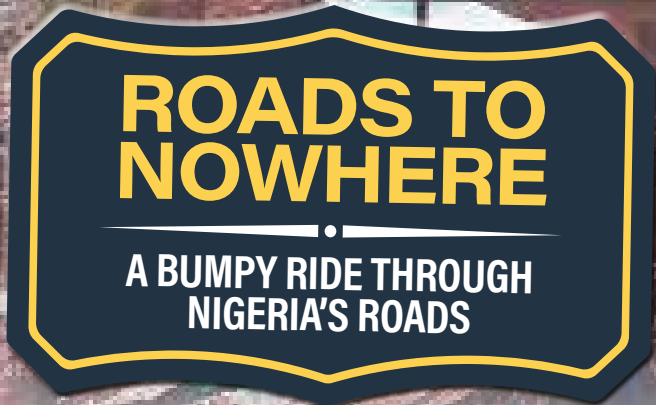


# ROADS TO NOWHERE

A BUMPY RIDE THROUGH NIGERIA'S ROADS



# Disclaimer

The data in this report is only up-to-date as of Thursday, 12 December 2024. Some of it is subject to change during the natural course of events. SB Morgen cannot accept liability for any errors or omissions that may follow such events and invalidate the data contained herein.

Our researchers collated the available data through desk research, one-on-one interviews and polling. Our editors sifted through the data and prepared the report, using various proprietary tools to fact-check and copy-edit the information gathered.

Our publicly released reports are formatted for easy and quick reading and may not necessarily contain all the data that SB Morgen gathered during a given survey. Complete datasets can be made available on request.

All forecasts were built using data from various sources. A baseline of accurate and comprehensive historical data is collected from respondents and publicly available information, including from regulators, trade associations, research partners, newspapers, and government agencies.



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# Introduction

Living and doing business in Nigeria is fraught with challenges, many of which stem from the country's inadequate infrastructure. While the unreliable power supply often takes centre stage as the country's most critical infrastructure issue, an argument can be made that the transportation system is even more vital. A comprehensive network spanning roads, railways, waterways and airways is crucial for national development, and among these, roads remain the backbone of movement and commerce.

The deteriorating condition of Nigeria's roads had become a significant strain on the economy, costing billions of naira annually in lost productivity and resources. Beyond economic setbacks, the poor state of the road network has claimed countless lives in preventable accidents. Despite substantial yearly budgets dedicated to road construction and maintenance, the country continues to face a persistent gap in the quality and quantity of its road infrastructure.

Nigeria boasts the largest road network in West Africa, spanning 108,000 kilometres of paved roads. The Federal Government is responsible for constructing and maintaining 32,000 kilometres of this network. Despite this network, a consistent and independent assessment of the current road conditions is absent. Recognising this ongoing oversight, SBM Intelligence has conducted an updated evaluation of Nigeria's major





# ROADS TO NOWHERE

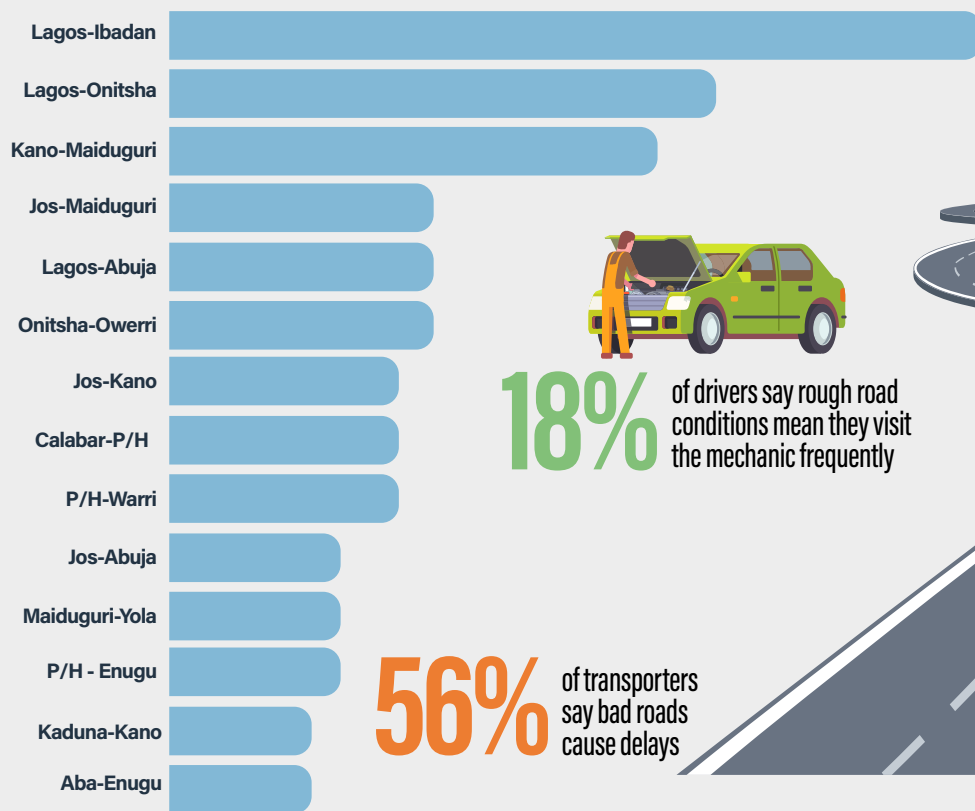
A BUMPY RIDE THROUGH NIGERIA'S ROADS

roadways, building on its 2017 report.<sup>1</sup> This revised study relies on insights from commercial vehicle drivers who ply these roads daily. Their firsthand experiences position them to provide valuable insights into the condition of Nigeria's roads. We have developed this report by combining their perspectives with our direct observations of various roadways.

## The most important roads to Nigeria's economy

Poor road conditions in Nigeria impose heavy costs on transportation operators. Delays, prolonged travel times, and increased fuel consumption are the most significant challenges, affecting over 75% of operators and hindering economic efficiency.

### Nigeria's most important roads for the economy



**18%** of drivers say rough road conditions mean they visit the mechanic frequently

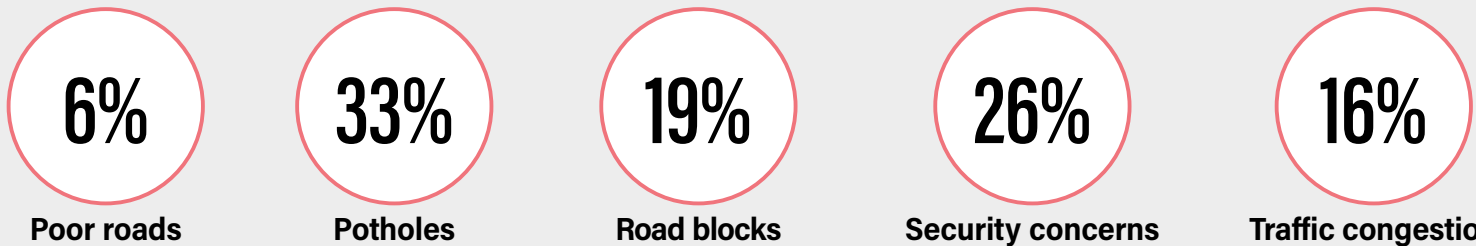
**56%** of transporters say bad roads cause delays

**36%** of respondents believe that improving the roads will have a significant economic impact

**49%** of respondents say that bad roads have significantly increased the maintenance costs of their vehicles

**86%** of transporters say the state of the roads have led to transport fare increases

### ISSUES AS THEY AFFECT ROAD USERS



Source: SBM Intelligence

<sup>1</sup> SBM Intel. (Oct 2017). Where roads are the enemy - A look at the state of Nigeria's roads. Available online: <https://www.sbmintel.com/2017/10/where-roads-are-the-enemy-a-look-at-the-state-of-nigerias-roads/>



**ROADS TO NOWHERE**  
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# The complex social, economic and political ties between Nigeria and its roads

Nigeria's most critical highways predominantly run from the southern coastal areas to the northern hinterlands. This layout reflects a degree of strategic planning in the design of the country's road network. The alignment makes practical sense: the northern regions house vast farmlands, while the southern coastal states host major seaports, pivotal for export and domestic consumption. These highways facilitate the movement of agricultural produce from the north to the ports and wealthier southern states with higher purchasing power, strengthening economic integration between Nigeria's historically distinct Northern and Southern regions.

The country's primary highways are the A1, A2, A3, and A4, which form the backbone of the national road system. All other significant roads branch out from these main arteries.

The A1 Highway begins in Lagos, Nigeria's commercial capital, extending to Birnin-Konni in Niger Republic. This approximately 19-hour route

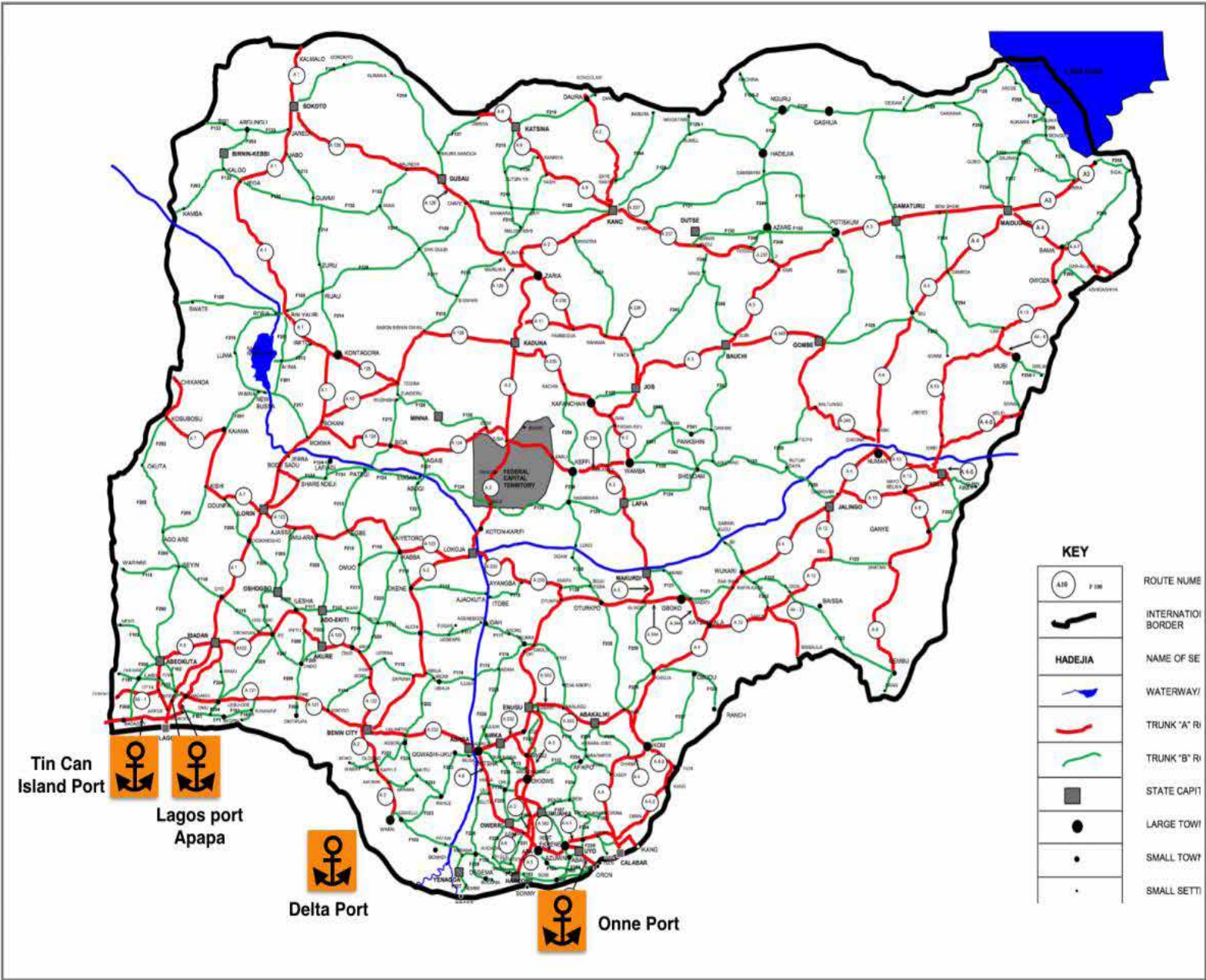




# ROADS TO NOWHERE

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traverses major cities and states, including Ibadan and Ogbomoso (Oyo State), Ilorin and Jebba (Kwara State), Jega (Kebbi State), and Sokoto. Beyond Nigeria's border, it transitions into Niger Republic's N1 highway. The A2 Highway starts in Port Harcourt, Rivers State. The A2 takes a westward route through Elele (Rivers State), Warri (Delta State), and Benin City (Edo State). It then veers north, passing through Ekpoma (Edo State), Okene (Kogi State), Abuja, Kaduna and Zaria. The highway extends to Kano, Kazaure (Jigawa State), and Daura (Katsina State), concluding at the border with Niger.





Like the A2, the A3 originates in Port Harcourt but heads northward, passing through eastern states such as Aba and Umuahia (Abia State), Okigwe (Imo State), Enugu and Nsukka (Enugu State), and Makurdi (Benue State). The road continues through Lafia (Nasarawa State), Jos (Plateau State), Bauchi, Potiskum (Yobe State), and Maiduguri (Borno State). It terminates in Gamboru, a Borno State town near the Cameroon border.

The A4 begins in Calabar, Cross River State, and stretches to Maiduguri, closely hugging the border with Cameroon. It passes through Ikom and Ogoja (Cross River State), Vandekiya and Katsina-Ala (Benue State), Wukari and Jalingo (Taraba State), and Numan and Yola (Adamawa State). The highway skirts areas near Chibok (Borno State) before converging with the A3 highway near Maiduguri.

These highways are not merely infrastructural assets but vital economic and social lifelines. They connect Nigeria's diverse regions, facilitate trade and cultural exchange, and underscore the intricate relationship between infrastructure and national unity.

Onitsha, a bustling southeastern city is the only significant population centre in Nigeria not directly situated along the routes of these four major highways. However, Onitsha is well-connected through the A232 highway, which links the A2 and A3, providing direct routes to Benin City and Enugu. Additionally, the city benefits from the strategic presence of the River Niger, which flows along its western flank, enhancing its accessibility and economic importance.





# ROADS TO NOWHERE

A BUMPY RIDE THROUGH NIGERIA'S ROADS

Nigeria's primary highways, including the A1, A2, A3, and A4, form the backbone of the national road system. They connect the country's diverse regions and facilitate trade and cultural exchange. These highways predominantly run from the southern coastal areas to the northern hinterlands, reflecting strategic planning in their design and enabling the movement of agricultural produce from the north to the ports and wealthier southern states.

However, it is important to note that Nigeria has not effectively utilised its waterways for transportation despite their significant potential to complement the road network and ease the burden on overland transport systems.





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# Road warriors and the state of play: Insights from Nigeria's commercial drivers

Nigeria's roads bear the trail of the relentless energy of its commercial drivers who keep the country moving. Far more than transporters of goods and people, they are the economy's lifeblood, connecting cities, villages and markets. Yet, their experiences and perspectives are often overlooked in broader discussions about transportation infrastructure and policy.







# ROADS TO NOWHERE

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SBM Intelligence conducted a nationwide survey, engaging 245 drivers across eight major commercial hubs: Abuja, Calabar, Jos, Kano, Lagos, Maiduguri, Onitsha, and Port Harcourt, to shed light on their realities. Through their accounts, we uncover the daily struggles of navigating congested highways, dodging potholes, and grappling with the looming risks of insecurity, and highlight the infrastructure's impact on commerce, security, and social mobility.

This survey brings their lived experiences to the forefront, highlighting their struggles and ingenuity in a system that tests their resilience with every journey.

**Nigeria's commercial drivers are the unsung heroes of the economy. They connect cities, villages, and markets despite navigating congested highways, dodging potholes, and grappling with insecurity. Their resilience and ingenuity are a testament to the country's unyielding spirit.**

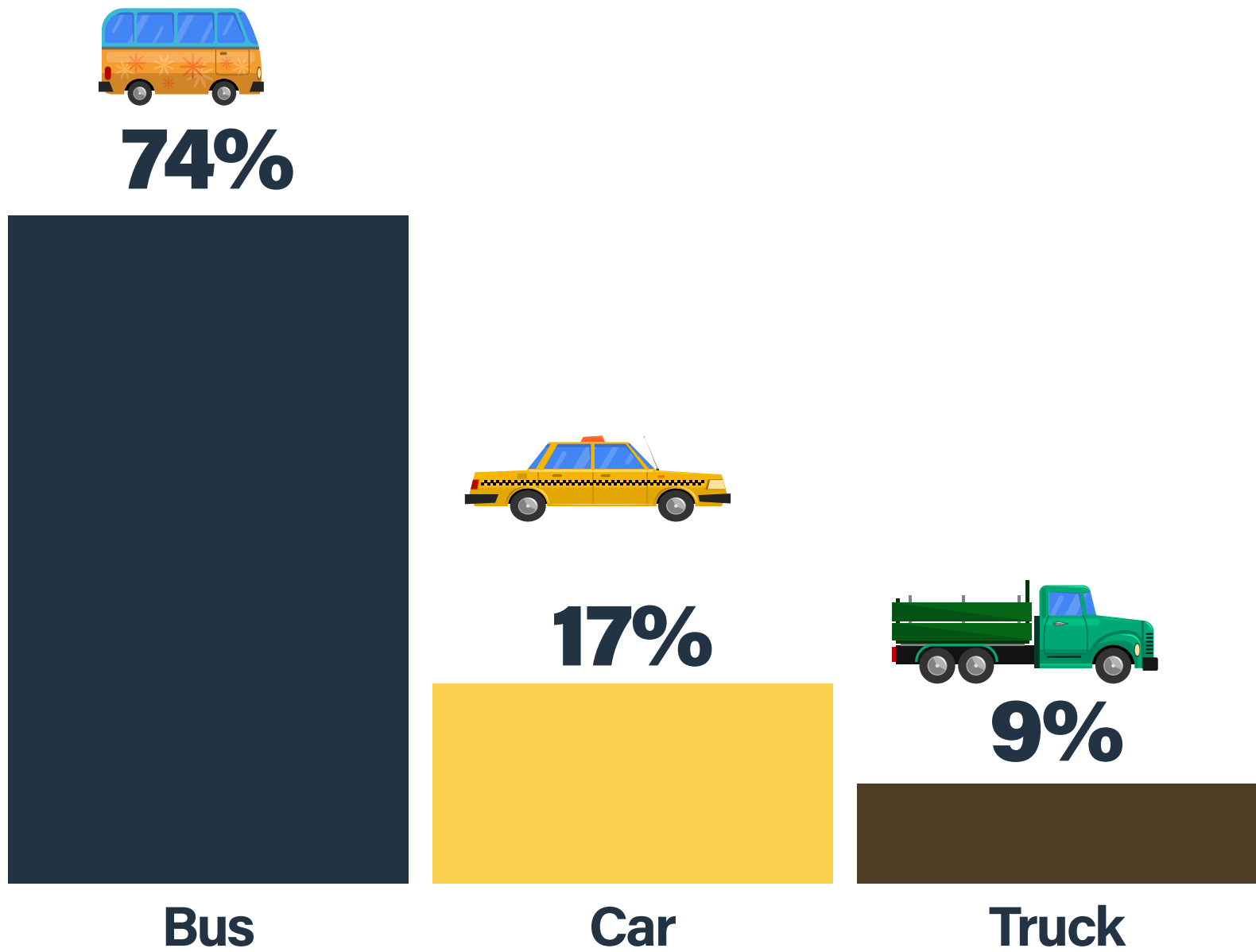
The survey shows that buses dominate Nigeria's roads, accounting for 71.8% of vehicles, followed by cars at 17.9% and Trucks at 8.6%. This distribution reflects the varied modes of transportation that cater to Nigeria's diverse commuting and cargo needs.



# ROADS TO NOWHERE

A BUMPY RIDE THROUGH NIGERIA'S ROADS

## What type of vehicle do you operate?







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# The Pulse of Connectivity

A total of 245 routes were examined in this analysis, originating from five major hubs—Lagos, Port Harcourt, Jos, Maiduguri, and Calabar—alongside other cities. Each city's routes provide insight into the country's connectivity patterns and transportation dynamics.

**Lagos**, Nigeria's bustling economic hub, accounted for 45 routes, serving as a significant hub for intercity transportation. The bustling route to **Ibadan** dominated with **28 trips**, reflecting the duo's deep economic and social ties. Other prominent links include **Sagamu**, which has **seven trips** and longer-distance destinations such as **Kano (six trips)** and **Abuja (four trips)**. Including routes to **Jos, Maiduguri, and Onitsha**—each with **two trips**—demonstrates Lagos's dual role in facilitating regional and cross-regional travel. This dynamic network showcases that Lagos focuses on frequent routes to nearby cities and keeps important connections to major cities across Nigeria, making it a vital part of the country's transportation system.

Nigeria's transportation network is a complex tapestry of routes and connections, with cities like Lagos, Port Harcourt, Jos, Maiduguri, and Calabar serving as vital hubs that weave together the country's diverse regions, fostering economic and social cohesion across vast distances.



## ROADS TO NOWHERE

A BUMPY RIDE THROUGH NIGERIA'S ROADS

Port Harcourt led in diversity and total routes, with 54 trips connecting to 21 destinations. The route to Warri is at the forefront, with 10 trips reflecting the South-South region's strong economic and cultural links. Equally significant are connections to Kano and Onitsha, each with seven trips, underscoring Port Harcourt's role in facilitating trade and movement between southern and northern Nigeria.

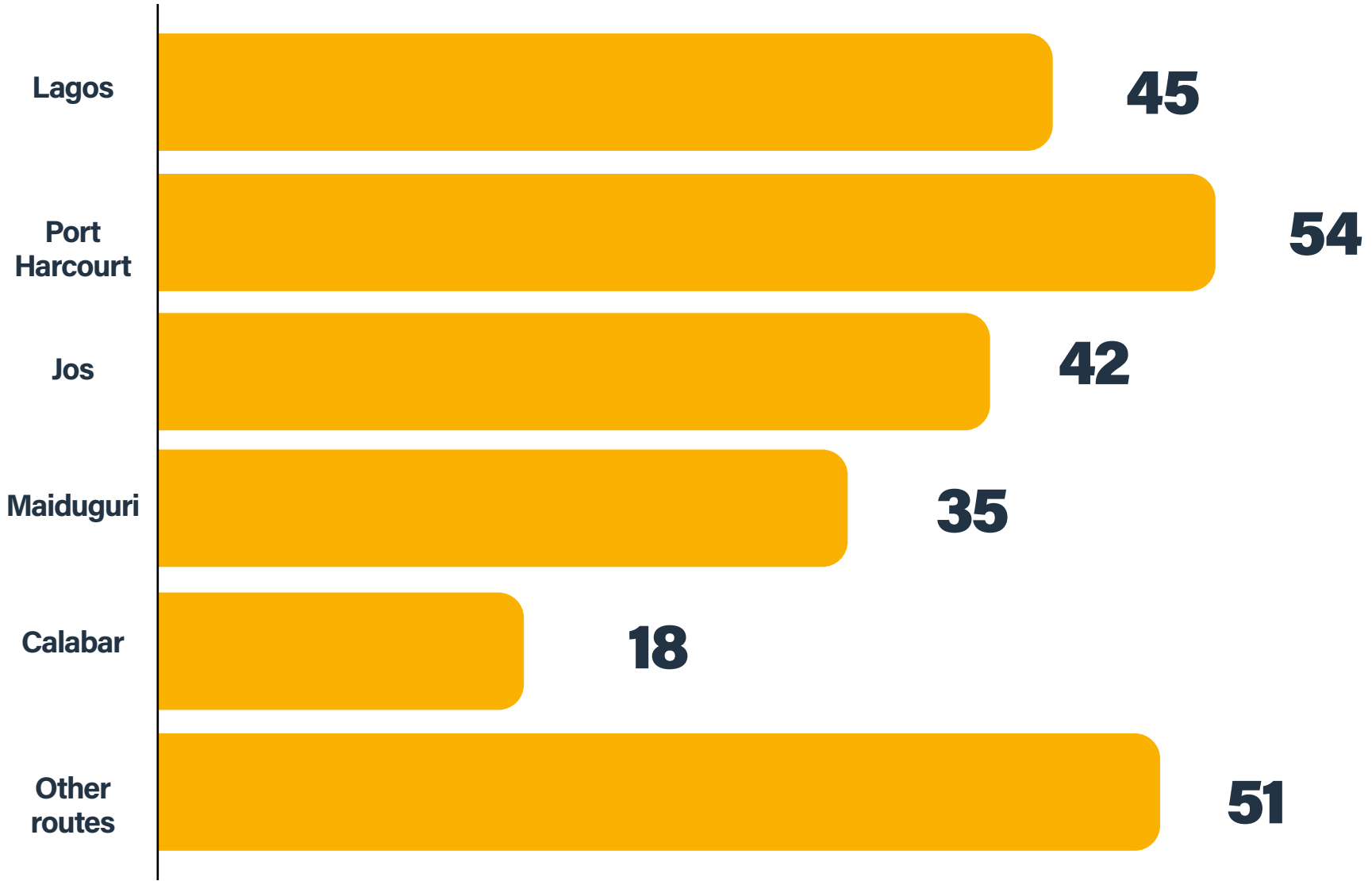
The city's network extends to major destinations such as Abuja, Anambra, and Lagos (each with four trips), as well as Enugu (three trips), highlighting its reach beyond its immediate region. Secondary connections to Akwa Ibom, Bayelsa, Calabar, Delta, Kaduna, and Owerri (each with two trips) reinforce its status as a vital hub. Meanwhile, single-trip routes to cities like Aba, Edo, Ibadan, Jos, and Uyo reflect Port Harcourt's commitment to maintaining ties with various locations. This extensive network positions Port Harcourt as an indispensable transportation hub in the South-South region, bridging key cities and fostering economic and social cohesion across Nigeria. Its diverse connections illustrate its pivotal role in the country's transport ecosystem, connecting people and goods across vast distances.



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## Number of Routes per Origin City



Jos contributed 42 routes, focusing on destinations in the northern and central regions. Notably, Maiduguri stands out with 21 trips, underlining the strong northern connections from Jos. Other vital destinations include Abuja, Bauchi, and Kano, each with five trips. Yola and Makurdi with four trips. The high frequency of trips to Maiduguri highlights the significant role Jos plays in facilitating northern connectivity.

Maiduguri accounted for 35 routes, focusing on connections to the northern and northeastern regions alongside a few international routes.





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Destinations included Kano (five trips), Yola (three trips), Niger (two trips), and Onitsha (two trips). Notably, Maiduguri also connects to Cameroon and Chad, each with one trip, highlighting its importance as a gateway for cross-border transportation. Other destinations include Enugu and Mubi, each with one trip, emphasising Maiduguri's extensive reach within Nigeria and beyond.

Calabar had 18 routes connecting to key cities and regions across Nigeria. Destinations include Abuja (four trips), Port Harcourt (three trips), and Jos, Lagos, Maiduguri, and Benue (each with two trips). Other destinations included Benin, Jalingo, and Onitsha, each with one trip. Calabar's routes highlight its strategic importance in linking Nigeria's South-South and southeastern regions.

The remaining 51 routes originated from other major cities, each connecting to different destinations. These cities include Aba (five trips), Makurdi (three trips), Lokoja (three trips), and Kano (three trips). Benin and Warri each had two trips, while 19 additional single routes connected various cities. This diverse spread of routes highlights the importance of smaller hubs in supporting and complementing Nigeria's broader transportation network.

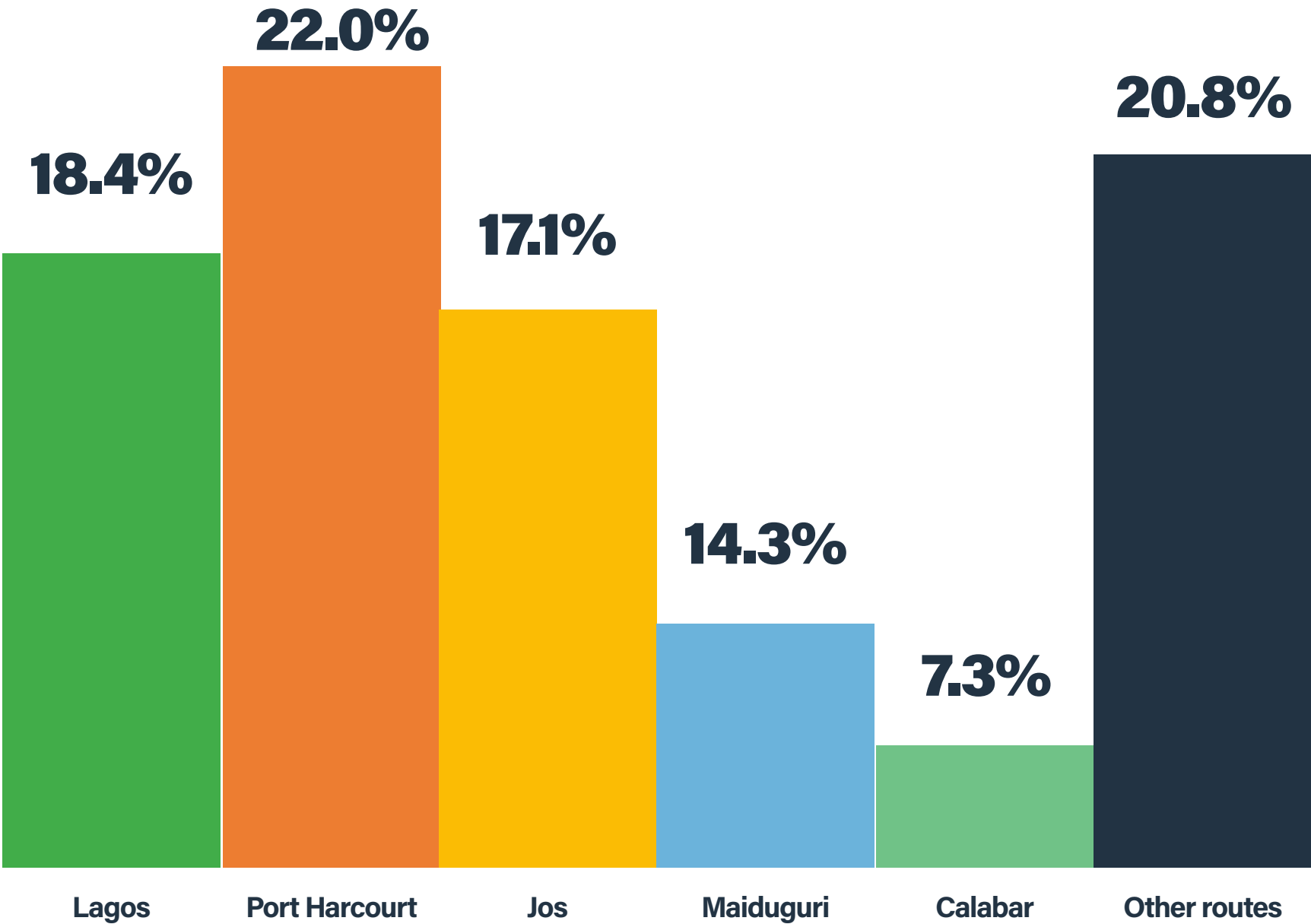
The patterns of routes across these cities reveal distinct regional connections. Lagos and Port Harcourt stand out for their extensive connectivity, while Jos and Maiduguri strengthen ties to the north. Calabar serves as an important link between the South-South and



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## Number of Routes



southeastern regions. These observations offer valuable insights into Nigeria's transportation dynamics and suggest areas where development and improvement could further enhance the network's efficiency and reach.

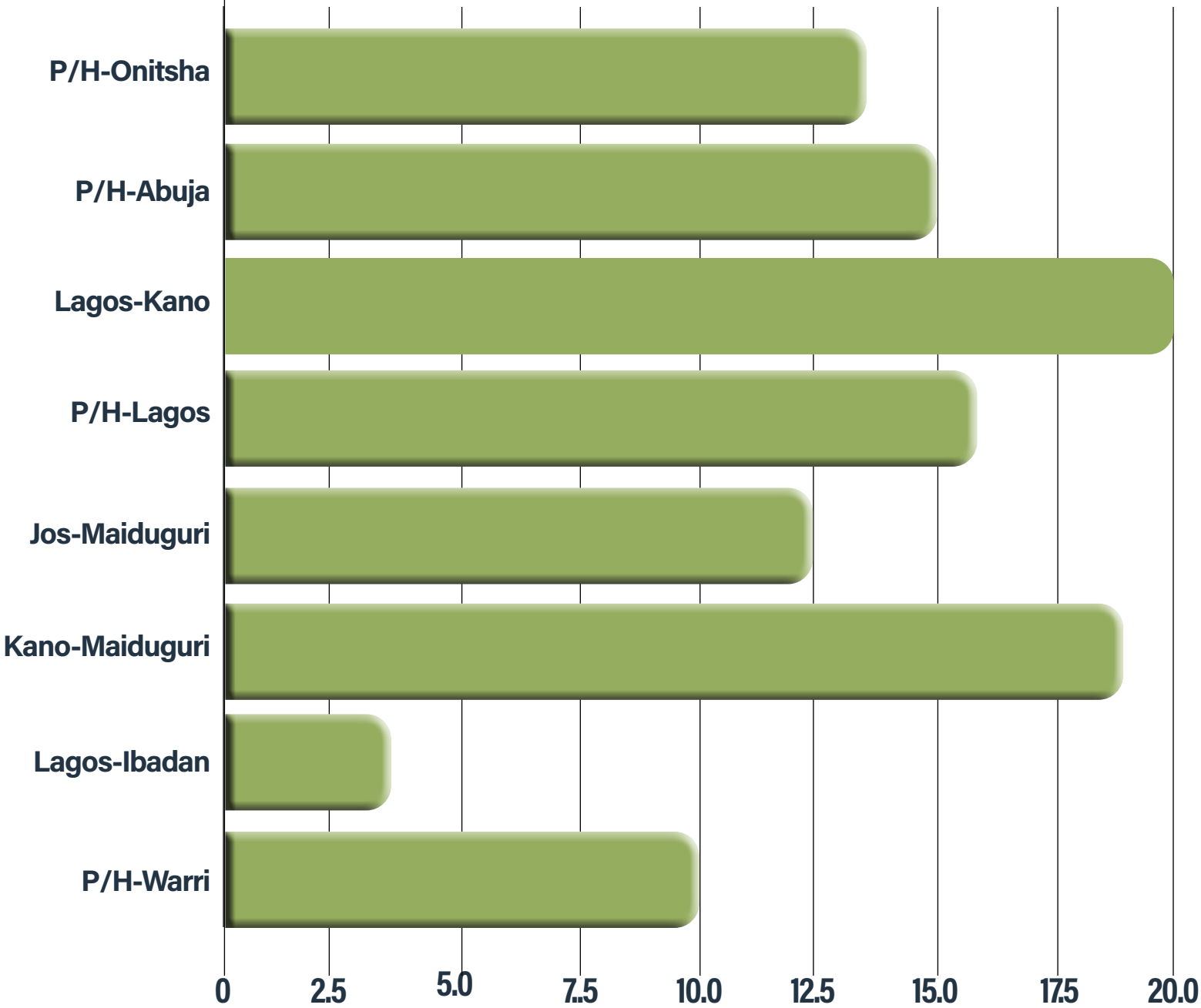


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# Travel Time

The survey showed that road conditions significantly impact transportation times across various routes in Nigeria, often exceeding those predicted by standard navigation tools. Issues such as traffic congestion, insecurity, and poor road infrastructure contribute to delays, highlighting the need to improve the country's transportation network to enhance efficiency and safety.

## Average Travel Time by route (hours)







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The Lagos to Kano route recorded the longest travel time at 20 hours, followed by Kano to Maiduguri at 19 hours and Port Harcourt to Lagos at 16 hours. The Port Harcourt to Abuja route averages 15 hours, while Jos to Maiduguri takes 12.5 hours. The Port Harcourt to Warri route takes 10 hours, and the Port Harcourt to Onitsha is completed in 8 hours. Lagos to Ibadan takes approximately 3.5 hours.

Compared to the estimated travel times on Google Maps, the actual travel times are significantly longer, primarily due to road issues such as traffic congestion, insecurity, and other factors.

Route	Provided Average Time (hours)	Google Maps Estimated Time (hours)	Difference (hours)
Lagos - Kano	20	14.9	5.1
Port Harcourt - Warri	10	3.1	6.9
Kano - Maiduguri	19	8.5	10.5
Jos - Maiduguri	12.5	7.8	4.7
Port Harcourt - Lagos	16	8.5	7.5
Lagos - Ibadan	3.5	1.5	2
Port Harcourt to Abuja	15	8	7
Port Harcourt to Onitsha	8	4	4



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# Traffic woes and Road conditions

The survey highlighted widespread dissatisfaction with road conditions, with most respondents perceiving them as subpar. Nearly half of the respondents (48.2%) rated the road surface condition as average, with 20.4% rating it as poor. Only 17.6% considered the road conditions good. This suggests that the road conditions are not ideal overall, with most respondents viewing them as only fair.

**Actual travel times on Nigerian roads are significantly longer than estimated, with delays caused by traffic congestion, insecurity, and poor road infrastructure - leaving nearly 70% of respondents rating road conditions as average or poor.**

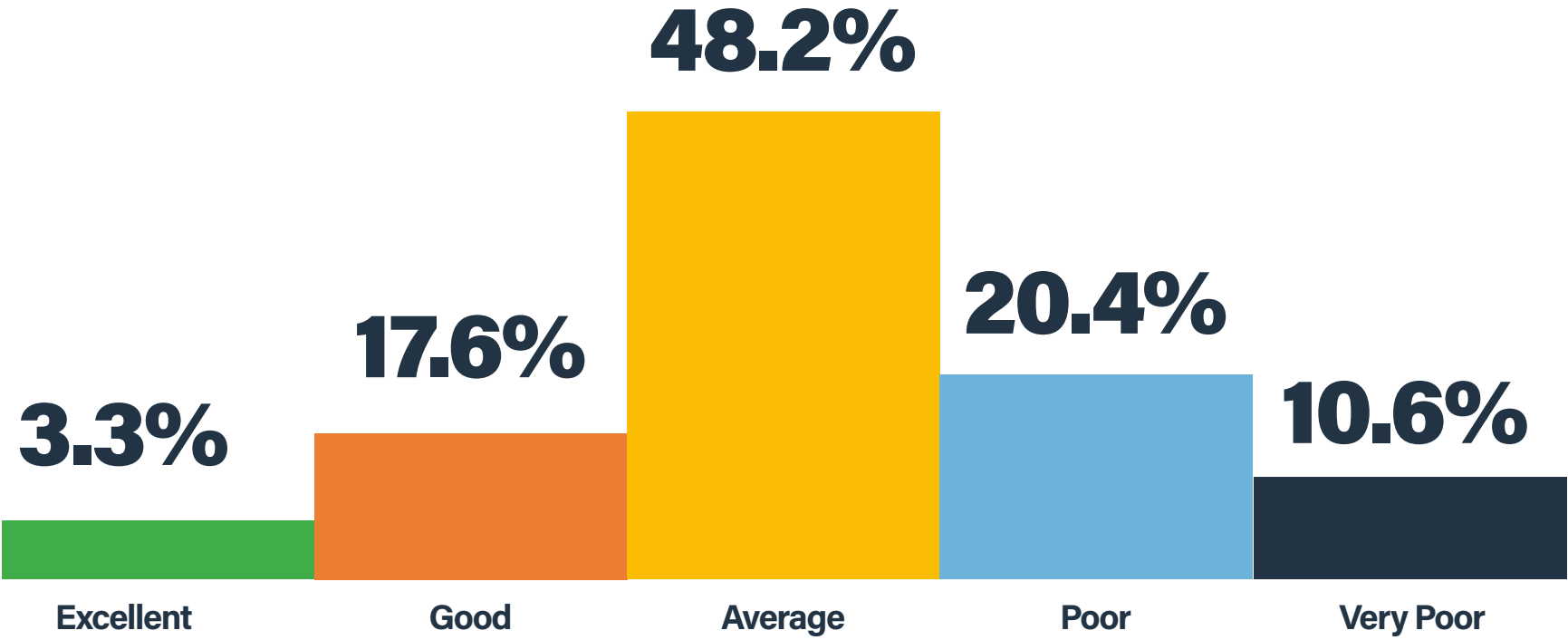




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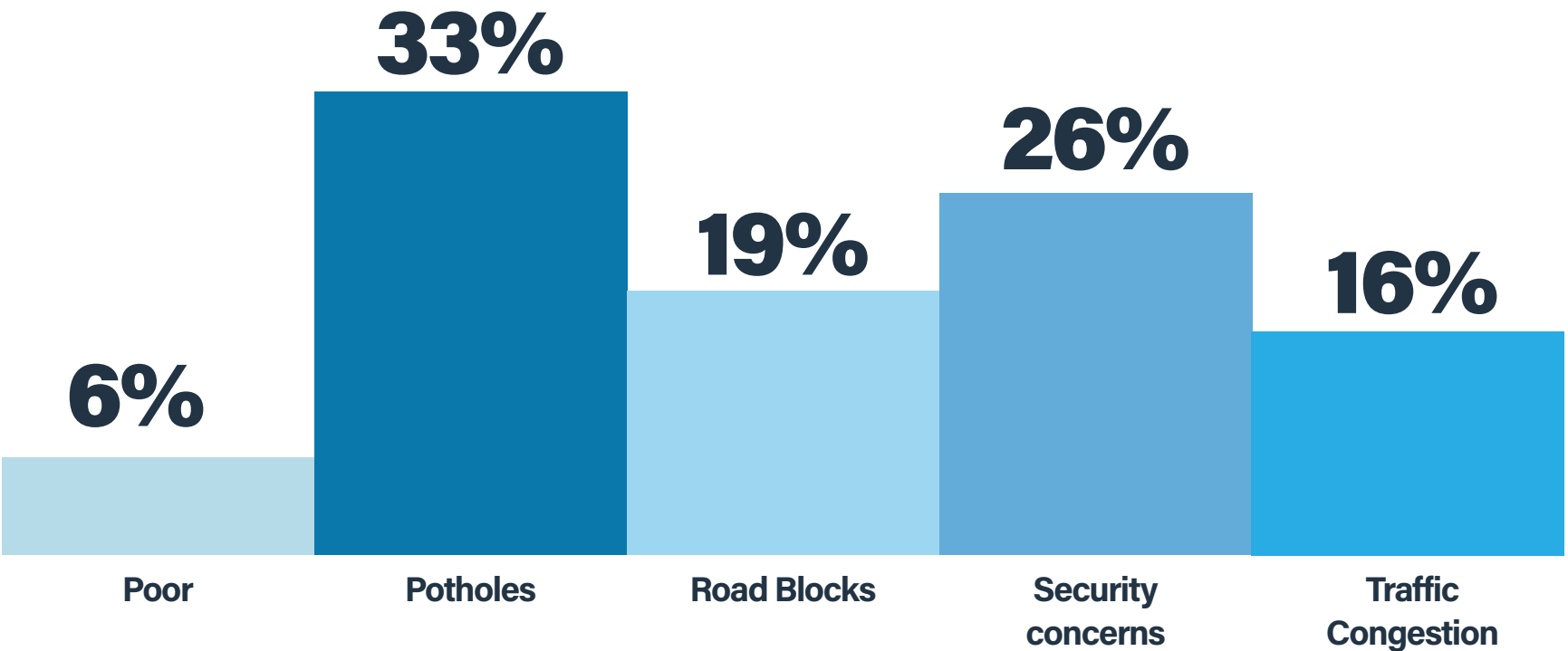
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## How would you grade the overall condition of the road surface?



The survey also revealed that potholes (32.9%) and security concerns (25.6%) were the most common issues faced on Nigerian roads.

## What are the most common issues you face on these roads?





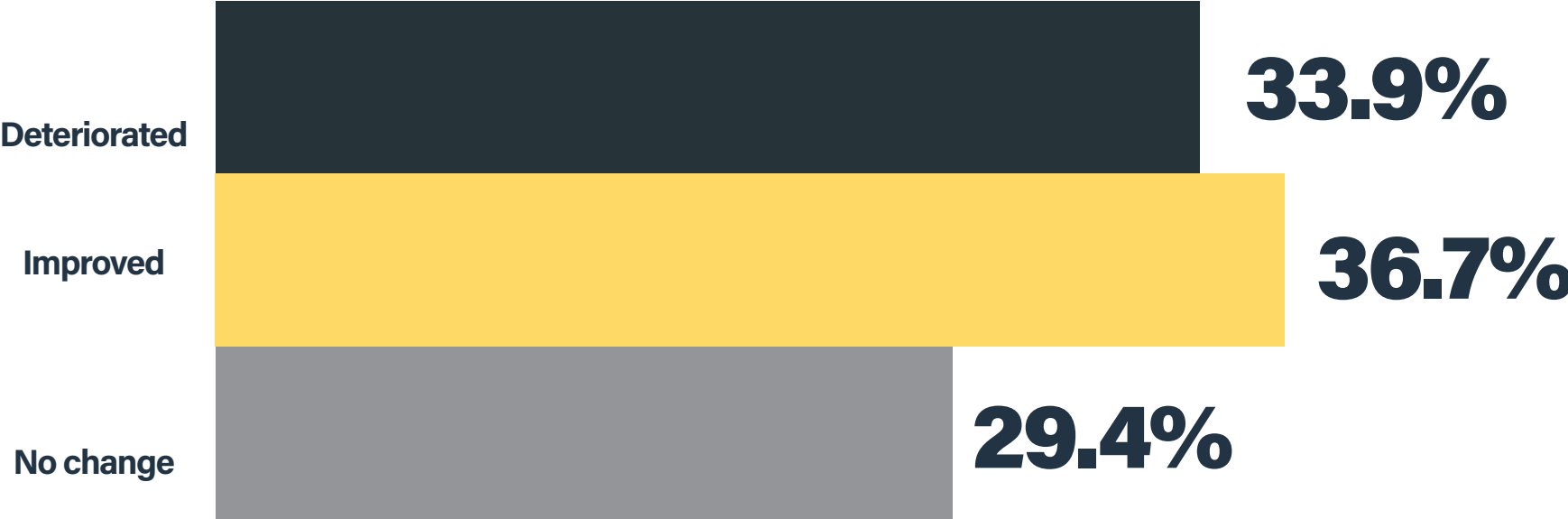


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Furthermore, 29% of the surveyed road users observed no change in road conditions over the past two years. 37% of respondents noted improvements, while 34% reported a deterioration in conditions. This indicates that progress in road infrastructure has been uneven, with some areas improving while others continue to face challenges.

## Over the last two/three years, how would you describe the condition of the road?



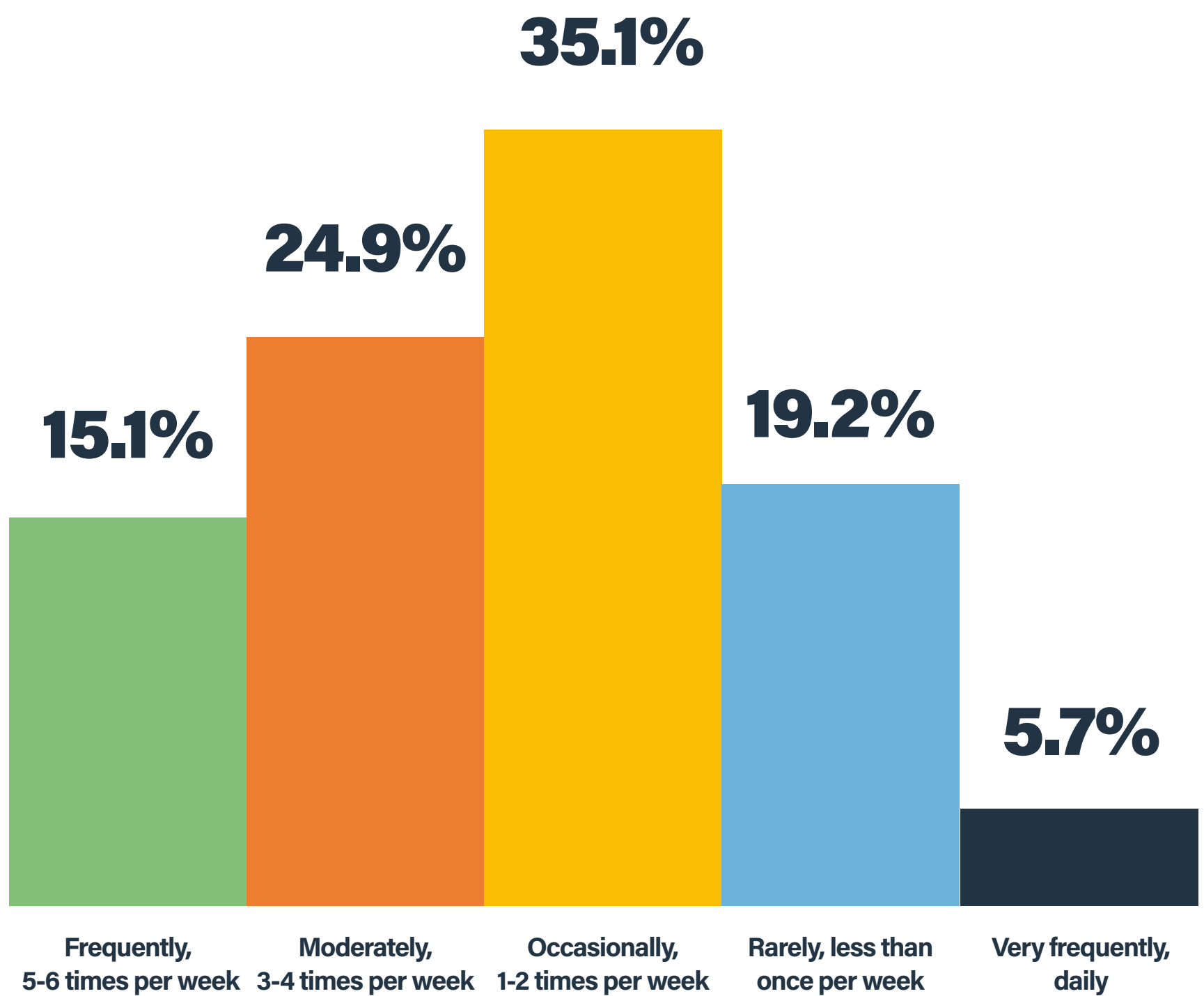
The survey showed that encounters with potholes are prevalent on Nigerian roads. A significant 35.1% of respondents reported coming across potholes occasionally, about one to two times per week. Meanwhile, 24.9% experienced them moderately, encountering them three to four times weekly, and 15.1% faced them frequently, up to five or six times per week. On the other hand, 19.2% of respondents rarely encountered potholes, and 5.7% reported daily encounters. These findings underscore the widespread nature of potholes on the roads, pointing to uneven and inconsistent maintenance efforts in addressing this persistent challenge.



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**How often do you encounter road defects (potholes, bumps, etc.)?** - to provide insights into whether some form of maintenance is carried out

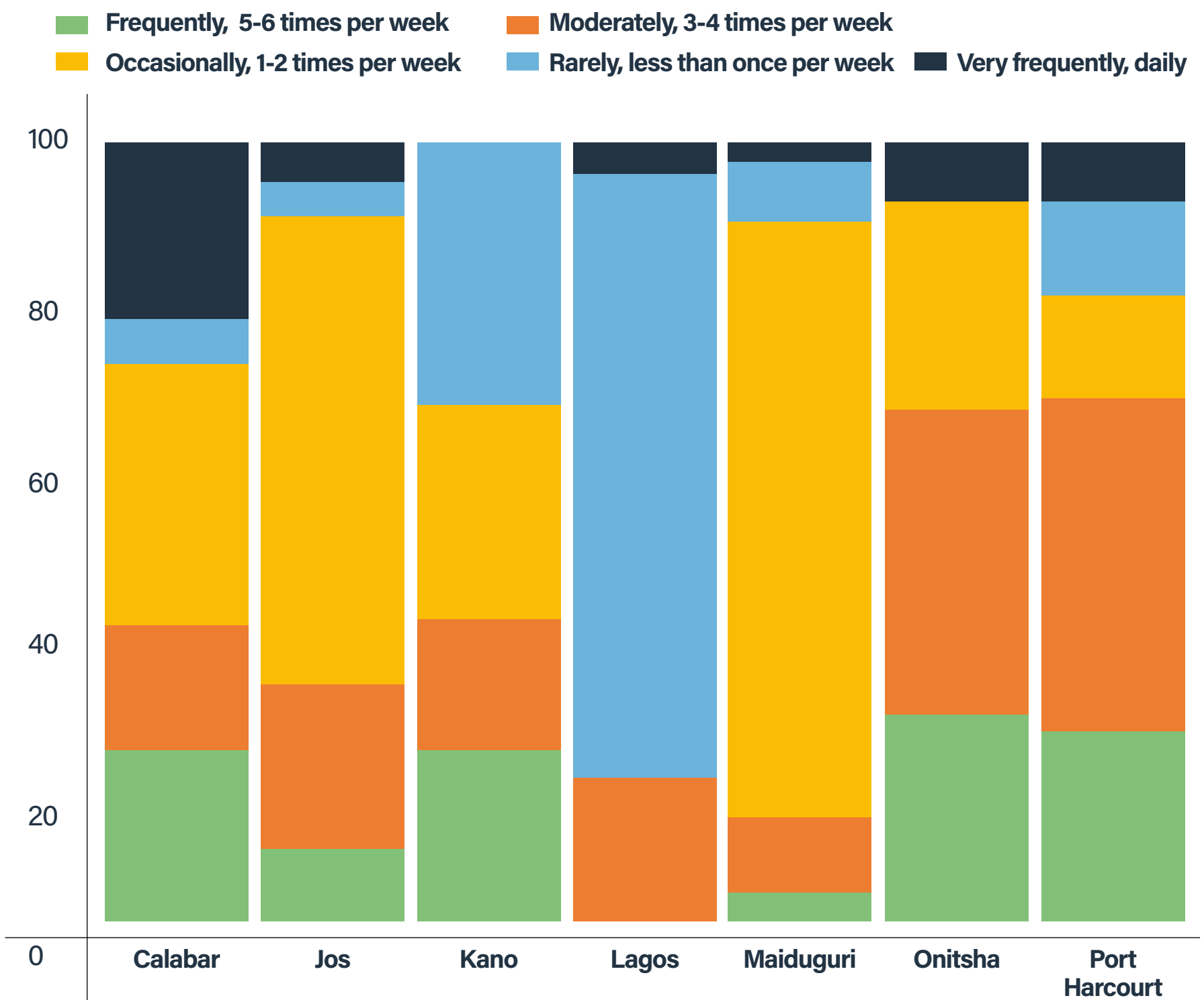




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## Percentage Distribution of Road Defect Frequency by location



Road drainage also emerged as a significant concern among respondents. According to the survey, 38.4% reported moderate flooding during heavy rain, while 25.7% experienced frequent flooding even with moderate rain. Additionally, 14.7% observed severe flooding in mild rain, often rendering roads challenging to navigate. In contrast, only 17.1% noted occasional

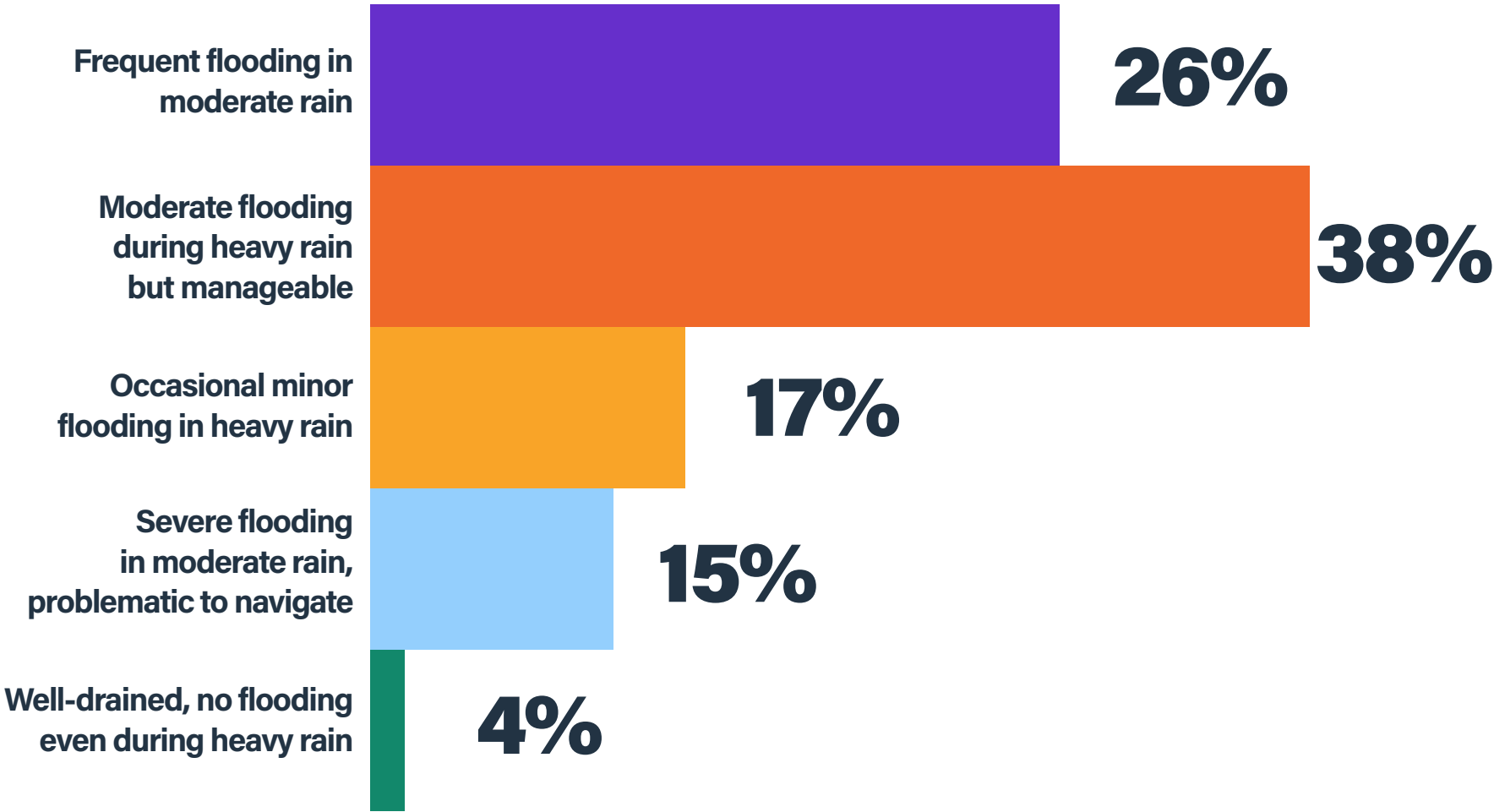




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minor flooding during heavy rain, and just 4.1% described roads as well-drained with no flooding. These findings highlight pervasive drainage problems, with most roads struggling to manage rainfall effectively, posing challenges for road users during the wet season.

### Does the road have proper drainage to prevent flooding?



The survey also provided insights into traffic flow patterns on Nigerian interstate highways and major connecting roads, revealing distinct variations throughout the day. Port Harcourt's interstate routes experience the most congestion, peaking in the evening with 35 traffic units. Maiduguri and Lagos follow, facing evening traffic volumes of 24 and 22 units, respectively.



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Potholes, poor drainage, and traffic congestion plague Nigeria's roads, with 75% of drivers encountering potholes at least occasionally and 64% experiencing flooding during heavy rain, highlighting the urgent need for improved road maintenance and infrastructure development.

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Generally, the evening hours between 5 p.m. and 8 p.m. witness the heaviest traffic across most highways. Afternoon traffic is moderate overall, though Port Harcourt stands out with high volumes of 23 units during this time. Morning traffic is relatively light, with manageable congestion levels, while nighttime sees the least activity on interstate roads.

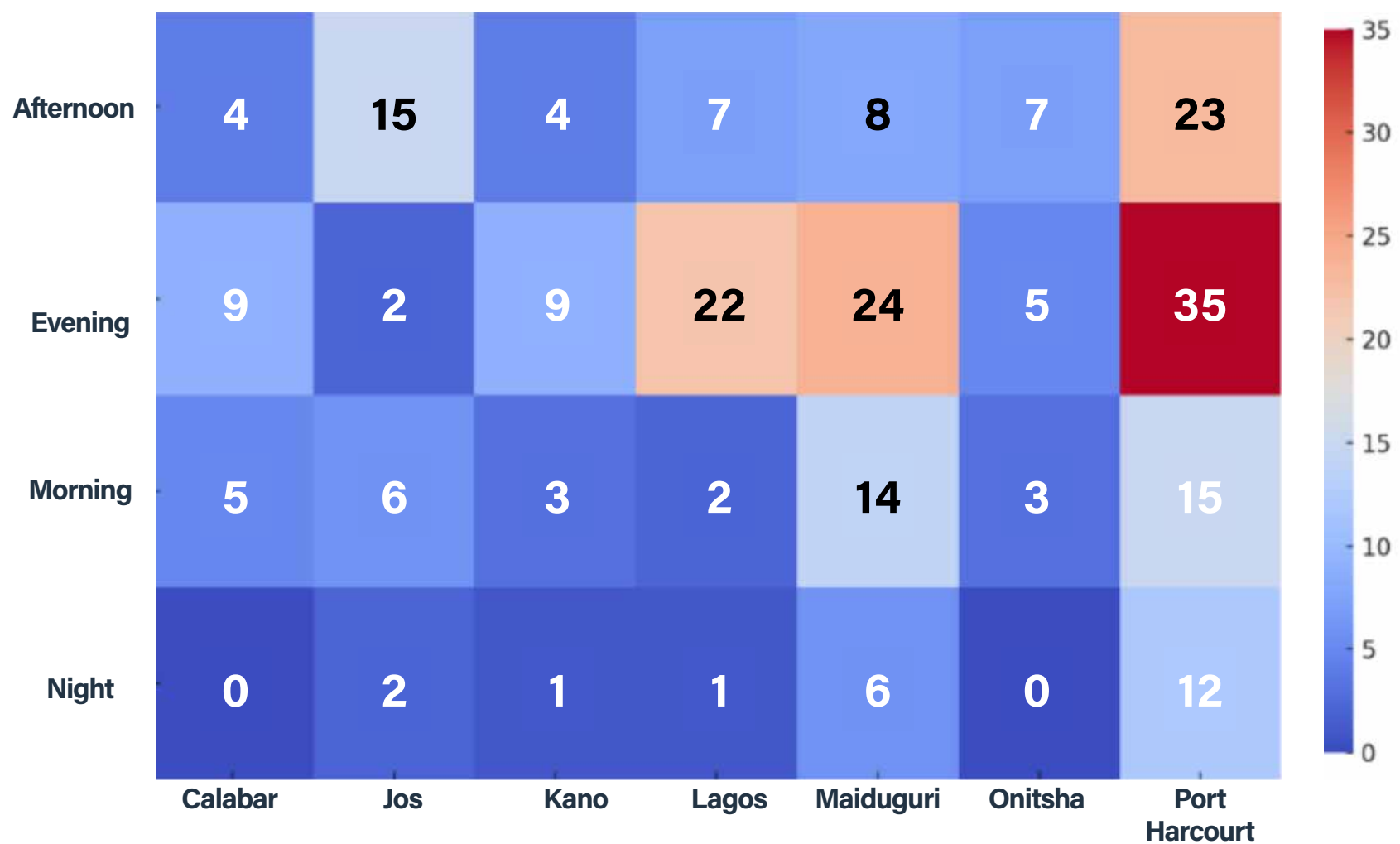
Calabar maintains light daily traffic regarding specific city connections, rarely exceeding moderate levels. Jos experiences its busiest period in the afternoon, while Onitsha's traffic remains consistently moderate at different times. Kano shows moderate traffic for most of the day, with a slight increase in the evenings. These findings highlight how traffic intensity and timing vary by location, emphasising the need for tailored strategies to manage congestion effectively.



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## Traffic Flow by Time of Day and Location



Drivers in Kano pointed out that while some roads have improved, the federal roads are still bad, and the government has abandoned some projects. They also complained of poor drainage and security challenges due to incomplete road projects.

The routes from Bauchi to Kano and Kano to Abuja (especially from Akwanga to Abuja) are reported to have improved. This improvement has been attributed to a combination of private initiatives, government projects and community efforts for security reasons. However, the routes from Kano to Kaduna (especially Saminaka in Zaria), Kano to Jos, and Kano to Port Harcourt have worsened due to poor maintenance efforts. The Jos to Abuja road, specifically around the Keffi to Mararaba to Nyanya



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axis, was reported to have been expanded and resurfaced, reducing travel time. The journey, which used to take 5-6 hours, now takes approximately 4-5 hours, reducing fuel consumption and vehicle wear and tear.

The Jos to Bauchi road has also seen notable improvements, with repaired potholes and newly installed road signs. While there have been significant improvements on most roads, some concerns are still evident on the Jos to Zaria/Kano road, as the road is prone to flooding during the rainy season. Commuters are optimistic that this road will also see significant improvements with continued maintenance and upgrading efforts soon. From the standpoint of Jos drivers, there has been an increase in the number of road maintenance crews and equipment on the roads, indicating a commitment to regular maintenance.

Drivers also pointed out the impact of public-private partnerships in financing and delivering road projects. Furthermore, community efforts, including advocacy groups and citizen-led initiatives, have helped raise awareness and push for improvements to the road network. Collaboration and coordination among these stakeholders have been pivotal to recent notable improvements.

**Nigeria's roads show glimmers of improvement, but challenges persist - from potholed highways to flooding, with drivers reporting varying levels of progress across regions, highlighting the need for sustained maintenance efforts and collaborative solutions.**





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Abuja drivers pointed out that most of the Federal roads have improved, although the rural roads linking the federal roads have not improved. The Abuja to Niger and Abuja- Nasarawa-Makurdi roads are reported to have improved, while the Abuja – Lokoja expressway is still an eyesore with its numerous life-threatening potholes. The drivers also reported increased Zuba- Suleja – Minna Expressway maintenance efforts.

Drivers in the northeast flagged that the Maiduguri-Damaturu road, Damaturu-Bauchi road, Damaturu-Kano road and Nasarawa-Makurdi road have improved. In contrast, the Jos-Nasarawa road has worsened. In the words of a driver, "It has gone from bad to worse. I really hate using that road."

In the South-South, drivers from Port Harcourt reported improvement in road conditions due to state government actions. The Rumuokwurusi Road, Artillery Road, Aba Express Road, and Eneka Road were reported to have improved.

The Calabar road was also reported to be bad, and people were opting for water transportation as an alternative. However, the Calabar ITU road and Calabar Ikom road were reported to have improved.

The consensus also portrayed that road maintenance efforts were more sustained within the states than on federal roads.

In the Southeast, few roads were pointed out to have been improved. The



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Enugu-Abakaliki Road, Enugu-Anambra Road, and Calabar-Ebonyi Road were reported to have improved. A driver said, "Traveling along the east from Onitsha to Abakaliki, towards Port Harcourt, the roads significantly improved."

However, the Enugu-Port Harcourt Road, Port Harcourt-Owerri Road, Eleme going to Owerri, the routes of Umuapku-Ohaji, Anambra-Asaba, Enugu-Benue, Benue-Lokoja, and Anambra-Benin, were cited to have worsened.

Drivers also complained that the Sagamu to Ijebu Ode inward Ondo State road is in terrible condition. A driver also pointed out that "The Benin bye pass to Warri is more than terrible, the journey that should have taken you one hour is now taking about three hours." The Ibadan to Abuja route was also pointed out as another terrible road, and the route moving from east through Abuja is terrible.

The Lagos-Apapa-Oshodi Expressway, Lagos-Ibadan Expressway, Ore Expressway and some parts of Oyo State were reported to have improved. However, the Ogbomoso Expressway, Jebba-Mokwa Road and Sango-Ota to Abeokuta Expressway were reported to have worsened.

The survey also found that maintenance efforts largely constituted using stone bases to patch the roads. It is also important to point out that drivers reported a decrease in travelling during the last yuletide season due to the hike in transport fares.

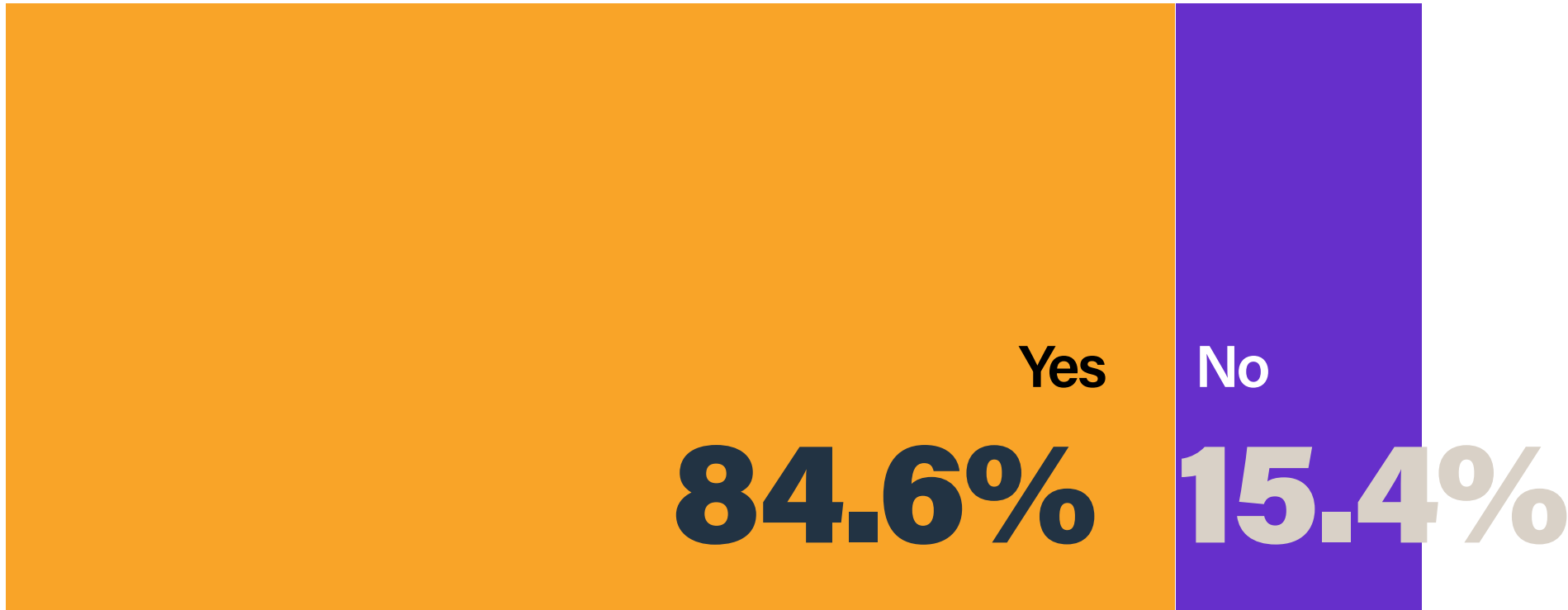


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# Security: A Looming Shadow

Insecurity remains a pressing issue on Nigeria's roads. An overwhelming 84.6% of respondents reported experiencing or hearing security incidents along their travel routes. This stark majority underscores the frequent occurrence of such incidents, leaving only 15.4% of respondents who had not encountered or heard of any. These findings highlight the pervasive nature of security challenges on the country's roadways and the urgent need for effective measures to address them.

## Have you ever encountered or heard of security incidents on this route?





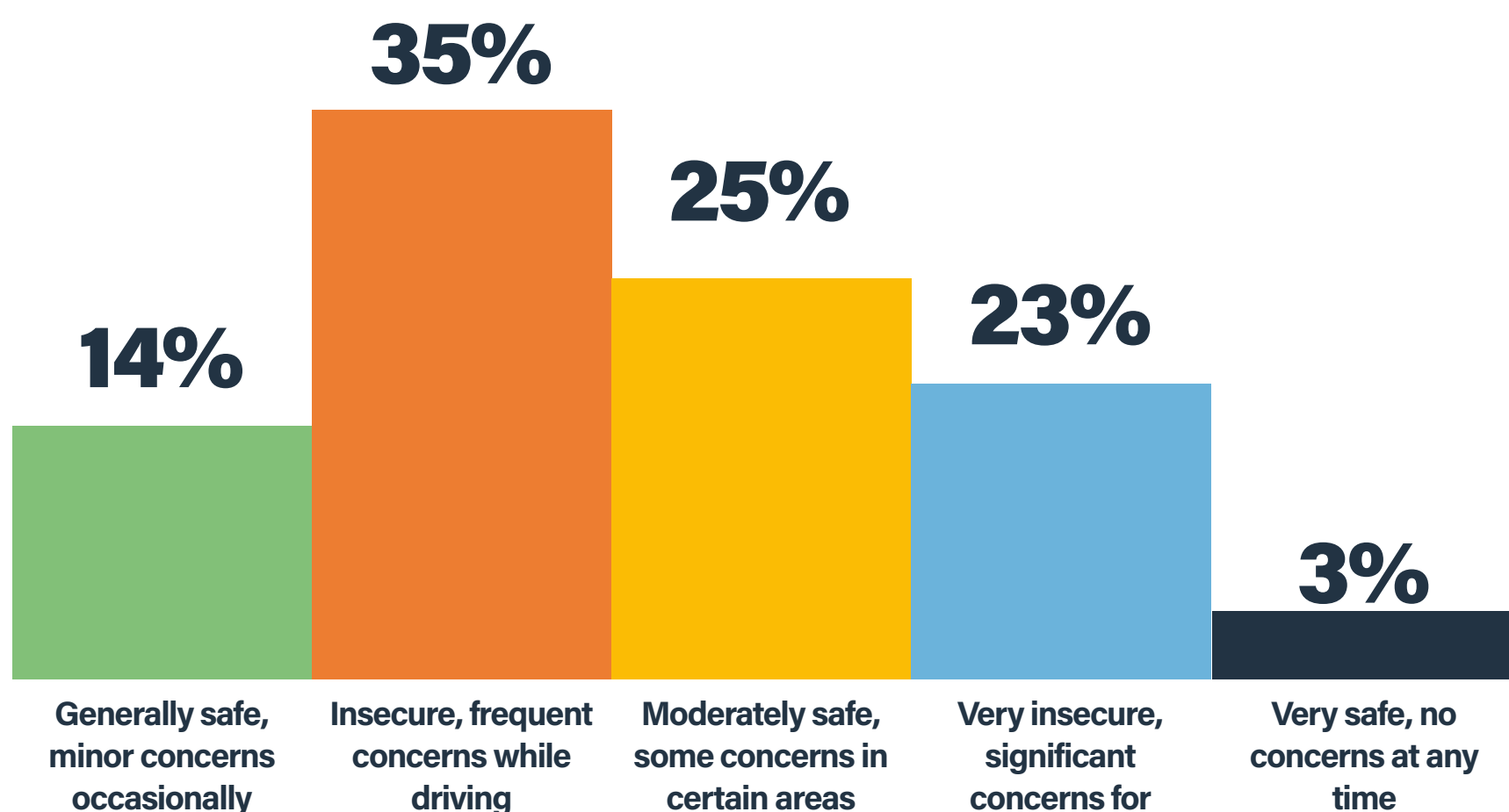
# ROADS TO NOWHERE

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Nigeria's roads are fraught with danger, from insecurity hotspots in Port Harcourt, Maiduguri, and Lagos to inconsistent police patrols and treacherous road conditions that have led to numerous accidents, underscoring the urgent need for improved security and infrastructure.

A notable 42% of respondents found the roads somewhat safe, though this varied in degree. Only 2.4% considered the roads very safe, 14.3% rated them generally safe, and 25.3% felt they were moderately safe. Conversely, a majority of 58% viewed the roads as unsafe, with 34.7% expressing frequent security concerns and 23.3% indicating significant fears of insecurity. This highlights a prevailing sense of unease among road users.

## How would you grade your sense of security while driving on this route, especially at night?







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The survey further highlighted the existence of dangerous hotspots across Nigeria's major cities and highways, pinpointing areas with particularly high risks of theft, attacks, and road hazards. Dangerous hotspots were identified in key urban centres like Lagos, Port Harcourt, and Maiduguri, all critical for interstate travel. These cities, known for heavy traffic, saw elevated insecurity, especially during peak travel hours in the evening, when commuters are most vulnerable.

## The Dangerous Spots for Security Incidents

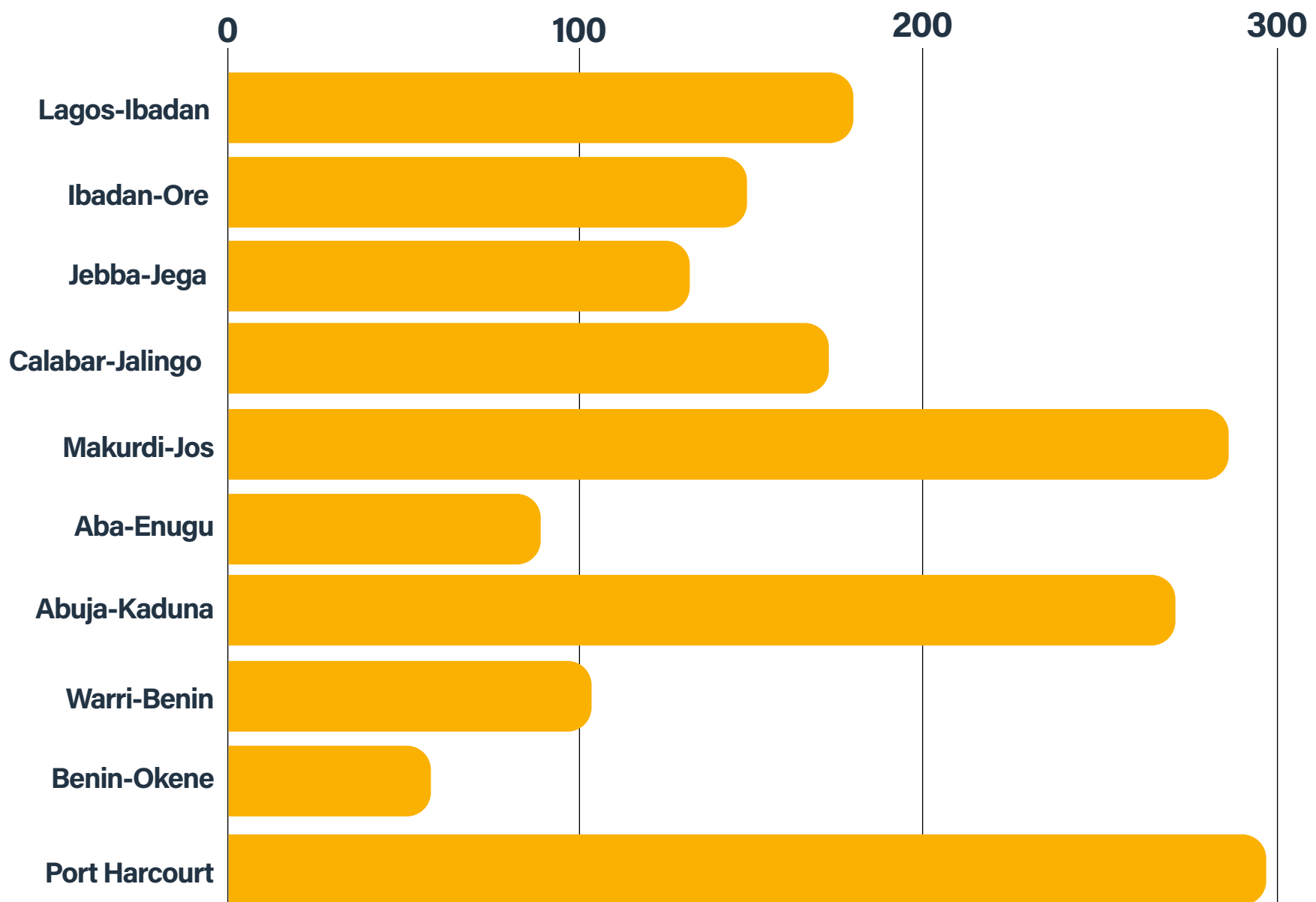
Location	Count	Location	Count	Location	Count
Calabar	18	Sanga	1	Banki, Mafa, Ngala	2
Agaji	1	Kano	18	Damaturu (Forest areas)	5
Akwanga axis	1	Dogon Daji (Sokoto road)	1	Daudu-Akeleku areas	5
Betem (Cross River/Benue)	1	Gamawa (Yobe)	1	Gombe-Bauchi border	1
Biase (Cross River)	1	Jere-Kagarko axis	1	Maiduguri-Damaturu	5
Ebony and Enugu areas	1	Rijana and Katari	1	Ngala-Dikwa	1
Enugu	1	Kaduna-Kawo village	1	Okene-Ajaokuta	1
Imo/Anambra boundary	1	Makera-Kujama road	1	Onitsha	15
Isiala, Abia boundary	1	Shagamu interchange	1	Benin-Auchi, Okene-Kogi	4
Kefi, Akanga	1	Ungwa Kawo (Kaduna road)	1	Obollo Axis (Otupko)	1
Nasarawa state	1	Lagos	32	Okigwe-Umunya	2
Jos	23	Abaji-Lokoja road	1	Port Harcourt	85
Akwanga (Nasarawa)	2	Alakaa (Oyo/Ogun)	2	Eleme Junction (Rivers)	16
Biliri (Gombe)	2	Benin bypass/Onicha	1	Eleme-Onne road	8
Hawan Kibo	1	Gboko (Benue state)	1	Eleme-Owerri road	12
Kaduna/Plateau boundary	1	Kaduna Zaria road	1	Ihiala-Okigwe road	2
Locations near Damaturu	2	Kidnapping hotspots	4	Mgbidi junction (Imo)	2
Obajana (Kogi)	1	Mokwa-Jebba highway	1	Okigwe junction	8
Outskirts of Jos	1	Shagamu interchange	3	Oyibo junction	2
Pambegua	1	Maiduguri	52	Yenagoa	1
<b>Grand Total</b>					<b>243</b>



# ROADS TO NOWHERE

A BUMPY RIDE THROUGH NIGERIA'S ROADS

## Nigeria's most economically important roads



The chart above shows security incidents (kidnappings, murders, armed robberies, etc) across the routes considered in this report between January 2023 and 2024. Data has shown that during the review period, the Port Harcourt-Warri route in Southern Nigeria has become the most dangerous, surpassing the Abuja-Kaduna highway which registered some of the most prominent security incidents (such as the AK-9 train attack) in March 2022. Kidnapping for ransom forms a major security threat to travellers across this route, unlike the Makurdi-Jos route, which has a mix of youth gang violence, and pastoral conflicts that move farmers to



## ROADS TO NOWHERE

A BUMPY RIDE THROUGH NIGERIA'S ROADS

protest against the government's poor security provision which, in turn, lead to roadblocks and attacks against motorists.

Port Harcourt was identified as the most frequently cited hub for dangerous hotspots, with specific areas such as Eleme Junction and the Ihiala-Okigwe Road highlighted as particularly risky. Following closely, Maiduguri was also flagged for its insecurity, with locations like the Damaturu Forest, Maiduguri-Damaturu Road, and Daudu-Akeleku areas commonly mentioned as danger zones. Lagos also ranked high, with the Shagamu interchange and Lagos-Ibadan Expressway noted as major security concerns. Respondents consistently flagged these areas as hotspots for criminal activities and road-related dangers, posing significant risks to travellers.

The survey also explored perceptions of police presence on the roads. In Calabar, the majority reported that regular police patrols were visible at key times, with all respondents acknowledging the visibility of police patrols. However, it may be occasional or rare. In Jos, the responses present a more balanced picture. A notable portion of respondents observed infrequent patrols, visible only occasionally, while a smaller group flagged regular patrols. This suggests that while patrols occur, their frequency is inconsistent and insufficient for many.



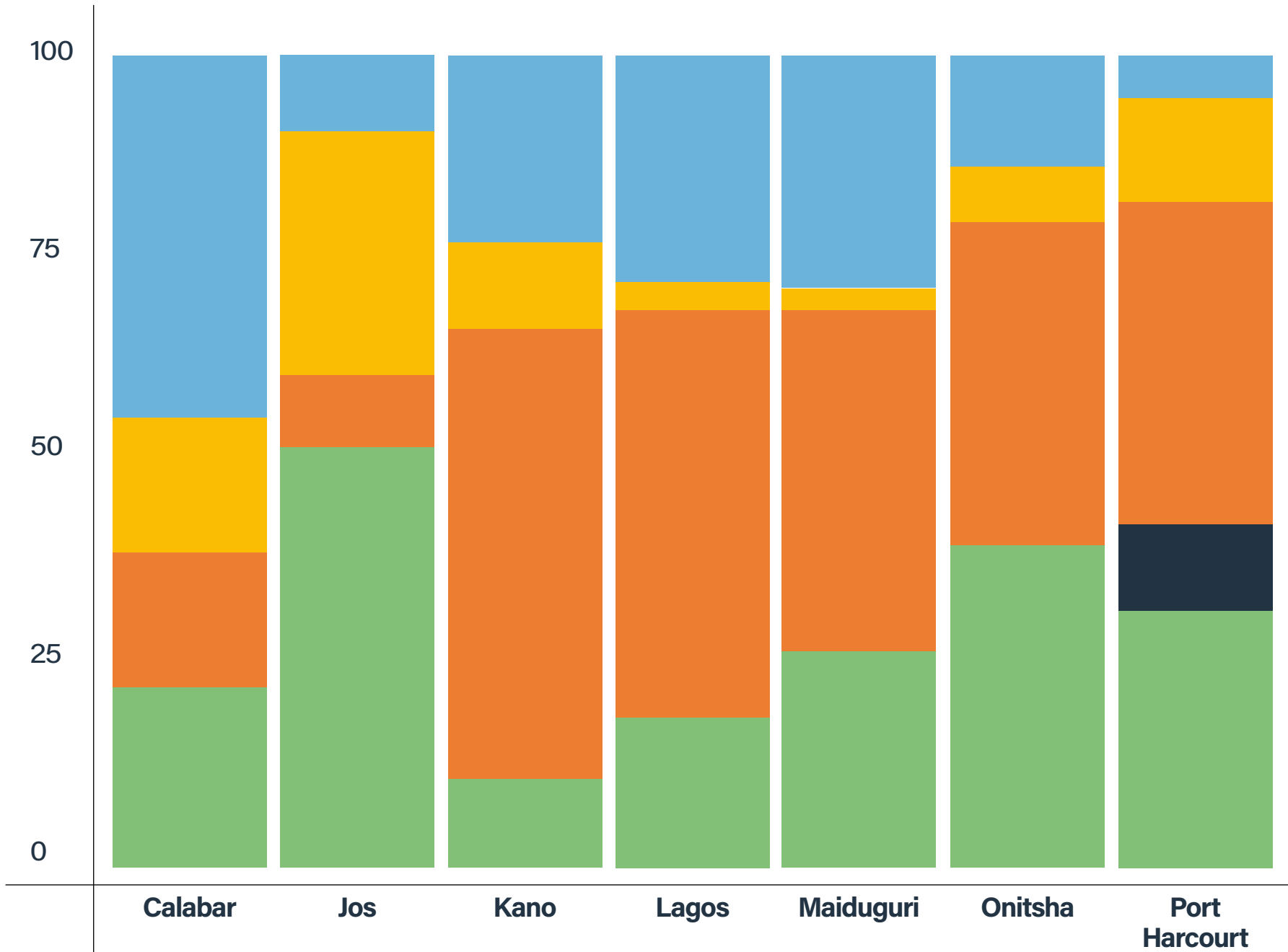


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## How would you rate the visibility and frequency of police/security patrols?

- Infrequent patrols, visible once in a while
- Occasional patrols, visible a few time a week
- Rare patrols, rarely see them
- Regular patrols, visible at key times
- No visible patrols, never any security presence



The pattern across Kano, Lagos, Maiduguri, and Onitsha is notably consistent. Most respondents from these cities reported occasional patrols, generally occurring a few times a week. However, some respondents mentioned more frequent patrols, while a smaller group indicated that patrols were rare, suggesting an inconsistent or insufficient presence in these urban areas.



# ROADS TO NOWHERE

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Like the other cities, Port Harcourt saw most respondents reporting occasional patrols. However, it stood out with the highest percentage of respondents noting “no visible patrols,” reflecting a significant concern about police presence within regional routes.

The data reveals a common trend of sporadic police visibility across interstate routes, with occasional patrols being the most reported frequency. Regular patrols are not a consistent phenomenon, and in many cases, respondents flagged the rare visibility of security officials, raising questions about the consistency and effectiveness of police patrol efforts. These findings highlight the pressing need for more consistent and visible police patrols to enhance security and public confidence across these regions.

Another significant concern for road users is the impact of poor road conditions on safety. Most respondents have experienced road accidents, either directly or indirectly, due to the poor condition of the roads.

## Have you experienced any road accidents (directly or indirectly) in the last year related to the road condition?



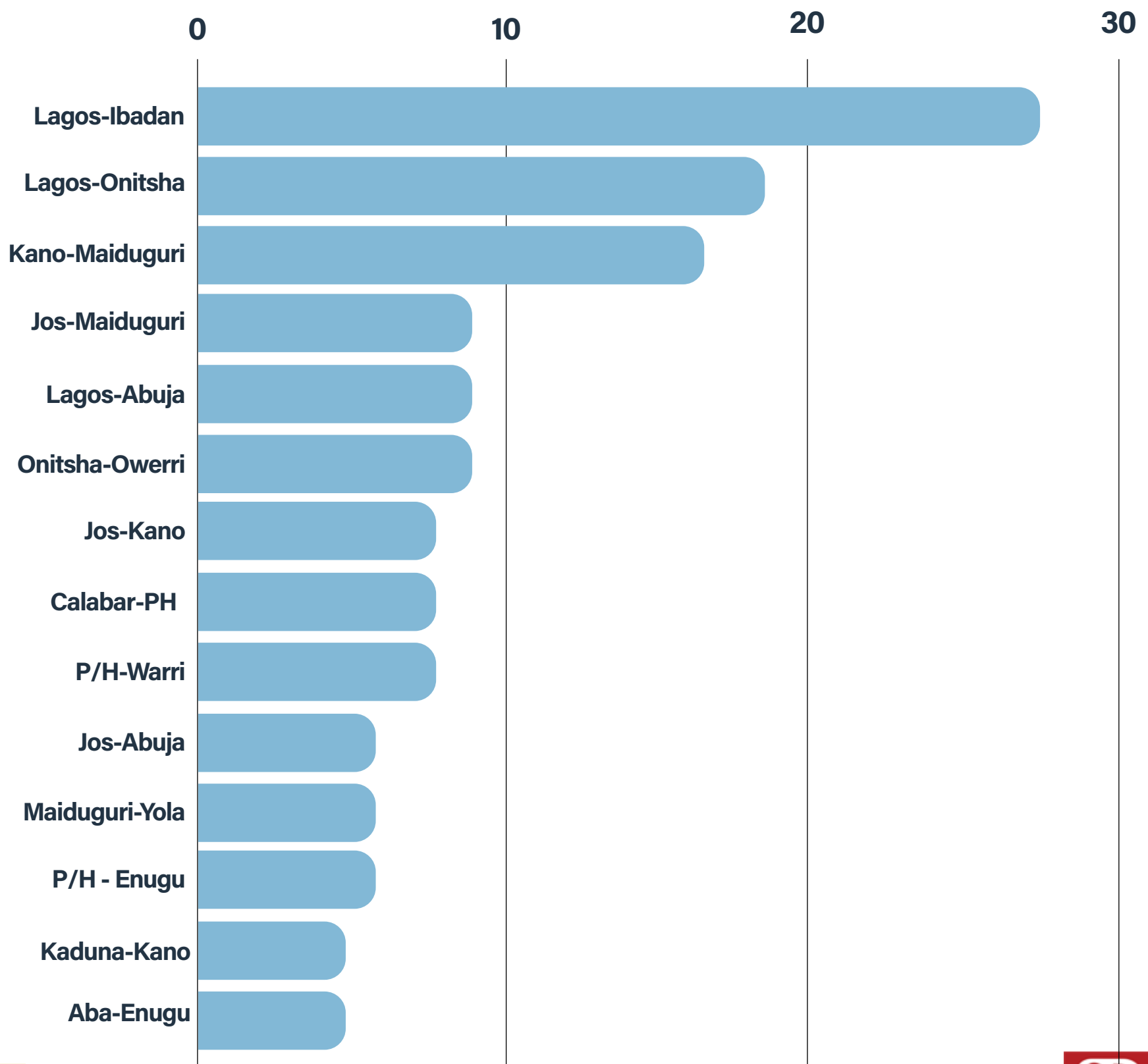


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# Economic Impact

The survey revealed that the Lagos-Ibadan route is the most frequently travelled, closely followed by the Lagos-Onitsha route. Additionally, the Kano-Maiduguri route ranks as one of the busiest routes.

## Top 15 Economic Activity Branches







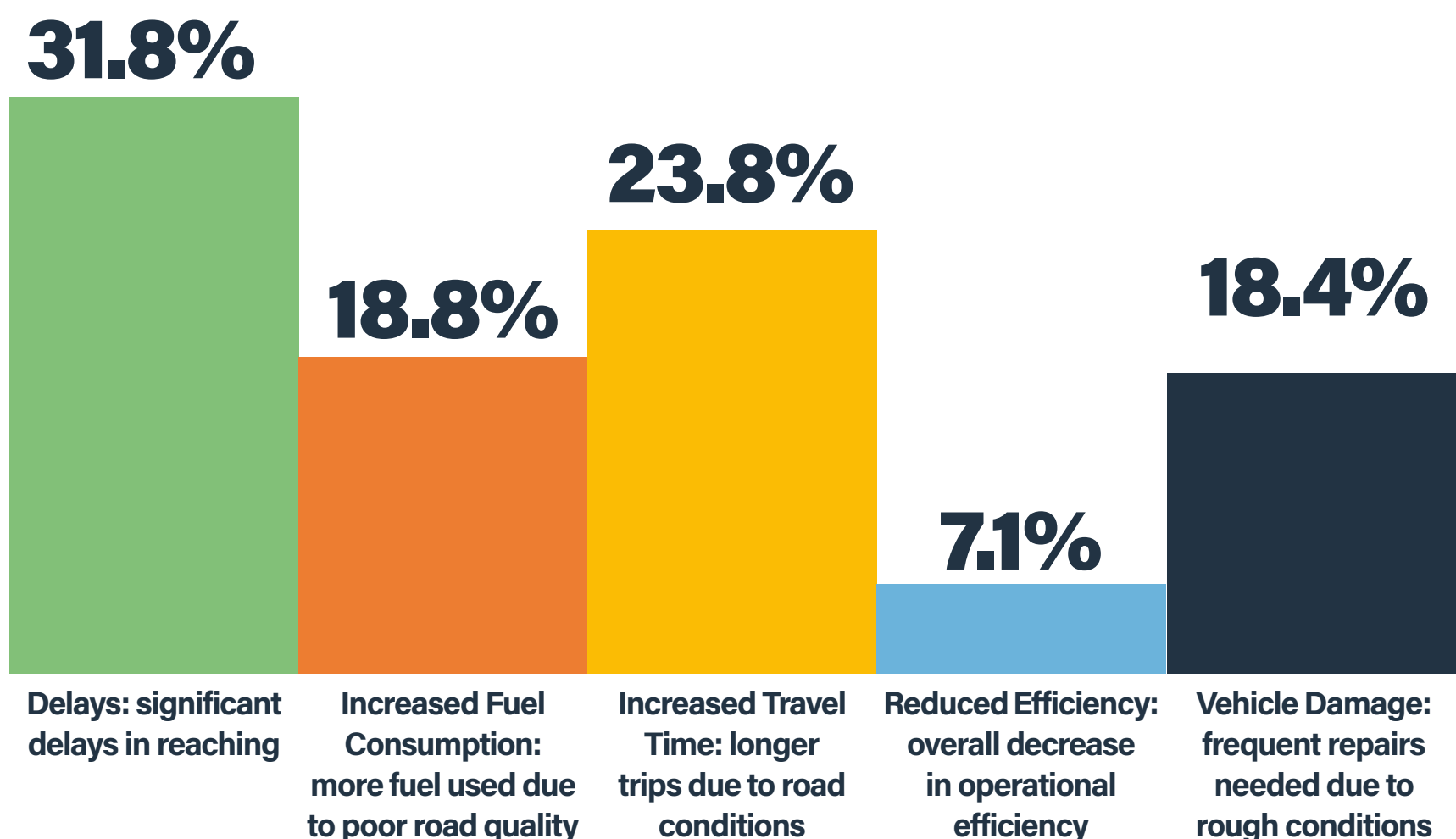
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Overall, the survey indicates a consensus that improvements in road conditions will yield a positive economic impact.

An analysis of the impact of road conditions on daily transport operations reveals that delays are the most common challenge, hindering 31.8% of operators from reaching their destinations on time. Prolonged travel times impact 23.8% of operators, while increased fuel consumption is reported by 18.8%. Frequent vehicle damage necessitating repairs troubles 18.4%, and 7.1% experience a general decline in operational efficiency. These findings underscore that time-related challenges are the most prominent effects of poor road conditions, followed by increased resource consumption and maintenance burdens.

## How do road conditions affect their daily operations?



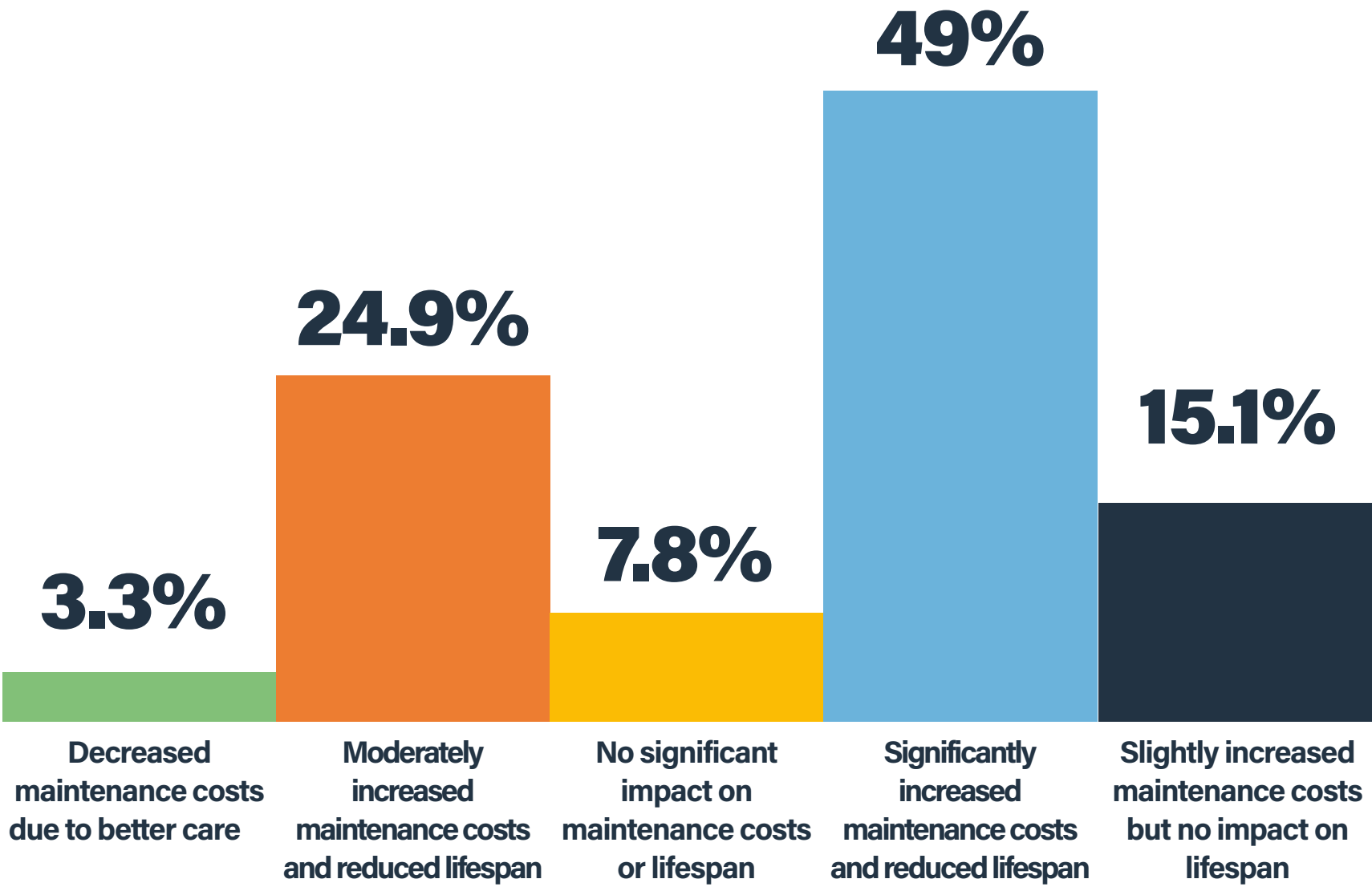


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Poor road conditions take a toll on vehicle maintenance and longevity, with nearly half (49%) of operators reporting significantly higher maintenance costs and shorter vehicle lifespans. About 25% experience moderate cost increases and reduced longevity, while 15% notice slight cost increases without affecting lifespan. Only 8% report no significant impact, and a small 3% have managed to lower their maintenance costs through improved care practices. These figures highlight the heavy financial burden poor roads impose on transport operators, straining their operations and profitability.

## Have the road conditions impacted your maintenance costs or vehicle lifespan?



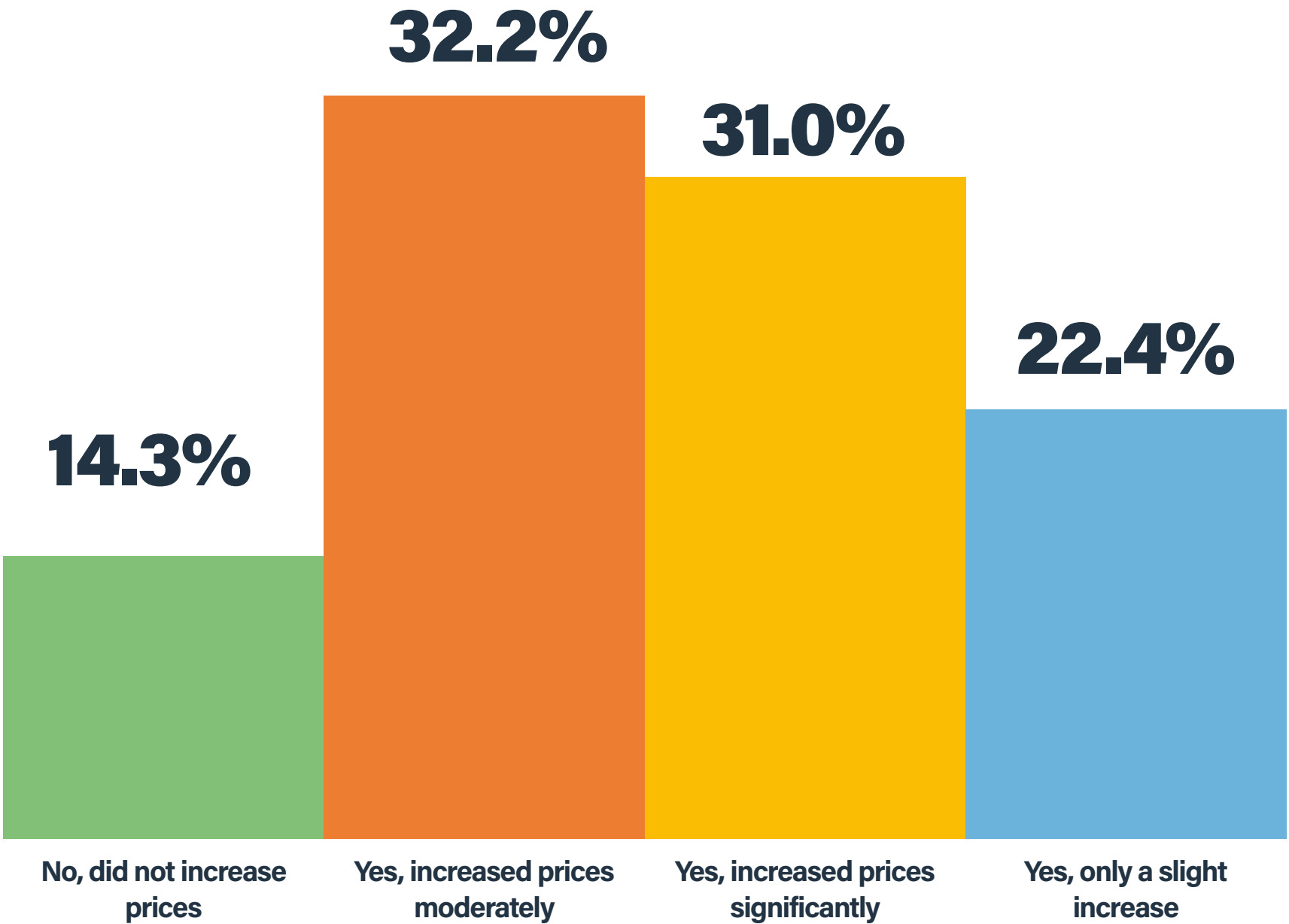


# ROADS TO NOWHERE

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The tough operating environment has pushed most transport operators to revise their pricing. The largest share (32.2%) introduced moderate price increases, while 31% significantly raised their rates. Another 22.4% opted for slight price adjustments, leaving only 14.3% able to maintain their original pricing. These numbers reveal a ripple effect of poor road conditions across the transport sector, with 85.7% of operators compelled to raise prices to keep their businesses afloat.

## Has the state of the roads caused you to increase transport prices?





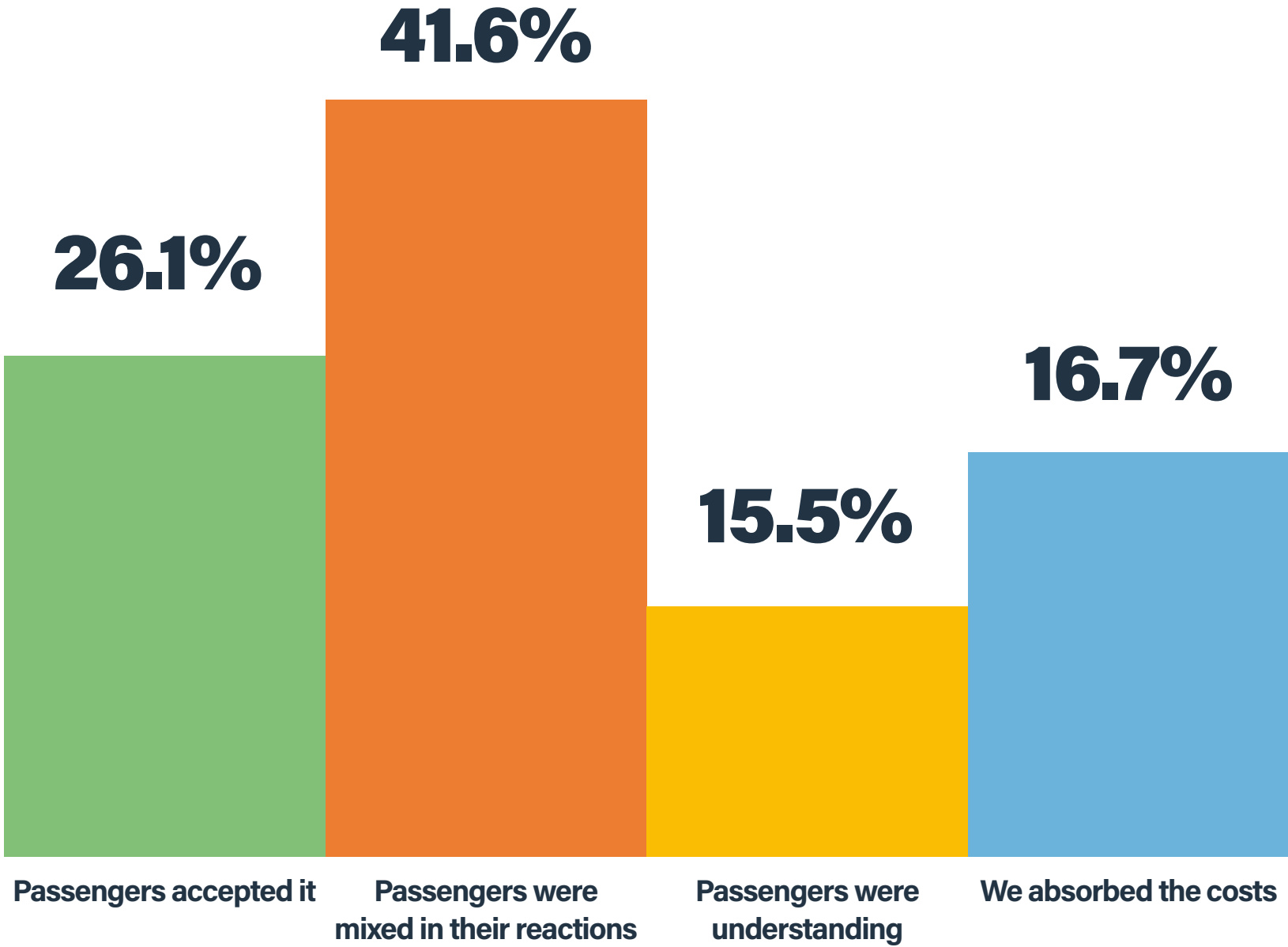


# ROADS TO NOWHERE

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The response to price increases highlights a nuanced dynamic between transport operators and their customers. The largest group (41.6%) reports mixed reactions from passengers, reflecting varied levels of understanding and acceptance. About 26.1% of passengers directly accepted the price hikes, while 15.5% clearly understood their reasons. Interestingly, 16.7% of operators opted to absorb the additional costs instead of passing them on, underscoring the delicate balance they maintain between sustaining operations and preserving customer relationships.

## If yes, how did passenger react to this?





## ROADS TO NOWHERE

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# Charting the Road Ahead: Actionable Solutions for Nigeria's Transport Challenges

Concerted efforts across multiple stakeholders are essential to address the challenges facing Nigeria's road transport sector. Poor road infrastructure has created a ripple effect of inefficiencies, increased costs, and strained operator-passenger relationships, and addressing these issues must become a national priority. The government should allocate more resources to rehabilitate and maintain critical routes, particularly high-traffic corridors like Lagos-Ibadan, Lagos-Onitsha, and Kano-Maiduguri. Transparency and accountability in executing these projects are crucial to ensure quality and timely delivery. Leveraging technology to monitor road conditions can also help identify priority areas for repair and ensure that resources are utilised effectively.

Insecurity on Nigeria's roads compounds the challenges of poor infrastructure, making travel unsafe for operators and passengers alike. Strengthening security along major routes through increased patrols, surveillance technology, and community engagement is vital to restoring confidence in the transport sector. Policies addressing infrastructure deficiencies and road safety can help reduce delays and safeguard lives, creating an environment where transport operations thrive.



## ROADS TO NOWHERE

A BUMPY RIDE THROUGH NIGERIA'S ROADS

Transport operators must also adapt by optimising their operations. Investing in regular vehicle maintenance and adopting fuel-efficient practices can reduce costs. Additionally, forming associations to advocate collectively for improved road infrastructure and security will amplify their voices in policy discussions. Partnerships within the industry for bulk purchasing of vehicle parts and fuel could further reduce operational expenses, enabling operators to pass these benefits to customers.

The private sector and development partners have a key role to play through more public-private partnerships (PPPs) to fund and manage road construction and maintenance. Such collaborations can introduce innovative solutions, such as GPS-based traffic systems, to streamline transport operations and improve safety. Similarly, civil society organisations must advocate for better road conditions while fostering public awareness of poor infrastructure's economic and social costs. By highlighting the impact on everyday lives, they can mobilise support for necessary reforms.

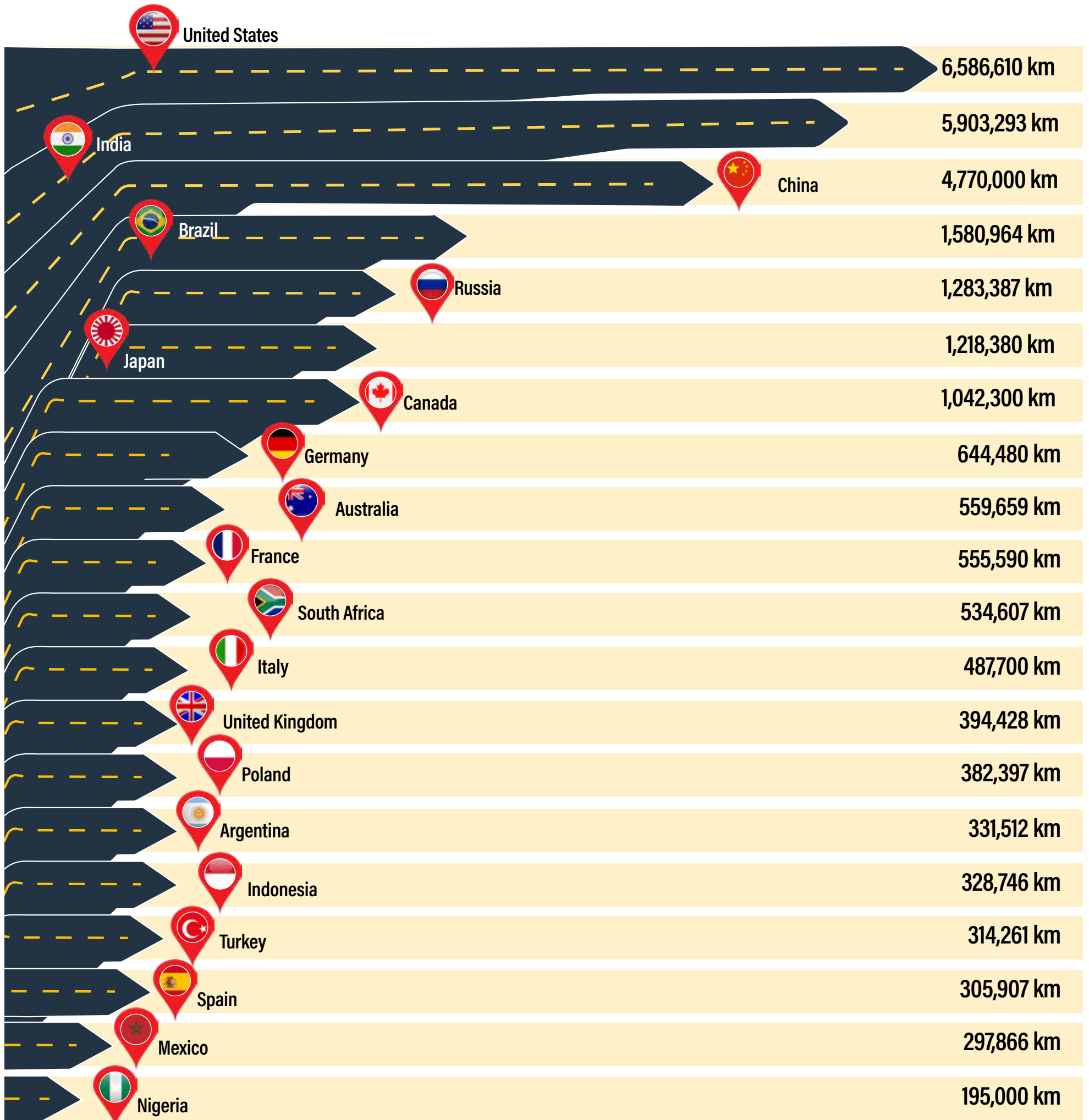
Addressing these challenges requires a multi-pronged approach. Policymakers must commit to a strategic plan to overhaul Nigeria's transport infrastructure with clear timelines and measurable outcomes. Transport operators and civil society must work together to hold stakeholders accountable and push for meaningful change. Private investment in infrastructure projects can complement government efforts and spur innovation. Above all, prioritising security on Nigeria's roads is non-negotiable, as a safer transport network will unlock economic opportunities, improve operational sustainability, and enhance the quality of life for all Nigerians.



# ROADS TO NOWHERE

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## List of countries by road network (paved and unpaved)



Data source: CIA Factbook, PIARC



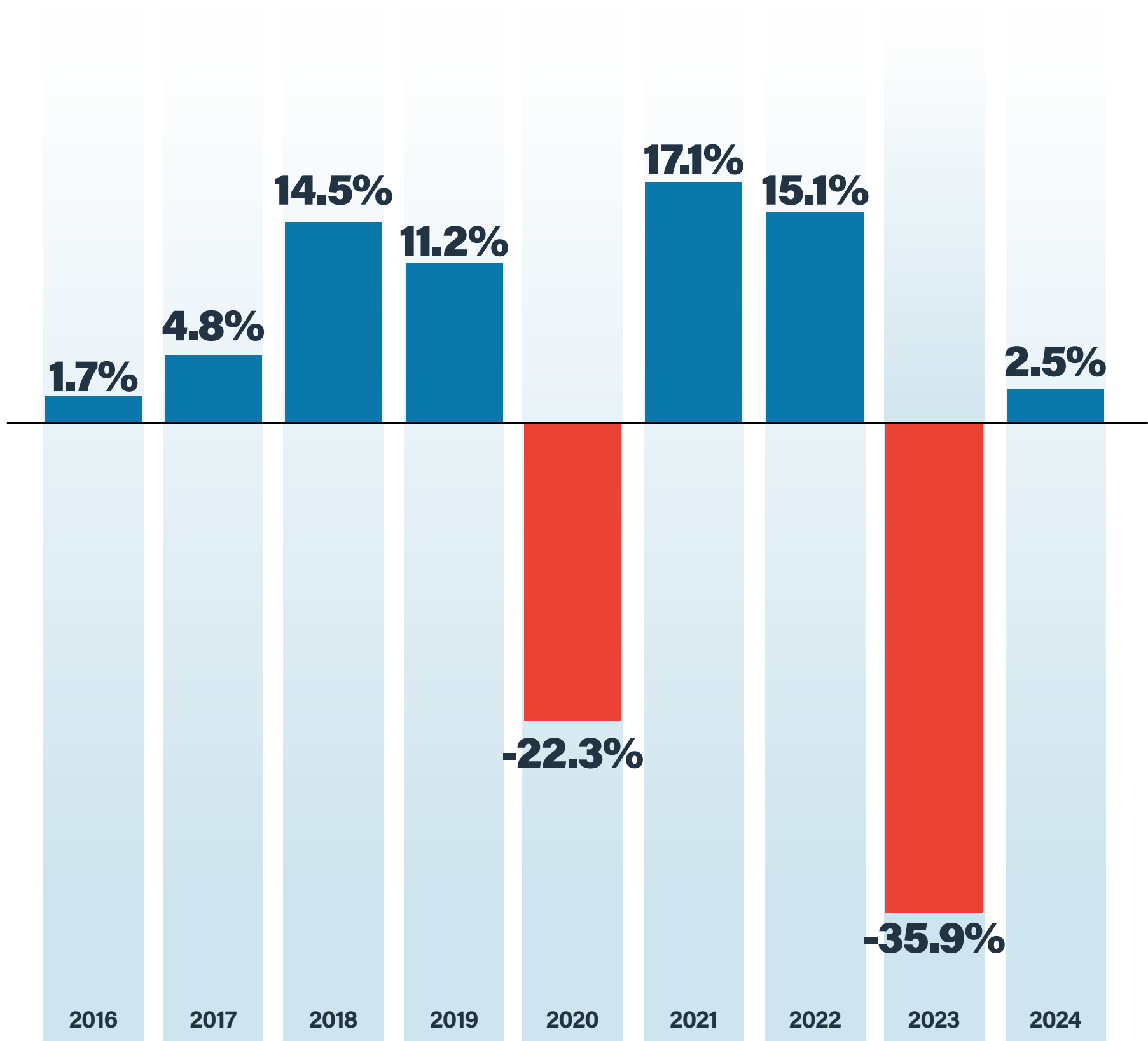


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## Conclusion

### Road Transport GDP Growth Rate





## ROADS TO NOWHERE

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This report highlights the profound impact of road conditions on the transport sector, revealing a cascade of challenges that extend beyond mere inconvenience. Poor infrastructure has led to delays, increased operational costs, frequent vehicle maintenance, and reduced efficiency, undermining the sector's productivity and profitability.

Operators, forced to adjust their pricing to offset these challenges, have faced varying degrees of passenger acceptance and resistance, underscoring the ripple effects of inadequate road conditions on broader economic and social dynamics.

The findings emphasise that addressing Nigeria's road infrastructure deficiencies is not just a matter of convenience but an economic imperative. Improved road conditions would significantly reduce delays, lower operational costs, extend vehicle lifespans, and stabilise pricing structures, creating a more efficient and sustainable transport system. Moreover, such improvements would enhance customer satisfaction, strengthen operator-passenger relationships, and unlock economic growth opportunities for the regions most affected by poor infrastructure. In conclusion, prioritising investments in road infrastructure is critical to alleviating the burdens transport operators and their customers face. A collaborative approach involving government agencies, private stakeholders, and communities is essential to achieve a sustainable solution that supports economic growth and improves all Nigerians' quality of life.

# ABOUT SBM

SBM Intelligence is an Africa-focused geopolitical research and strategic communications consulting firm that addresses the critical need for political, social, economic, and market data and big data analytics. We employ various data collection methods. Our Data Collection Methodology team advises on data collection methods for all ONS social and business surveys. With clients within the business and the wider government community, we aim to provide expert advice on data collection procedures and conduct research to improve survey quality.

Since 2013, we have provided data analytics and strategic communication solutions to clients across various sectors in Nigeria, Ghana, the Ivory Coast, Kenya, South Africa, the United Kingdom, France and the United States.

