



IUMI 2018

Ports development in Africa seen by
an operator / European investor

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19th September 2018



Bolloré

- › **82,000** employees in **143** countries
- › Turnover: **€18.325 B**
- › EBITDA in 2017: **€2,072 M** (+103%)
- › Net Income in 2017: **€2081 M**

Founded in 1822, the **Bolloré Group** ranks among the **500 largest companies in the world**

Managed since 1981 by Vincent Bolloré, from the 6th generation of the Bolloré family

Stability of shareholding structure allows to pursue a **long-term investment strategy**

**TRANSPORT
AND
LOGISTIQUE**

**MEDIAS AND
COMMUNICATION**

**ELECTRICITY
STORAGE AND
SOLUTIONS**

BOLLORE

TRANSPORT & LOGISTICS



LEADING OPERATOR IN PORT CONCESSIONS



- › Operator of 21 port concessions worldwide
- › 1st port concessions operator in Africa
- › Operator in 15 French ports
- › 98 shipping agencies



GLOBAL PLAYER IN INTERNATIONAL FREIGHT FORWARDING AND LOGISTICS



- › Among top 10 worldwide
- › Global footprint: Europe, Asia, US and Africa



OPERATOR OF 3 RAILWAY CONCESSIONS IN AFRICA



- › Operator of 3 rail concessions in Africa
 - Sitarail: Côte d'Ivoire – Burkina Faso
 - Camrail: Cameroon
 - Benirail: Niger – Benin



MAJOR PLAYER IN OIL LOGISTICS AND DISTRIBUTION



- › 2.3 million cubic meters of storage capacity
- › Leading independent distributor of heating oil in France

1st integrated logistics network in africa

AFRICA

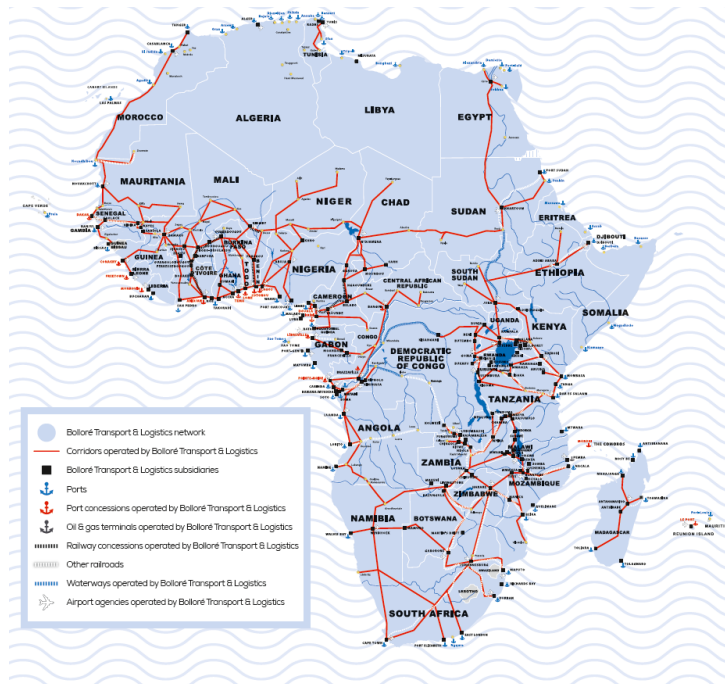
Area : 30 415 873 km²

Nb of people (2016) : 1 225 080 510

Nb of Countries : 54

Main Languages: Arab, French, English, Portuguese , others languages

From : Wikipédia



BOLLORE KEY FIGURES



22 000 people in 46 countries



21 ports



281 covered warehouses



6,000 trucks and handling equipments



Management of 40 specific corridors



years of continuous presence on the African continent

Bolloré Ports in Africa

KEY FIGURES

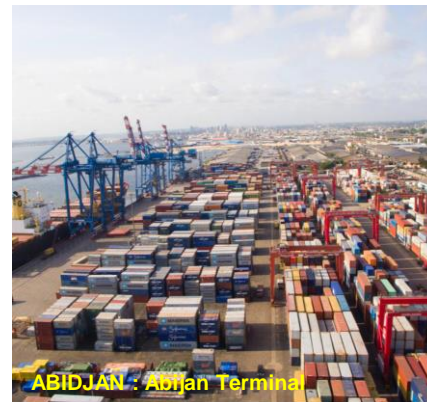
First private port operator in Africa

- › **10 000** employees
- › **€ 320 M** annual investments in 2017
- › **> € 3 Bn** investments since 15 years
- › **17** container terminal concessions
- › **4,75 M** TEUs handled
- › **11 M** tons of general cargo handled
- › **93** shipping agencies



Ports Developments in Africa

- Strong development for 15 years
- Indisputable results
- Increased private Investment
- Recommendations from The World Bank

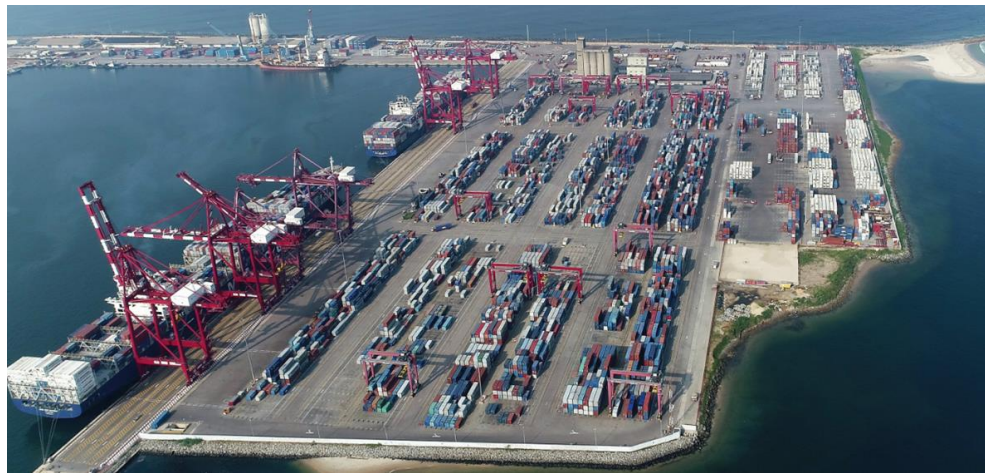


Port Development in Africa

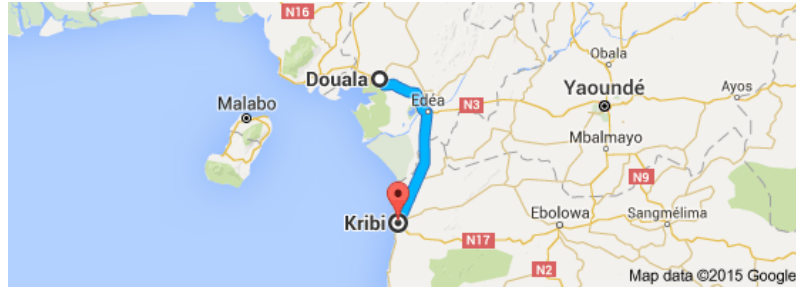
Republique of the Congo Pointe Noire 2009



Republique of the Congo Pointe Noire 2018



Current Problem : Congestion has moved



Current Problem - Congestion has moved : 2 solutions

- 1 Open up the ports
- 2 Decongest the cities

Ultimate solution: creating dry ports

It is today the priority of the investments of the providers in Africa

Current Problem - Congestion has moved : Dry Port

These are ports without direct access to the sea, located in the interior of the continent, in countries landlocked or not.

- Many advantages
- A geopolitical need



25 DRY PORTS AND ICDs IN AFRICA

- Bobo Dioulasso (Burkina Faso)
- Ouagadougou x 2 (Burkina Faso)
- Kagbelen (Guinea)
- Ngaoundéré (Cameroon)
- Bélabo (Cameroon)
- Franceville (Gabon)
- Téma (Ghana)
- Mombasa x 2 (Kenya)
- Blantyre (Malawi)
- Bamako x 3 (Mali)
- Lagos x 2 (Nigeria)
- Niamey (Niger)
- Dosso (Niger)
- Kampala (Uganda)
- Kigali (Rwanda)
- Dar es Salaam (Tanzania)
- Bangui (Central African Rep.)
- Kinshasa x 2 (DRC)
- SMT - N'Gueli (Chad)

DRY PORTS

The dry ports must be connected by road, by rail even by river to the seafront

- Corridor concept
- An example of a corridor organization: railway



- 1000 km railway
- 38 Locomotives
- 1213 wagons



- 1260 km railway
- 24 Locomotives
- 834 wagons



An example of one of our China / Africa Trade



180,000 employees

N° 83 in the Fortune Global 500

3 Business Units :

- Network infrastructure
- Corporate business
- Consumer business

+ 170 countries

With Bolloré : 27 countries in Africa
in the Top 5 of their FFW
Air / Sea / Road / Customs
> 7,000 TEU's

BOLLORÉ / HUAWEI IN AFRICA



27 countries



PTW 26 countries



28 warehouses (24 countries)



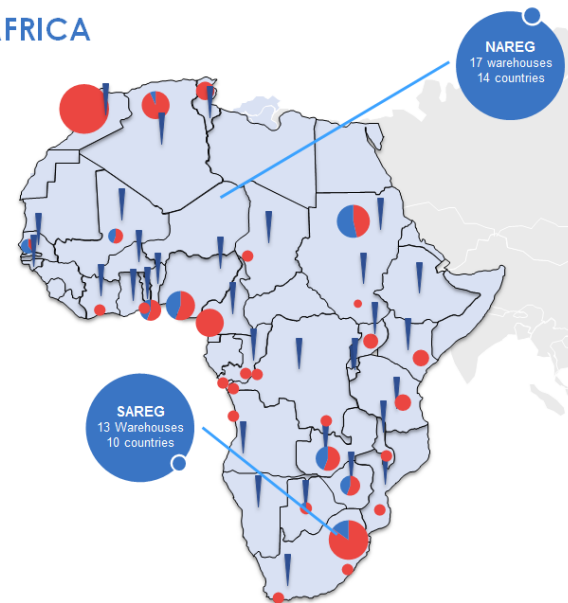
17 countries



Whs indoor / outdoor space repartition



Bolloré / Huawei Cooperation



THANK YOU



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