

Marruecos, Puerta de Entrada a África

Situación y Oportunidades



Webinario: Miércoles 6 de Julio 2022

Casablanca: Pulmón Económico del País



Tanger Med: Puerta de Enlace a África



En 2021 superó a Algeciras por primera vez como 1er puerto en tráfico de contenedores del Mediterráneo







5,8 millones vs 5,1 millones

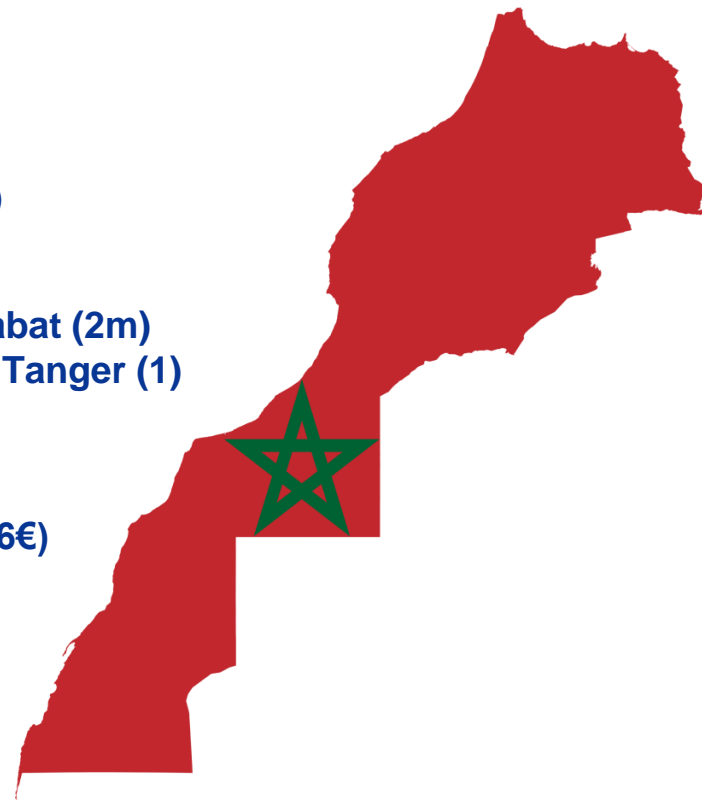
Ifrane: La pequeña Suiza de Marruecos



Marruecos

Información General

	Capital	Rabat
	Area	710.850 KM2
	Población	37,13 millones (Enero 2021) 60,3% urbana (2015)
	Principales Ciudades	Casablanca (5 millones), Rabat (2m) Fez (1m), Marrakech (1m) y Tanger (1)
	Esperanza de Vida	76 años
	Moneda	Dirham (MAD) (1 MAD=0,096€)
	PIB per capita	3.009,25 USD (2020)



Entre enero y febrero de 2022 Marruecos fue el 2º destino de las exportaciones gallegas fuera de la UE y el 3º mercado del que más importamos

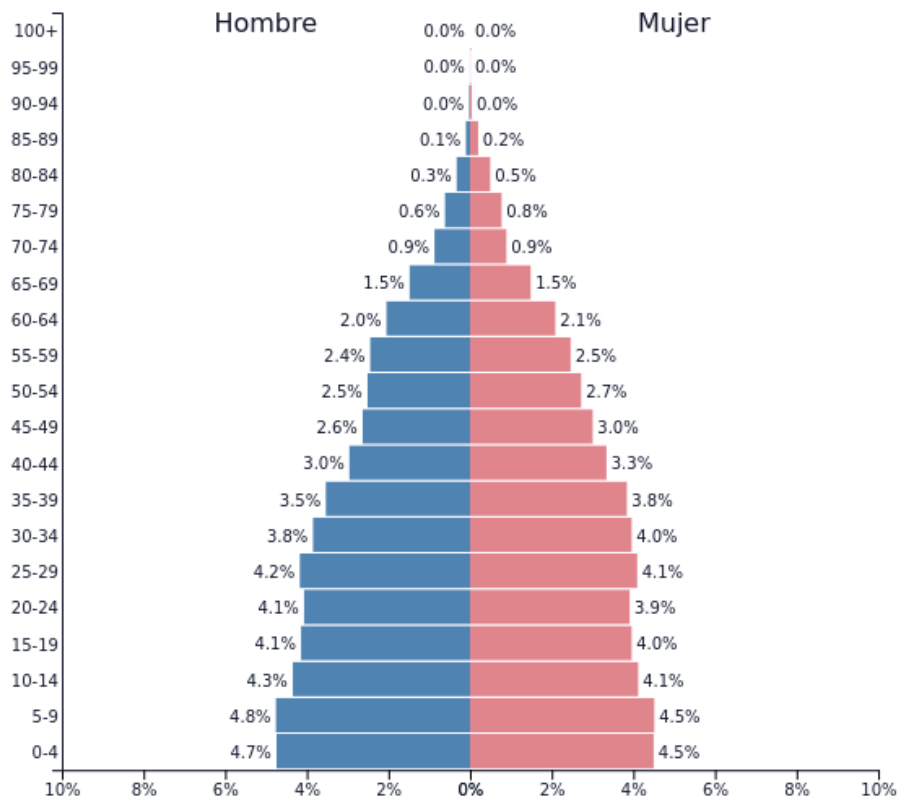
ECONOMÍA:

Industria: Fosfatos, automoción, aeronáutica, energías renovables, textiles, artesanía/cuero...

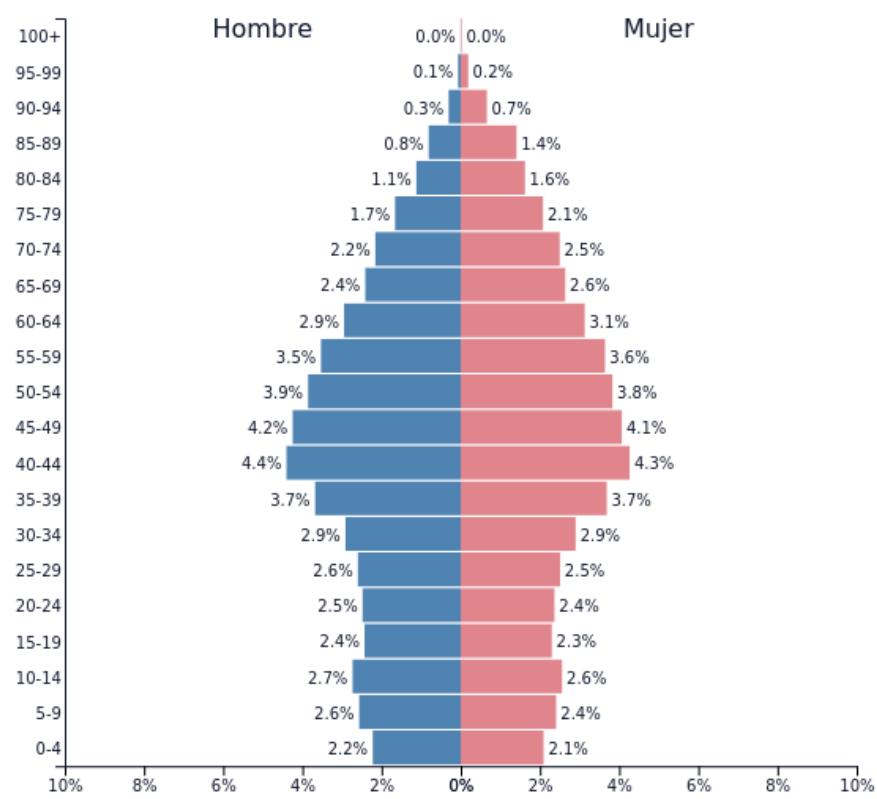
Agricultura: Cebada, trigo, frutas cítricas, vino y ganado

Exportaciones: Automóvil, textil, pesca, productos químicos inorgánicos, transistores, minerales, fertilizantes...

Pirámide Poblacional



PopulationPyramid.net



PopulationPyramid.net

Infraestructuras



14 aeropuertos internacionales

Casablanca, Hub Europa-África



Primer TGV del continente (Casablanca-Tanger)

Prevista una línea Casablanca-Marrakech-Agadir



1.839 km de autopistas

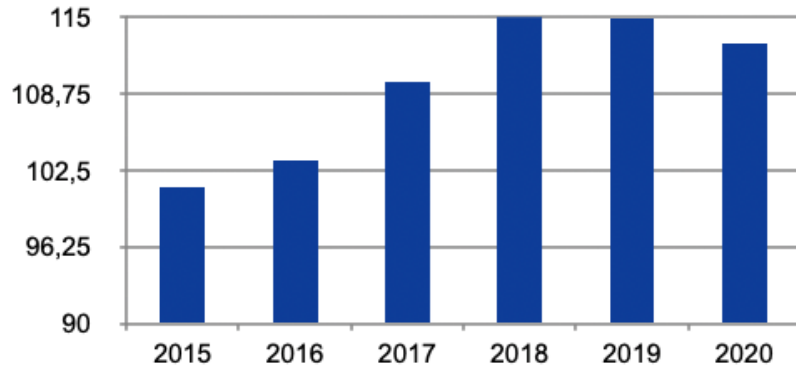


38 puertos de los cuales 13 están abiertos al comercio internacional

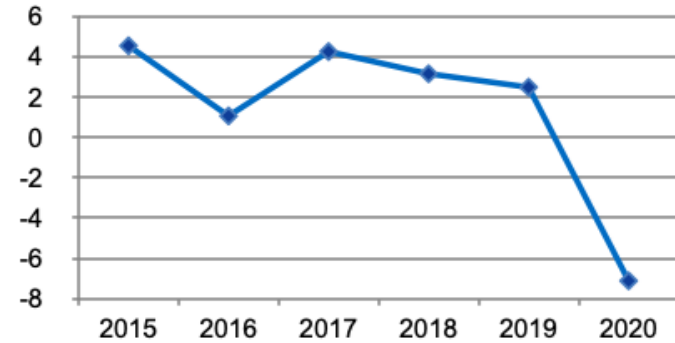
El 98% del comercio exterior del país pasa a través de los puertos

Indicadores Económicos (1)

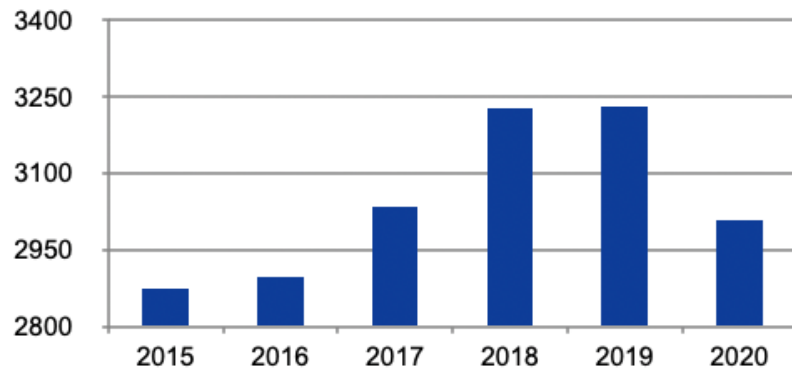
PIB (Miles de millones de \$)



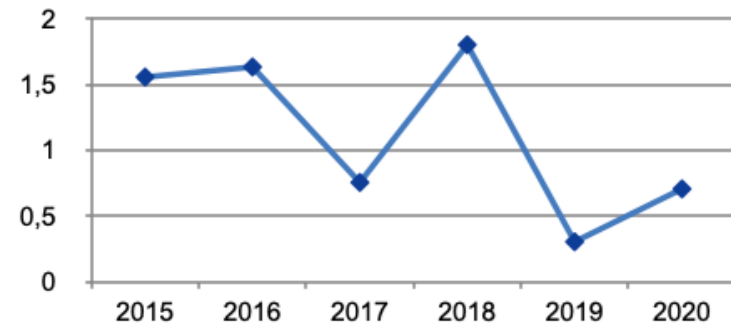
PIB (Crecimiento anual en %)



PIB per Capita (\$)

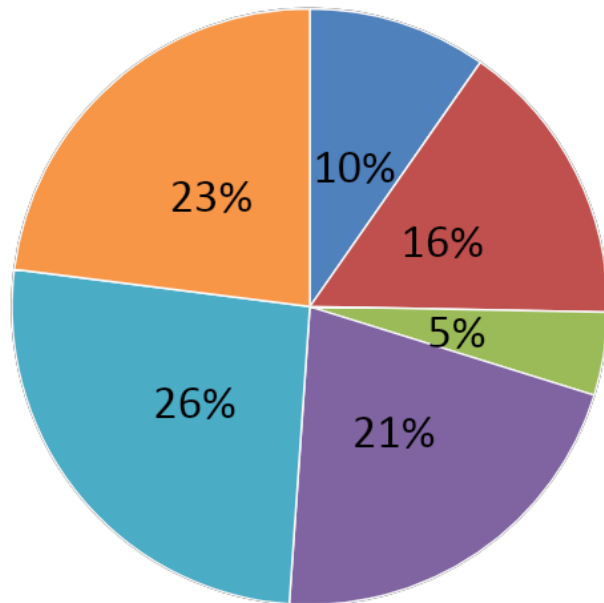


Tasa de Inflación (%)



Indicadores Económicos (2)

Estructura de las Importaciones (2019)



- Productos alimenarios
- Productos energéticos
- Productos "brutos"
- Semimanufacturas
- Productos finales de equipamiento
- Productos finales de consumo

-Las importaciones en 2019 ascendieron a 492 mil millones de Dh (46,90 mil millones €)

-Aumento del 2% respecto al 2018 (+9,8 mil millones de Dh).

-Reducción de la importación de productos energéticos y de productos brutos

-En 2018 el aumento fue del 9,9%

-En 2017 del 6,7%

-En 2016 del 10,3%

Indicadores Económicos (3)

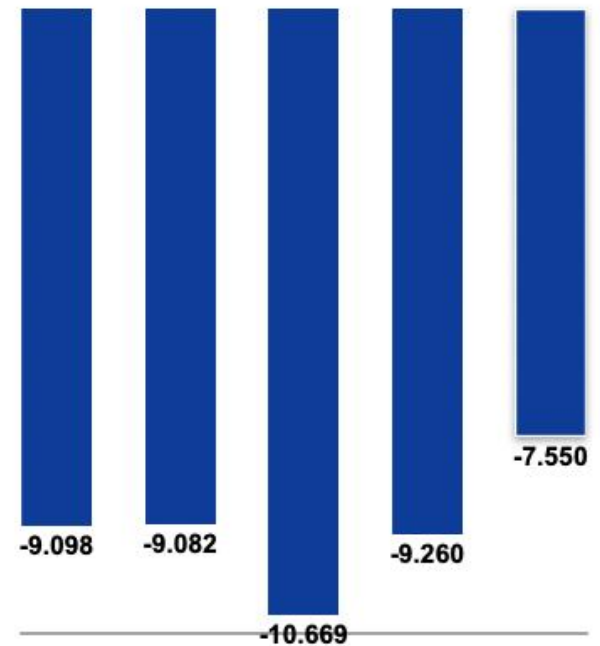
Crecimiento Anual de las Imp/Exportaciones en %



En % du PIB



Balanza Comercial (Millones de €)



Oportunidades de Negocio

- Agrícola
- Industrial
- Turismo
- Logística
- Construcción
- Infraestructuras
- Bienes de consumo
- Energías renovables



A tener en cuenta



- **Alto coste de entrada y aprendizaje**
- Asesoramiento personalizado en todo momento
- **Necesario definir estrategias a medio plazo, evitando los estereotipos y atajos**
- Relativamente abierto a los intercambios con el exterior y se ha dotado de un importante número de tratados de libre comercio
- Existen múltiples **barreras**, sobre todo **no arancelarias**

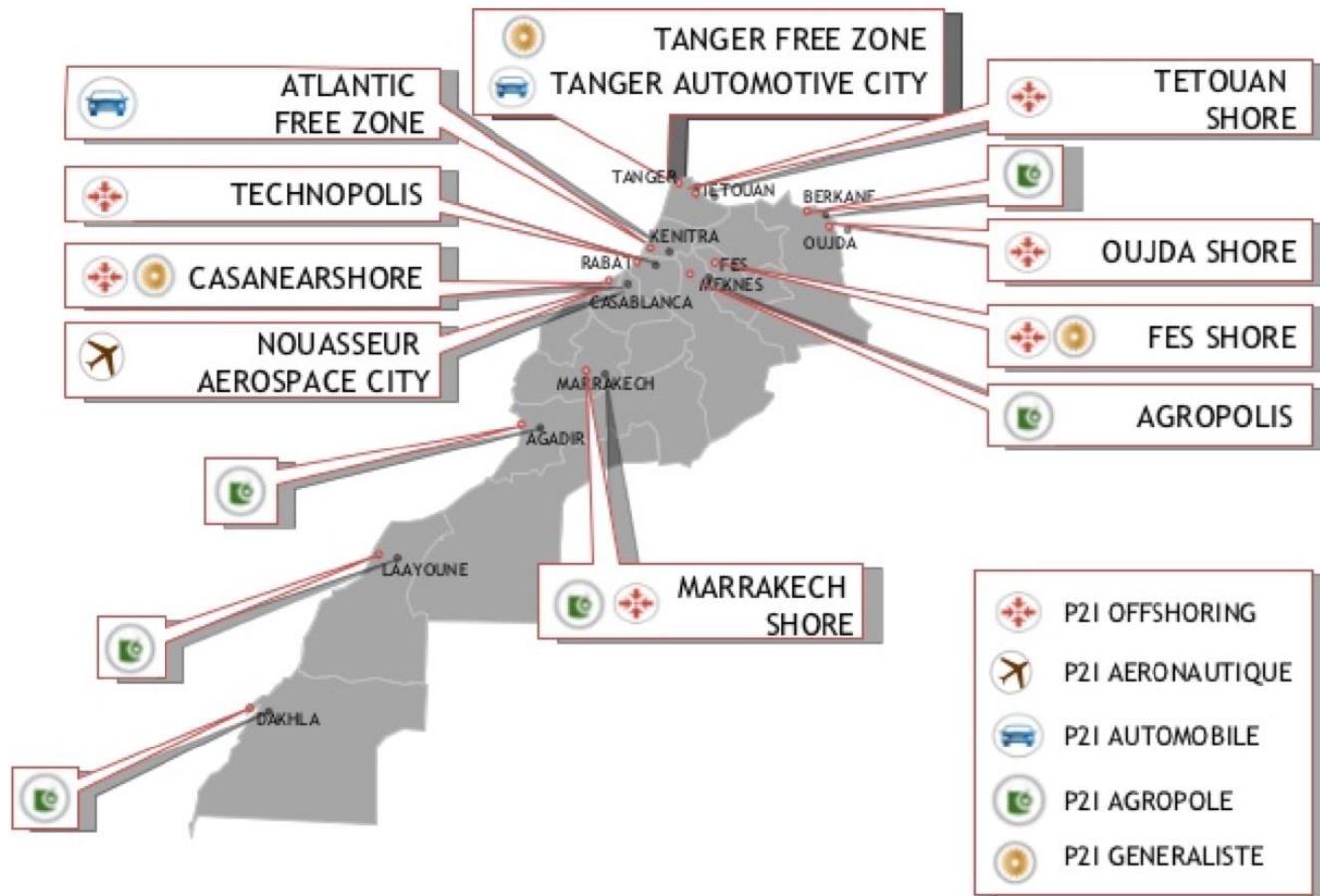
División Regional



Marruecos: Puerta de Entrada a África

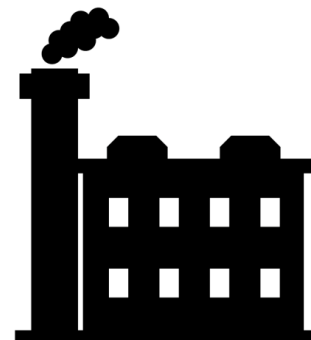


El Sector Industrial

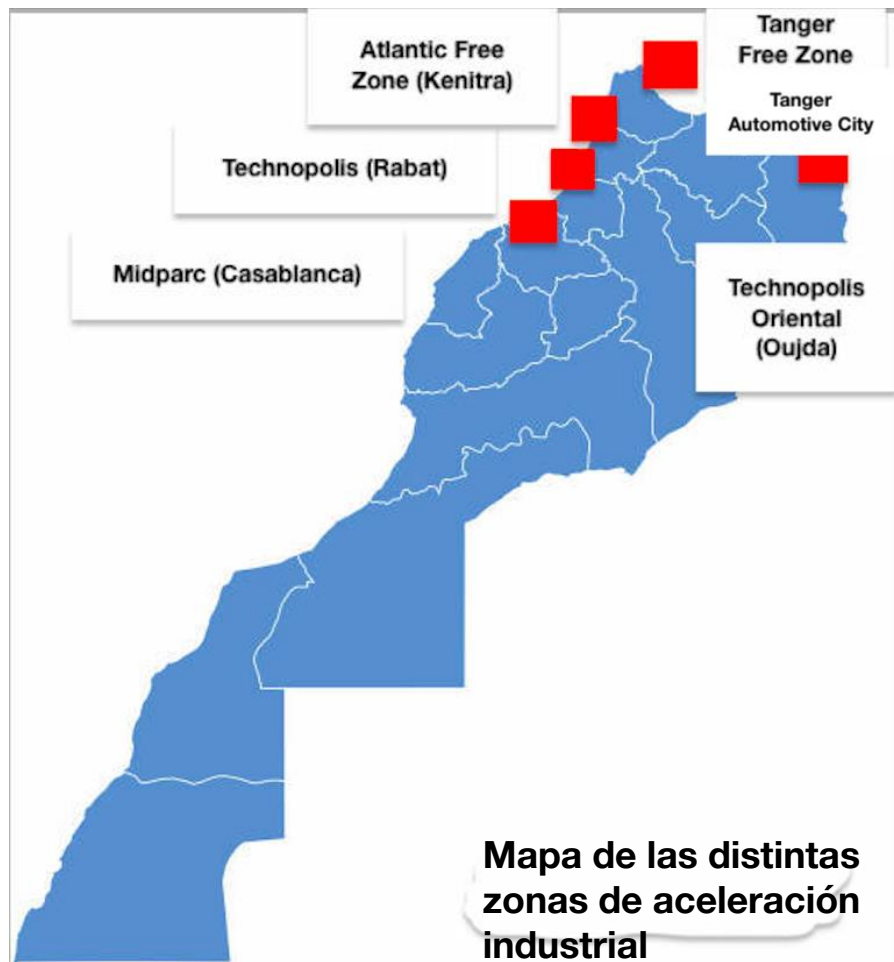


Algunos de los Principales Parques Industriales

- Región de Tánger-Tetuán
 - Tanger Free Zone
 - Tanger Automotive City
- Región de Kenitra
 - Atlantic Free Zone
 - Zona Industrial de Sidi Kacem
- Región de Rabat-Salé-Zemmour-Zaer
 - Parque Industrial de Ain Johra
 - Technopolis
- Región del gran Casablanca
 - Mohammedia
 - Ouled Salah



Zonas Francas o de Aceleración Industrial y Otros Incentivos



Fuente: Elaboración propia

Otros incentivos:

- Región de Beni Mellal-Khenifra
 - Repatriación de capitales
 - Exoneración del IVA para la compra de equipamiento, material... en el proceso de instalación
 - Exoneración de impuestos durante los primeros 5 años y tasa reducida en los años siguientes
- Región Dakhla :
 - Exoneraciones fiscales
 - Apoyo para los proyectos que pasen los 100 millones de Dhs (Infraestructuras ext, ayuda reclutamiento...)
 - Facilidad trámites
 - Acompañamiento obtención autorizaciones

Sectores Clave



El Sector del Automóvil



*Ahora Stellantis

Kenitra



RENAULT NISSAN MITSUBISHI

Tanger y Casablanca (SOMACA)

- **1er sector exportador del país** (7,63 mil millones de € en 2019)
- 2º mayor productor del continente
- Más del 80% de los vehículos son exportados a Europa
- Ha creado +147.712 puestos de trabajos directos entre 2014-2019
- **+250 empresas marroquíes y extranjeras presentes**
- Tasa de integración local del 60% —> Objetivo del 80% para 2025



El Sector de la Aeronáutica

-Sector dinámico y en constante desarrollo

-**Presencia de 142 empresas** del sector. Entre ellas Boeing (Desde 2016), EADS, Safran, Bombardier, Lisi Aerospace, Daher, Le Piston, Aerolia, Thales...



-A finales de 2019 contaba con más de 17.500 personas empleadas y 1.500 millones de € de cifra de negocio.

-La tasa de integración local es del 38%

-Según el gabinete Mazars, **Marruecos es el 5º más dinámico del mundo** y el 1º en África en este campo

-Casablanca cuenta con una zona de aceleración industrial y 2 institutos de formación

El Sector de las Energías Renovables



-Success Story del continente

-País más atractivo de la región MENA y de África en términos de inversión en energías renovables

-Objetivo de alcanzar un mix energético mayoritariamente verde en 2030: 52%

-Destaca en energía eólica y solar

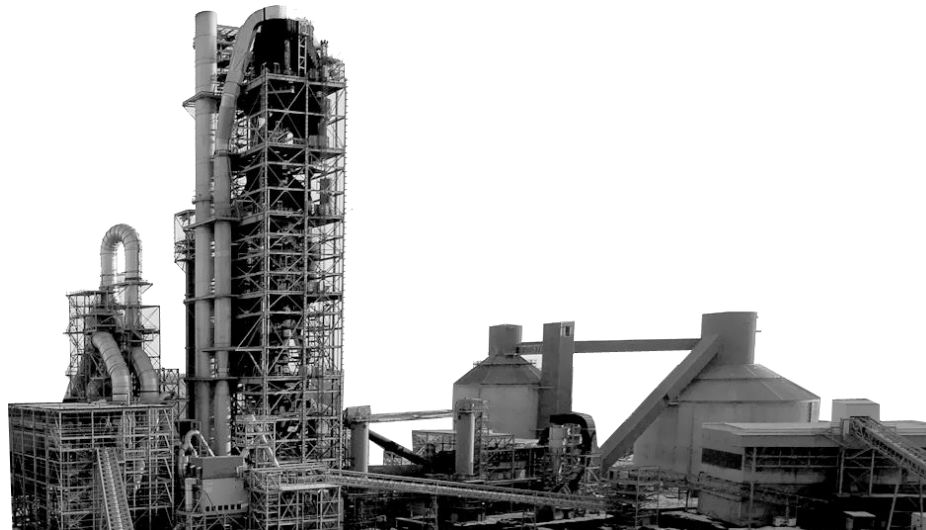
-A tener en cuenta el hidrógeno verde y energía eólica offshore

El Sector de la Agroindustria y Manufacturas

-La industria de fosfatos ha sido tradicionalmente la de mayor peso en las exportaciones. La principal compañía es de propiedad estatal al igual que muchas de ellas de la industria de la transformación del azúcar

-Las manufacturas suponen un 30% del PIB industrial

-Algunos ejemplos son productos alimentarios, bebidas, textiles, cerillas, metal y cuero. En la industria pesada serían las refinerías (2), fertilizantes químicos, fundición, asfalto o el cemento



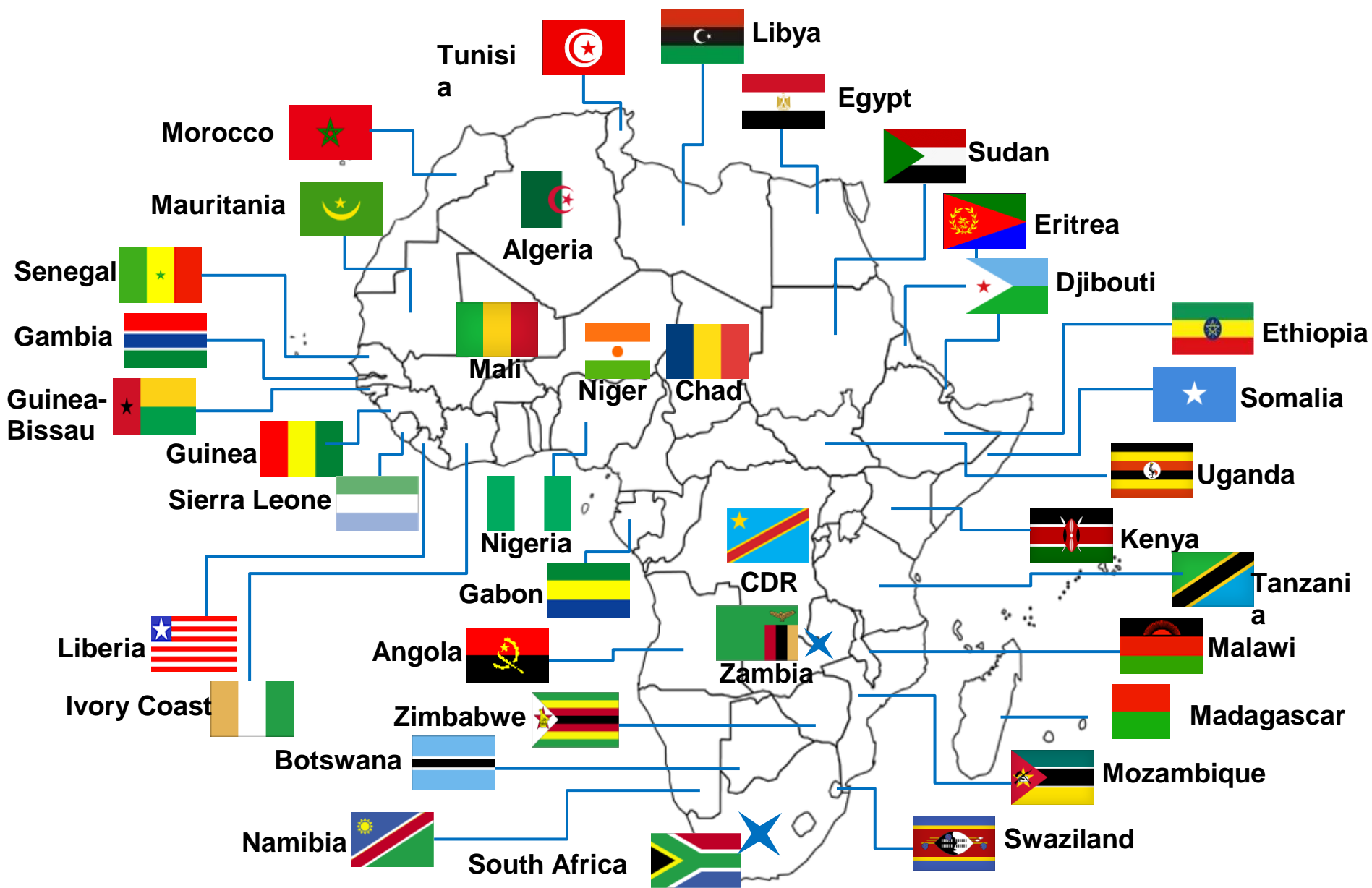
Otros Sectores de Interés



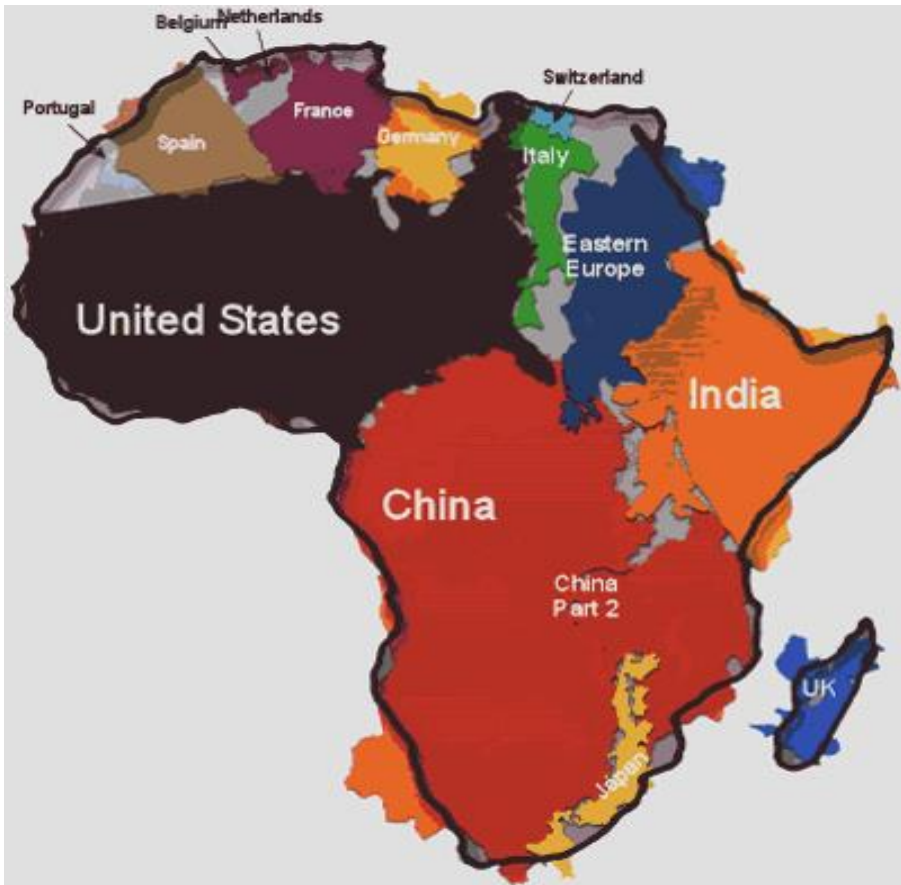
Ventajas a la Inversión Extranjera

- Situación geográfica y ventaja en costes
- Estabilidad política
- Estabilidad macroeconómica y buenos ratings de las agencias de inversión
- Apertura internacional y liberalización económica
- Mejora del clima de negocios
- Ambición y proyectos de desarrollo

¿Conoces Africa?



África



África tiene más países que ningún otro continente: **54**



2º Continente
más poblado

1,2 mil millones
de habitantes



El 50% de la población
es menor de 25 años

Por lo menos 3000 grupos étnicos
y +3000 lenguas



By 2100 **40%**
of the world's
population will be African



16 out of 26
fastest growing economies are in Africa

50%
are under 20



40%
live in cities



1.03
billion
people

Largest & youngest workforce | **122 million people**
will be added to the workforce by 2020

504 million



Fastest growing population
Fastest growing workforce

workforce by 2020

Fastest growing digital consumer market
600 million
internet users in 2025



360 million
smart phone users in 2025

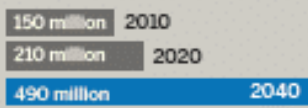


31%
of all Africans live within
25 km of internet connectivity



6-7%
Expected GDP growth in
Sub-Saharan Africa by 2020

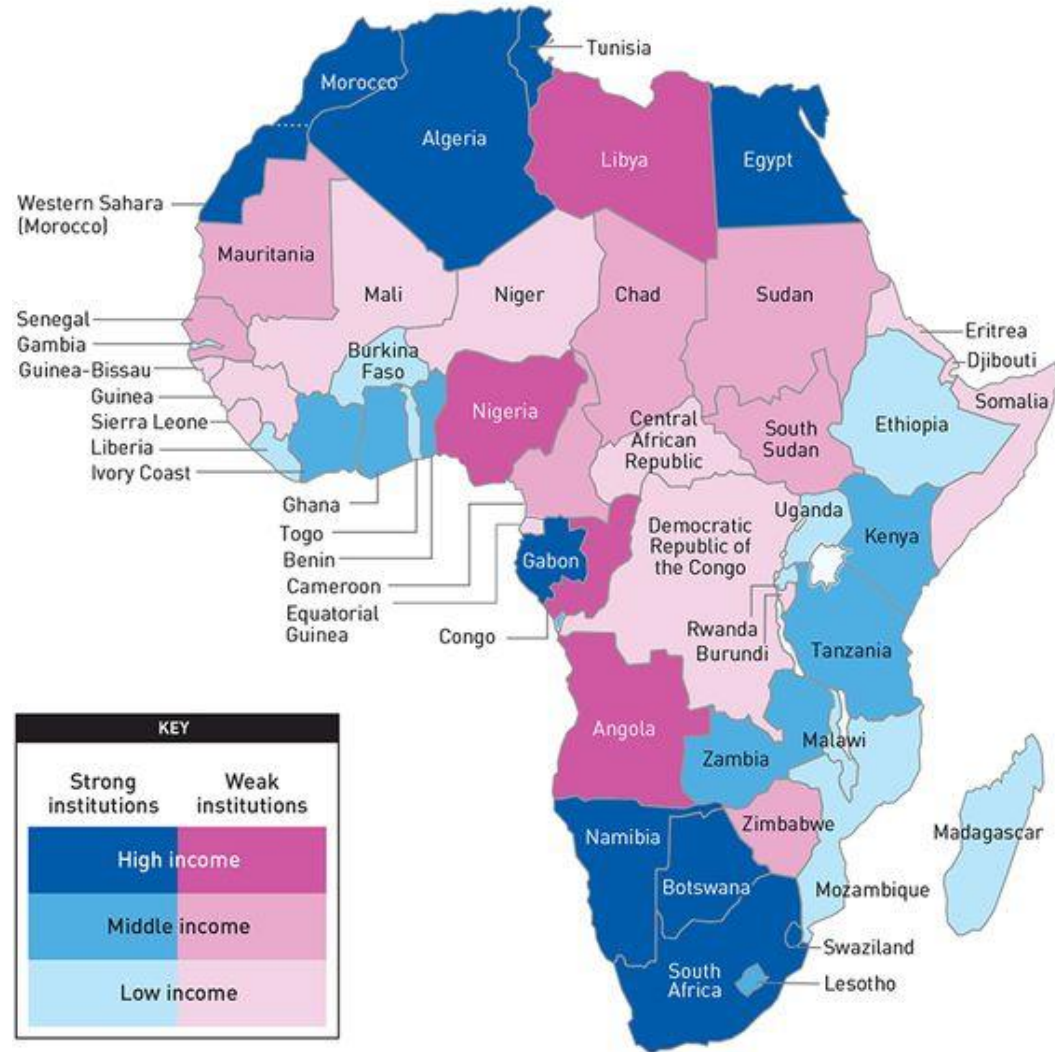
Exponential middle class
growth expected



2-3% Expected
GDP growth in
South Africa
by 2020

Africa's Markets

Analysis of wealth and institutional strength reveals six basic categories.



Note: Map excludes the following island nations: Cape Verde, Comoros, Mauritius, Sao Tome and Principe, and Seychelles.
Source: World Bank (2014 data on GDP per capita, at constant 2005 US\$); the World Bank's "Doing Business 2015" Index

TOTAL WEALTH OF AFRICAN CITIES IN 2017 (Billions US\$)



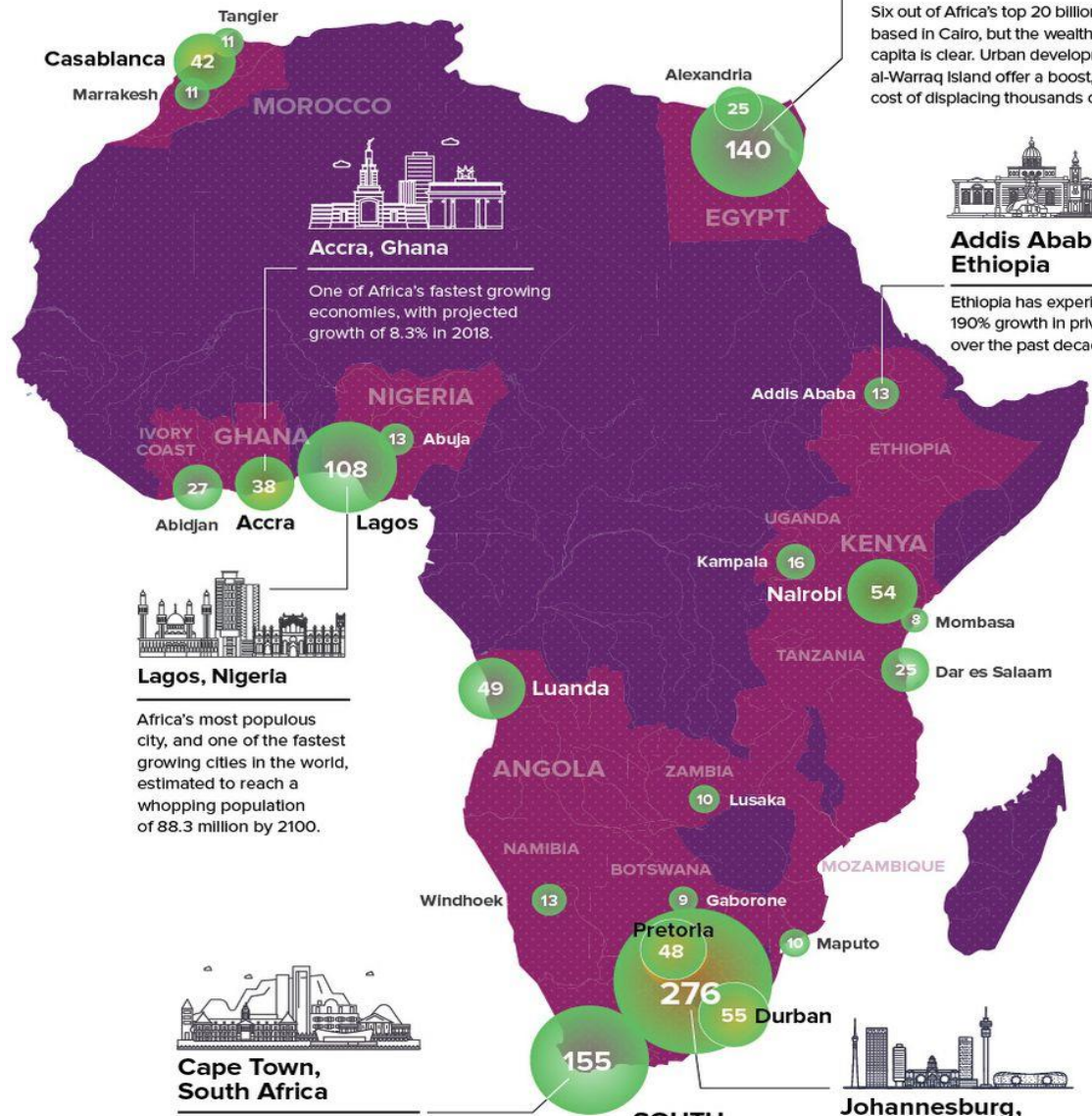
Cairo, Egypt

Six out of Africa's top 20 billionaires are based in Cairo, but the wealth disparity per capita is clear. Urban developments like al-Warraq Island offer a boost, but at the cost of displacing thousands of residents.



Addis Ababa, Ethiopia

Ethiopia has experienced a 190% growth in private wealth over the past decade.



Lagos, Nigeria

Africa's most populous city, and one of the fastest growing cities in the world, estimated to reach a whopping population of 88.3 million by 2100.



Cape Town, South Africa

Most expensive real estate in Africa, with prime rates of US\$6100 per square meter - prices on par with Berlin and Washington DC.



Johannesburg, South Africa

Home to 18,200 high net worth individuals, the largest concentration in Africa.



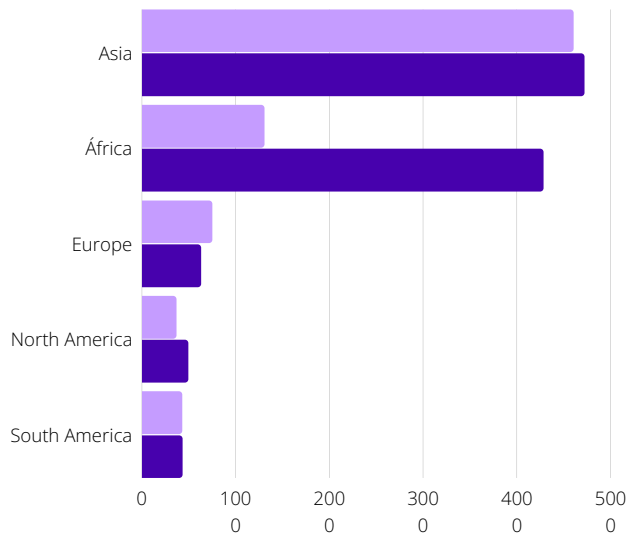
Accra, Ghana

One of Africa's fastest growing economies, with projected growth of 8.3% in 2018.

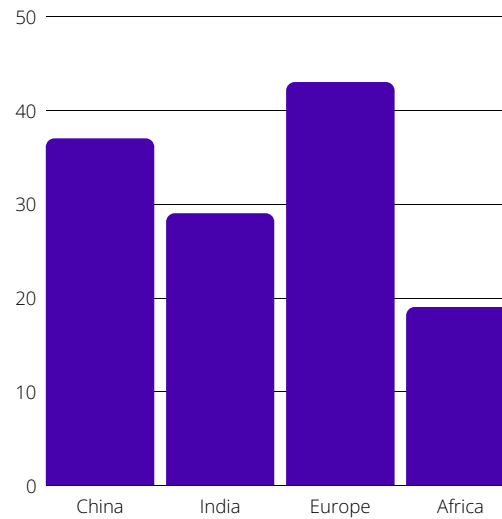
03

Africa, the continent of the future

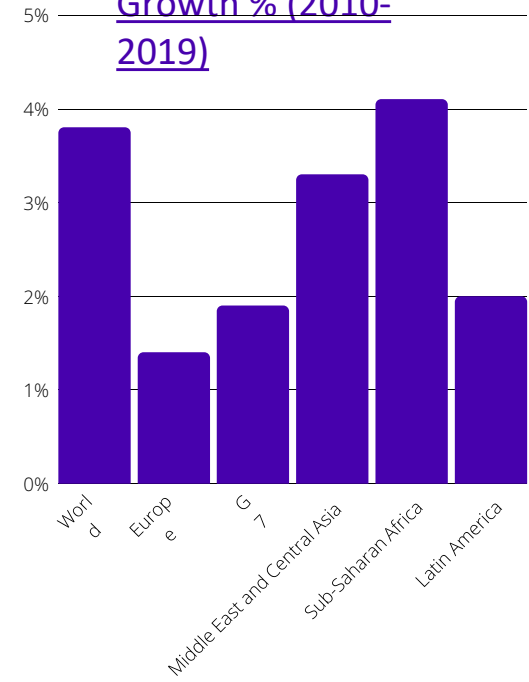
Evolution of the population 2020-2100



Average Age (2019)



10 Year Average GDP Growth % (2010-2019)



Countries with the most opportunities

04

Northern Africa

Morocco
Algeria
Tunisia
Egypt



Western Africa

Senegal
Ivory Coast
Ghana



Central Africa

Nigeria
Cameroon



Southern Africa

Angola
South Africa
Mozambique



Eastern Africa

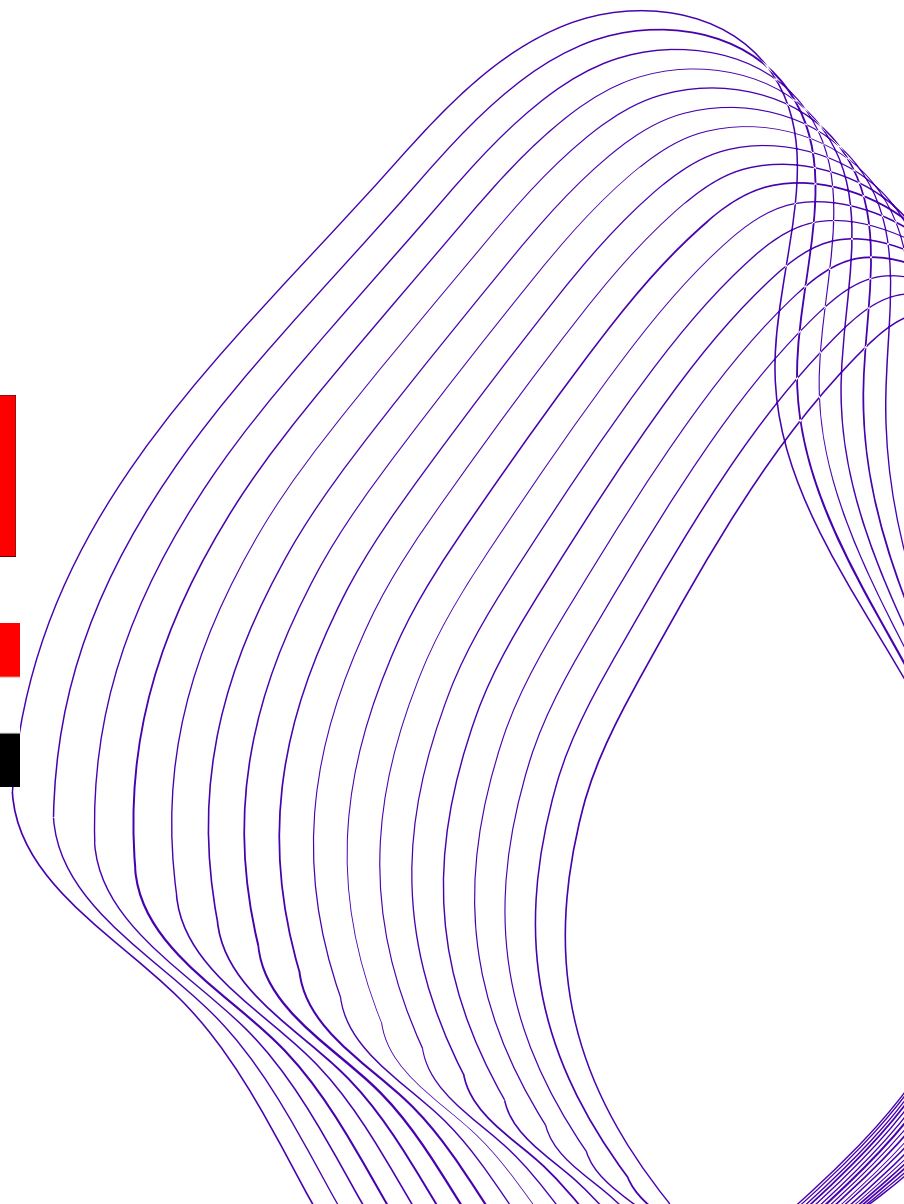
Kenya
Tanzania
Ethiopia
Rwanda



09

MOROCCO, THE GATE TO AFRICA | MARCH 2021

North Africa



Algeria

MOROCCO, THE GATE TO AFRICA | MARCH 2021

10

It is the biggest African country and the 10th in the world.

It has the highest life expectancy at birth in Africa.

It has almost 44 million inhabitants and is the 9th most populated African country.

Is the second largest Francophone country in the world in terms of speakers, in 2008 11 million Algerians (33%) could read and speak this language.



4th biggest African Economy and the 10th With Regards to GDP Per Capita

Free Trade Agreements Signed With the EU and AfcFTA. Member of Pan-Arab Free Trade Area

The country has repealed in 2020 the controversial 49-51% rule

Algeria's Population is Concentrated in the Coastal Area





Algeria's Main Sectors

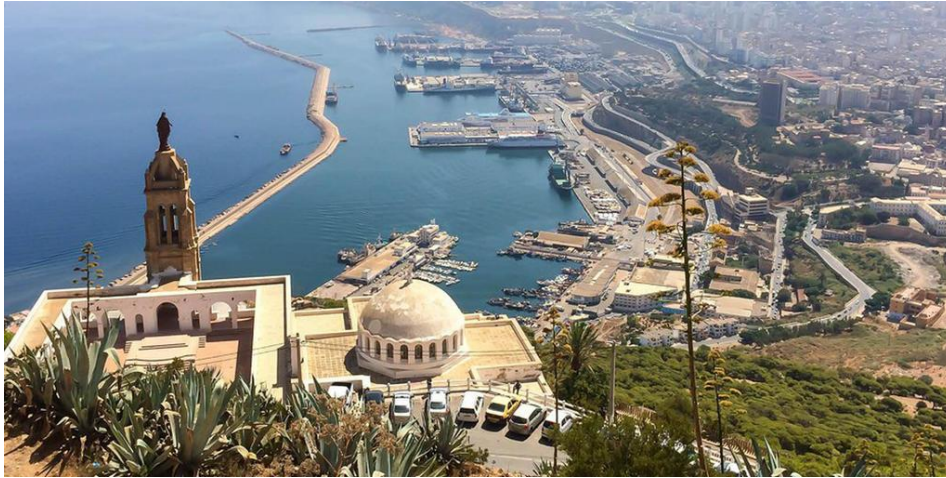
Hydrocarbons

Algeria has the 10th largest reserves of natural gas in the world.

Hydrocarbons account for 95% of export earnings, 60% of budget revenues and 30% of GDP.

Others

- Chemicals and precious metals (1%)
- Fertilizers (1%)
- Sugar (0,65%)



Algeria's Opportunities and Success Stories

Opportunities

- Additional Financial Act (AFA)
 - Foreign companies can acquire any algerian counterpart except in strategic sectors and purchase and resale activities.
 - Foreign companies will now be able to finance their investments through loans provided by foreign banks.
 - Renewable energies, infrastructure (4G or Optic fiber), hospitality, agriculture, automobile industry, etc.

Success Stories

- CasbahTech

Tunisia

MOROCCO, THE GATE TO AFRICA | MARCH 2021

13

Is the smallest country both in size and population (11,8 million) of North Africa.

Two thirds of Tunisian citizens live in urban areas. Over 2 million live in Tunis' metropolitan area.

54th in the 2020 Democracy Index, it is the 4rd African country.



11th highest GDP per capita in Africa

70% of Tunisia's trade is with the European Union

Free Trade Agreements with the EU, Jordan, Common Market for Eastern and Southern Africa or the AfCFTA

Considering joining the Economic Community of West African States (ECOWAS)





Tunisia's Main Sectors

Tourism

- 4th most visited African country (9,4 million).
- Competitor of Turkey, Egypt, Cyprus or Malta.

Agriculture and agri-food products

- Agriculture accounts for 12% of the GDP.
- 30-45% of the dates sold in the US, are imported from Tunisia.
- 20% of farm products are exported.

Oil and Natural Gas

- Tunisia produces 41,634 barrels per day of oil (as of 2016) ranking 68th in the world. Tunisia produces every year an amount equivalent to 3.6% of its total proven reserves

Automotive Industry

Automotive sales and services represent one of Tunisia's major economic sectors. Tunisia does have a small car-assembly industry.



Tunisia's Opportunities and Success Stories

Opportunities

- Renewable energies
- Tourism
- Development of the transportation infrastructure and facilities

Success Stories

- GoMyCode
- InstaDeep
- Expensya

Egypt

Is labeled as the oldest country in the world.

Is the Arab world's most populous country (107 million).

Most of the territory is located in Africa however the Sinai Peninsula is in Asia. It has strong ties with African and Middle Eastern countries.

Egypt is the largest regional provider of migrant labor to the Middle East.



3rd highest GDP in 2019 in Africa and the 2nd largest in the Arab world

Free Trade Agreements with the EU, AfCFTA, GAFTA, EFTA, Mercosur or Turkey

Moreover, Egypt has individual agreements with countries such as Jordan, Lebanon, Syria...

Egypt controls the Suez Canal

In 2020, almost 19,000 ships crossed the canal.

The revenue generated accounted for 5,6 billion USD.



Egypt's Main Sectors

Tourism

- Most visited African country in 2019.
- It had 13 million visitors, 15% more than in 2018.

Food Processing

- It is one of the fastest growing sectors.
- Average Egyptian consumer's consumption of processed foods has increased 40% in less than a decade.
- The Arab region accounted for most of the exports due to the numerous trade agreements.

Textiles

- It is considered to be the first sector in terms of the labour force, 50% of which are women.
- The US (50%) and the EU (30%) are the biggest importers.

Chemicals

- The Indian chemical group Sanmar had invested in 2015 \$1.45bn in the country.
- \$350m in the expansion of the Port Said PVC's plant.



Egypt's Opportunities and Success Stories



Opportunities

- Tourism
- Renewable Energies
- Construction Market
- Food Processing Industry
- Oil and Gas exploration

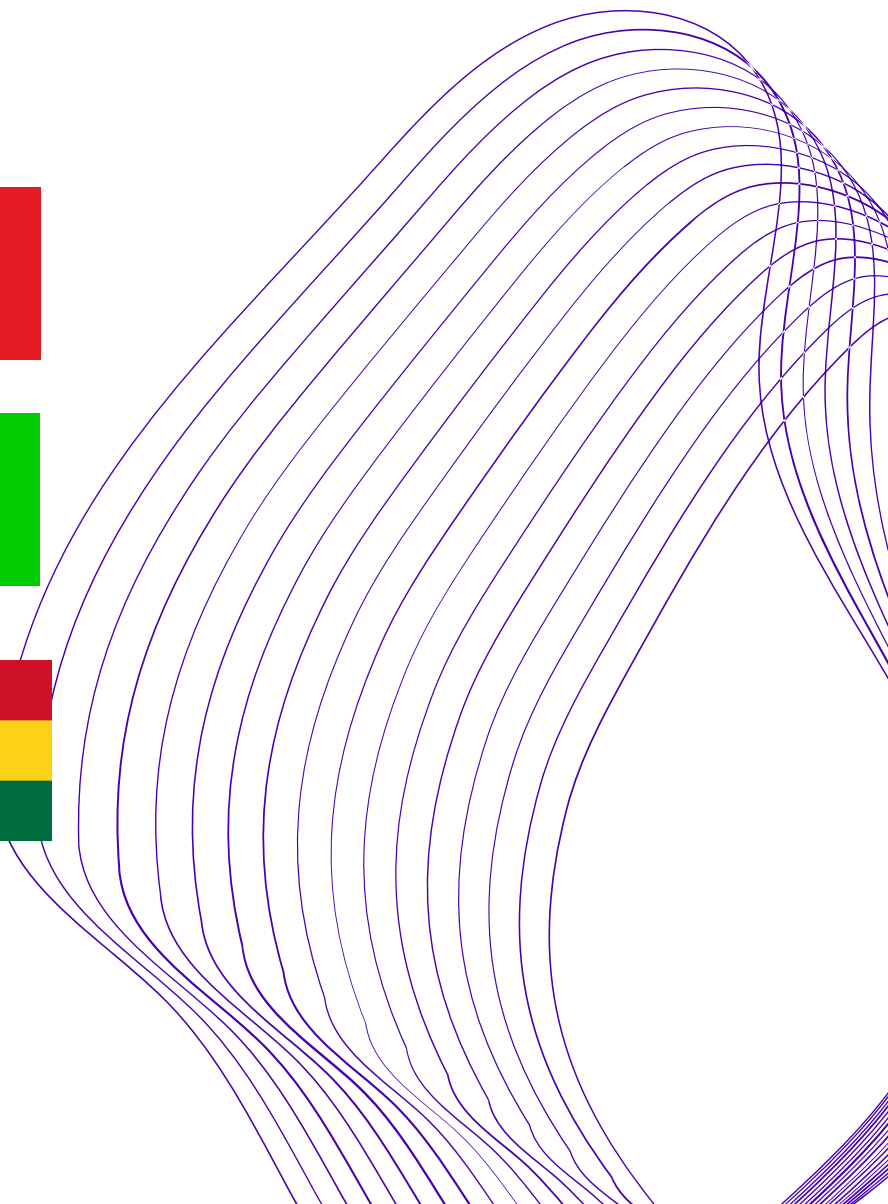
Success Stories

- Instabug / Tagaddod
- Biodiesel Misr
- MerMaid
- Mumm
- Taskty

19

MOROCCO, THE GATE TO AFRICA | MARCH 2021

Western Africa



Senegal

MOROCCO, THE GATE TO AFRICA | MARCH 2021

20

French is the official language and one third of the country can read and speak this language.

Is classified among the top three fastest-growing economies, behind Ivory Coast and Tanzania.

Senegal has one of the best developed tourism industries and it is one of the most stable countries.

A quarter of the population lives in Dakar, the capital city.

2nd biggest Economy of the West African Economic Union (UEMOA) and 4th of the CEDEAO

It is positioned as the entry door in West Africa

Dakar is a shipping and transport hub

Is home to banks and other institutions which serve all of Francophone West Africa

5,2% GDP growth in 2019





Senegal's Main Sectors

Primary Sector (15,7%)

- Agriculture
 - Exports cotton and peanuts
- Fishing
- Cattle Raising

Secondary Sector (23,9%)

- Agro-food
- Construction
- Mining Industry

Service Sector

- Trade
- Transportation
- Telecommunications
- Public Sector
- Financial Services



Senegal's Opportunities and Success Stories

Opportunities

- Tourism
 - Oil, Gas and Mining Exploration
 - Plan Sénégal Emergent
 - Construction Supplies
 - PPP Projects (Public-Private Partnerships)
-

Success Stories

- Economic success despite the size of the country and the lack of natural resources

Ivory Coast

French is also the official language and it is the lingua franca (There are 78 different languages).

The country has 26,3 million inhabitants and 51% of them live in urban areas.

40% of the population is under 14.

More than 4 million live in Abidjan, the economic capital and which used to be the administrative capital (1933-1983).



Abidjan is one of Africa's main ports

Among the largest producers and exporters of cocoa, coffee and palm oil

The economy had an average annual growth of 8% between 2012 and 2019

It has one of the best and most extensive infrastructure in Sub-Saharan Africa



Ivory Coast's Main Sectors



Construction Sector and Public Work

- Was one the main drivers of growth in 2019.

Agriculture and fishing

- Cocoa alone contributed 15% of GDP and about 38% of exports in 2019.
- Almost 70% of Ivorian people are engaged in some form of agricultural activity.

Private Investment

- Transportation
- Telecommunications
- Finance & Business Services

Manufacturing





Ivory Coast's Opportunities and Success Stories

Opportunities

- Infrastructure and construction
 - Urban mobility
 - Digital Economy
 - Cashew industry
-

Success Stories

- Entrepreneurial Ecosystem
- Cinetpay

Ghana

The republic of Ghana ranks 8th with regards to nominal GDP in Africa and 19th in nominal GDP per capita.

The estimated population is 31 million, the country would be the 13th most populated country in the continent.

English is the official language in the whole country. Nevertheless, French is usually taught in schools and universities.

Ghana was ranked Africa's best in the World Press Freedom Index in 2018.



6,3% GDP growth in 2018

14% GDP growth in 2011, an all time high.

Life expectancy at birth in 2020 was 68 years

12th african country with the highest life expectancy.

Member of the Organisation Internationale de la Francophonie and the Commonwealth

Accra is among the 10 wealthiest cities in Africa

In terms of private wealth.



Ghana's Main Sectors

Commodities

- Oil.
- Bauxite
- Manganese
- Second biggest gold producer.
- Second largest cocoa producer.

Industrial sector

- Mining
- Lumbering
- Light manufacturing
- Aluminum smelting
- Food processing
- Cement production
- ...

Construction Sector and Public Work

- Was one the main drivers of growth in 2019.



MOROCCO, THE GATE TO AFRICA | MARCH 2021

28

Ghana's Opportunities and Success Stories

Opportunities

- Medical tourism
 - The energy diversification program
 - Renewable energy
 - Building nuclear plants
 - Authorities' industrialization efforts
 - Construction
-

Success Stories

- Blue Power Energy
- The tourism industry empowering women
- mPharma

Central Africa



Nigeria

The Federal Republic of Nigeria has an estimate of 200 million citizens, the 7th country with the highest population in the World.

Over 50% of the population speak English, being the 4th country in the World in terms of speakers.

Lagos is the largest city in Africa and the 18th in the World.

Is the biggest African economy by nominal GDP.

By 2050 it is forecasted that Nigeria's population will double

In 2100 some forecasts show that Nigeria would have a population of 800 million.

Entrepreneurial attitude

30% of Nigerian residents are entrepreneurs, among the highest rate in the World.



Nigeria could become the 9th largest global economy in 2100

Africa's largest producer of oil

Is the 11th global biggest oil producer



Nigeria's Main Sectors

Oil and Gas

- Oil contributes two thirds of state revenues and for over 80% of exports.

Agriculture

- Cattle.
- Cocoa.
- Peanuts.
- Rubber.
- Palm oil.

Services (54%)

- Wholesale and retail trade.
 - Real Estate.
 - Telecommunications.
 - Banking.
-



Nigeria's Opportunities and Success Stories

Opportunities

- Agroprocessing.
- Services Market.
- Infraestructure.
- Privatization in the power sector.
- Film Industry.
- Bank Industry.

Success Stories

- Max Okada
- Nollywood
- Jumia.com
- Konga.com
- PayStack
- Flutterwave

Cameroon

The Republic of Cameroon recognizes French and English as official languages. English is spoken in the north-west and south-west regions.

Is a member of the Commonwealth of Nations and the Organisation of Islamic Cooperation.

Douala is the largest city and the economical capital whereas Yaoundé is the political capital.



Free Trade Agreements

- AfCFTA
- European Union
- United Kingdom
- Canada

China and India are its biggest export partners

- China acquires timber and other commodities.

It is very diverse in terms of geography and culture

Key member of the CEMAC (Economic and Monetary Community of Central Africa)



Crude oil and petroleum products

- Is a leading producer of crude oil and is developing the production of gas.
- It hosts a pipeline from Chad.

Cameroon's Main Sectors

Other commodities

- Lumber/Timber to China
- Cocoa beans
- Plantain
- Palm oil
- Coffee
- Cotton



MOROCCO, THE GATE TO AFRICA | MARCH 2021

35

Cameroon's Opportunities and Success Stories

Opportunities

- Modernization of agriculture
 - Potential to become a food exporter to the region.
 - Tourism and hospitality
 - Entertainment facilities and fast food chains.
-

Success Stories

- Buea Tech Hub

Southern Africa



Angola

Became an independent country in 1975.

The official language is portuguese, 71% speak this language at home (85% in urban areas and 49% in rural areas).

Is the 10th biggest economy in Africa by nominal GDP.

Luanda, Angola's capital, is the world's most expensive city for expats. Is the 6th African capital that hosts the most millionaires.



Member of the OPEC

- 90% of exports

Free Trade Agreements

- AfCFTA
- SADC Free Trade Area
- European Union
- US

Portugal remains one of Angola's largest trading partners

Chinese investment

- Angola is one the african countries where China has invested more

Angola's Main Sectors

Oil

- It is a member of the OPEC since 2007.
- Oil production contributes about 50% of the country's GDP and around 90% of exports.
- Angola is the 15th largest producer of oil in the World.
- Total (41%), Chevron (26%), Exxon (19%) and BP (13%) are the companies exploring and drilling oil.

Diamonds

- 3rd largest producer in Africa

Steel Industry





Opportunities

- Steel Industry
 - Hydroelectrical energy
 - Diamond industry
 - Infraestructure
 - Agriculture
-

Success Stories

- Recovery from the 27 year long civil war.

South Africa

MOROCCO, THE GATE TO AFRICA | MARCH 2021

40

Is the southernmost country in Africa.

It has 3 capital cities: Pretoria (Executive), Bloemfontein (Judicial) and Cape Town (Legislative).

English is one of the official languages of the country.

The Union of South Africa (1910) is the predecessor of the democratic republic of South Africa (1994).



Ranks 40 in the Democracy Index Ranking

2nd biggest African economy

Quality of Living

Durban, Cape Town and Johannesburg are in the top 4 of the African continent.

The Durban Harbour is the largest and busiest port in sub-Saharan Africa

South Africa's Main Sectors



Commodities

- World's largest producer and exporter of gold, platinum, chrome and manganese.
- 2nd largest of palladium.
- 4th of diamonds.
- Coal.

Industry

- Car manufacturing.
- Machinery.
- Mining equipment.
- Railway rolling stock.

Agriculture

- World's 7th largest producer of wine.
- Africa's biggest producer of corn and sugar.

Services (60% of the GDP)

- Tourism and travel sector.
- Real Estate.
- Business Services.
- Finance.



South Africa's Opportunities and Success Stories

Opportunities

- South Africa's Start-ups.
- Reforms in the electricity sector.
- Private investment in infrastructure.
- Car manufacturing.

Success Stories

- Snaplify
- wiGroup
- Yoco
- Zoono

Mozambique

Mozambique has a population of 29 million, about two thirds work and live in rural areas.

Between 1977 and 1992, the country faced a civil war.

The minimum GDP growth between 2001 and 2015 was 6,7%, with growth peaks of 11 or 12%.

Portuguese is the only official language and 80% of people living in urban areas is fluent in it.



Shares the border with 4 countries that are landlocked

Zimbabwe
Malawi
Zambia
Eswatini

China and South Africa are its main trade partners

China accounts for 40% of the exports.

Free Trade Agreements

US
SADC
EU
AfcFTA



Mozambique's Main Sectors

Agriculture, fishing and forestry

- Export of fish and seafood
- Timber
- Sugarcane
- Cashew nuts
- Cotton
- Coconuts
- Cassava
- Maize

Industry

- Gas and oil discoveries.
- The 4th largest coal reserves.
- The Mozal aluminium project, the country's largest foreign investment project.



MOROCCO, THE GATE TO AFRICA | MARCH 2021

45

Mozambique's Opportunities and Success Stories

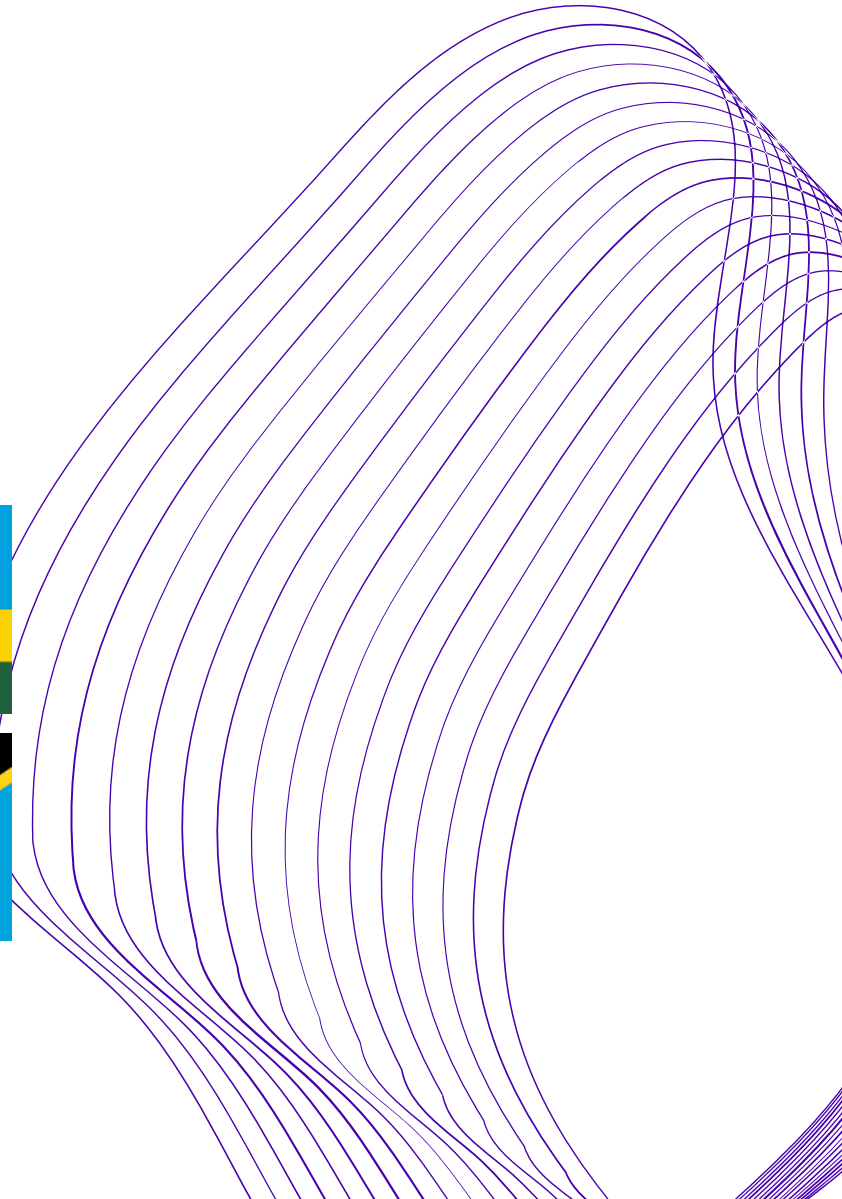
Opportunities

- Four neighbouring countries don't have access to the sea.
- The coal mining industry.
- Infrastructure
 - Severely affected by the civil war and typhoons

Success Stories

- Stability after a 15 year long civil war.
- Clean Mining.

Eastern Africa



Kenya

Kenya gained independence in 1963 from the United Kingdom.

The official languages are English and Swahili.

Kenya is the 7th largest African country by population and the 6th by nominal GDP.

Nairobi, Mombasa and Kisumu are the three largest cities. Mombasa is one of the busiest ports in Africa.



Mombasa is one of the busiest ports in Africa

Uganda and South Sudan are landlocked and depend on Kenya.

3rd largest economy in Sub-Saharan Africa

"Savannah Valley"

After South Africa and Nigeria, Kenya hosts some of the most innovative companies of the continent. The Government has invested over \$140 million in Kenyan start-ups.



Kenya's Main Sectors

Agriculture

- Is the most important contributor to Kenya's GDP.
- Tea (2nd exporter in the world) and horticulture are the leading export earners.
- Dry beans.
- Coffee.
- Sugarcane

Service Sector

- Tourism.
- Manufacturing.
- Financial Industries.
- IT and Communications.
- Construction.



Kenya's Opportunities and Success Stories



Opportunities

- Titanium.
- Oil and gas.
- Vision 2030 program that will prioritize:
 - Manufacturing.
 - Universal healthcare.
 - Affordable housing.
 - Food security.

Success Stories

- M-Pesa
- Azuri Technologies
- Gjenge Makers Ltd.
- <https://www.youtube.com/watch?v=QbZKP4UAtL8&t=20s>

Ethiopia

It is considered to be the region from which modern humans set out in the Middle East and other regions.

Ethiopia is one of the oldest states in the World and alongside Liberia it was never a colony (It was occupied by Italy from 1936 to 1941).

It is the 10th biggest country in Africa.

It is the 13th most populous country in the World and the 2nd of the continent.



7th biggest African economy

Top 4 recipient of chinese investment in Africa

It is the fastest growing economy in East Africa (World Bank)

Ethiopia's economy averaged a 9,8% growth between 2008 and 2019.

Economic growth has favoured the reduction of poverty in urban and rural areas.

In 2016 24% of the population lived under the poverty line.





Ethiopia's Main Sectors

Agriculture, forestry and fishing

- It accounts for 40% of Ethiopian's GDP.
- Production is of a subsistence nature.
- Coffee, oilseeds and flowers are the main exports.
- The fishing sector is artisanal and a small part of the economy.

Public Sector

- Financial and insurance services.
- Telecommunications.
- Transportation.

Industry

- Textile industry.
- Manufacturing.
- Mining.



MOROCCO, THE GATE TO AFRICA | MARCH 2021

52

Ethiopia's Opportunities and Success Stories

Opportunities

- The peace process with Eritrea will allow Ethiopia to utilize Eritrean ports for international trade.
- Privatization of public companies.
- The Growth and Transformation Plan wants to
 - To position Ethiopia as a manufacturing hub.
 - Expanding physical infrastructure .

Success Stories

- Agricultural success story

Tanzania

MOROCCO, THE GATE TO AFRICA | MARCH 2021

53

The official languages of the country are English, Swahili and Arabic in the island of Zanzibar.

It is the 6th most populated country in Africa.

It is home to the mount Kilimanjaro, the highest mountain in Africa.

Dodoma is the capital city. Nevertheless, Dar es Salaam, the former capital, is still the largest city, economical capital and it has the country's largest port.



Efforts in wildlife and nature preservation

It has 22 national parks which cover 15% of Tanzania's land area.

One of Africa's fastest growing economies

Averaging 7% since 2000.

9th most important African economy

6th biggest Sub-saharan economy by nominal GDP.





Agriculture

- It accounts for 30% of the country's GDP and for more than 80% of the exports.
 - Tanzania produced:
 - Maize
 - Sweet potato
 - Banana
 - Rice
 - Sugarcane
 - Beans
 - Sesame seeds
-

Tanzania's Main Sectors

Other

- Mining
 - Gold accounts for 90% of the value of those exports.
- Construction.
- Manufacturing.
- Tourism.
- Services.



MOROCCO, THE GATE TO AFRICA | MARCH 2021

55

Tanzania's Opportunities and Success Stories

Opportunities

- Desalination of seawater.
- Tourism.
- Foreign investment in Zanzibar and the renewal and change of status of the port (Free port).

Success Stories

- Marinecultures.org

Rwanda

The Republic of Rwanda is one of Africa's smallest countries. It comprises 26,798 km² and is landlocked.

It has a population of over 12,6 million, being the most densely populated mainland African country.

English, French, Kinyarwanda and Swahili are the official languages. In 2008 the country switched from French to English as the scholastic instruction language.



Green initiatives

Kigali, the capital, is one of the World's cleanest cities.

The importance of female leaders

Rwanda was the first country in the World with a majority in parliament.

Focus on education

Despite the fact that the country is predominantly rural and subsistence based, the government aims to facilitate access to everyone and transform the country into a knowledge-based one.

Fast growing and open economy

2nd most open economy in Sub-Saharan Africa.

GDP growth exceeded 10% in 2019.



Agriculture and commodities

- Rwanda's economy is heavily dependent on agriculture .
 - Rwanda's main exports were:
 - Gold
 - Coffee
 - Tea
 - Tin
 - Tantalum
 - Tungsten
-

Rwanda's Main Sectors

Services

- Trade.
- Hospitality / Tourism.
 - Rwanda is positioning itself as a business and conferences hub.
- Financial services.



MOROCCO, THE GATE TO AFRICA | MARCH 2021

58

Rwanda's Opportunities and Success Stories

Opportunities

- The construction of a new international airport and the development of its national airlines, RwandAir.
 - Tourism.
 - Energy generation.
 - Construction and Infrastructure.
 - ICT.
-

Success Stories

- The reconciliation process and development of the country

Consejos practicos en Africa

Private

Public

- Seeking advice from public and private institution

- Personal relationships
→ a key element of business



- Avoid stereotypes
- Identify and seize the present and future business opportunities

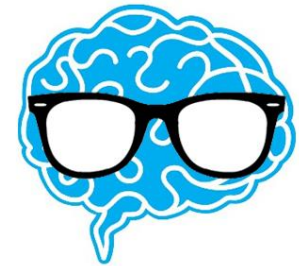


Consejos practicos en Africa



Take advantage of the positive valuation of Western products and services

- **Seek expert advice when required**
- **Every business is different**



Distribution channels by sector



HORECA

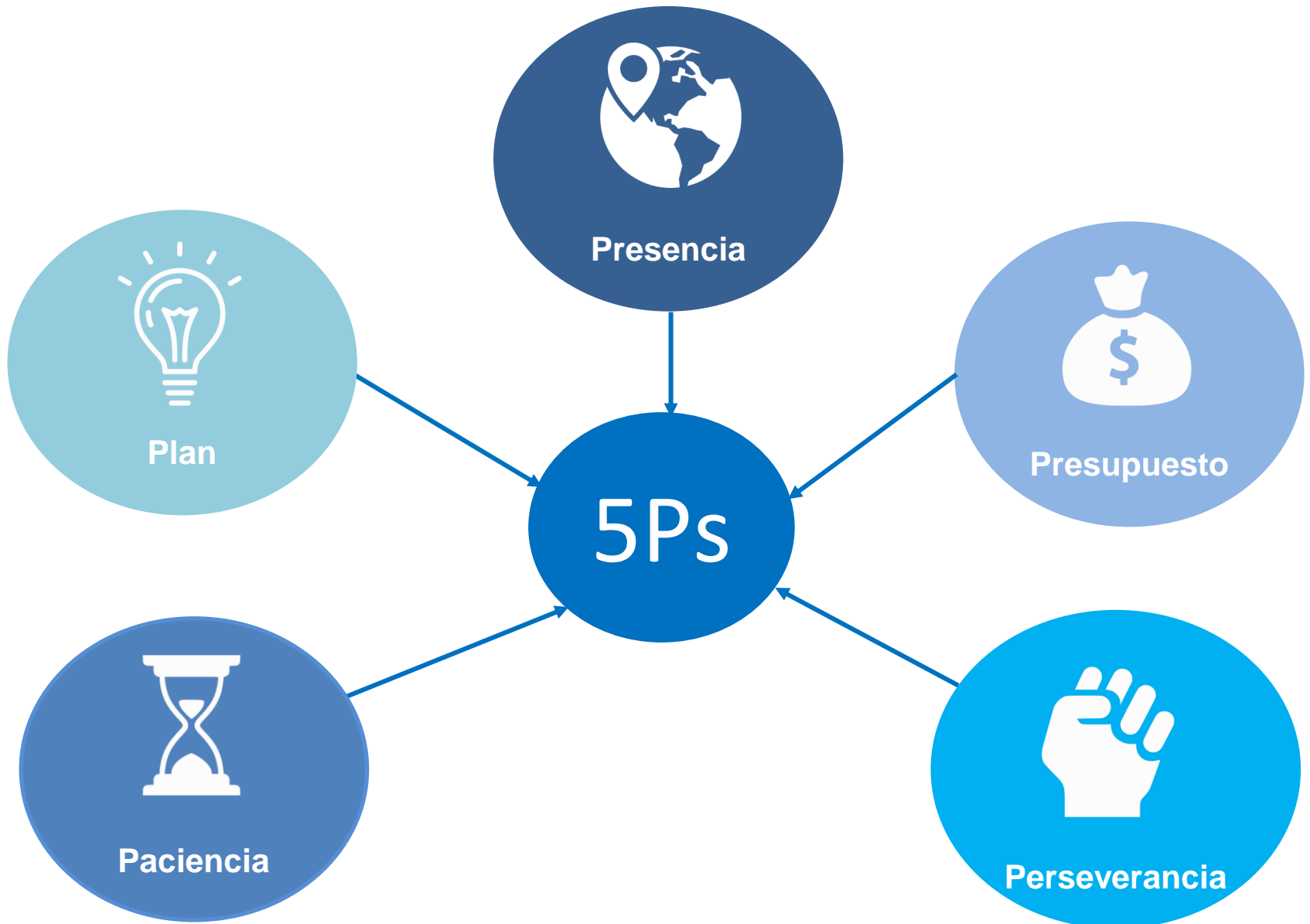
**Importer /
Distributor**

Retail chains

**Informal channel
(Stores)**



Estrategia de las 5Ps



SERVICIOS INDEGATE



Planeamiento estratégico



Estudios de mercado



Búsqueda de socios comerciales



Misiones comerciales



Representante de ventas



Puesta en marcha de la compañía



Asesoramiento en materia legal, fiscal y laboral



Servicios de traducción



Conferencias y seminarios



Negociación y acuerdos estratégicos



indegateconsulting



28 Rue de Provins - Casablanca



+212 522 301 547

+212 60606 5339



davidgaray@indegate.com

www.indegate.com