and, where the cargo base justifies it, agro-processing and light manufacturing. Cotton, cereals, sesame, Arabic gum, livestock products, processed foods, timber and fertilizers are not only corridor commodities; they are also candidates for inland value addition.

2. **Regional value creation.** AfCFTA is explicitly designed to promote value-added production and regional value chains rather than simply intensify the exchange of raw products. Dry ports can support that agenda by becoming the inland point where product quality is consolidated, freight is standardized, SMEs access formal logistics, and industrial users cluster around reliable storage and customs services. In other words, the dry port is where a corridor can stop being extractive and start becoming productive.

3. **Multimodality as a cost and resilience lever.** Road-only corridors remain exposed to congestion, road deterioration, rainy-season disruptions and checkpoint inflation. Rail-road interfaces reduce those risks when they are reliable and commercially integrated. Even where rail networks are degraded, the cost differential can remain material: on the Douala–

Ngaoundéré axis, rail haulage is priced at roughly USD 0.104 per ton-km against USD 0.112 by road *(HELP Logistics report, 2024)*. A dry port located at the right rail break or road-rail transfer point can therefore reduce logistics costs, improve backhaul economics and make local production more competitive.

The Corridor 2.0 is then an integrated economic system in which physical infrastructure, logistics platforms, customs and regulatory architecture, digital data flows, energy networks and productive ecosystems converge toward a common objective; the generation of economic value along the entire route, not only at its endpoints. Performance is measured not only in transit time and cost per ton-kilometer, but in value captured inland, industrial activity anchored along the route, and the degree to which the corridor contributes to territorial rebalancing and economic sovereignty for landlocked and hinterland countries.

II. State of play and projections — West and Central Africa focus

A. Examples of high-potential corridors

Dakar–Bamako. The principal western Sahel gateway still carries the largest share of Mali's seaborne freight through Senegal, but that leadership is no longer guaranteed. Senegal's share of Malian transit slipped from roughly 68 percent in 2021 to 58 percent in 2024 as Côte d'Ivoire's ports captured volume *(DNTTMF – Direction Nationale des Transports Terrestres, Maritimes et Fluviaux du Mali; SITRASS, 2024)*. Future competitiveness will depend not only on the performance of Dakar and Ndayane, but also on inland efficiency at Tambacounda, Kidira and the border interface with Mali. The strategic issue is therefore not simply port capacity: it is whether Senegal can rebuild a reliable end-to-end rail-road and customs chain that restores predictability for Malian cargo.

Douala/Kribi–Ngaoundéré–N'Djamena. This 1,800–2,000 km axis already handles roughly 1.06 million tons per year (about 53 percent of Chad's total corridor traffic and 90 percent of its international freight - *HELP Logistics report, 2024*) and rainy-season conditions can reduce road capacity by as much as 50 percent. Despite the limitations of the Cameroonian rail network (single track, sections at 20 km/h, six-day rail transit times), multimodal rail-road traffic still retains a meaningful role because it remains cheaper than all-road transport. In this context, Ngaoundéré is not a peripheral node: it is a pivotal intermodal asset whose performance directly affects corridor cost, resilience and trade regularity.

Ngaoundéré could become a major intermediate city in Central Africa, integrating industrial zones, logistics platforms, universities, vocational training centres, residential neighbourhoods, health infrastructure, and regional public facilities.

Abidjan–Ouagadougou. One of the most structured corridor systems in West Africa: a strong maritime gateway, an all-weather road system and a parallel railway operated by SITARAIL that already carries 0.9–1.0 Mt of freight per year (around 38 percent of corridor volume). Total corridor freight exceeds 1.2 Mt annually *(SITARAIL operating data, 2021–2022)*, with public policy aiming to bring transit performance below three days through digitalization and infrastructure upgrades. Ferkessédougou is strategically located to become both a redistribution hub for Burkina Faso and a platform for industrial transformation in northern Côte d'Ivoire; the May 2019 decree declaring its 732-ha dry port a project of public utility makes the regulatory framework unusually favorable.

Ferkessédougou has the potential to become a flagship example of integration between logistics, industrial, and urban development, with housing, public services, education facilities, mobility infrastructure, commercial spaces, and business incubators.

Abidjan–Lagos. This route should be read through a dry-port lens, even though it is not a classic landlocked-hinterland route. As the first phase of the Dakar–Lagos coastal corridor, it spans about 1,080 km, crosses five ECOWAS member states and eight border-crossing points, and links some of West Africa's largest economic centers and maritime gateways. Its strategic value lies in its potential to function as a coastal production spine, connected to inland feeder platforms, logistics zones and manufacturing clusters that extend its reach toward Burkina Faso, Mali and Niger.

Across these corridors, demand projections produced from country-level GDP outlooks and customs data converge on a structural conclusion: corridor traffic is growing materially, but in many cases faster than the infrastructure that supports it.

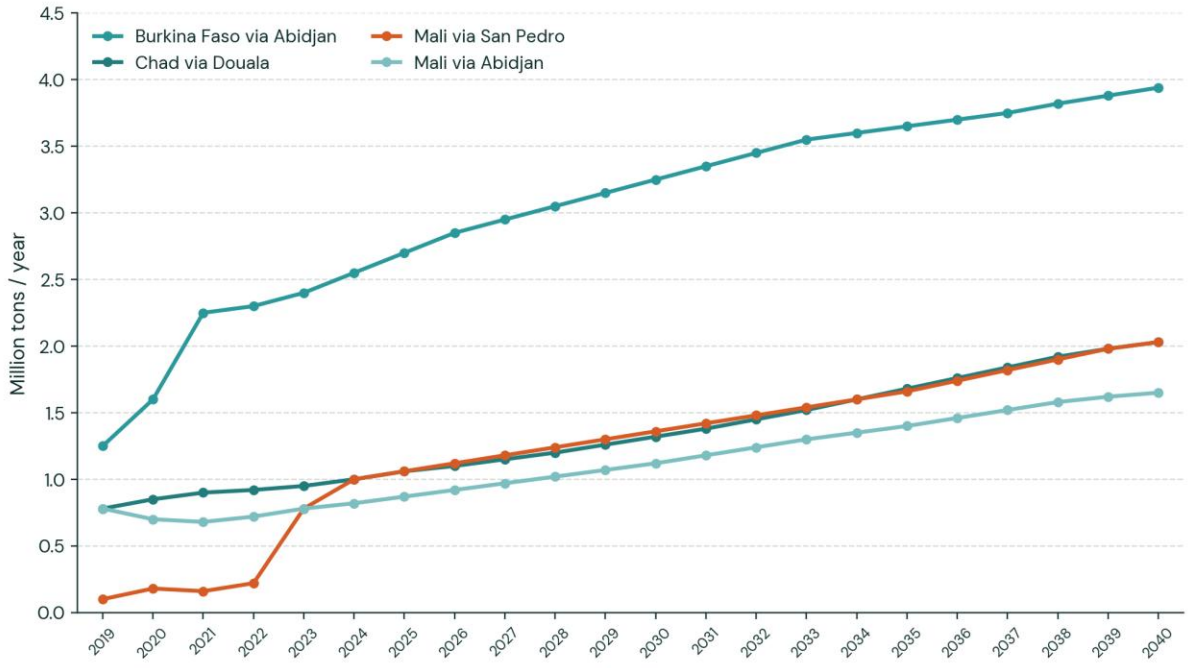

Figure 4. Corridor traffic projections, West and Central Africa.

Sources: Port of Abidjan (PAA), Port Autonome de Douala (PAD-Cameroon), Port of San Pedro (PASP), customs records 2024. Growth assumptions: IMF World Economic Outlook country GDP forecasts.

Three observations stand out when looking at corridor-level detail. First, Mali's transit traffic via Côte d'Ivoire is on a clear long-term uptrend, with combined Abidjan and San Pedro flows projected to nearly double by 2040 under a 4.7 percent CAGR.

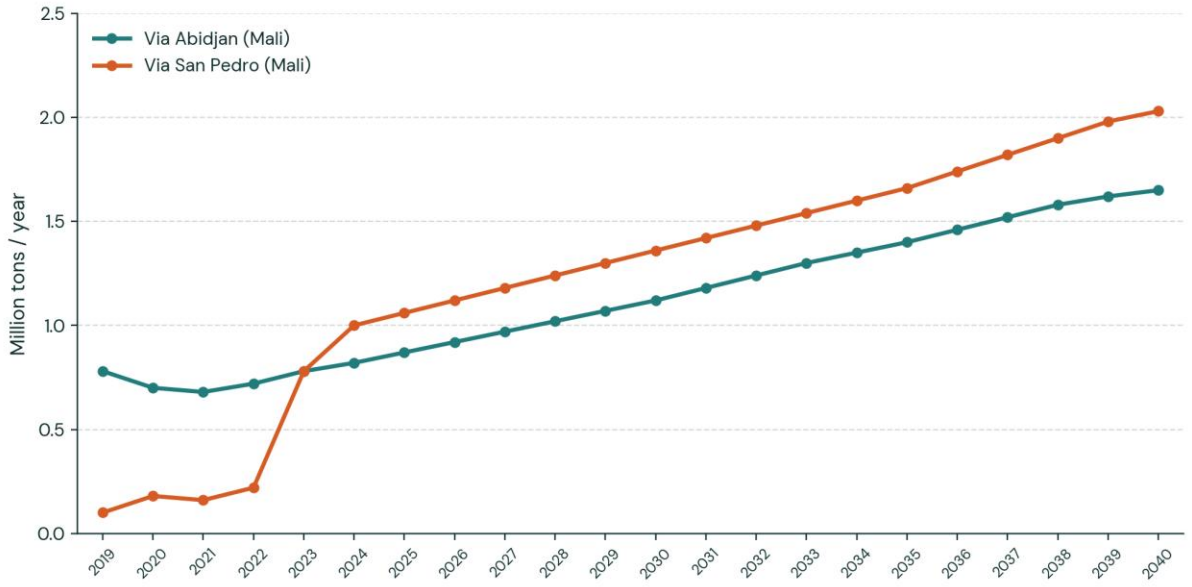

Figure 5. Projected Malian transit traffic via Ivorian gateways, 2019–2040.

Second, Burkina Faso's flow via Abidjan exceeds the volumes of any single Sahelian counterpart and creates a genuine industrialization opportunity along the corridor.

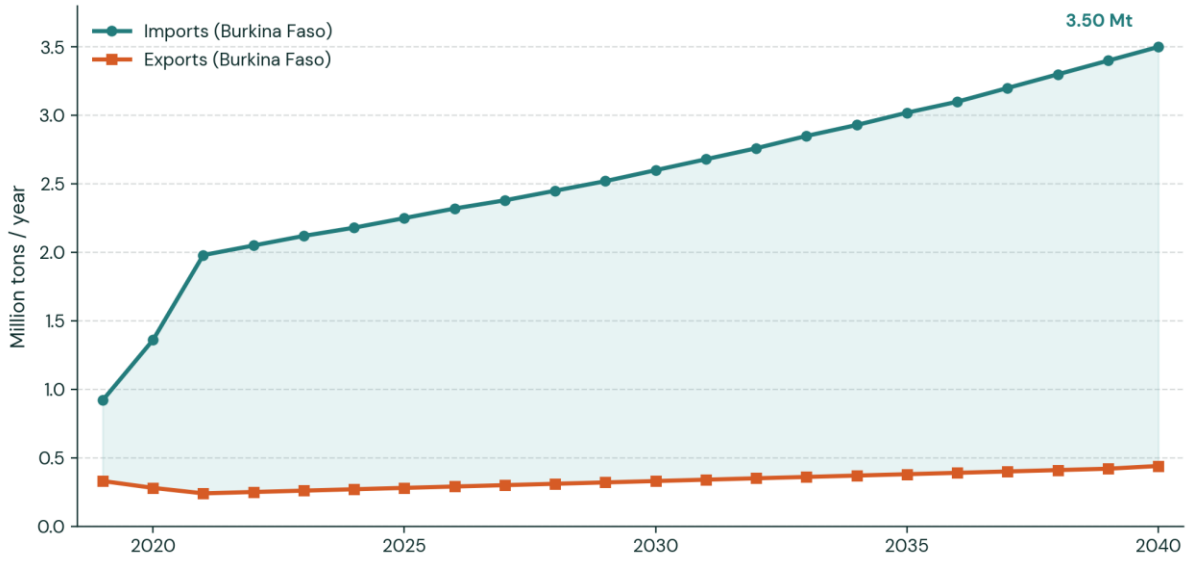

Figure 6. Projected Burkinabè transit traffic via the Port of Abidjan, 2019–2040.

Third, Chad's transit demand via Douala will collide with current Douala transit capacity well before 2035 if no inland and port-side capacity is added, opening a structural opportunity for dry-port and intermodal investment.

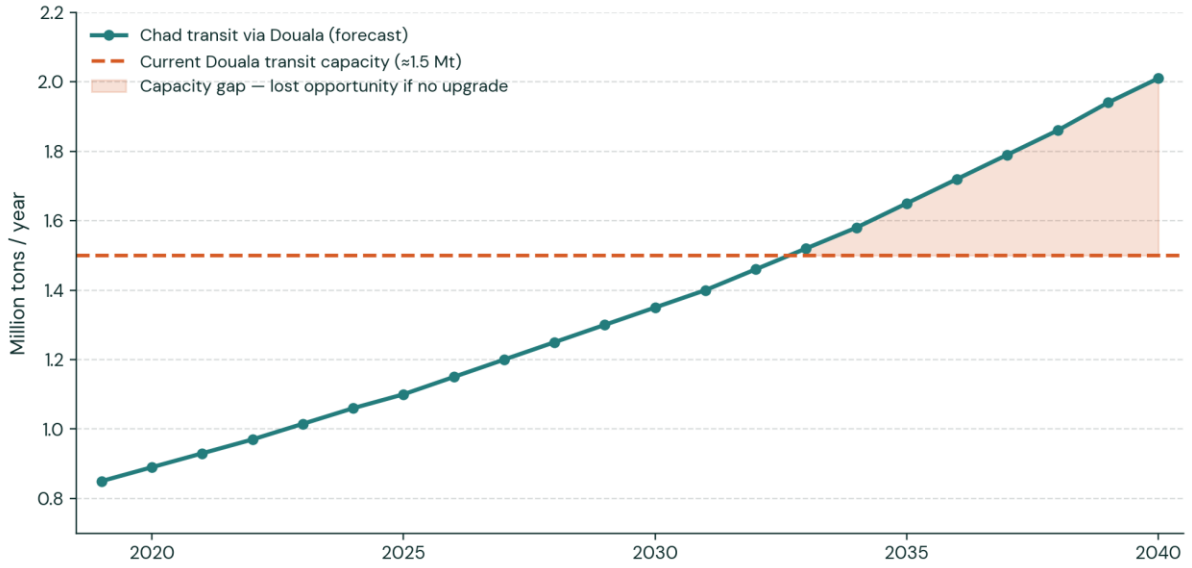

Figure 7. Projected Chadian transit traffic via Douala against current capacity, 2019–2040.

B. Digitalization — the nerve centre

Digitalization should no longer be understood as an enabling feature of corridor systems, but as their operational backbone. In the context of Corridor 2.0, data infrastructure functions as the nerve centre that connects ports, dry ports, customs authorities, logistics operators and financial actors into a single, coordinated system.

Without trusted and interoperable data, physical infrastructure cannot deliver reliability, efficiency or scale. Fragmented information flows, manual processes and lack of coordination continue to generate significant transaction costs across African corridors (*estimated by the World Bank (2023) at 2–8 percent of cargo value depending on corridor)*, often offsetting the benefits of physical investments. In this sense, the performance gap between corridors is increasingly defined not only by infrastructure quality, but by the degree of digital integration.

Platforms such as SIGMAT, along with single-window systems, e-seals, cargo tracking technologies and port community systems, are transforming the economics of corridor operations. By enabling real-time visibility, reducing duplication of procedures and improving coordination across jurisdictions, they directly enhance trade facilitation and operational predictability.

Critically, digitalization also plays a central role in improving the bankability of corridor infrastructure. Reliable data reduces information asymmetries, strengthens risk assessment and enables new financing mechanisms linked to trade flows, including trade finance, inventory financing and performance-based lending. In this perspective, data is not only a tool for efficiency — it is a financial enabler that connects infrastructure assets to capital markets.

> **POLICY IMPLICATION**
>
> The emerging divide in African corridor systems is no longer only between coastal and landlocked regions, but between connected and disconnected corridors. The most competitive and investable dry ports will be those that combine physical capacity with fully integrated digital ecosystems, extending data continuity from maritime gateways to inland markets.

III. Challenges and obstacles to overcome

Four obstacles consistently surface across our market assessments. They are not symptoms of insufficient ambition; they are structural frictions that determine whether physical platforms translate into productive corridors.

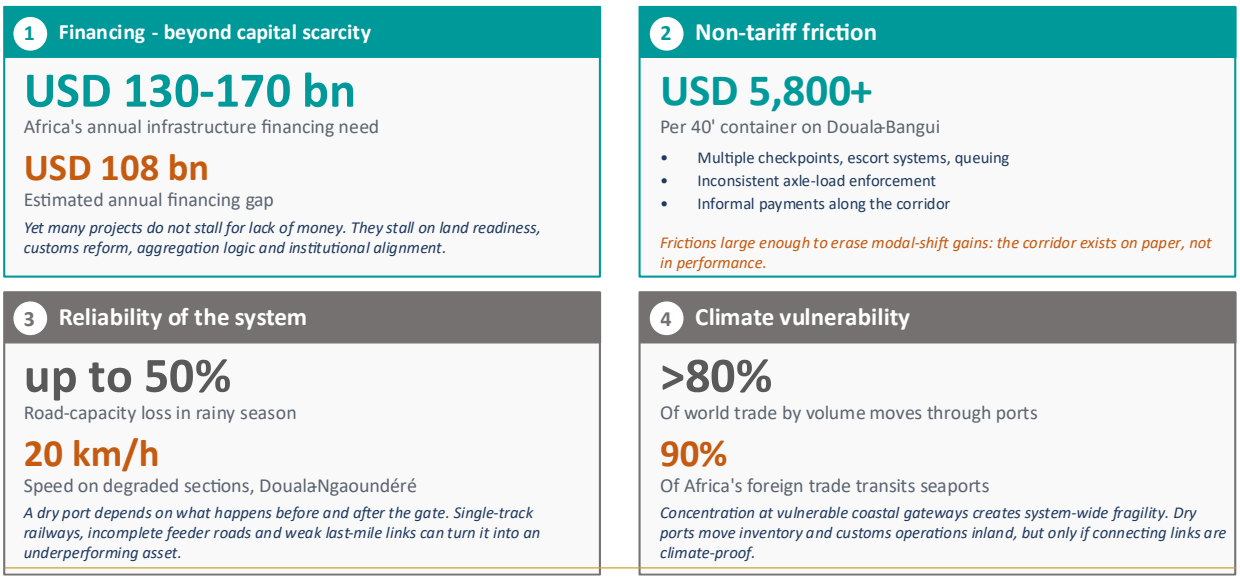

Figure 8. Four obstacles to productive corridors.

Financing — beyond capital scarcity. Africa's annual infrastructure financing needs remain in the range of USD 130–170 billion, with a financing gap that can reach USD 108 billion *(African Development Bank, Africa Infrastructure Development Index, 2023; OECD, Perspectives on Global Development, 2024)*. Yet many corridor projects do not stall only because funding is unavailable. They stall because land readiness, interface design, customs reform, traffic aggregation and institutional coordination have not been solved well enough to make capital comfortable.

Non-tariff friction. Administrative harassment, repeated checkpoints, escort systems, inconsistent axle-load enforcement, border queuing and informal payments can destroy corridor economics even when the physical infrastructure is present. On the Douala–Bangui route alone, road costs reach USD 5,800–6,800 per 40' container, with around 70 percent of total cost concentrated in trucking and informal payments *(HELP Logistics report, 2024; World Bank Logistics Performance Index, 2023)*.On several Central African routes, such frictions are large enough to erode the savings generated by multimodal transport. In effect, the corridor exists on paper, but not in performance.

Reliability of the system. A dry port depends on what happens before and after the gate. Single-track railways with speed restrictions (down to 20 km/h on degraded sections of

Douala–Ngaoundéré), incomplete feeder roads, under-equipped border posts and weak last-mile connections can all turn a strategically located inland platform into an underperforming asset. Corridor planning must therefore focus on operating systems and interfaces, not only on terminal footprints.

Climate vulnerability. Maritime transport carries more than 80 percent of world trade by volume *(UNCTAD, Review of Maritime Transport, 2023)*, and around 90 percent of Africa's foreign trade transits seaports. Climate impacts on those gateways can cause costly damage, delay and operational disruption. For African corridor strategy, this matters because concentration at vulnerable coastal gateways creates system-wide fragility. Dry ports can improve resilience by moving inventory, customs operations and buffer storage inland, but they only deliver that resilience if the connecting inland networks are themselves reliable and climate-proof.

Beyond climate risks, excessive concentration of logistics activities in port cities creates land pressure, urban congestion, quality-of-life degradation, and territorial inequalities. Dry ports can help deconcentrate growth and support new regional urban centres.

Taken together, these challenges do not merely constrain corridor performance: they define the conditions under which infrastructure becomes investable. Corridor 2.0 strategies, centred on integrated dry-port platforms, provide a coherent response by addressing risk at its source — through flow aggregation, system integration, digitalization and value creation. The objective is not only to overcome obstacles, but to transform risk into structured investment opportunities.

IV. Economic models and financial engineering

A. Revenue streams

A viable dry-port strategy cannot rely solely on cargo-handling revenues. Traditional logistics income streams — storage, bonded warehousing, container handling or parking services — provide the operational base of the platform, but rarely constitute a sufficient foundation for long-term financial sustainability.

The economic resilience of Corridor 2.0 dry ports instead derives from the progressive integration of higher-value activities. Value-added logistics services — including grading, sorting, palletizing, cold-chain operations and light agro-processing — significantly increase the margin captured per ton handled while strengthening the integration of regional supply chains.

Beyond logistics services, dry ports increasingly operate through an industrial and territorial logic. Adjacent special economic zones, SME clusters, workshops, fuel stations and industrial land leases create more stable and diversified revenue streams while anchoring productive activity inland. This territorial dimension is particularly important in African corridors characterized by seasonal trade cycles and fluctuating cargo volumes.

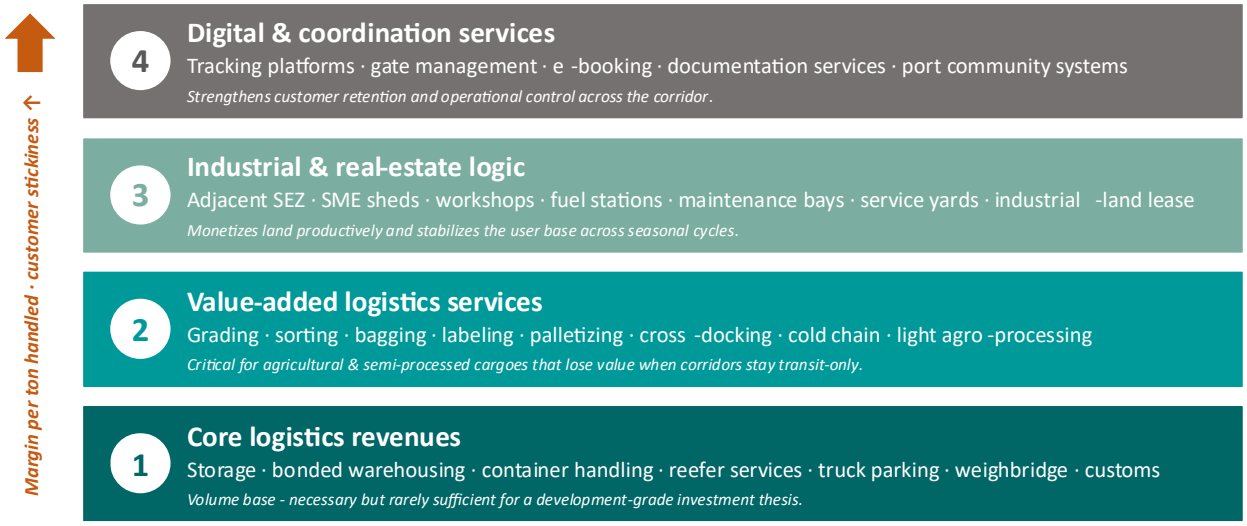

Figure 9. Four revenue layers of a modern dry port.

Core logistics revenues remain important — storage, bonded warehousing, container handling, reefer services, truck parking, weighbridge operations and customs-related services — but these revenue lines are rarely sufficient on their own to support a broader development thesis.

The second layer of revenue comes from value-added logistics services. These include grading, sorting, bagging, labeling, palletizing, cross-docking, consolidation, cold-chain services and, in some cases, light assembly or agro-processing support. These functions are particularly relevant for agricultural and semi-processed cargoes that lose value when corridors are treated only as transit pipes.

The third layer comes from industrial and real-estate logic. Adjacent special economic zones, SME sheds, workshop areas, fuel stations, maintenance bays and service yards allow dry ports to monetize land more productively and attract a more stable base of users. Where cargo demand is seasonal (as on most West African corridors with sharp Ramadan, Tabaski and harvest peaks) land-use diversification becomes even more important for financial resilience.

A fourth layer is now emerging around digital and coordination services: tracking platforms, gate management, documentation services, e-booking, data interfaces and corridor-visibility

tools. These are not the largest revenue lines, but they materially strengthen customer stickiness and operational control.

Dry port projects could include residential programs, worker housing, training centers, health centers, commercial spaces, and cultural/sports facilities.

B. Financing strategies — toward blended finance

The financing structure of dry ports should reflect the hybrid nature of Corridor 2.0 infrastructure systems. Commercially viable components — such as terminals, warehouses, truck parks, fuel depots and industrial facilities — can attract private investment under concession or PPP structures where demand visibility is sufficiently robust.

By contrast, enabling infrastructure and public goods — including rail rehabilitation, border facilities, customs systems, resilience upgrades and access roads — often require concessional finance, sovereign participation or development-finance support. The challenge is therefore not to separate public and private financing, but to align them within coherent investment architectures.

This is where blended finance becomes particularly relevant. Properly structured dry-port ecosystems allow public and concessional capital to reduce systemic risk, while private investors scale operational capacity and service delivery. In this framework, public intervention functions primarily as a derisking mechanism rather than a substitute for private investment. Globally, blended finance transactions in infrastructure reached USD 16.4 billion in 2022 (Convergence Blended Finance, State of the Market Report, 2023), with growing allocations to African transport and logistics platforms.

The growing integration of climate and resilience objectives further strengthens this approach. Projects incorporating modal shift, renewable-energy systems, solarized cold chains, flood resilience or emissions reduction can increasingly access climate-finance instruments alongside conventional infrastructure funding.

Other models can also be considered such as lease-back models for buildings, classic leasing for specific equipment, and revenue-sharing models for digital platforms and online service activities.

As a result, the financial logic of dry ports is progressively evolving beyond traditional transport infrastructure models toward integrated platform financing, where logistics, industrial activity, digital services and resilience objectives reinforce one another within a single investment ecosystem.

C. Governance

The financial and operational performance of dry ports depends ultimately on the clarity and coherence of their governance architecture. In the Corridor 2.0 framework, governance operates on distinct but interdependent levels, each of which conditions the effectiveness of the others.

Platform-level governance concerns the institutional identity of the dry port itself. Each platform requires a dedicated operating entity; whether a purpose-built port authority, a state company, a private concessionaire, or a hybrid management structure, endowed with clear mandates over land management, customs coordination, service licensing, and revenue collection.

National-level governance thru institutions like the General Authority for Land and Dry Ports (GALDP) in Egypt, a government body responsible for establishing, planning, and managing the country's network of inland container depots and inland logistics zones.

Corridor-level governance requires coordinating bodies capable of aligning sovereign states, port authorities, customs administrations, and logistics operators across a shared route. Functional examples illustrate both the value and the limits of such arrangements. An example of this governance scheme is the *TTCO* (Tripartite Transport and Transit Corridor Organization) on the Douala–N'Djamena axis that has historically managed transit documentation and axle-load standards, though with uneven enforcement.

Regional-level governance provides the harmonization layer without which domestic reforms produce only partial gains. Frameworks such as ECOWAS, CEMAC, the WAEMU customs union and the AfCFTA legal architecture define the common standards (transit regimes, e-seal protocols, axle-load conventions, single-window interoperability) that allow national systems to function as a coherent network. The ECOWAS SIGMAT platform and the AfCFTA trade facilitation instruments represent the current frontier of this harmonization effort; their operational adoption remains uneven, but the regulatory infrastructure now exists to anchor corridor-level governance at scale.

D. Case study — the Ngaoundéré dry port in the Cameroon–Chad corridor

> **SITE SNAPSHOT — NGAOUNDÉRÉ (CURRENT FOOTPRINT)**
>
> - **Position:** terminus of the 884-km CAMRAIL line from Douala via Yaoundé–Bélabo; gateway to N'Djamena and Sahel road network.

- **Existing infrastructure:** 12,500 m² of covered warehousing (6 blocks); 30,000 m² open yard with ~300 TEU ground slots; 5,540 m³ fuel storage.
- **Corridor anchor:** 1.06 Mt/yr Chad transit (90% of Chad's foreign trade); rail rates of USD 0.104/ton-km vs. USD 0.112 by road.
- **Capacity context:** Douala approaching transit saturation at ~1.5 Mt; Chad's GDP-linked traffic projected at 4.1% CAGR.

Ngaoundéré illustrates how a dry port can evolve from a conventional modal-transfer point into a strategic inland platform within a regional corridor system. Positioned at the junction between Cameroon's rail backbone and the Sahelian road network, the site already concentrates several characteristics of an intermodal logistics hub, including warehousing capacity, container yards and fuel-storage infrastructure.

Figure 10. Ngaoundéré dry-port site — satellite view, location within Cameroon and site documentation.

Its strategic importance, however, lies less in its existing footprint than in its potential role within the broader Cameroon–Chad corridor architecture. As trade volumes continue to grow and coastal congestion intensifies, Ngaoundéré can increasingly function as an inland stabilization node aggregating cargo, improving customs coordination, reducing exposure to port-side disruptions and supporting the development of value-added logistics services.

The development of the Ngaoundéré dry port could be accompanied by a full logistics and industrial city project, including housing, university campuses, technical schools, health centres, innovation hubs, sports infrastructure, and cultural facilities.

Airport development could also be considered to complement maritime/logistics services with air freight capacity and strengthen the accessibility and attractiveness of the platform.

In this perspective, the site should not be approached merely as a transport interface, but as a platform capable of structuring regional flows and anchoring productive ecosystems across Central Africa and the Sahel. Strengthening bonded operations, agro-logistics, container services and digital corridor visibility would significantly reinforce both corridor resilience and the long-term bankability of the asset.

V. Performance indicators for monitoring

For Corridor 2.0 strategies to remain credible, performance measurement must extend beyond traditional logistics indicators. The effectiveness of dry ports should be assessed not only through cargo throughput, but through their capacity to generate value creation, system reliability, digital integration and territorial transformation.

The following framework proposes a multidimensional scorecard designed to evaluate both operational efficiency and long-term development impact.

#	Performance dimension	Key indicators tracked	Suggested target
1	Legal & institutional readiness	Concession clarity · land control · customs authorization · environmental permitting · bankable risk allocation	Bankable allocation of risks; permits issued before financial close
2	Operational efficiency	Average cargo dwell time · truck turnaround · border-crossing time · yard productivity	Dwell time < 48 h

#	Performance dimension	Key indicators tracked	Suggested target
3	Digital interoperability	SIGMAT (or equivalent) live connection · single-window compatibility · e-seal usage · agency data visibility	End-to-end data exchange across origin / transit / destination
4	Modal performance	Share of rail / structured multimodal traffic · backhaul utilization · empty-movement reduction	Sustained increase in rail / multimodal share over baseline
5	Value creation	Share of cargo receiving value-added services · cold-chain performance · warehouse occupancy · industrial-land absorption	Visible scale-up of value-added services year-on-year
6	Local content	Jobs created · SME participation · local contractor share · skills transfer programmes	Local contractor share > 20% of contract value
7	Resilience & sustainability	Flood downtime · renewable-energy use · emissions intensity per ton moved · avoided truck-kilometers	Falling emissions intensity; minimal weather-related downtime

Table 1. Performance indicators for monitoring dry-port strategy.

Taken together, these indicators reflect the evolution of dry ports from isolated logistics facilities toward integrated infrastructure platforms. Monitoring frameworks should therefore capture not only transport performance, but also economic integration, industrial transformation and resilience outcomes. In the context of Corridor 2.0, performance is ultimately measured by the capacity of infrastructure to generate sustainable and investable economic systems.

VI. Conclusion and strategic recommendations

Africa should no longer approach dry ports as passive inland extensions of seaports. The strategic opportunity is far broader: to develop integrated Corridor 2.0 systems capable of transforming transport infrastructure into engines of regional production, economic resilience and territorial integration.

The central challenge is no longer simply to facilitate cargo movement. It is to structure corridors that can generate value inland, support industrial ecosystems, reduce systemic vulnerabilities and attract long-term investment. In this perspective, dry ports emerge as

strategic platform assets positioned at the intersection of logistics, digital infrastructure, energy systems and productive activity.

This transformation is particularly important in a context marked by rapid urbanization; *Africa's urban population is projected to reach 1.5 billion by 2050 (UN DESA, World Urbanization Prospects, 2022)*, growing regional trade ambitions under AfCFTA, climate-related disruptions and the ongoing reconfiguration of global value chains. Corridors able to combine multimodal connectivity, digital interoperability and inland value creation will increasingly define the competitive geography of the African continent.

The issue, therefore, is not only whether Africa can build more infrastructure, but whether it can develop infrastructure systems that are economically transformative, operationally resilient and financially investable.

RECOMMENDATION

The future of African infrastructure will not be determined solely by the quantity of roads, railways or ports constructed, but by the capacity of corridor systems to generate integrated economic value. In this emerging paradigm, dry ports are no longer secondary logistics facilities. They are strategic inland platforms capable of converting flows into industry, infrastructure into investment ecosystems, and corridors into instruments of regional transformation.

The question facing Africa is therefore no longer whether the continent needs more corridors, but whether its corridors can become productive, resilient and investable systems. Where Corridor 2.0 approaches are successfully implemented, the answer can increasingly be yes.

About this publication

Jade Advisory

Founded in 2019 in Tunis and expanded to Riyadh and Paris in 2024, Jade Advisory supports governments, public entities, sponsors, and investors in the development and delivery of infrastructure and public service projects across Europe, the Middle East, and Africa.

We operate on both sides of the table: advising public authorities on project preparation and procurement, and supporting private developers and bidders on strategy, bid, and financing. Our work spans the full project lifecycle, from strategic planning and feasibility to transaction structuring, procurement management, due diligence, and financial close.

TABC

Tunisia Africa Business Council (TABC) is an independent pan-African business organization founded in 2015 to strengthen economic cooperation between Tunisia and African countries. It connects businesses, investors, institutions and policymakers to promote trade, investment, innovation and regional integration across Africa.

Through initiatives such as the Tunisian Consortium for African Development (TUCAD), TABC promotes economic diplomacy, industrial partnerships, infrastructure development and the integration of African value chains.

Its Think Tank, "For a Shared Prosperity in Africa", provides strategic analysis and policy recommendations on topics including innovation, digital transformation, sustainable development, entrepreneurship and Africa's economic integration. The Think Tank aims to bridge research, policy and action to foster inclusive and sustainable growth across the continent.

DTA International

DTA International is an international architecture, urban planning, territorial engineering, and strategic consulting firm specializing in:

- transport infrastructure
- logistics platforms
- integrated urban projects
- territorial strategies
- economic corridors
- new mobility solutions

Through its multidisciplinary expertise, DTA International supports governments, investors, and development institutions in the design of projects that create economic, social, urban, and environmental value.

CONTACT

For inquiries about this publication, the underlying corridor assessments, or our advisory services in infrastructure and corridor strategy, please reach out to the authors directly.

Khaled Amri

Managing Partner, Jade Advisory

Email contact@jade-advisory.com
Mobile +33 7 53 43 55 56 | +216 26 218 950

Mondher Khanfir

Senior Economic Advisor, TABC

Email mondher.khanfir@gmail.com
Mobile +33 7 62 12 99 55

Borhene Dhaouadi

Partner, DTA International

Email borhene.dhaouadi@groupement-dta.com
Mobile +33 6 75 88 58 69

JADE ADVISORY OFFICES

France	1bis Rue Albert 1er, 92600 Asnières-sur-Seine
Tunisia	Rue de l'Euro, Immeuble Sélim, 1053 Tunis
KSA	3141 Anas Ibn Malik, 8292 Al Malqa Dist. 13521 Riyadh
Website	jade-advisory.com