

# AFRICA SUPPLY CHAIN INSIGHTS

Monthly Bulletin on Supply Chain News & Trend in Africa

BULLETIN N. 1/ April 2026

## Dangote Refinery: Transforming Africa's Oil Landscape

*Nigeria's power house boosts regional energy security*

The Dangote Refinery is ramping up gasoline exports across Africa.

The Key challenge: balancing exports with local supply to ensure energy stability and lower costs for African citizens

## Africa's Strategic Energy Opportunity

*With Middle East disruptions, African producers have a chance to secure a long-term role*

### IN FOCUS

#### Fuel Shortage

Lesson from South Sudan and Kenya

#### AFCFTA & Energy

How the free trade area is reshaping African energy markets

## IN GLOBAL ENERGY, DIVERSIFYING MARKETS AND INVESTING IN CAPACITY ARE CRUCIAL



### REGIONAL COOPERATION NEEDED

- Shared fuel reserves for crises Response
- Cross-boarder pipelines & transport Network
- Local Refining investment
- Joint policies to stabilize prices

### Spotlight on the African Energy Bank

A new path to energy sovereignty?  
Can Africa self-fund its energy future?

### Spotlight on the African Energy Bank

Integrating for resilience: Steps for a united and self-sufficient future.

# Africa Supply Chain & Energy Bulletin: Joint Publication by Desiderio Consultants & AISCR *Edition 1 – April 2026*

## Africa's Energy Moment: From Opportunity to Responsibility

Africa stands at a defining moment in its energy trajectory, where rising demand, industrial expansion, and global disruptions converge to create both risk and opportunity. This bulletin marks the launch of a joint initiative between AISCR and Desiderio Consultants, designed as a platform to deliver concise, insight-driven analysis of supply chain developments across the continent.

This inaugural edition examines the impact of disruptions in global energy flows triggered by the conflict in the Persian Gulf, assessing their implications for African economies. It highlights persistent challenges, including fuel shortages, price volatility, and structural inefficiencies, while also pointing to emerging opportunities for African countries to reposition themselves within global energy supply chains.

From the transformative role of Nigeria's Dangote Refinery in strengthening regional fuel security to the potential of AfCFTA in advancing intra-African energy trade, this bulletin goes beyond tracking events. It distills key trends, offers practical insights, and supports informed decision-making in a rapidly evolving global landscape. Ultimately, it underscores how Africa can turn current disruptions into a pathway toward a more resilient, integrated, and equitable energy future.

*Prof Marcus Ambe, President & CEO AISCR*

## Dangote Refinery – Transforming Africa's Fuel Landscape: Nigeria's powerhouse refinery boosts regional energy security

The Dangote Refinery is [ramping up gasoline exports](#) across Africa. However, higher export volumes do not automatically translate into lower energy costs at home. The real challenge lies in balancing external sales with reliable domestic supply. This calls for coordinated action between governments and private operators to secure local markets, ensure transparent pricing, and strengthen distribution systems. Stable and affordable energy is not just desirable: it is essential for Africa's industrialisation, a central ambition of the African Continental Free Trade Area (AfCFTA).

The refinery's impact depends on efficient trade ecosystems: functioning cross-border infrastructure, harmonized regulations, streamlined customs procedures, and reliable payment systems. Without these, even competitively priced fuel cannot move efficiently across the continent.

If these constraints are addressed, Dangote's expansion could catalyze a structural shift in African energy: reducing reliance on imports, enhancing intra-African competition, and boosting investment in refining and logistics.

### Key Takeaways:

- Balance export expansion with domestic energy security.
- Prioritize infrastructure and trade facilitation to unlock regional markets.
- Use competition to drive efficiency and strengthen supply resilience.

## Africa's Strategic Energy Opportunity: Seizing a historic chance amid Middle East disruptions



Global energy disruptions, particularly in the Middle East, create a rare opportunity for African producers to establish themselves as reliable long-term suppliers.

The recent escalation of the Yemen conflict, including the [Houthi threat to the Bab el-Mandeb Strait](#), highlights the vulnerability of global shipping routes and the urgent need for diversified supply sources. African producers can capitalize on this by:

- Signing long-term supply contracts.
- Investing in refineries and gas plants to ensure uninterrupted operations.
- Diversifying export markets to avoid dependence on a single buyer.

Countries like [Algeria](#) are already demonstrating how expanding energy partnerships can help diversify supply sources and reduce reliance on vulnerable global supply route.

### Key Takeaways:

- Reliability and capacity expansion build global trust.
- Market diversification avoids African energy producer countries to be perceived as temporary "alternative" sources.

## Exposing Africa's Energy Vulnerabilities: Why Shortages and Price Spikes Persist

Fuel shortages, rationing, and rising prices continue to affect African countries. The [Egyptian government](#) has ordered shops, restaurants, and cafes to close by 9 PM (10 PM during weekends), starting from 1st April 2026, as part of a raft of temporary measures to combat soaring energy prices caused by the Iran war. South Sudan and Mauritius have both [announced](#) similar measures restricting electricity consumption.

In [Kenya](#), the Energy and Petroleum Regulatory Authority (EPRA) decided to freeze retail pump prices for petrol, diesel, and kerosene, keeping them unchanged despite ongoing increases in global oil prices (a move aimed at shielding consumers from immediate cost increases). However, this price freeze has contributed to market distortions in the local fuel sector. With prices fixed while international costs rose sharply, many independent petrol stations began to hold back supplies and buy extra fuel in anticipation of a future price review, rather than selling at the current controlled rates. In contrast, [Zimbabwe](#) announced changes to its regulations to allow the dilution of petrol by increasing the ethanol content from 5% to 20%.

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These measures highlight structural weaknesses in Africa's energy systems which affect also oil producers. These pressures stem from a combination of factors: heavy dependence on imports and limited supply routes, insufficient refining capacity, infrastructure bottlenecks, and fragmented governance with weak regional coordination.

Addressing these vulnerabilities requires a shift from isolated national approaches to coordinated regional solutions. Shared strategic reserves could provide a buffer during crises, while integrated cross-border pipelines and transport networks would allow energy to flow more efficiently to where it is needed. Expanding local refining capacity would reduce dependence on external suppliers, and aligned policy frameworks could help stabilize markets and manage price volatility. Ultimately, resilience will depend on Africa's ability to act collectively—building interconnected systems that can absorb shocks rather than amplify them.

### Key Takeaways:

- Regional backup mechanisms are critical to mitigate external disruptions
- Stronger coordination is the foundation of a more resilient and reliable energy system

### AfCFTA & Regional Energy Trade: Building Intra-African Energy Markets

Recent disruptions in the Gulf highlight the vulnerability of African economies to external energy shocks and underscore the urgency of building intra-African energy markets under the AfCFTA. Regional trade can reduce dependence on extra-continental suppliers, shorten supply chains, lower transport costs, and improve access for landlocked countries. Over time, this can contribute to price stability, support industrial activity, and strengthen economic resilience by securing reliable energy inputs for businesses and households.

### Structural Requirements and Challenges

To realize these benefits, African countries must address key structural constraints. Efficient cross-border energy trade relies on:

- Adequate infrastructure, including pipelines, storage facilities, port capacity (ports equipped to handle fuel imports and exports, including jetties, storage tanks, and loading/unloading facilities for ships carrying refined products or crude oil), and heavy-duty roads and rail lines that can transport fuel safely and efficiently from refineries or depots to inland or landlocked markets.
- Streamlined border procedures and harmonized regulatory frameworks to facilitate smooth trade flows.

Without these elements, intra-African energy trade risks being fragmented, costly, or unreliable.

### Building Regional Energy Hub



With sustained investment and coordination, countries with significant refining capacity can evolve into regional energy hubs, supplying neighboring markets and anchoring integrated energy value chains

This development would enhance supply chain resilience, support regional industrialization, and move Africa toward a more self-reliant, interconnected, and robust energy system.

### Key Takeaways

- Resilience through regional trade: Intra-African energy trade reduces exposure to global supply shocks and strengthens energy security.
- Infrastructure and policy alignment are critical: Effective pipelines, storage, transport networks, and harmonized regulations are essential to unlock AfCFTA's full potential.
- Refining hubs drive integration: Countries with refining capacity can become regional suppliers, reshaping Africa's energy landscape and fostering deeper continental integration

### Spotlight: Africa Energy Bank, A new path to energy sovereignty

[The Africa Energy Bank \(AEB\)](#) is a landmark financial institution, formed through a strategic partnership between the African Petroleum Producers' Organization (APPO) and the African Export-Import Bank (Afreximbank). Announced in 2023, it is currently being operationalised as a key instrument to finance projects in the Africa's energy sector and strengthen the continent's energy sovereignty. and announced in 2023, is being operationalized as a dedicated vehicle to finance Africa's energy value chain. Its emergence comes at a critical moment, as global fuel supply disruptions expose the risks of overdependence on external markets and fragmented supply systems.

In this context, the Bank's utility goes beyond long-term development finance. It can act as a stabilising instrument. By mobilising African capital into refining, storage, transport infrastructure, and regional distribution, it can help reduce supply bottlenecks, strengthen intra-African energy flows, and cushion the continent against external shocks. In other words, it provides a mechanism not only to develop resources, but to secure access to them when global markets become volatile



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By supporting investments across the energy value chain that go beyond extraction, the Bank can help African nations to retain more value domestically, foster industrialisation, create jobs, and build integrated regional markets. This move can accelerate the shift from exporting raw commodities to value-added energy systems.

### Key Takeaways:

- Acts as a financial buffer to enhance resilience during global supply disruptions.
- Strengthens Africa's capacity to finance and control its own energy systems.
- Supports the transition toward regional, value-added energy markets.

### The Road Ahead: Turning Crisis into Opportunity. Building a Resilient, Integrated, and Equitable Energy Future

As Africa faces an increasingly complex energy landscape, marked by global supply shocks, rising demand, and climate-related pressures, the path forward lies not merely in responding to crises but in transforming them into strategic opportunities for growth and resilience. African leaders and policymakers are called upon to adopt a forward-looking vision that emphasizes regional integration, robust governance, and investment in human and technological capital.

### Coordinated Regional Infrastructure

A cornerstone of a resilient energy future is the development of harmonized regional infrastructure. This involves not only expanding pipelines that connect producers and consumers across borders but also establishing shared reserves and strategically located storage facilities. Such coordination reduces vulnerability to localized disruptions, ensures a smoother flow of energy supplies, and creates economies of scale that lower costs. By treating energy infrastructure as a continental network rather than isolated national systems, African countries can collectively enhance energy security and strengthen their bargaining position in global markets.

### Strengthening Governance and Legal Frameworks

Infrastructure alone is not enough. It must be complemented by strong governance and transparent legal systems. African leaders need to implement enforceable regional regulatory frameworks that provide certainty to investors, protect public interests, and facilitate cross-border cooperation. Transparent contracts, standardized regulations, and efficient dispute-resolution mechanisms can prevent conflicts, attract sustainable investment, and ensure that the benefits of energy development are equitably shared among all stakeholders. This institutional solidity transforms energy shocks from a source of instability into opportunities for coordinated growth.

### Investing in Human Capital and Technology

Equally critical is the cultivation of skilled human resources and the adoption of modern technologies. Training engineers, technicians, and energy managers to operate complex systems is essential for the efficient functioning of regional networks. At the same time, embracing advanced energy platforms—ranging from smart grids to renewable integration and digital monitoring systems—can optimize production, distribution, and consumption. Investing in human capital ensures that Africa's energy future is not only technically robust but also socially inclusive, empowering communities and fostering innovation across the sector.

### Key Takeaways

- Coordinated Action as a Strategic Lever: By aligning infrastructure development, policy, and investment, African nations can transform global and regional energy shocks into opportunities for collaboration and growth.
- Integrated Energy Systems for Shared Prosperity: Building interlinked, resilient energy systems guarantees more equitable access to power, enhances regional stability, and lays the foundation for long-term economic development across the continent.

In sum, the challenges facing Africa's energy sector are not insurmountable. With strategic foresight, investment in people and technology, and strong governance, crises can be leveraged to build an energy future that is resilient, integrated, and truly inclusive, benefiting all African citizens.

**Kindly support this initiative by taking a few minutes to complete the survey.**



The graphic features the AISCR logo at the top left, with the text 'ADVANCED INSTITUTE FOR SUPPLY CHAIN RESEARCH' and 'Connecting Research, Education & Practice' to its right. Below this is an illustration of a person in a purple shirt and red pants holding a megaphone. The main title 'AISCR SURVEY' is prominently displayed in large blue letters. Underneath, the subtitle reads 'TRADE COMPLIANCE IN 2026: EXPORT CONTROLS, SANCTIONS & TRADE-READY SUPPLY CHAINS'. A QR code is positioned on the right side. To the left of the QR code, a list of bullet points states: 'Your input will help shape: Practical insights for navigating export controls and sanctions; Strategies for building trade-ready and compliant supply chains; Capacity-building and training priorities for institutions and professionals'. At the bottom, the text 'Scan Here!' is followed by 'Takes: 3-5 minutes - Confidential responses' and two contact options: 'info@aiscrglobal.org' and 'www.aiscrglobal.org'.

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2  
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23  
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### Webinar: Why Procurement fail and what african institutions must do differently

This interactive session will explore why procurement reforms frequently fail, drawing from real-world case studies, institutional experiences, and lessons learned across the continent. Participants will gain actionable insights into practical strategies for designing, implementing, and sustaining reforms that actually work.



The Africa Supply Chain & Energy Bulletin, by Desiderio Consultants and AISCR, offers key insights into Africa's evolving supply chains and energy sector and will continue bringing fresh, actionable perspectives to help stakeholders navigate challenges and seize opportunities.

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