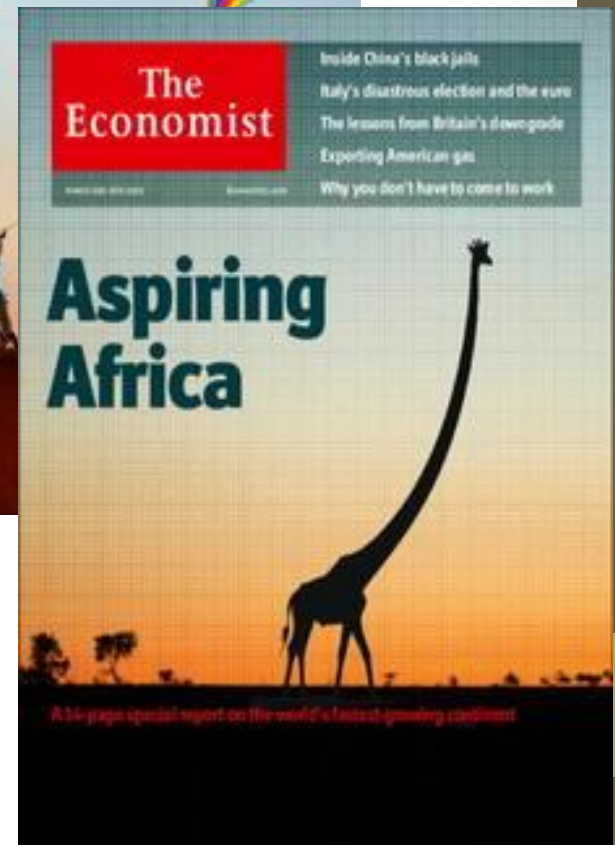
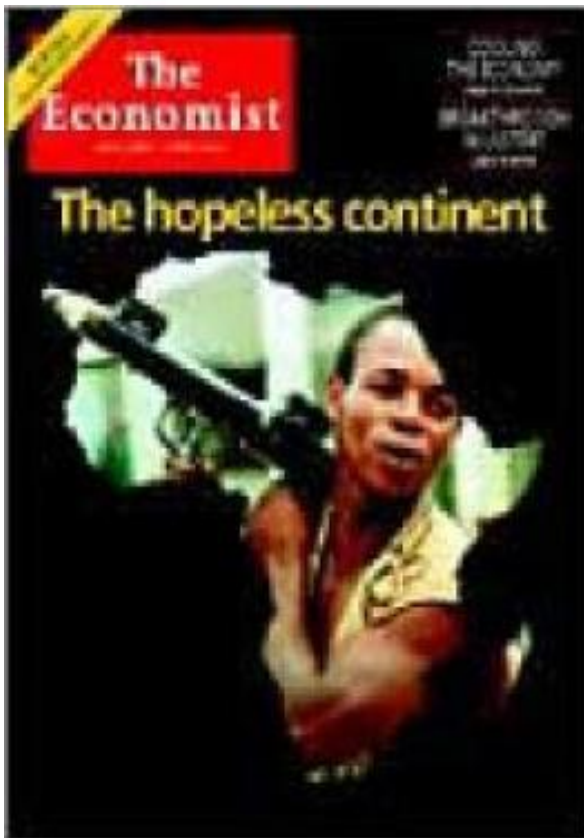


INVESTMENT OPPORTUNITIES IN EASTERN AFRICA

東アフリカにおける投資機会

Africa's Story Is Changing

変貌するアフリカ



Outline of Eastern Africa (SEEDS + EAC)

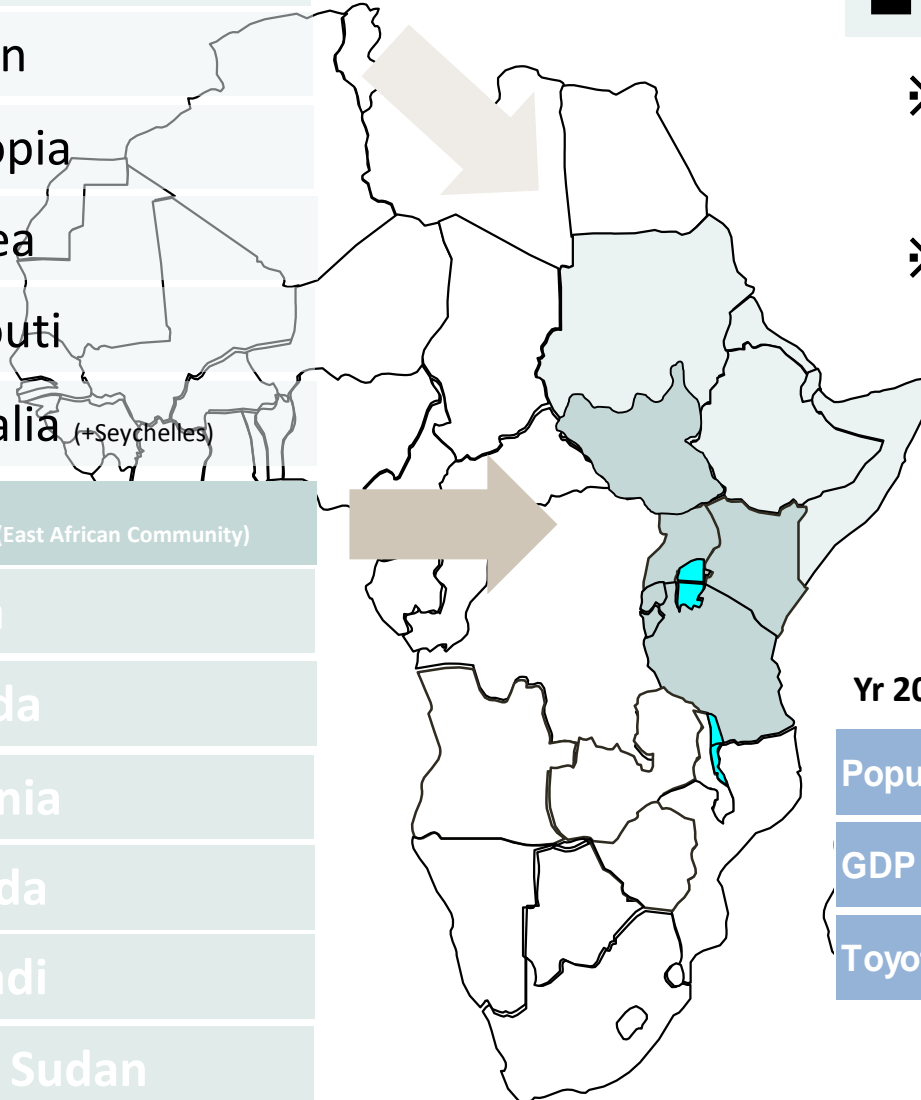
東アフリカ概要

■ SEEDS

- Sudan
- Ethiopia
- Eritrea
- Djibouti
- Somalia (+Seychelles)

■ EAC (East African Community)

- Kenya
- Uganda
- Tanzania
- Rwanda
- Burundi
- South Sudan



■ Basic Data of the Region

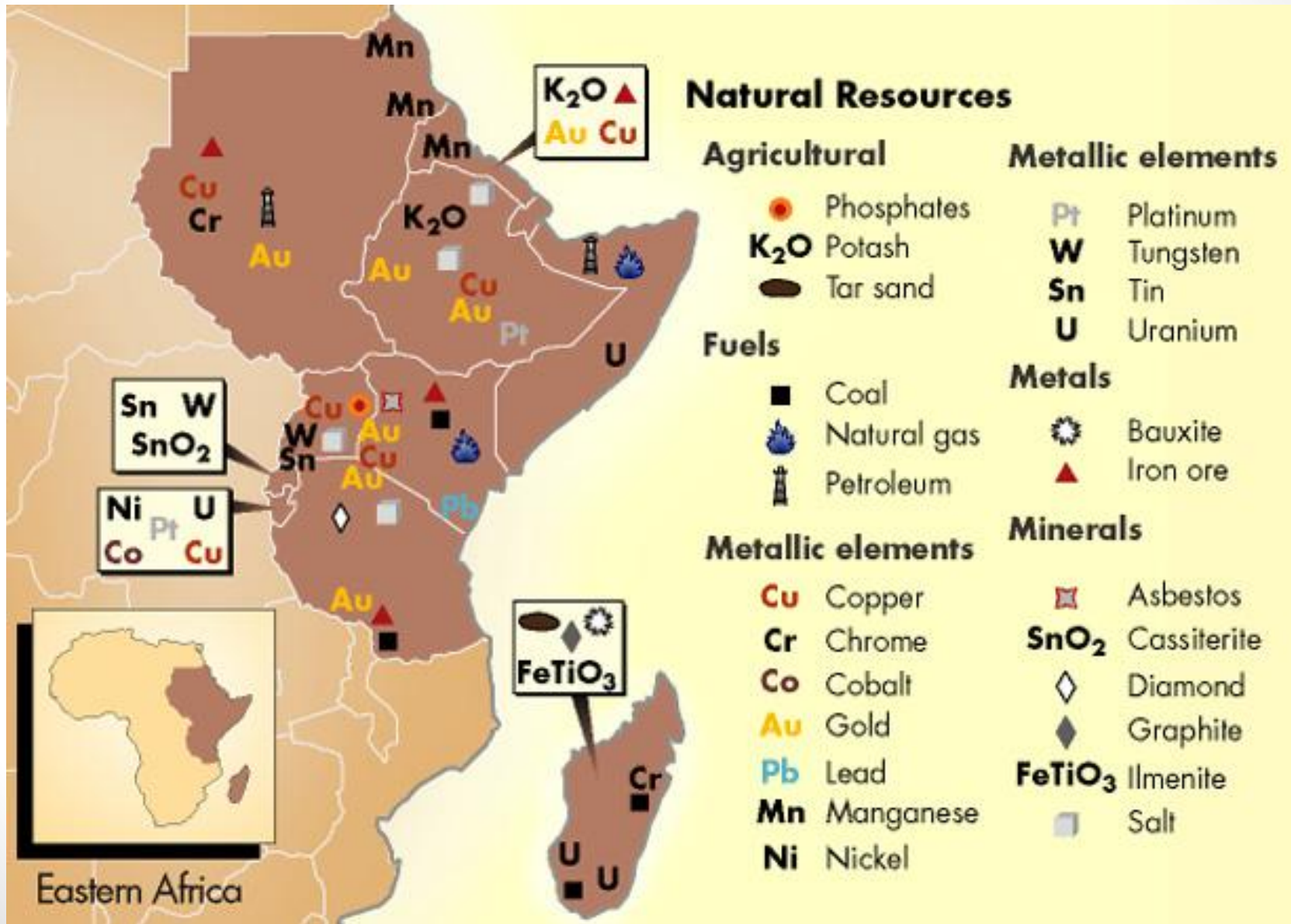
- ※ Total Population is **1/3 of Sub-Sahara Africa**
- ※ Total GDP is **equal to Malaysia's GDP**
- ※ Total Toyota Sales is expected to **over 10,000 units in 2015**

Yr 2012	EAC	SEEDS	TOTAL
Population	144 Mil	122 Mil	266 Mil
GDP (\$)	109 Bil	65 Bil	174 Bil
Toyota Sales	5,585	2,544	8,129

※ **Rich in Natural Resources**

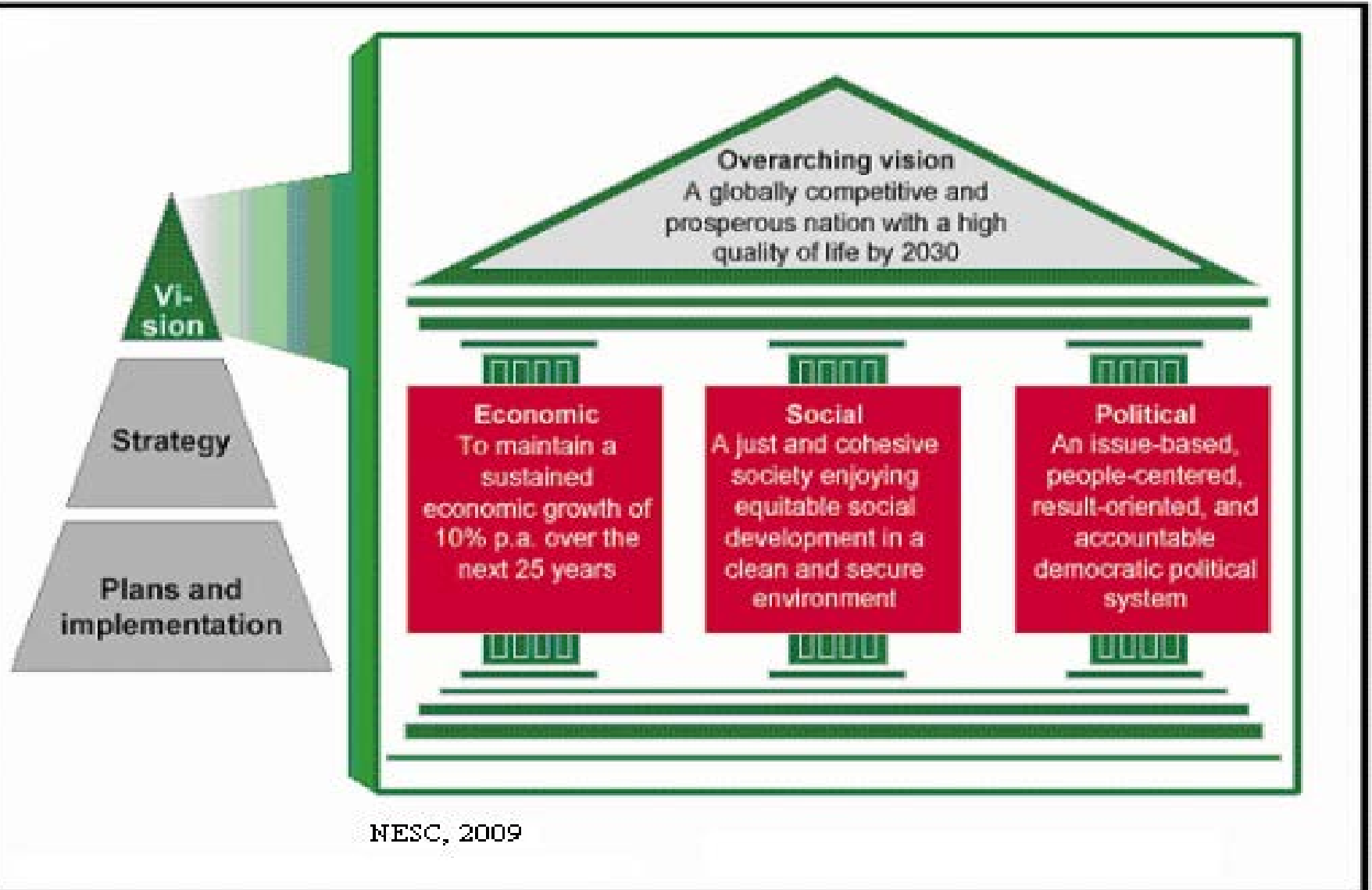
Natural Resources Map of Eastern Africa

東アフリカ資源マップ



National Development Plans KENYA

Vision 2030 ケニア国家開発ビジョン Vision 2030



NESC, 2009

National Development Plans UGANDA

Vision 2040

ウガンダ国家開発ビジョン Vision 2040

A transformed Ugandan society from a peasant to a modern and prosperous country within 30 years

- With a stable GDP of 6.4% per annum Agriculture is the largest contributor (66.5%) followed by service sector (tourism) and industry.
- Through policy changes and shifts in labour distribution v.2040 aims to attain maximum multiplier effect across the board value addition throughout the key sectors
- The main pillars of Vision 2040 are:
 - Agriculture
 - Oil & Gas
 - Energy
 - Transport & Infrastructure
 - Mining
 - Industrialization
 - Science, Technology, Engineering and Innovation

UGANDA VISION 2040



National Development Plans RWANDA

Vision 2020

ルワンダ国家開発ビジョン Vision 2020

To develop Rwanda into a middle income country by the year 2020 by transforming it into a knowledge based economy that is competitive, regionally and globally

- The Key Pillars of the vision are:
 - Good Governance
 - An efficient state
 - Skilled Human Capital, including education, health and information technology.
 - A vibrant private sector
 - A world class physical infrastructure
 - Modern Agriculture
- The state shall act primarily as a catalyst to ensure an adequate policy framework for infrastructure, human resources and guarantee legal framework are geared towards stimulating private investments
- Key sectors shall be:
 - Service Sector
 - Healthcare & Human resource development
 - Infrastructure; Energy, transport, Water & Telecommunication

National Development Plans TANZANIA

Vision 2025 タンザニア国家開発ビジョン Vision 2025

The Vision aims at achieving high quality livelihood, good governance through rule of law and develop a strong competitive economy for the Tanzania

- Vision 2025 runs on achieving three principal objectives:
 - High quality livelihood
 - Education and gender empowerment, universal access to healthcare
 - Human Resource Development
 - Good Governance
 - Reviews in policy framework to ensure equity and wealth creation
 - Globally competitive economy
 - Private sector stimulation
 - Establishing a substantial industrial sector
 - Achieving adequate level of physical infrastructure
 - Energy
 - Water
 - Telecommunication
 - ICT

National Development Plans ETHIOPIA

Growth & Transformation Plan

The GTP 5 year plan aims to achieve industrialization and improve the country's economy by attaining a projected GDP growth of 11-15% from 2010 to 2015

• Key goals of the GTP are to:

- Encourage foreign direct investments in agriculture
- Provide basic infrastructure in four industrial cluster zones
- Renew focus on natural resources and raw material industries such as gold, oil, gas, potash and gemstones
- Increase road networks by 10,000 Kms throughout the country
- Build a 1,500 km standard gauge railway line and create manufacturing plants for locomotive engines and and railway signaling systems
- Quadruple power generation from 2,000MW to 8,000MW, building 82,500 miles of new power distribution lines and rehabilitating 4,800 miles of transmission lines
Seek investment in renewable energy projects involving hydro, wind, geothermal and bio fuels.
- Increase mobile telephone subscribers from 7 million to 40 million.

National Development Plans SOUTH SUDAN

- South Sudan is a vast country (covering an area equal to Kenya, Uganda, Rwanda and Burundi combined) with a relatively small population of approximately 12 million)
- It has abundant natural resources (including oil, gold, Uranium, Cobalt and timber) and quality agricultural land with plenty of water, including lakes rivers and abundant rainfall
- South Sudan is a relatively young country and thus highly unexplored. Business opportunities include:
 - Mining
 - Oil exploration
 - Drilling started as recently as 1990's
 - Agriculture
 - Large tracts of fertile land provide opportunity for large scale farming, livestock farming, fisheries
 - Energy
 - Forestry
 - Tourism

REGIONAL PROJECTS

域内プロジェクト一例

- **LAPSSET (Lamu Port) - Kenya**
 - A new infrastructure corridor comprising a port in Lamu, a crude oil pipeline, a railway line, a highway, 2international airports and 2resort cities, linking Kenya, Uganda, South Sudan and Ethiopia.
- **Southern Agricultural Growth Corridor (SAGC) - Tanzania**
 - The project will identify existing and potential project opportunities in the corridor from Dar es Salaam to Bujumbura
- **Standard Gauge Railway – Kenya, Uganda, Rwanda and South Sudan**
 - The project shall link East African countries through a road network and standard gauge railway line from Mombasa to Kigali and Juba,
- **Electricity Energy Pool - Uganda**
 - The project is a planned energy transmission network between Uganda-Kenya; Uganda-Tanzania; Uganda-Rwanda totaling 572KV and 970 Km
- **Mombasa Port - Kenya**
 - The Port Project shall increase capacity and enhance efficiency of Mombasa Port elevating it to international standards and improving regional shipping lead-times, serving 6 countries
- **Agricultural Mechanization – Kenya, Uganda, Tanzania**
 - The project; being implemented by E.A countries at different levels, aims at harnessing agricultural potential through value-addition & agro-processing

Opportunities in E.A. Region

東アフリカ地域における
投資機会/ケニア

 KENYA
VISION 2030

	KENYA
Nairobi Commuter Rail	<ul style="list-style-type: none">• To provide for expanded, safe, affordable and efficient rail commuter services in Nairobi• Project completed in sections: Syokimau, Imara Daima and Makadara.
Railway Cities	<ul style="list-style-type: none">• Entail redevelopment of existing rail stations into mini cities which include business parks for light manufacturing, hotels, shopping arcades, restaurants and parking garages.
Dry Port at Voi	<ul style="list-style-type: none">• An inland intermodal terminal directly connected by rail to the sea port• To operate as a centre for transshipment of sea cargo to inland destinations, will also include storage, maintenance for road/rail cargo carriers and customs clearance services.
Special Economic Zones (SEZ'z)	<ul style="list-style-type: none">• The project envisages to have various projects available for investors. Based on the Master plan developed the Institution
Energy Generation (Approx. 5,000 Mw) KENGEN	<ul style="list-style-type: none">• The project entails joint venture (PPP) power generation from geothermal and wind energy, gas, and coal.

Opportunities in E.A. Region

東アフリカ地域における
投資機会/ケニア

	KENYA
Mombasa Petroleum Trading Hub-Single Buoy Mooring	<ul style="list-style-type: none">• Trading hub will be a modern petroleum terminal comprising two offshore petroleum jetties• A modern Greenfield Petroleum tank farm with a design capacity of 800,000MT is to be developed in phases from an initial minimum capacity of 300,000MT.
Multi-Purpose Dam Development PJ	<ul style="list-style-type: none">• Based on PPP Agreement, several multi-purpose dams shall be constructed in the Lake Basin Region under BOOT Model• Pre-Feasibility Study Complete for Nyanza, Kisumu & Bungoma Sites
State of the Art Abattoir (Mandera County)	<ul style="list-style-type: none">• Based on PPP Agreement, the project comprises the development of a modern state of the art abattoir with capacity to slaughter over 200 heads of livestock, under Islamic tradition.• The Abattoir will be equipped for product processing /utilization, meat preservation, processing, butchering and development of meat market.• Other components include production of biogas from animal waste and solar energy. The project requires 5-10 acres of land..

	UGANDA
Agriculture Mechanization	<ul style="list-style-type: none">• The project aims at value-addition in the agriculture sector through mechanization and agro-processing• Development of a phosphates industry
Oil & Gas	<ul style="list-style-type: none">• Uganda has viable Oil & Gas deposits at 3.5 billion barrels in Albertine Graben• For value addition an oil refinery shall be built to achieve maximum multiplier effect• Pipeline infrastructure shall be developed as well as a LPG pipeline across the region
Minerals	<ul style="list-style-type: none">• Favourable geological environment provides an opportunity to develop a strong mining industry• Uganda is rich in Iron Ore deposits, Phosphates (Fertilizer production), Rare Earth Minerals (IT and Electronic Products) and Uranium which are all critical elements in the Key industries
Transport & Infrastructure	<ul style="list-style-type: none">• By 2040 Uganda will have a multi-lane Standard Gauge railway which will connect to the East Africa Railway system

Opportunities in E.A. Region

東アフリカ地域における
投資機会/ウガンダ

	UGANDA
Industrialization	<ul style="list-style-type: none">• The goal is to develop lifeline industries that utilize local potential in the first 10 years e.g. agro-based industries, iron & steel industries, oil & gas industry• Establish a Hi-Tech City as a hub for digital industries and to build a strong STEI foundation• Setting up of SEZs for sustainable development of FDI and domestic direct investment
Energy	<ul style="list-style-type: none">• It is estimated that Uganda will require Approx. 41,800 kWh by 2014 to meet capacity, electricity shall be generated from different sources:<ul style="list-style-type: none">• Hydro-power (4500 MW)• Geothermal (1500 MW)• Nuclear (24000 MW)• Solar (5000 MW)• Biomass (1700 MW)• Peat (800 MW)• Thermal (4300 MW)

Opportunities in E.A. Region

	RWANDA
Tourism	<ul style="list-style-type: none">• The country has 6 spectacular volcanoes, 23 lakes, numerous rivers, dense forest, and savannah.• Specific opportunities include hotels, a cable car, training schools, exhibition centers and theme parks and aquariums
Physical Infrastructure	<ul style="list-style-type: none">• Opportunities include building housing estates for all levels of society, office blocks and malls., development of entertainment centers and manufacturing of construction finishing materials.
Transport	<ul style="list-style-type: none">• Including Road & Rail infrastructure, the goal is to link Rwanda to the Indian Ocean ports of Kenya and Tanzania by road and rail and by water to the Benguela Railway line in the DRC.
Energy	<ul style="list-style-type: none">• To generate electricity from Hydro (100 sites available), gas from Lake Kivu (approximately 6 billion cubic meters of gas to generate 150 MW), geothermal for 740MW, peat for 1,200MW
Manufacturing	<ul style="list-style-type: none">• Rwanda is strategically placed with market access to the region through the EAC, COMESA and preferential agreements with the EU and US and free land in the Kigali Economic Zone

Opportunities in E.A. Region

	RWANDA
Agriculture	<ul style="list-style-type: none">• The goal is to improve productivity through best practices and irrigation especially in the key sectors of Coffee, Tea, Horticulture and Floriculture• Opportunities include building of coffee washing stations, roasting facilities, processing and packaging plants and operating of large scale plantations
ICT	<ul style="list-style-type: none">• The goal is to utilize the Government's investment in a countrywide fiber optic network, connection to the submarine cables on the coast of Kenya, a state of the art tier 3 internet data center, a deployed broad band covering over 80% of the country and an innovation and incubator center for start ups• Opportunities include; BPO centers, technical training institutes, software development, technology parks, ICT financing mechanisms, business development centers.
Financial Services	<ul style="list-style-type: none">• Rwanda has 9 Commercial Banks serving 42% of the population. With the growth of the economy averaging 7% there is room for many more to offer the full array of banking services

Opportunities in E.A. Region

	TANZANIA
Agriculture	<ul style="list-style-type: none">• There is huge opportunity in Agribusiness, with especial regard to Traditional crops, horticulture, Floriculture, Oil Palm, Jatropha, Sugar ethanol, Organic cotton, Pyrethrum,, Artemisia, Fish Aquaculture
Mining (Minerals & Hydrocarbons)	<ul style="list-style-type: none">• There is opportunity in extractive minerals, base metals and gemstones, gold, tanzanite• Tanzania also has substantial deposits of Hydrocarbons- Oil and Gas, Coal• Investment opportunities in this sector lie in extraction, refining and processing
Infrastructure	<ul style="list-style-type: none">• The goal is to create a wide-spread efficient transit system including roads, power, sea port, airport and railway lines• There is investment opportunity in construction of a Mass transit system for Dar es salaam
Tourism	<ul style="list-style-type: none">• The country has a natural advantage in terms of National Parks, flora and fauna that can be exploited for tourism• Investment opportunities include Hotels, Game Lodges, Beach Resorts, Conference and Exhibitions Centers

Opportunities in E.A. Region

	TANZANIA
Manufacturing	<ul style="list-style-type: none">Tanzania has a large population and soon access to lower cost power ideal for manufacturing, with market access to SADC, COMESA and EAC countries
Transportation	<ul style="list-style-type: none">As the gateway to Central Africa through its Southern infrastructure corridor
Service Sector	<ul style="list-style-type: none">Services sector has many opportunities especially in the hospitality industry. Tanzania has many of Africa's National Parks and over a thousand KMs. Of Indian Ocean Beach Front.
Financial Services	<ul style="list-style-type: none">Tanzanians are currently under banked and there is room for additional commercial banks
Human Resources	<ul style="list-style-type: none">Tanzania lays stock on Education, training and capacity building.

Opportunities in E.A. Region

	ETHIOPIA
Agriculture	<ul style="list-style-type: none">• The diverse agro-climatic zones and the abundant availability of ground water from lakes and rivers, including the Blue Nile make Ethiopia very viable agriculture wise• Opportunities abound in the growing of Coffee, Tea, Horticulture, spices, maize and cotton, with potential in rubber and palm oil, sugar cane, jatropha and castor bean
Manufacturing	<ul style="list-style-type: none">• Main manufacturing is in the production of food, beverages, tobacco, textiles and garments, leather goods, paper, metallic and non metallic mineral products, cement and chemicals.• Priority areas for investment are in production of textiles and garments and garments, leather products, cement, metal and engineering, chemicals, pharmaceuticals and agro processing
Mining	<ul style="list-style-type: none">• Ethiopia has substantial mineral deposits offering excellent opportunities for mineral prospecting and development• Examples are: gold, tantalum, platinum, marble, granite, limestone, clay, gypsum, gemstone, iron ore, coal, copper, silica, and diatomite
Heavy Construction	<ul style="list-style-type: none">• Government's spending on physical infrastructure is the highest in Africa and includes, highways, roads, railway lines, housing, offices etc.

Opportunities in E.A. Region

	ETHIOPIA
Oil & Gas	<ul style="list-style-type: none">• Ethiopia shares a basin with Sudan, South Sudan, Uganda and Kenya, thus creating significant opportunities in the exploration and development of oil and gas in the major sedimentary basins namely - the Ogaden, the Gambella, the Blue Nile and the Southern Rift Valley
Hydro Power & Geothermal Power	<ul style="list-style-type: none">• With 9 major rivers including the Blue Nile, there is potential to generate 45,000 MW of electricity against a current capacity of 2,000 MW.• In addition there is potential to generate another 5,000Mw from Geothermal Energy.• Investors are encourage to participate in power generation with no limits. Much of the new power will be exported to neighboring countries to earn foreign exchange.
Telecommunication	<ul style="list-style-type: none">• With a population of 90 million people a GDP growth of 10 to11%, a mobile phone penetration of only 10-15% and only 1% of the population with access to the internet, Ethiopia is very attractive market to ICT investors.
Tourism	<ul style="list-style-type: none">• With a unique historical and cultural heritage, magnificent scenery, cool climate and important archeological sites, Ethiopia is ideal for investment in hotels, lodges and conference facilities

Opportunities in E.A. Region

	SOUTH SUDAN
Oil exploration & Mining	<ul style="list-style-type: none">• The country has huge oil reserves with a current revenue of USD 2 billion (98% of total exports)• As the country continues to build relationships current revenue is expected to triple• The country is also rich in minerals which can be exploited to diversify Oil revenues
Agriculture	<ul style="list-style-type: none">• Current capacity for large scale agriculture can be used to bridge the gap between supply and demand• There is also opportunity in Sugar cane farming and processing to Sugar and Ethanol, especially in Mangala which was identified by the EU many years ago as being of high potential but was never exploited
Forestry	<ul style="list-style-type: none">• South Sudan has the largest plantation of TEAK.• Investment opportunity includes harvesting and replanting of TEAK
Energy	<ul style="list-style-type: none">• The goal is to use Geothermal, Hydro, Solar and Wind Energy for Electricity Production to replace the current thermal energy powered generation

Opportunities in E.A. Region

SOUTH SUDAN

Construction & Machinery

- There is opportunity for investors in Construction and Agricultural Machinery Sales, Spares Service (for infrastructure development and the mechanization of the proposed large scale agriculture).

Automotive

- Automobile sales service and spares (currently almost nonexistent on the ground).
- Current market size stands at 1 500 units per annum.

ODA (Overseas Development Assistance)

- ODA funded projects in infrastructure and Social Development either as EPC or PPP.
- Japan is currently a major Development Partner to the Republic of South Sudan.

TOYOTA PROJECTS IN EASTERN AFRICA

豊田通商による東アフリカプロジェクト

「TRY 1」 ~ East Africa ~

Oil Pipeline *BOT
(South Sudan - Lamu Port 2,000km)



Earth & Resources

Desalination Water Supply and Sewage Service
(Water Service Provider by PPP framework)



Life & Community

GEOHERMAL POWER PLANT PROJECT
(EPC and IPP)



Earth & Resources

Mombasa Port Development
(Installation of Gantry Crane and Port Operation)



Earth & Resources

Agriculture Mechanization
CASE IH and Yanmar Distributor



Life & Community



Life & Community

Agricultural Products
(FS on Bixa Process Business in Coast Region)

