

# Kili Partners

# Company Profile

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Kili Partners is an advisory, business and project development firm that assists clients to access growth opportunities and markets across the African continent.

Our leadership team has extensive commercial and advisory experience across the African continent, and has a connected and trusted network of influence, insight, and access that enable Kili's clients to identify, evaluate, and unlock high growth opportunities in challenging African markets.



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*Unlocking  
Africa*

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# Leadership and track record

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## **Joshin Raghubar** **Chairperson**

Joshin Raghubar is an entrepreneur in the media, marketing, and technology sectors. He is engaged in the evolving role of entrepreneurship, trust and innovation in the 'good society'.

He is the founder of iKineo, a Pan-African customer engagement agency; Sprout, South Africa's leading digital media performance firm; and Explore Sideways, a leading online purveyor of wine tourism experiences. Joshin serves as the chairperson of the Bandwidth Barn, Africa's largest non-profit incubator and accelerator for technology businesses; non-executive director of the Cape Innovation & Technology Initiative (CITi), the public/private sector agency tasked with development of the region as a technology and innovation cluster; and non-executive director of Enke, a non-profit organization that works to empower youth to develop social innovations in their communities.

Joshin also serves as a non-executive director of both the Africa Leadership Initiative (Southern Africa) and the African Leadership Network. He is a fellow of the Africa Leadership Initiative and the Aspen Institute's Global Leaders Network, a fellow of the United States-Southern African Centre for Leadership and Public Values, and a member of the Bertelsmann Foundation's global Transformation Thinkers program. Joshin is also a 2016 Yale World Fellow. He has a business science (honours) degree from the University of Cape Town, and a masters in development studies from the University of the Western Cape's Institute for Social Development.



# Leadership and track record

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## Natalia Sánchez Managing Partner

Having lived and worked in more than 15 countries, Natalia has extensive experience in emerging markets in Africa, Eurasia and Latin America. She has met hundreds of policy makers and business leaders for the production of promotional investment reports published in Fortune Magazine, BusinessWeek Bloomberg and other international media.

She has a wide understanding of growth opportunities in different markets and industries. As Manager of the Africa Desk at Rödl&Partner, she assisted non-African investors and international institutions with their African projects. Her 13 years of experience in emerging markets and business development include country office leadership roles in South Africa, Nigeria, Kenya, Mozambique, and Morocco.

Natalia also consults for Latin American diplomatic corps, and for European, African, and Latin American corporates wanting to invest, trade or establish business relations across regions. She is a key advisor for government relations and crisis management to the political advisory agency Mas Poder and a member of the Institute of Business Advisors of South Africa.

Natalia has a postgraduate in Management and Entrepreneurship from the University of Cape Town. She holds a BA in International Relations and Diplomacy obtained in Paris and Heidelberg. She speaks Spanish, English, French, Portuguese, Italian, and German and is currently learning Mandarin.



# Europe

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## **Francesco Gastaldon** **Associate**

Francesco has extensive experience in consulting Italian and foreign companies in international markets, with a special focus on Sub-Saharan Africa. He worked for private and public entities in Italy and abroad, advising private sector clients and business associations on international investment strategies in emerging markets.

As Africa Desk Manager at Rödl&Partner, Francesco coordinated the Italian business advisory activities of the firm, supporting existing clients in their business activities in Africa, and expanding new business opportunities for the firm. He was previously a Business Development Manager at Promos - Special Agency of Milan Chamber of Commerce for International Affairs, where he was in charge of business consultancy projects in emerging and frontier markets, including Sub-Saharan Africa, the Gulf, Iran, and South East Asia.

Francesco holds a BA in Economics and a MA in International Development from the University of Bologna. He pursued his Master's Degree studying between the University of Bologna, the University of Copenhagen and the University of California, Berkeley.



# Service Areas

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## **Advisory**

- African market entry and market growth
  - ✓ Strategy
  - ✓ Implementation
  - ✓ Investment Facilitation

## **Business development**

- Identification, and development of growth opportunities for existing businesses.
- Implementation of the business development plan: hands-on, commercial approach.

## **Export Desk**

- Build and manage distributor, agent, and importer network.
- Marketing and sales support - result oriented.
- Export management assistance.

## **Project development and project management**

- Opportunity identification, development and mobilisation.
- Packaging and mobilisation of projects.



# Clients and Sectors

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Our clients are MNCs, large, and medium size companies and investors with the ability to pursue large transactions and ambitious expansion strategies into Africa.

Kili Partners advises on and develops projects in a variety of sectors with a focus on:

- Infrastructure
- Construction and Real Estate
- Energy
- ICT
- Agribusiness
- Manufacturing
- Healthcare



# The Africa Opportunity

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## Africa 2008

**\$1.6 trillion**

Africa's collective GDP in 2008,  
roughly equal to Brazil's or Russia's

**\$860 billion**

Africa's combined consumer  
spending in 2008

**316 million**

the number of new mobile phone  
subscribers signed up in Africa since 2000

**60%** Africa's share of the  
world's total amount of  
uncultivated, arable land

**52** the number of African cities with  
more than 1 million people each

**20** the number of African companies  
with revenues of at least \$3 billion

## Africa tomorrow

**\$2.6 trillion**

Africa's collective GDP in 2020

**\$1.4 trillion**

Africa's consumer spending in 2020

**1.1 billion**

the number of Africans  
of working age in 2040

**128 million**

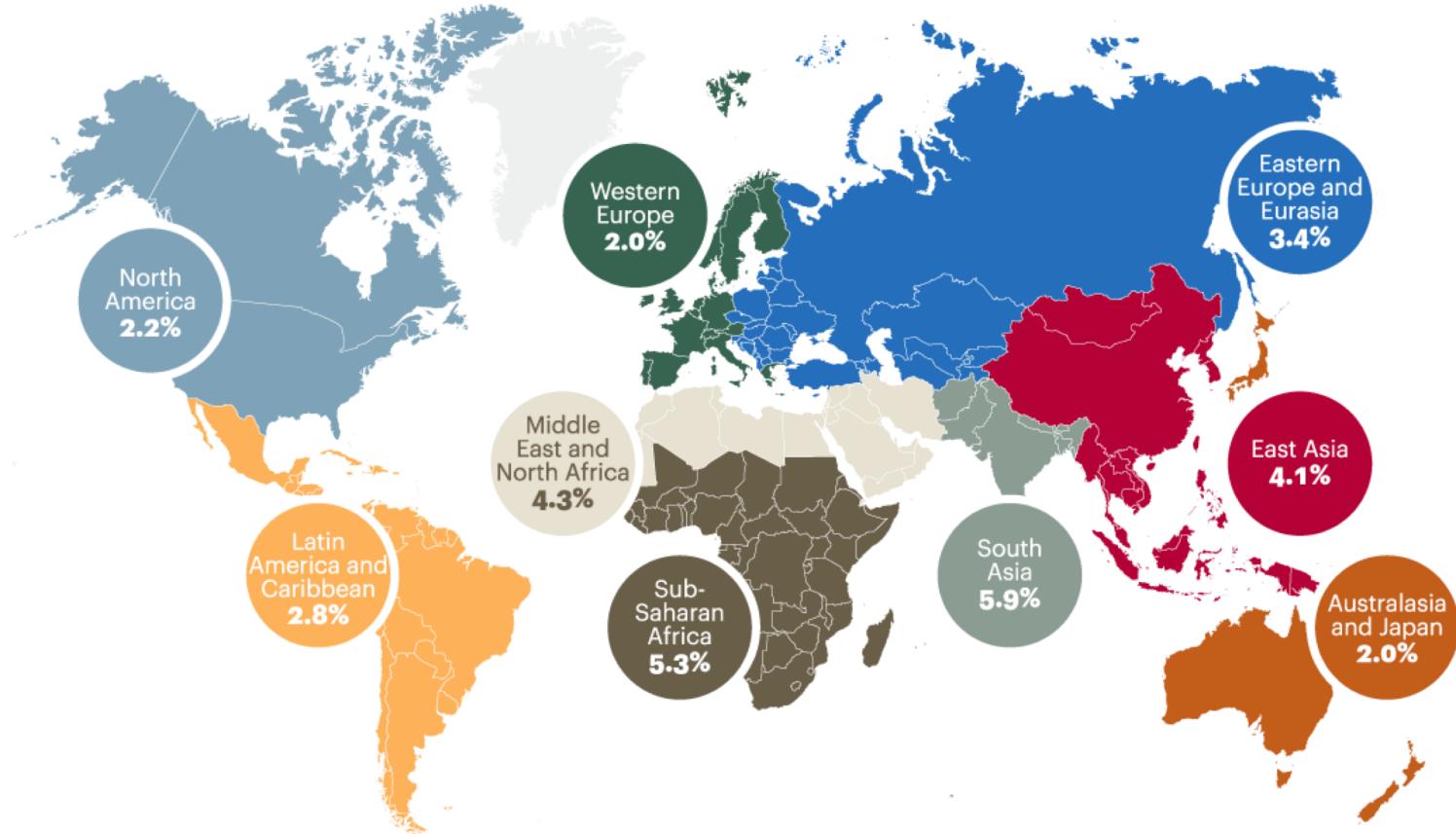
the number of African households  
with discretionary income in 2020

**50%** the portion of  
Africans living  
in cities by 2030



# The Africa Opportunity

%, 2016–2020 annual average



# The Africa Opportunity

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**Table 1: The 10 largest economies in Africa by share of World GDP (PPP), 2015**

Country	Rank	% Share of World GDP (PPP)	% of Africa's World GDP (PPP)
Nigeria	1	1	19.2
Egypt	2	0.9	17.3
South Africa	3	0.6	12.5
Algeria	4	0.5	9.9
Morocco	5	0.2	4.8
Angola	6	0.2	3.2
Sudan	7	0.2	2.9
Ethiopia	8	0.1	2.8
Kenya	9	0.1	2.5
Tanzania	10	0.1	2.4

Source: International Monetary Fund<sup>2</sup>

Notes:

1. Data not available for Somalia



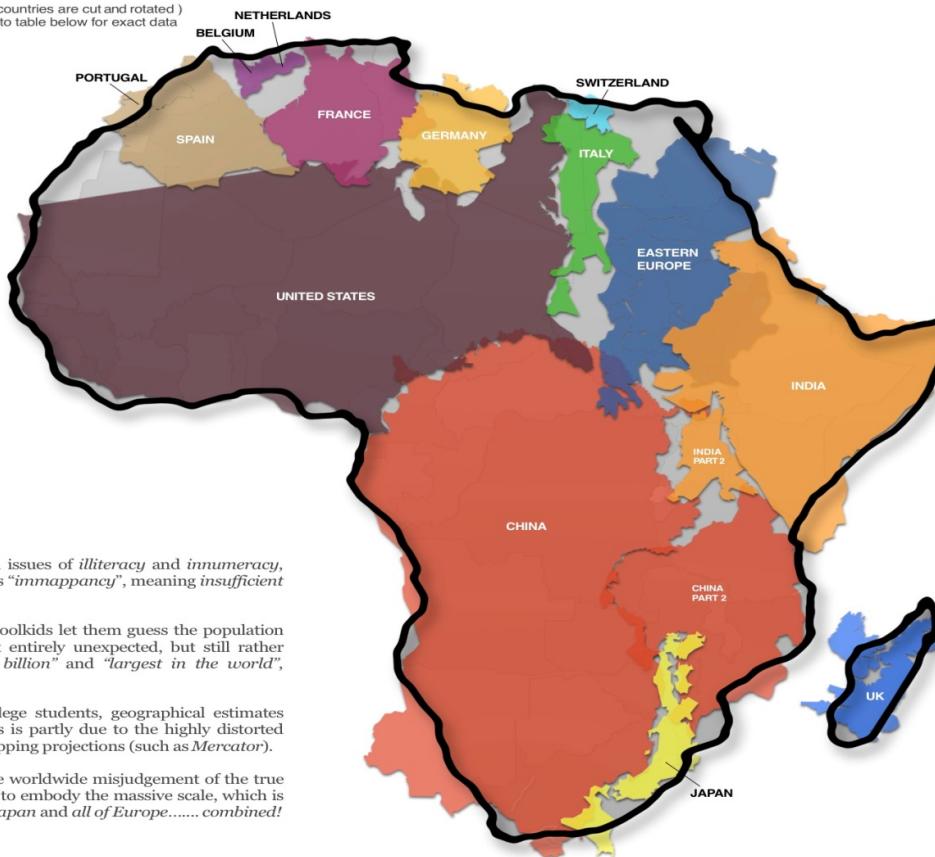
# The Africa Opportunity

## The True Size of Africa

A small contribution in the fight against rampant *Immappancy*, by Kai Krause

Graphic layout for visualization only (some countries are cut and rotated)  
But the conclusions are very accurate: refer to table below for exact data

COUNTRY	AREA x 1000 km <sup>2</sup>
China	9.597
USA	9.629
India	3.287
Mexico	1.964
Peru	1.285
France	633
Spain	506
Papua New Guinea	462
Sweden	441
Japan	378
Germany	357
Norway	324
Italy	301
New Zealand	270
United Kingdom	243
Nepal	147
Bangladesh	144
Greece	132
<b>TOTAL</b>	<b>30.102</b>
<b>AFRICA</b>	<b>30.221</b>



## Top 100 Countries

Area in square kilometers, Percentage of World Total  
Sources: Britannica, Wikipedia, Almanac 2010

	AREA km <sup>2</sup>	%
1	17.089.642	11.50
2	16.944.702	10.70
3	9.598.961	6.40
4	9.629.091	6.40
5	9.148.476	5.77
6	7.698.624	5.20
7	3.267.263	2.30
8	2.724.900	1.80
9	2.505.813	1.70
10	2.000.000	1.40
11	1.824.741	1.20
12	2.344.468	1.60
13	2.166.086	1.50
14	1.964.375	1.40
15	1.860.360	1.30
16	1.759.750	1.20
17	1.694.140	1.10
18	1.628.750	1.10
19	1.564.100	1.00
20	1.505.216	0.96
21	1.281.460	0.86
22	1.267.000	0.85
23	1.246.700	0.85
24	1.241.900	0.83
25	1.221.037	0.82
26	1.141.748	0.76
27	1.100.000	0.74
28	1.098.581	0.74
29	1.025.520	0.69
30	1.000.000	0.67
31	945.087	0.63
32	923.768	0.62
33	900.000	0.61
34	824.116	0.55
35	801.590	0.54
36	783.565	0.53
37	756.100	0.51
38	730.000	0.51
39	676.578	0.45
40	652.090	0.44
41	632.000	0.43
42	632.834	0.43
43	622.964	0.42
44	600.000	0.41
45	587.041	0.39
46	582.000	0.39
47	562.960	0.39
48	547.960	0.35
49	527.960	0.35
50	513.120	0.34
51	500.000	0.34
52	488.100	0.33
53	475.442	0.32
54	470.000	0.31
55	447.400	0.30
56	446.550	0.30
57	430.000	0.30
58	438.317	0.29
59	406.762	0.27
60	398.000	0.26
61	377.930	0.25
62	367.114	0.24
63	354.000	0.23
64	338.419	0.23
65	331.212	0.22
66	320.000	0.22
67	323.802	0.22
68	322.463	0.22
69	309.500	0.21
70	301.336	0.20
71	274.226	0.19
72	270.467	0.18
73	266.000	0.18
74	256.369	0.20
75	242.900	0.17
76	241.038	0.16
77	238.391	0.16
78	236.800	0.16
79	207.600	0.14
80	199.951	0.13
81	185.180	0.12
82	181.030	0.12
83	163.820	0.11
84	163.610	0.11
85	143.998	0.10
86	143.100	0.10
87	142.000	0.10
88	130.373	0.09
89	120.520	0.08
90	117.600	0.08
91	117.600	0.08
92	117.600	0.08
93	117.600	0.08
94	117.600	0.08
95	117.600	0.08
96	117.600	0.08
97	117.600	0.08
98	117.600	0.08
99	117.600	0.08
100	117.600	0.08
<b>TOP 100 TOTAL</b>		<b>132.632.524</b>
<b>89.34</b>		



In addition to the well known social issues of *illiteracy* and *innumeracy*, there also should be such a concept as "*immappancy*", meaning *insufficient geographical knowledge*.

A survey with random American schoolkids let them guess the population and land area of their country. Not entirely unexpected, but still rather unsettling, the majority chose "*1-2 billion*" and "*largest in the world*", respectively.

Even with Asian and European college students, geographical estimates were often off by factors of 2-3. This is partly due to the highly distorted nature of the predominantly used mapping projections (such as *Mercator*).

A particularly extreme example is the worldwide misjudgement of the true size of *Africa*. This single image tries to embody the massive scale, which is larger than the USA, *China*, *India*, *Japan* and *all of Europe.....combined!*



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# The Africa Opportunity

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## Growth Drivers

- Increased political and macroeconomic stability.
- Improved regulatory and business environments.
- Untapped mineral wealth, oil and gas supplies and uncultivated arable land on a landmass that can comfortably house China, India, the US and Western Europe.
- The most favourable demographic of any emerging market. Africa has a population of a billion people with 50% under the age of 34.
- A fast-growing middle class with 500 million new consumers expected to start shopping in the next 10 years.
- The urgent need for infrastructure across the 54 countries to support other essential developments.



# Growth Sectors

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**Telecommunications**



**Finance and fin-tech**



**Energy**



**Infrastructure, construction, housing and real estate**



**Agriculture  
Food Processing**



**Manufacturing**



**Health Care**



# Growth Sectors

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## Telecommunications

- Africa has surpassed Europe in the number of mobile phones and the U.S in number of cell phone users.
- Subscriber growth is strong. Rural is the next frontier.
- Opportunities in IT services, data, media, ISPs, mobile tech.



# Growth Sectors

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## Finance and fin-tech

- Africa's financial services sector is projected to grow 40% by 2020.
- 80% of Sub-Saharan Africa is unbanked.
- Africa has surpassed Europe in the number of mobile phones and the U.S in number of cell phone users.
- Fin-tech innovations such as M-Pesa, and other mobile money services, has increased economic participation and decreased capital asymmetry.



# Growth Sectors

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## Energy

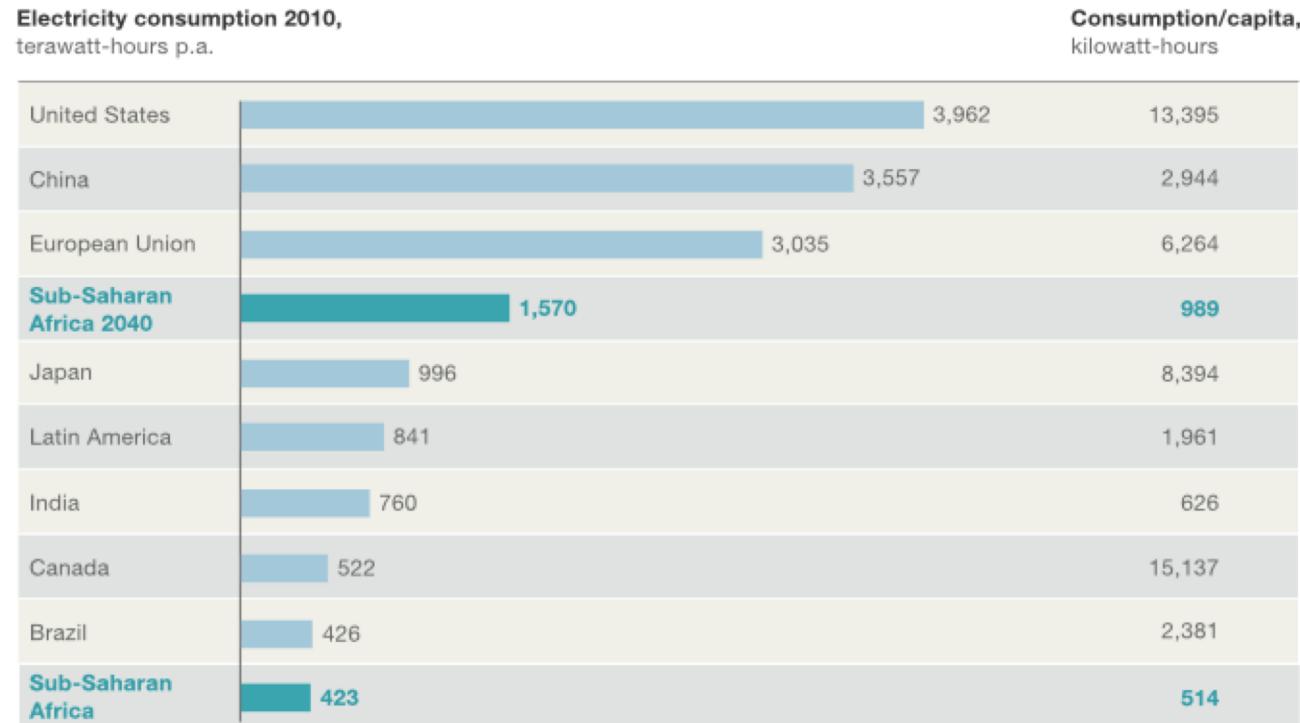
- Power demand will increase 93% by 2035.
- Household electrification rate in Africa stands at just 43%
- Electricity coverage ranges from 65% in urban areas to 28% in rural areas.
- Opportunities to partner in projects or to export material
- Increased renewable energy initiatives set to spur growth on the continent.



# Energy

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**Although sub-Saharan Africa consumes less electricity than Brazil, by 2040 its demand will reach a level equal to 2010 consumption in Latin America and India combined.**



Source: Key World Energy Statistics, Organisation for Economic Co-operation and Development and the International Energy Agency, 2013, [iea.org](http://iea.org); World Development Indicators, World Bank Group, [worldbank.org](http://worldbank.org)

# Growth Sectors

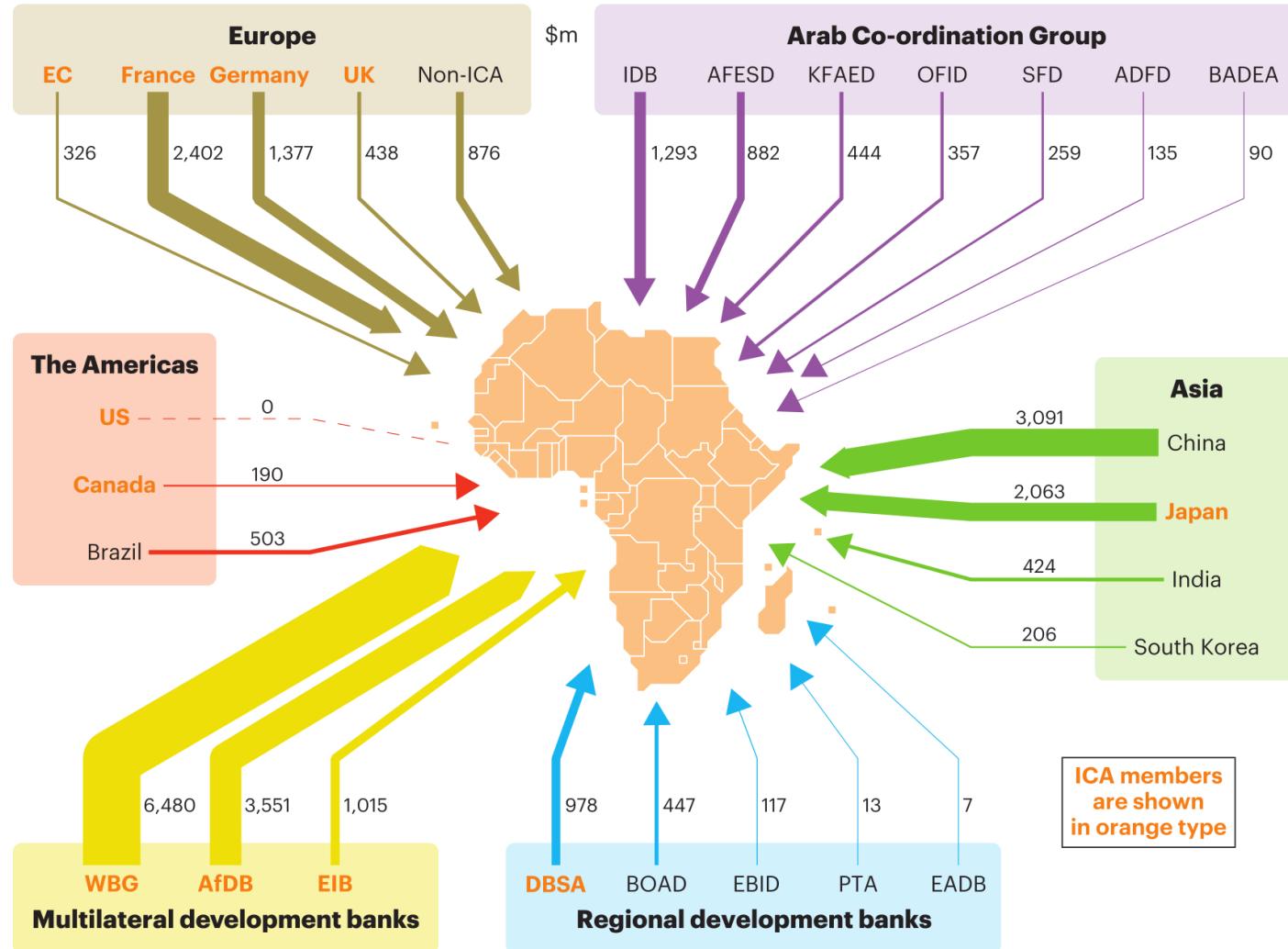
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## Infrastructure

- Mega Projects in West, East and Southern Africa.
- Infrastructure spending in the region is projected to grow by 10% a year over the next decade - exceeding USD180 billion by 2025.
- Nigeria, South Africa and Kenya dominate the infrastructure market in West, Southern and East Africa respectively.
- Funding initiatives by private investment firms and public funding arms have increased in recent years.



# Foreign Direct Investment



# Growth Sectors

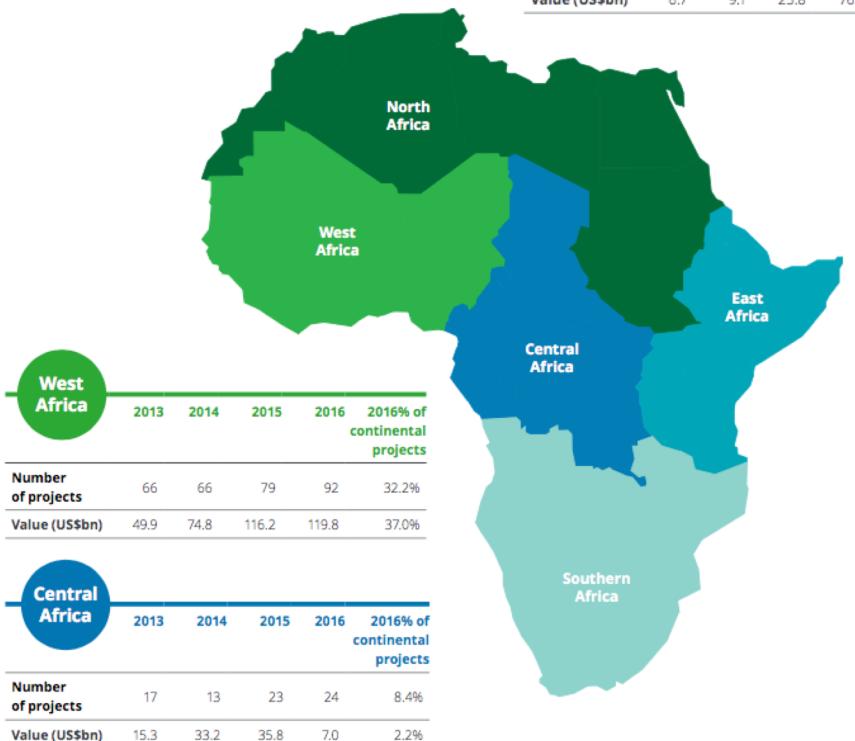
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## Construction

- Total value of projects under construction increased 15% year on year, from USD325 billion to USD375 billion.
- Transport (33.6%), Energy and Power (21%), Water (3.8%), Mining (2.8%), Oil and Gas (4.5%), and Real Estate (22.4%) and Other (8%).
- Opportunities to partner in projects or to export material
- Housing, water, energy and transport infrastructure are priority sectors for investment to spur on socio-economic growth in the continent.



# Construction



	2013	2014	2015	2016	2016% of continental projects
Number of projects	22	8	29	42	14.7%
Value (US\$bn)	6.7	9.1	25.8	76.1	23.5%

	2013	2014	2015	2016	2016% of continental projects
Number of projects	93	51	61	43	15%
Value (US\$bn)	67.7	60.7	57.5	27.4	8.5%



Source: Deloitte analysis, 2016

# Growth Sectors

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## Housing and real estate

- By 2100, 40% of the world's population will live in Africa.
- The rise of the urban middle class is encouraging residential and modern retail developments in many of the continent's major cities
- Prime office rents in Luanda, Angola, are among the highest in the world at USD150/sqm per month
- The increase in tourism and the 'Airbnb effect' has resulted in increased price of property rentals in Cape Town, Nairobi and Marrakesh.

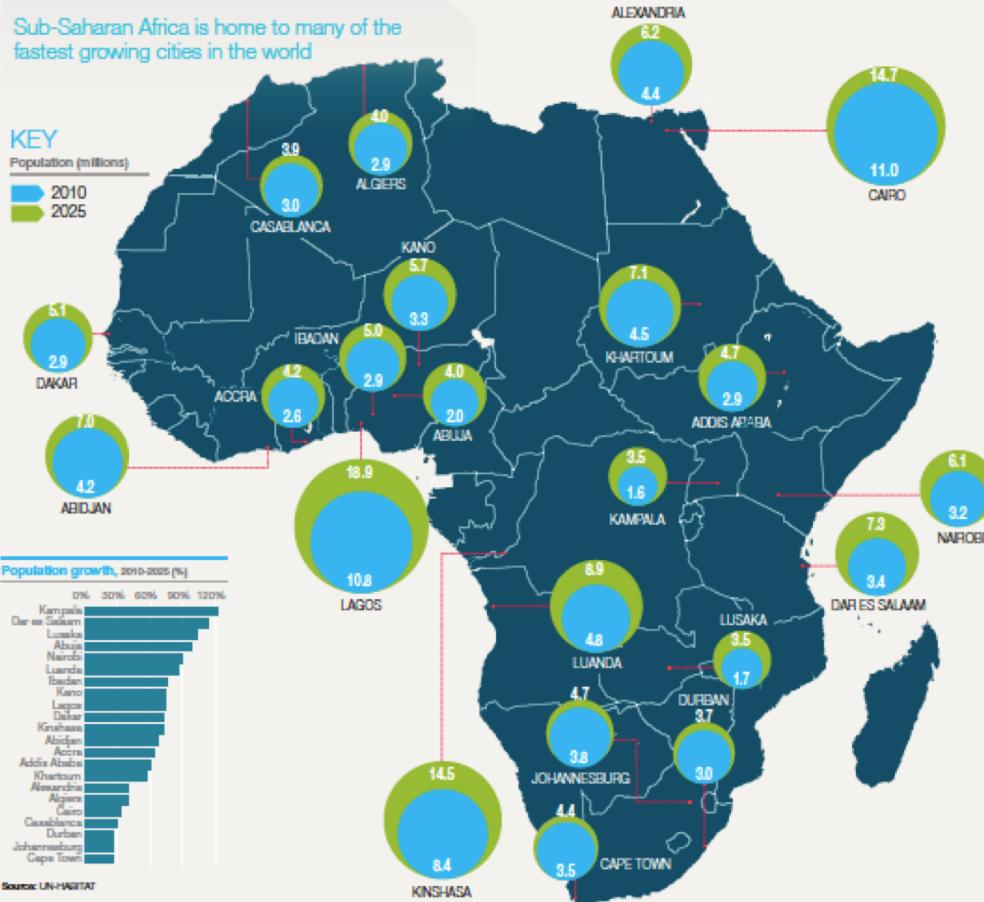


# Housing and Real Estate

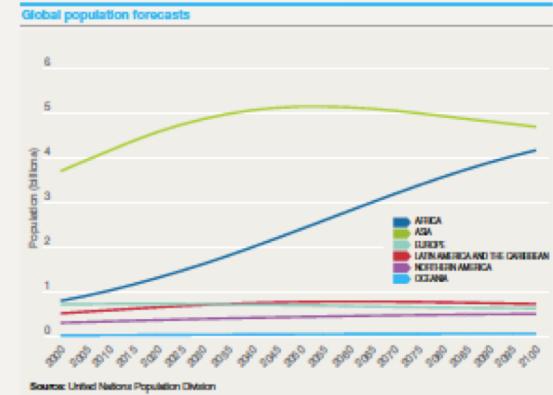
## AFRICA'S POPULATION GROWTH

## Africa's growth cities

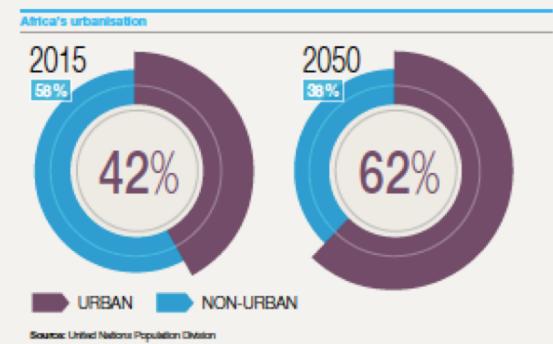
Sub-Saharan Africa is home to many of the fastest growing cities in the world



By 2100, it is projected that nearly 40% of the world's population will live in Africa.



Africa's population will become primarily urban over the coming decades



# Growth Sectors

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## Manufacturing

- Underdeveloped industry but share of the region's GDP has held steady at 10-14%, with steadfast growth projected at 3.5% per annum.
- Africa is becoming cheaper, with infrastructure improvements and lift of trade barriers, improving regulations and FOREX advantages.
- Opportunities in automotive, green economy, furniture, textile and leather, yachts.

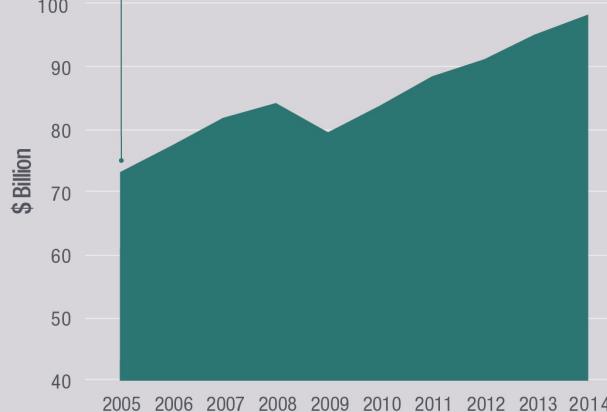


# Manufacturing

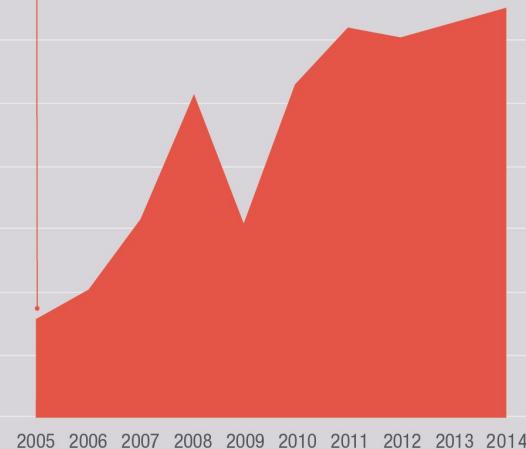
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Think African manufacturing is in decline? Think again.

African manufacturing grew from \$73 billion in 2005 to \$98 billion in 2014\*



Manufacturing exports doubled from \$50 billion in 2005 to more than \$100 billion in 2014



Manufacturing in sub-Saharan Africa has increased in real terms by 3.5% a year – faster than the global average.

\*in 2005 prices

Find out more at [odi.org/african-manufacturing](http://odi.org/african-manufacturing)



# Growth Sectors

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## Agriculture

- In 2013 the agribusiness industry was worth USD313 billion (expected to reach USD1 trillion by 2030) (WBG data).
- 70% of Africans make a living from agriculture but it accounts for just 33% of the continent GDP.
- Opportunities in agro processing also expand the need for processing and packaging equipment.



# Growth Sectors

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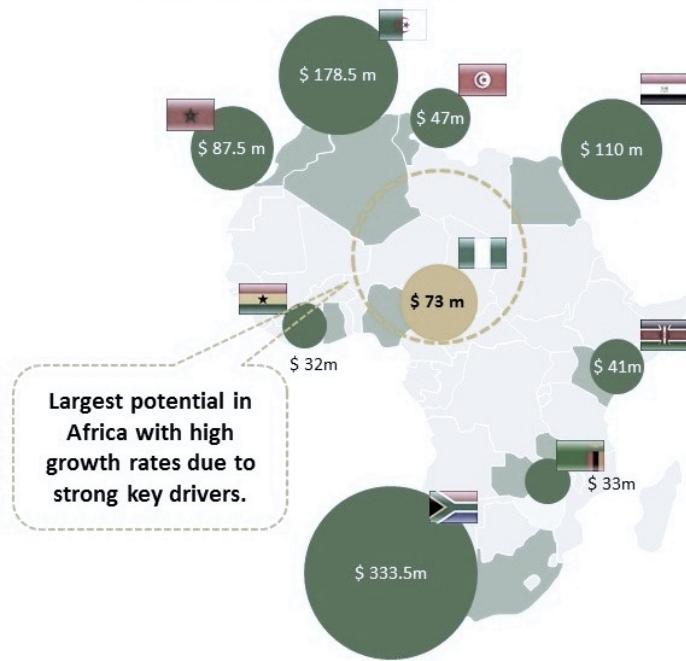
## Healthcare

- Sub-Saharan Africa's health care market reached USD35 billion by 2016. Spurred on by urbanization, improving business environment and increased healthcare capacity.
- As investment in the sector increases, there are more opportunities for solution providers: hospital equipment, pharmaceuticals, medical technologies and other healthcare services and products.
- The African market for medical equipment represents 2% globally.
- Pharmaceutical manufacturing is expected to grow by 14% from 2015 - 2020

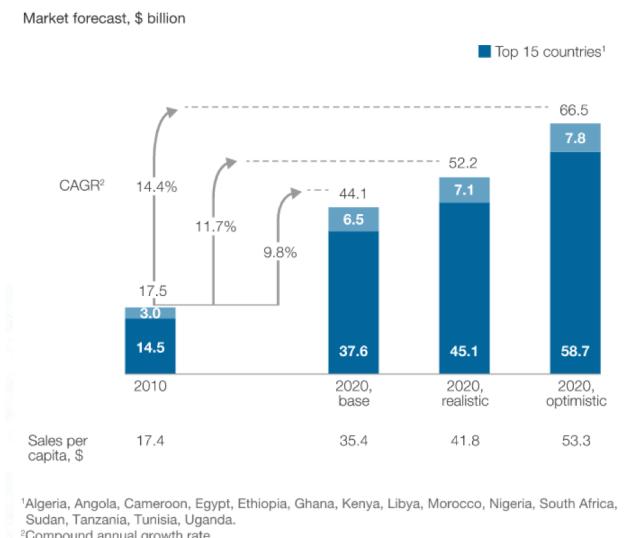


# Healthcare

**South Africa is the largest African market for medical equipment. Great chances exist in Nigeria.**



**Total market size  
Africa 2015:  
approx. \$1.4bn**



Source: African Development Bank; BMI Research; International Monetary Fund; World Bank; World Health Organization; McKinsey analysis

McKinsey&Company

# Our Partners

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Strategic Partner



Data and Media Partner



# Locations

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