






THE RWANDA OPPORTUNITY

Rwanda Day, February 2024



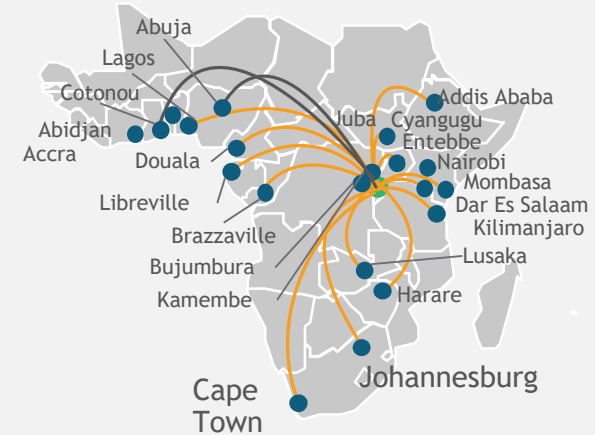
Rwanda has experienced consistent economic growth and is strategically positioned to serve as a gateway into Africa

Strong economic growth

Countries	10Y Avg	2022	2023 (P)
 Rwanda	7.1%	8.2%	7.9%
 Ethiopia	9.5%	4.8%	5.7%
 Botswana	1.4%	4.2%	4.4%
 Kenya	8.9%	5.9%	5.7%
 Tanzania	6.9%	5%	5.6%

- **One of the fastest growing African economies** in the last decade; exceeding the avg. African growth rate
- **Friendly business environment** with no restrictions on foreign ownership and attractive tax incentives
- **Inclusive economic growth model** prioritizing gender equality, youth empowerment and climate resilience

Strategic gateway to Africa



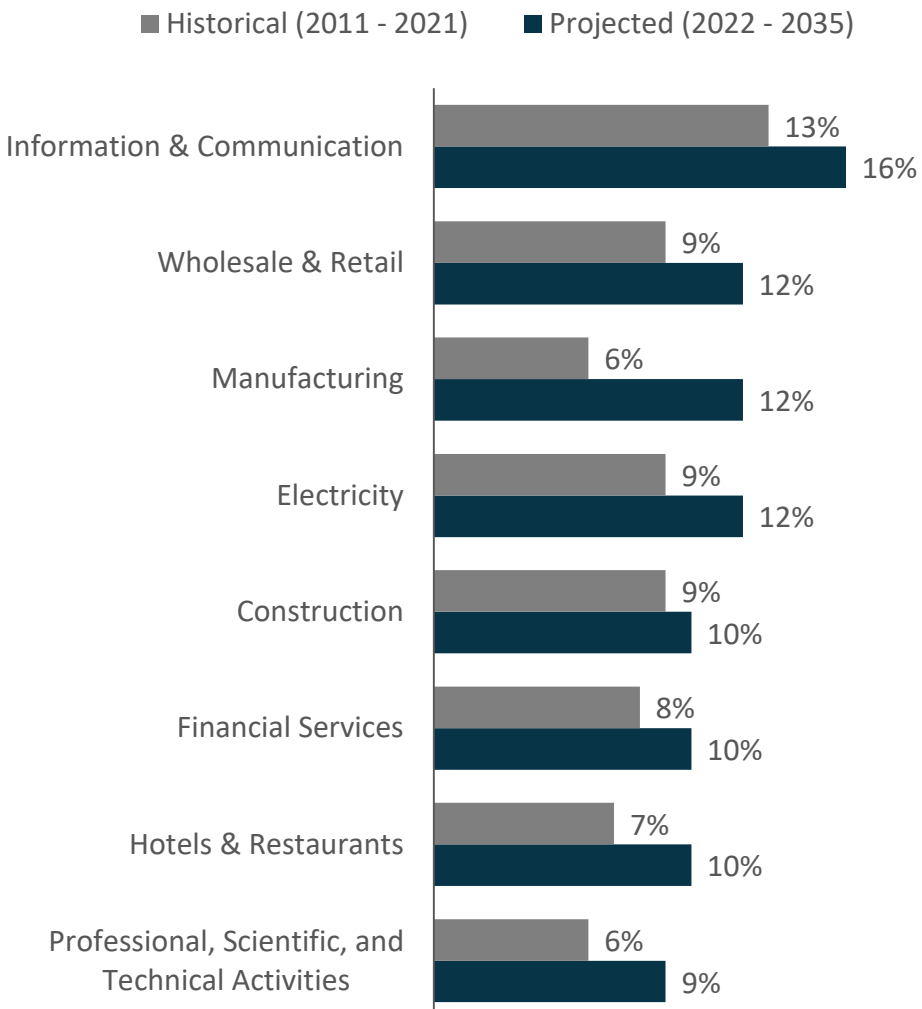
— Existing direct connections to Kigali — Planned direct connections to Kigali



- **Preferred access market for ~80m people** living in proximity with additional access to African and global markets through robust free trade agreements
- **Strong air connectivity** with direct flights to Africa, Europe, Middle East and Asia and a USD 1 Bn dollar airport under construction

Rwanda's economic transition is anchored on fast growing sub-sectors

Rwanda nurtures local innovators and attracts global innovators looking to test, launch and scale



Source: RDB Analysis, National Strategy for Transformation, National Institute of Statistics of Rwanda

Health

Kigali Health City



~ Africans spend ~\$1 billion a year on outbound medical treatment.

~ Rwanda is developing a health hub with specialized, high-quality medical services, cutting-edge technology and innovative research in Africa.

~ Ongoing projects include a heart center for cardiac surgeries, IRCAD Africa center for minimally-invasive surgeries & Artificial Intelligence, extension of King Faisal teaching hospital and a center of excellence for infectious diseases.

Investment required:\$ 500M

Agriculture

Gabiro Agribusiness Hub



- ~ Government of Rwanda has invested in the development of a 15,600ha fully irrigated commercial farm focusing on food crops and high value crops for export.
- ~ Phase1 (5,600ha) is completed and fully subscribed by farm operators.
- ~ Investment gap to develop Phase2 (10,000ha) with a pipeline of operators ready for offtake.

Investment required:\$100M

Rwandan companies expanding abroad



~Rwandan companies expanding abroad seek to develop large scale commercialized agriculture in other African countries.

~The companies have large arable land concessions in Central African Republic, Republic of Congo and Mozambique to grow cereals, vegetables, palm oil, biofuel oil seeds

- Mozambique: 34,000Ha
- Central African Republic : 100,000Ha
- Republic of Congo: 11,000 Ha & 121,000Ha

Mining

Precious Metals & Critical minerals value-chain



~ Invest in Rwanda's mining sector value-chain - mineral exploration, mine development/extraction, mineral processing and mineral trading.

~Rwanda has diverse proven Minerals essential to the energy transition.

- *Lithium*
- *Gold*
- *Rare Earth minerals*
- *3Ts (Tin, Tungsten, Tantalum)*
- *Gemstones .*

Real Estates Opportunities

Kigali Innovation city



~ Kigali City has an emerging university and Tech Innovation cluster i.e. Carnegie Mellon University, African Leadership University, University of Rwanda Center of Excellence for biomedical engineering, BioNTech and Cooper Pharma.

Investment: real estate to develop grade A offices, student housing and residential facilities for the growing tech community.

Investment required: \$100M

Total Project size is \$300M

Parklane



- ~ Around the Kigali Convention Center & Hotel, & City Height Tours;
- ~ The Parklane Tour project seeks to develop and operate a 19-floor mixed use complex.
- ~ This is a prime location adjacent to key Conference & Business Centers

Investment required: \$62.5 Million

Prime End residential Estates



~ Rwanda's National Pension Fund has developed 504 prime end residential units called the vision city 1.

~ These have been fully occupied and it's currently seeking a partner in developing two new residential estates in Kigali;

- 1,487 residential units called Vision city II (model homes are 75% completed)
- Five star Hotel (55rooms), 30 villas & 687 Dwelling units with retail & recreational facilities.

Investment required:\$296M

High Impact Middle income Housing



~Rwanda's housing market needs 30,000 new units per year of which up to 75% are in the middle income category.

~ The sector has already attracted developers, but with limited capacity.

~ The government seeks a Partner to invest in this high impact & mass demand housing market in Rwanda.

Unit Purchase Value: \$40,000

Green Economy

Green City Kigali (GCK)



~ Rwanda is setting a trajectory towards a Net zero emissions future and is currently pioneering a green and affordable city with green technologies & innovations for green and climate resilient urbanization.

~ The project will sit on 600ha and Green city Kigali is looking for a partner in developing the project. Land has already been identified and feasibility study completed

~ The first stage will comprise of 1700 - 2000 housing

Investment required:\$150M

Gasmeth



~ Partnership with a Privately owned company focused on the Lake Kivu gas project two with 25-year (+5-year extension) concessions for extracting up to 40mmcfpd

~ The extracted gas will primarily be used in the transportation, industrial, household, and power generation sectors in Rwanda and for export

Investment required:\$375M

Manufacturing

Glass manufacturing



~ Rwanda has significant sandstone deposits of 60 Million Tons which accounts for 70% of the raw materials needed for manufacturing of both float and container glass. The readily available raw materials presents an opportunity to set up a glass manufacturing plant

~ 64,000 MT estimated regional market size for container glass and 90,000MT for float glass.

Financial indicators	Container glass	Float glass
Total investment	\$ 85Million	\$150Milliom
IRR	29.4%	20.8%
NPV	\$31.8Million	\$41.8Million
Payback period	5yrs & 3 months	8yrs & 4mnths

FMCG Manufacturing



The manufacturing space holds several investment opportunities.

Based on import size and values for Rwanda, there is potential opportunities in:

- Agro-processing
- Construction materials
- Light manufacturing, &
- Cross-cutting enablers (packaging materials)

Investment required: \$5-\$10 Million

Tourism

Kigali Cultural Village



~ Kigali Cultural Village is a development of one spot to showcase Rwanda's Cultural heritage.

~ With its phase one already complete with basic infrastructure, this integration of cultural, commercial, and environmental facilities will provide unique amenities, services, and conveniences that will be attractive to local, regional and international tourists.

Investment required
\$ 42.2 M

Karongi Lake Side Resort



Rwanda is positioning itself as a prime tourism destination in Eastern Africa attracting a new upscale clientele to the region.

Through different PPP models (BLT, BTO or BOT) There is opportunity to invest in the development of a deluxe Resort with approx. 60 - 100 rooms at an upscale 4 - 5* level on 3.7 Ha prime site in Karongi. This will close the gap of lack of an upscale hotel in Karongi district

Investment required
\$10M - \$30M

Hotel Strip - Rubavu



Rwanda Convention Bureau plans to extend some conferences to secondary cities like Rubavu. This creates an opportunity for investors to invest in the development of a Hotel Strip in Rubavu district.

This facility will be strategically located on 1.2 Ha at the shores of Lake Kivu which is a hot spot for tourism activities, and less than 100 meters from the existing Serena Hotel.

Investment required
\$10M - \$20M

We welcome you, come visit us
today.....



www.rdb.rw

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