



MOBILITY

HEALTHCARE

CONSUMER

INFRASTRUCTURE



WITH  
AFRICA  
FOR  
AFRICA

2022 PROFILE



## AT A GLANCE

### — 4 BUSINESS DOMAINS —

*Mobility*  
*Healthcare*  
*Consumer*  
*Infrastructure*



access to  
**47** of the continent's **54** markets

locations in

**40** African countries

**7** French overseas  
territories (FOTs)  
Myanmar, Vietnam

**170** years in Africa

**€6.9**  
billion of which



revenue  
(April 2021-March 2022)



Over  
**21,000**  
employees



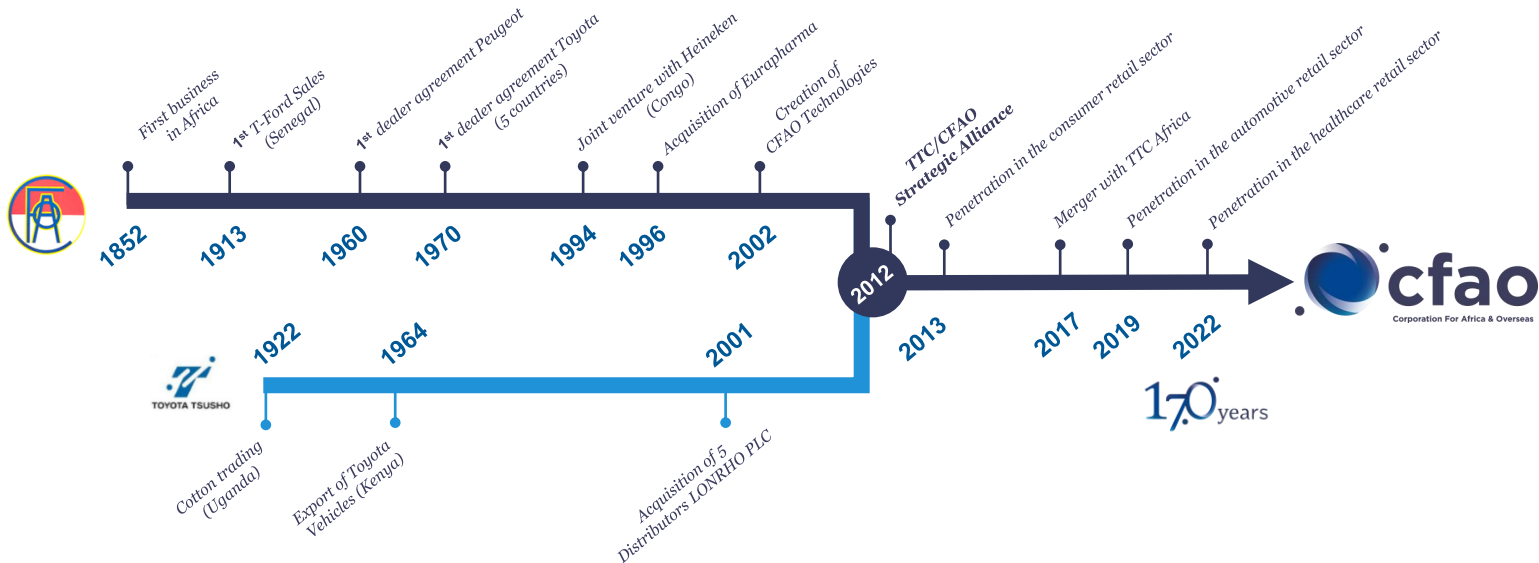
**155**  
operating  
subsidiaries

Head office in  
**France**

PART OF  
**TOYOTA TSUSHO CORPORATION GROUP**

**WITH AFRICA FOR AFRICA**

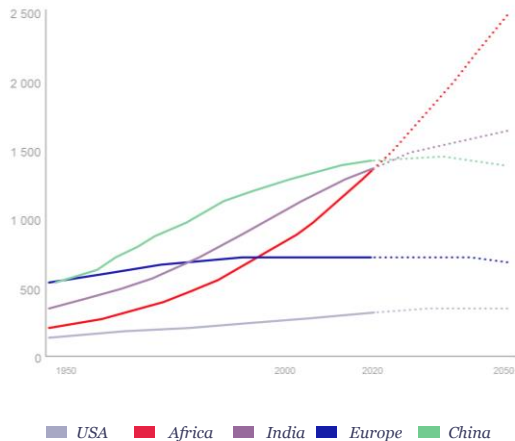
# 170 YEARS OF EXPERIENCE IN AFRICA



# OUR COMMITMENTS FOR AFRICA

CONTRIBUTE TO A FASTER  
SUSTAINABLE ECONOMIC GROWTH  
THAN THE RAPID GROWTH OF THE  
AFRICAN POPULATION

World population  
(in millions)

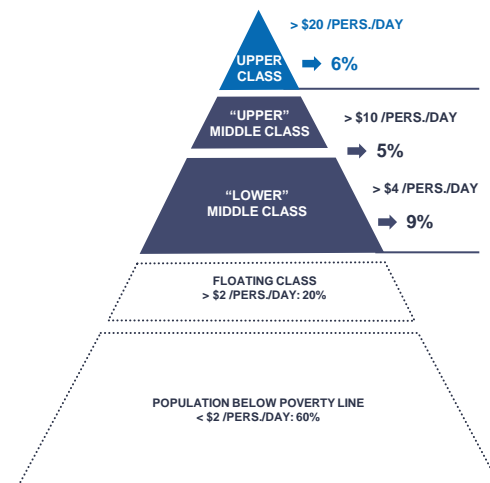


Source: United Nations, Department of Economic and Social Affairs, Population Division (2019).

CONTRIBUTE TO  
THE INDUSTRIALIZATION  
OF THE CONTINENT



CONTRIBUTE TO THE EMERGENCE  
OF THE MIDDLE CLASS BY CREATING  
JOBS AND OFFERING AFFORDABLE  
PRODUCTS



Source: BearingPoint based on ADB data, 2015

The analyses are based on a study conducted by BearingPoint and Ipsos for CFAO in 2015.

# OUR STRATEGY TO DELIVER SUSTAINABLE GROWTH

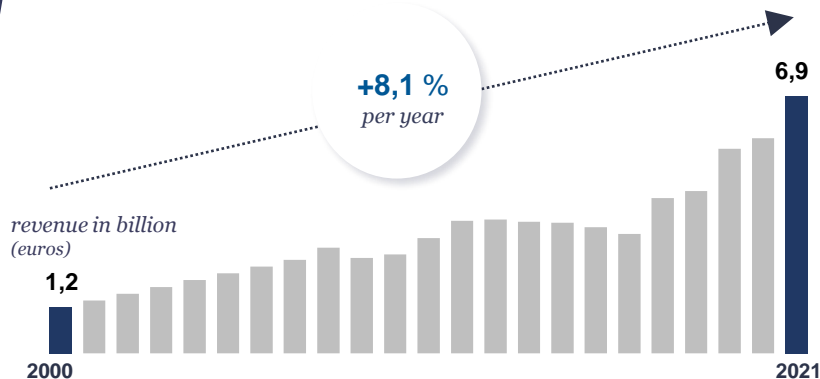
## — MARKET ENVIRONMENT — WITH MANY CHALLENGES

- › **High potential markets**
- › **Fragmented** market (54 countries)
- › Sub-Saharan markets are still **small and volatile**
- › **Regional integration** under construction
- › **Various risks:** devaluation, Forex, political, security, etc.
- › **Growing** middle class but **limited** purchasing power

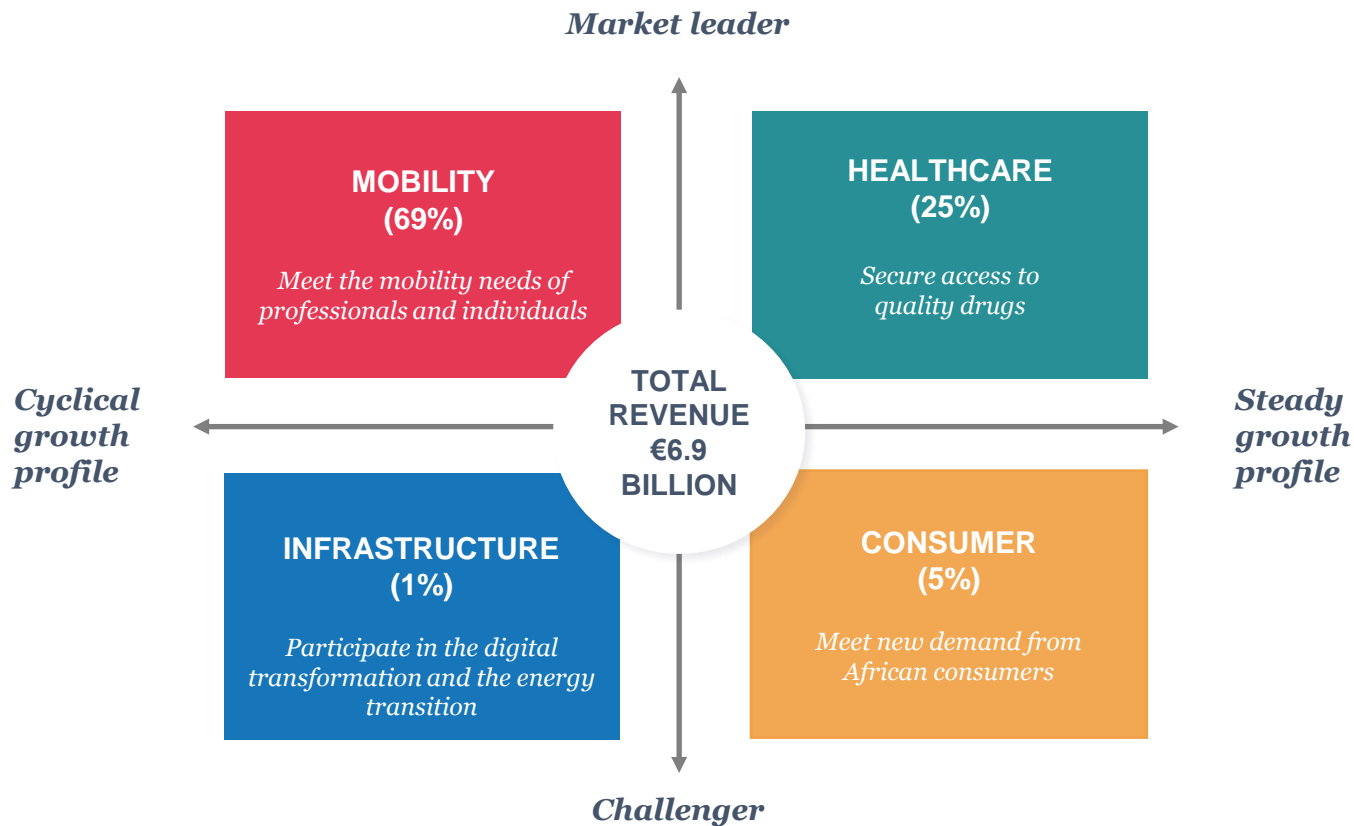
## — OUR 4 STRATEGIC AXES —

1. *Diversified business portfolio and large pan-African presence*
2. *Partnerships with strong brands*
3. *Value chain integration*
4. *Evolution to the use of cleans vehicles and renewable energy*

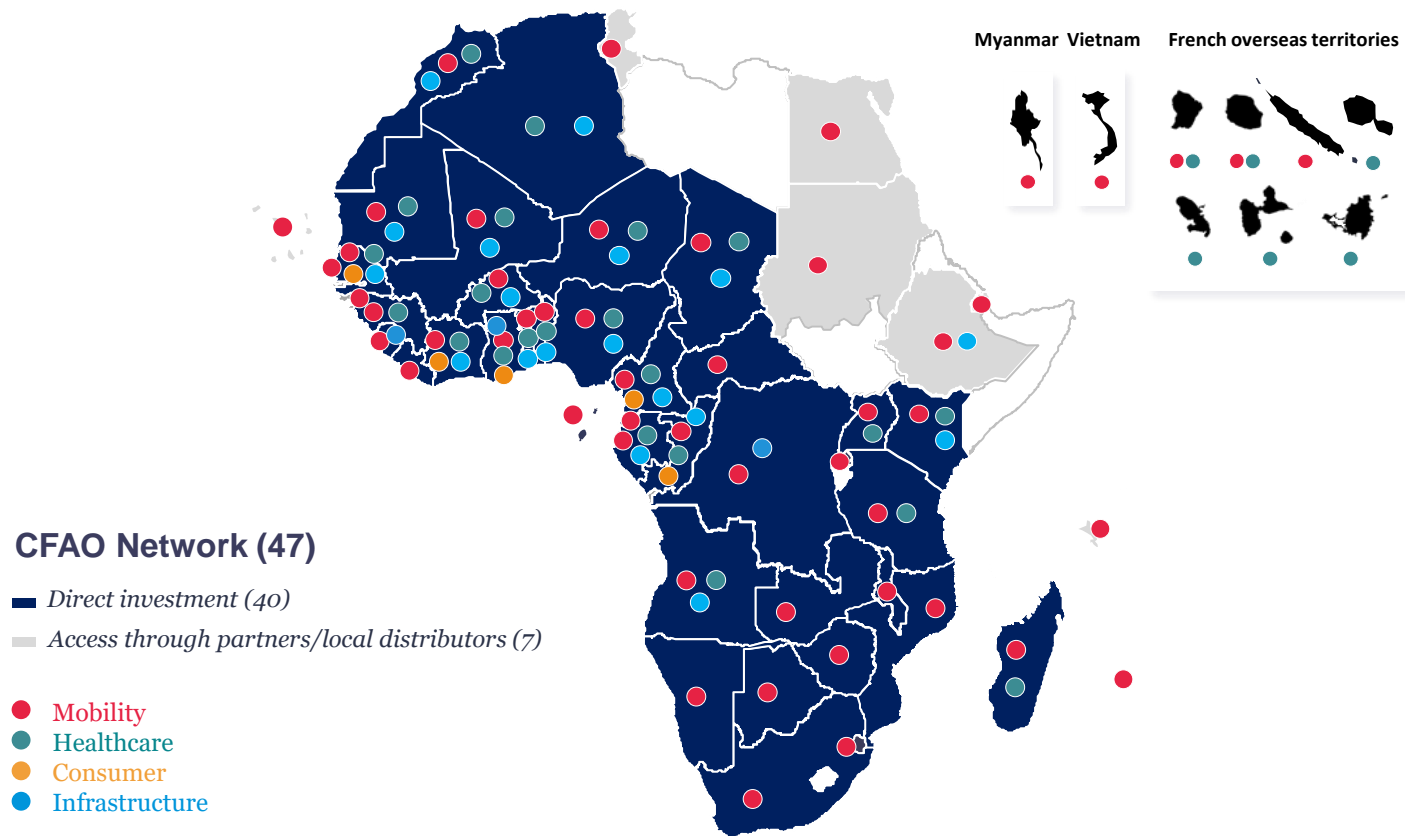
## — AVERAGE GROWTH IS NEARLY DOUBLE — AFRICA'S GDP



## A DIVERSIFIED & COMPLEMENTARY BUSINESS PORTFOLIO

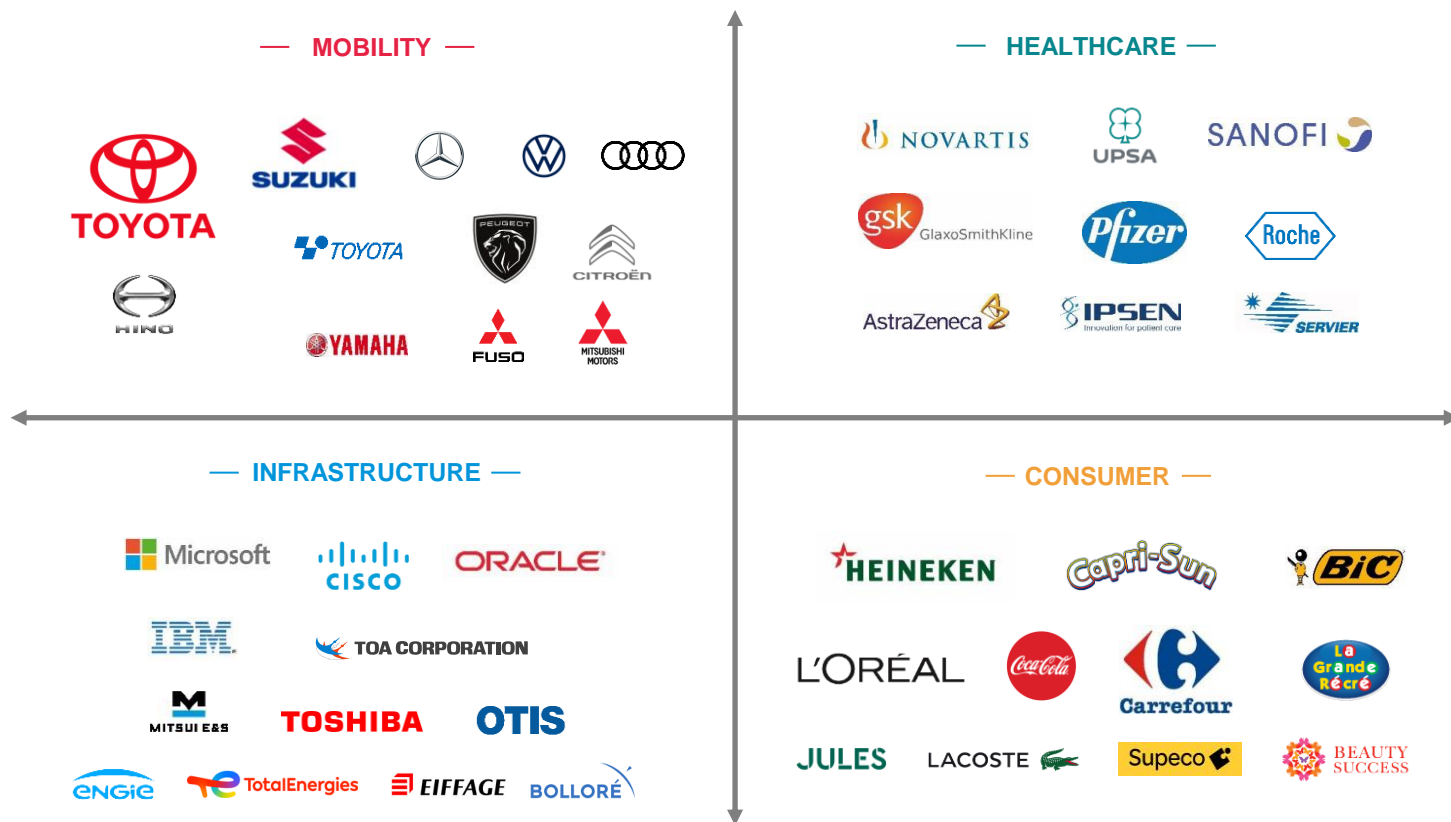


## OUR DISTRIBUTION NETWORK IN 47 AFRICAN COUNTRIES





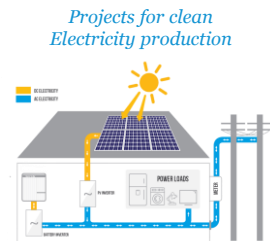
## IN PARTNERSHIP WITH THE STRONGEST BRANDS



# INTEGRATION OF PRODUCTION AND RETAIL

## PRODUCTION IN AFRICA « Upstream »

 TOYOTA TSUSHO AFRICA



## IMPORT, WHOLESALE & LOGISTICS

*Historical core  
business*

## MOBILITY

*Market leader  
in Sub-Sahara  
(B2B and B2C)*

## HEALTHCARE

*Market leader in Morocco,  
Sub-Sahara and FOT*

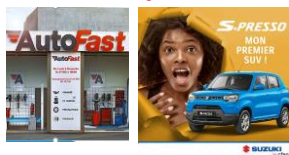
## CONSUMER

*Challenger in FMCG  
and beer markets*

## INFRASTRUCTURE

*Challenger in ICT, lift and  
energy markets  
(B2B and B2G)*

## RETAIL « Downstream »



 cfao  
MOTORS

 Goodlife  
Pharmacy Health Beauty



 Carrefour  
Carrefour market

 Supeco  
Des économies tous les jours

 PLAYCE  
VOTRE RENDEZ-VOUS SHOPPING

## AN ORGANIZATION IN 7 DIVISIONS



# MOBILITY

REVENUE

**€4,8 billion**



**50**  
countries  
**3** FOTs



over  
**120,000**  
new vehicles  
sold



over  
**265**  
dealerships



over  
**34,000**  
used vehicles  
sold

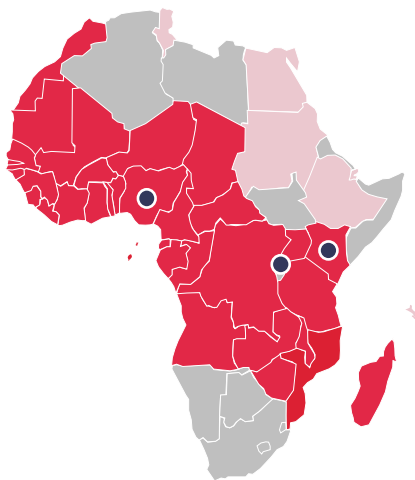
# THE LARGEST AUTOMOTIVE DISTRIBUTION NETWORK IN A DEVELOPING MARKET



## REVENUE

**€2,9 billion**

*except South Africa*



- **35** CFao locations
- **7** local distributor partners
- *production sites*



**165**  
dealerships



*over*  
**95,900**  
new vehicles sold



**20,800**  
two-wheelers  
sold



**46** countries and **3** FOTs



**37** countries



**33** countries



**15** countries



**18** countries



**10** countries



**8** countries



**7** countries



**3** countries



**23** countries



**33** countries



**23** countries



**24** countries



## OUR MOBILITY SERVICES OFFER

### — PAN-AFRICAN LONG-TERM RENTAL NETWORK —



*financing solutions*



*tracking*



*assistance and replacement vehicle*



*insurance*



*full maintenance*



### — REPAIR CENTRES & AUTOMOTIVE PARTS MAINTENANCE —



In partnership with TotalEnergies

### — A PAN-AFRICAN BRAND —

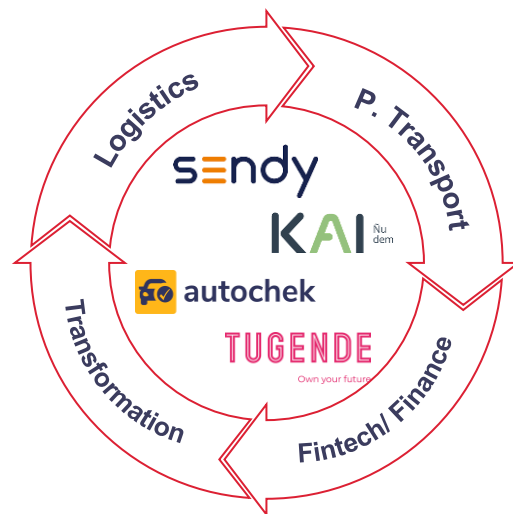
**AUTOMARK**  
Certified Used Vehicles



### — INCUBATION OF NEXT MOBILITY IN AFRICA —



*Focus on 4 projects scope creating an eco-circle*





# SOUTH AFRICA, OUR LARGEST MARKET IN AFRICA

## REVENUE

**€1,9 billion**

*in South Africa*



**160**  
*dealerships*



*over* **28,500**  
*new vehicles sold*



**28,000**  
*used vehicles sold*



*Supply of parts and  
services to the automotive  
industry in South Africa*

## — PRODUCTION SUPPORT —



## — DISTRIBUTION OF MAINTENANCE EQUIPMENT —



Acquisition of EIE in 2022



## — RETAIL AUTOMOTIVE GROUP & VEHICLE RENTAL —



*over* **100** multi-brand  
dealerships and a car rental service  
**23** car brands distributed





# HEALTHCARE

REVENUE  
**€1,7 billion**



**28**  
countries  
**6** FOTs



**8,600**  
*Retail pharmacies  
delivered several  
times a day*



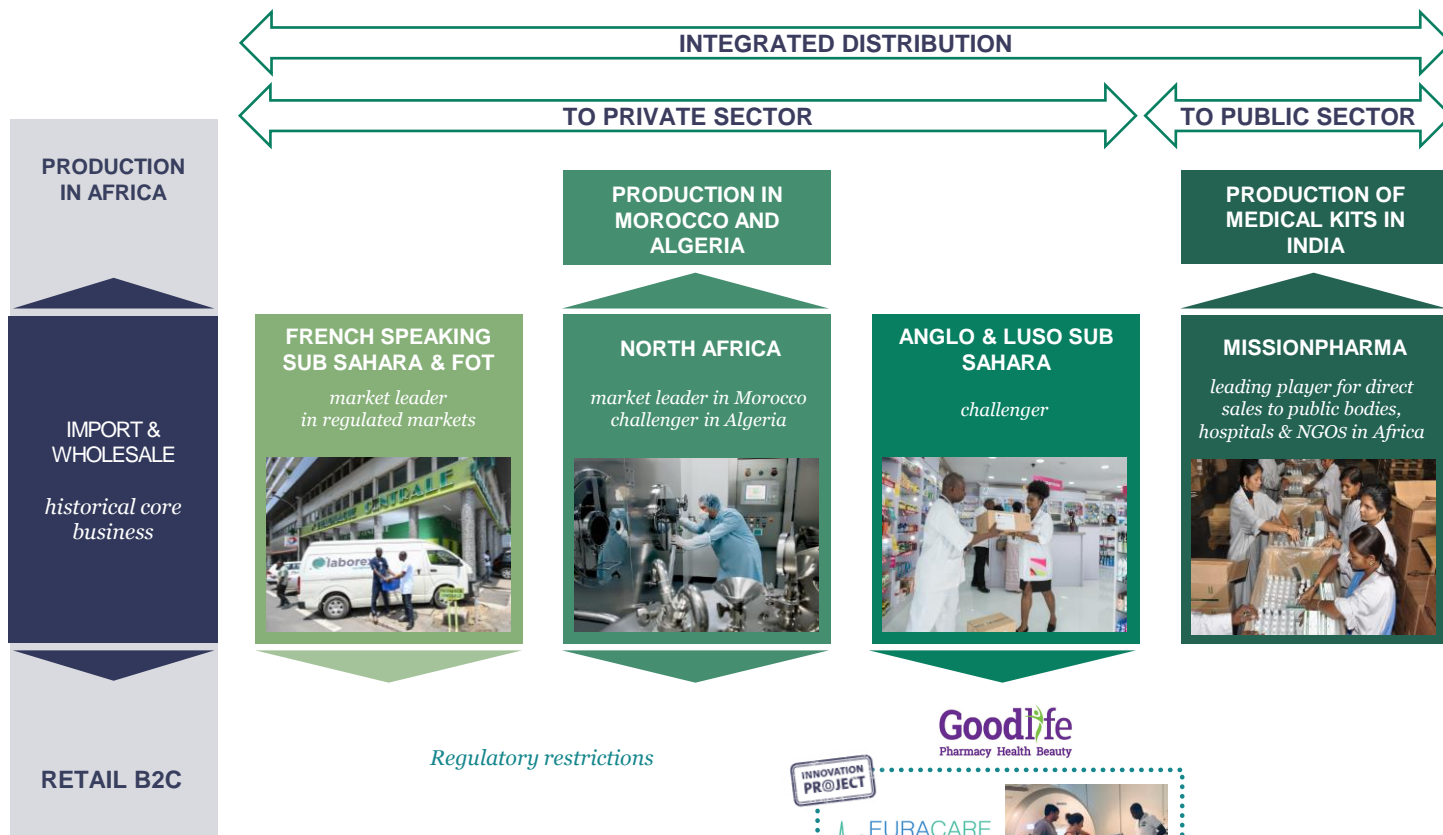
over  
**500**  
supplier  
laboratories



over  
**31,000**  
products  
references



# OUR MISSION: SECURE ACCESS TO QUALITY DRUGS





# CONSUMER

REVENUE

**€341 million**

Food purchases account for  
**25%** of the budget of the African  
middle classes



**5**

countries



breweries

over **2,5** million  
hectolitres



**17** stores

**3** shopping  
malls

# A DIFFERENT VALUE PROPOSAL FROM PRODUCTION TO RETAIL — CONSUMER



## — BREWERIES —



- › BRASCO (Congo)  
Beer: **1,2 million** hectolitres and soft drinks: **0,6 million** hectolitres
- › BRASSIVOIRE (Côte d'Ivoire)  
Beer: **0,7 million** hectolitres



## — FOOD, HYGIENE & CONVENIENCE —

L'ORÉAL

- › Manufacturing: over **6 million** cosmetic products in Côte d'Ivoire



- › Manufacturing: over **5 million** pouches in Côte d'Ivoire



## — MULTI-PURPOSE FACTORY —

- › Products made locally to bring leading brands to Africa's emerging middle classes at affordable prices



## — FOOD —



- › Developing a network of stores Carrefour and Supeco in **Cameroon**, **Côte d'Ivoire** and **Senegal**
- › Several distribution formats: hypermarket, supermarket and cash & carry

## — PROPERTIES —

- › Supporting the development plan of Carrefour network

## — BRANDS —

- › Building and operating a network of franchised stores



# INFRASTRUCTURE

REVENUE

**€76 million**

**70%**

*of total energy consumption in Africa  
comes from renewable sources\**



**15**

countries



**11**

subsidiaries



**18**

CFAO locations with  
solar panels

*\* mainly traditional biomass*

# WE PARTICIPATE IN DIGITAL TRANSFORMATION AND ENERGY TRANSITION

INFRASTRUCTURE



— B2B —



*Integration, outsourcing and managed service for IT and communication solutions including data centers, cybersecurity*



*Installation and outsourcing of OTIS in 19 countries  
Multi-brand lift maintenance*



*« Solar for Savings »  
projects for SMEs*



- ▲ Headquarters in Côte d'Ivoire
- Regional hubs (West Africa, Central Africa)
- CFAO Technology & Energy locations
- Other countries covered



— B2G —



*Support of TTC Japan on development projects for government clients to:*

- > Renewable energy
- > Infrastructure
- > Off-grid



**9**  
countries  
covered

*Projects supported in 2021:*

- > Desalination plant in Senegal
- > Reinforcement of the electricity network in Cabinda, Angola

## OUR 3 PRIORITIES TO REDUCE OUR CARBON FOOTPRINT



Solar  
panels

### USE RENEWABLE ELECTRICITY FOR OUR ACTIVITIES

*"Solar4savings" action plan (-50% by 2030)*



Clean  
Vehicles

### PROMOTE THE USE OF CLEAN VEHICLES IN AFRICA

*Hybrid and electric vehicles*



Renewable  
Energy

### CONTRIBUTE TO RENEWABLE ENERGY PRODUCTION

*Direct investments in power generation projects financed by Japan*





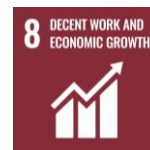
**CARBON  
NEUTRAL**





## OUR SUSTAINABLE DEVELOPMENT COMMITMENTS

### CFAO FOCUSES ON UNITED NATIONS SUSTAINABLE DEVELOPMENT GOALS



### INTERNAL PROGRAMMES & PARTNERSHIPS

Health  
by cfao

Education First  
by cfao





# WITH AFRICA FOR AFRICA



## A RELIABLE SHAREHOLDER WITH A LONG-TERM VISION



Owns  
**100%**  
of CFAO's  
share capital

**JPY 8,028  
billion**

revenue  
(April 2021-March 2022)



Over  
**64,400**  
employees



**1,000**  
operating  
subsidiaries



Over  
**120**  
countries

Listed on the Tokyo stock exchange,  
nearly **22%** of TTC's shares are owned by TOYOTA

### **7** Business units

- > Africa
- > Metals
- > Global parts and logistics
- > Machinery, Energy and projects
- > Automotive
- > Food and consumer services
- > Chemicals and electronics



# **2022 PROFILE**

## *English version – May 2022*

### ***Communications Department***

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*Sources: BearingPoint (based on ADB data, 2015), World Bank, BAD, UN*

*Alcohol abuse is bad for your health, drink responsibly.*

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