



SOUTHERN
AFRICA EUROPE
CEO DIALOGUE



The European House
Ambrosetti

SOUTHERN AFRICA EUROPE CEO DIALOGUE

7th Edition

Johannesburg – The Capital On The Park & **Virtual Platform**
November 26-27, 2020

BUILDING AN EXCLUSIVE, INFLUENTIAL COMMUNITY OF LEADERS FOR GROWING
THEIR ENTERPRISES, THEIR COUNTRIES, AND THEIR CONTINENTS

PRESENTATION BY TONY STENNING

BOLLORE
TRANSPORT & LOGISTICS

IOT and innovation

Solutions for AFRICA

October 2020



The Bolloré Group

Bolloré

- › A 198-year-old family Group, with a long-term strategy
- › 84,000 employees in 130 countries
- › Turnover: €24.843 B (2019)
- › EBITDA in 2019: €1,634M (+0.2%)
- › Net Income in 2019: €1,408 M

BOLLORE
TRANSPORT & LOGISTICS

ONE OF THE LEADING TRANSPORT AND LOGISTICS OPERATORS IN THE WORLD

- › Leader in transport and logistics in Africa
- › One of leading group in freight forwarding and logistics
- › #1 port and rail concessions operator in Africa
- › Major actor in oil logistic and distribution in France and Europe.

I IAVAS

AN INTEGRATED MEDIA, CONTENT AND COMMUNICATIONS GROUP

The company operates businesses throughout the media value chain, from talent discovery to the creation, production and distribution of content.

vivendi
UNIVERSAL
UNIVERSAL MUSIC GROUP

CANAL+
GROUPE
GAMELOFT

BlueSolutions

ELECTRICITY STORAGE AND SOLUTIONS

LMP BATTERIES AND SUPERCAPACITORS

- › Mobile Applications
 - autolib' bluecar bluebus
 - blueindy bluesummer bluetram
- › Stationary Applications (Bluezone and Bluestorage)
 - bluezone bluestorage
- › Systems and Services
 - IBER Polyconseil

**A GLOBAL PLAYER IN
FREIGHT FORWARDING
AND LOGISTICS**

- › Member of top 10 worldwide
- › Turnover €4.9 billion
- › Global footprint in international transportation and value-added services

BOLLORE
LOGISTICS

**A LEADING OPERATOR
IN PORT CONCESSIONS**

- › #1 port concessions operator in Africa: 21 port concessions
- › Operator of international port concessions: India, Haiti, Timor-Leste
- › Operator in secondary ports in France

BOLLORE
PORTS

**MAJOR RAILWAY
OPERATOR AND
DEVELOPER IN AFRICA**

- › Operator of 3 concessions in Africa
Existing: Ivory Coast – Burkina Faso and Cameroon –
New: Benirail (Niger – Benin)
- › A prime railway developer

BOLLORE
RAILWAYS

**1ST INDEPENDENT
PLAYER IN FRANCE IN
OIL LOGISTICS AND
DISTRIBUTION**

- › Leader in domestic fuel distribution in France
- › Strong presence in Oil logistics, in France and EU

BOLLORE
ENERGY

36,500 EMPLOYEES | **109** COUNTRIES | **€ 8.5** BILLION TURNOVER

The Group in Africa |

No.1

The most extensive integrated Logistics network in **48** countries

50











Years of **continuous presence**



Advanced knowledge of **Customs processes** & Trade regulations

ISO

Compliance with highest international standards

-  Bolloré Transport & Logistics network
-  Corridors operated by Bolloré Transport & Logistics
-  Bolloré Transport & Logistics subsidiaries
-  Major ports in Africa
-  Port concessions operated by Bolloré Transport & Logistics
-  Oil & gas terminals operated by Bolloré Transport & Logistics
-  Railway concessions operated by Bolloré Transport & Logistics
-  Other railroads
-  Waterways operated by Bolloré Transport & Logistics
-  Airport agencies operated by Bolloré Transport & Logistics



We operate **14 port concessions**



Hinterland Transport with management of **40 specific corridors**



We manage **280** covered warehouses



We own & operate a fleet of **1,200 trucks**

Stakes

Our industry is highly labour intensive. It has transformed over the past 20 years from simple Port to Port transactions to tailor made solutions E2E.

Where customers' requirements are getting more and more specific, the 3PL's need to standardise the processes, aiming at gaining in productivity whilst offering transparency, immediacy & easy access to information.

New tools to simplify the experience

Predictive analytics

Customer Digital Platform

Track & trace enhanced with IOT solutions

Challenges of the 3PL Industry on the customers' journey

- Standardisation in communication
- Multiple contact points at customers & 3 PL
- Transactional aspects of the relationship
- Expectation from the customers to have a live and detailed visibility on ongoing transactions

Questions?

- 1) Transport costs in Africa are high by World standards – how does Bollore Logistics deal with barriers such as this?
- 2) What impact has or will the African Trade Agreement have on your industry?
- 3) What is Bollore Logistics doing in terms of Innovation and Digitalisation to improve supply chain efficiencies and provide solutions for their clients?

Logistics Challenges Solved with IOT support

TEMPERATURE CONTROL

Transport and storage solutions for a wide range of temperatures, 2-8; -20°C and cooler (-60°C for raw materials)

Temperature monitoring end to end

SECURITY

Anti-hijacking security & risk precautions

Theft prevention requires increased visibility of the stock.

Data security

Risk of counterfeit products

VISIBILITY & TRACEABILITY

Possible re-call of vaccines

Avoid stock shortage or wasting products.

Accounting inventory
Up to the minute

CAPACITY

10 billion units expected by 2021: bottlenecks for the space on aircrafts, and the availability of cooling packaging

Volatile transport offer

QUALITY

Meet healthcare industry recommendations and standards
Cold-chain integrity
Substantial amount of disqualified products due to arrival-only quality checks.**

Specific needs for waste and recycling management

* Seabury consulting webinar input, Seabury consulting analysis

** DHL White paper « Delivering pandemic resilience »

Takeaways & Lessons Learned

ANYTHING REMAINS POSSIBLE IN TERMS OF IMPROVING THE SUPPLY CHAIN IN AFRICA

PEOPLE AND ORGANISATIONS ARE AGILE & ADAPTING FAST TO DO MORE & BETTER

CROSS FERTILISING EXPERIENCES OF THE GLOBAL NETWORK IS KEY

PEOPLE
POWERED
INNOVATION