

BUNGE

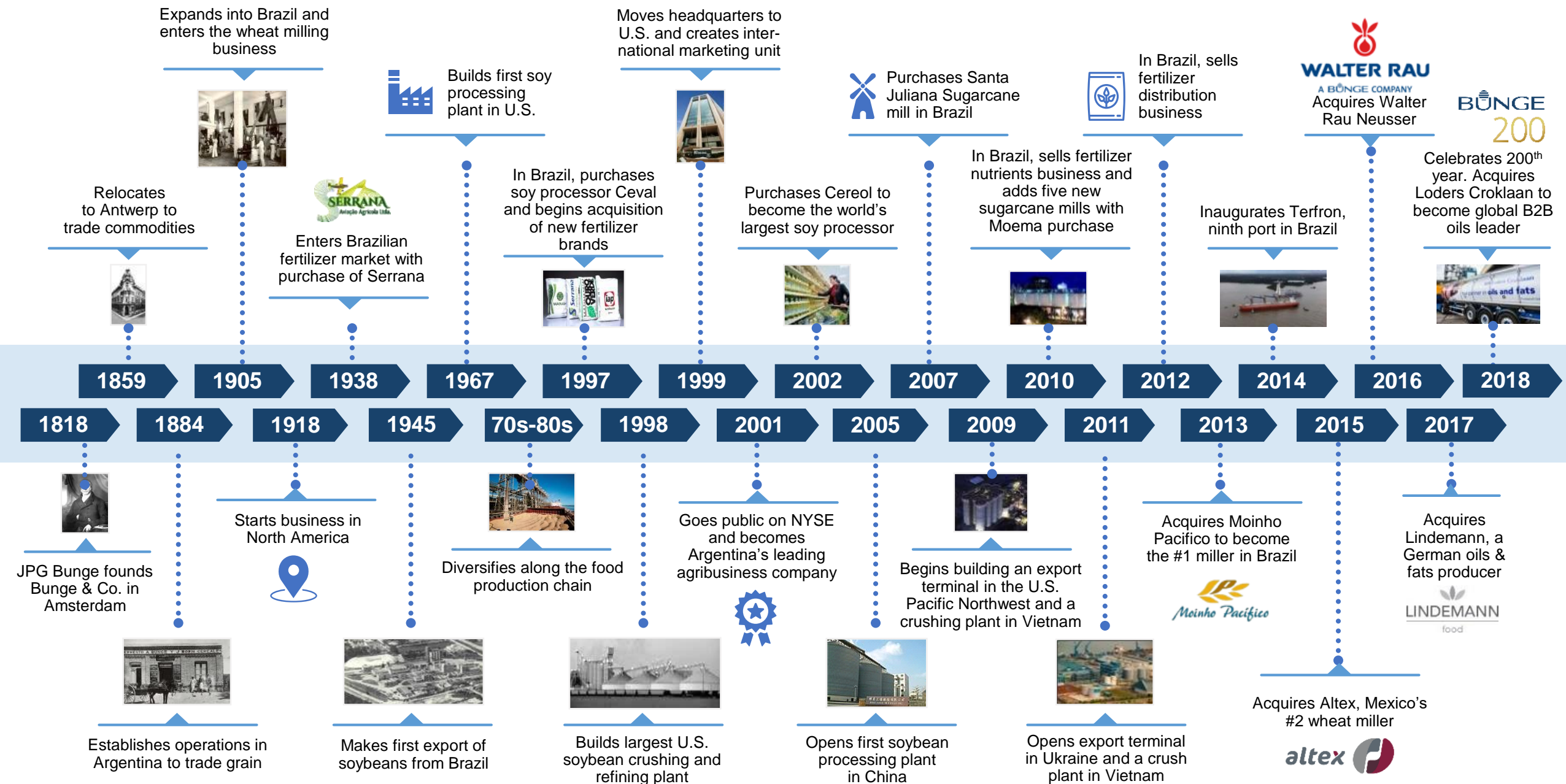
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# IAOM NAIROBI

OCTOBER, 2018 – JEAN CHARZAT, BUNGE

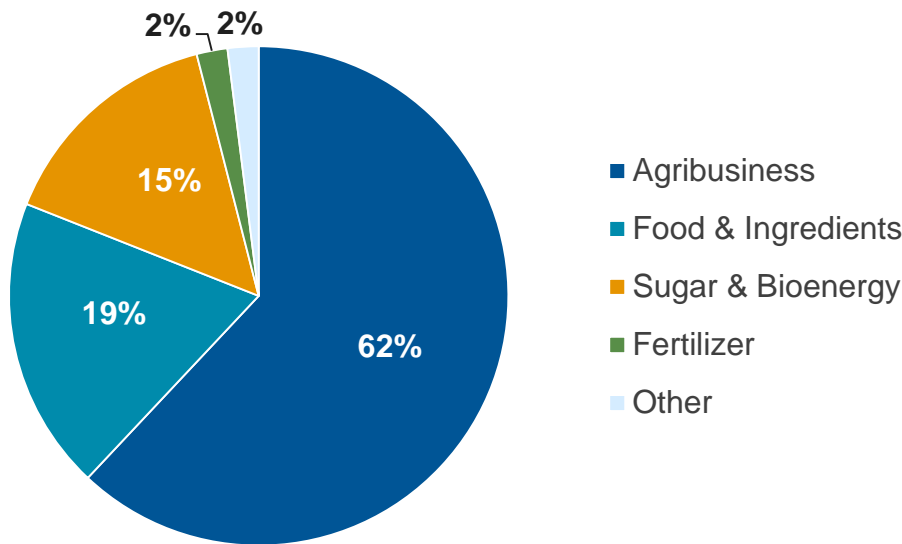
BUNGE  
200





# Bunge Today

Average  
Invested  
Capital



NET SALES

\$46 B

EMPLOYEES

~32,000

FACILITIES

~400

COUNTRIES

~40+

## AGRIBUSINESS

- A global leader in oilseed processing
- A global leader in grain and oilseed origination and marketing

## FOOD & INGREDIENTS

- Global B2B oils leader with full line of product solutions
- Leading corn and wheat miller in the Americas
- World-class innovation and applications capabilities

## SUGAR & BIOENERGY

- 21 mmt sugarcane milling capacity producing sugar, ethanol and electricity

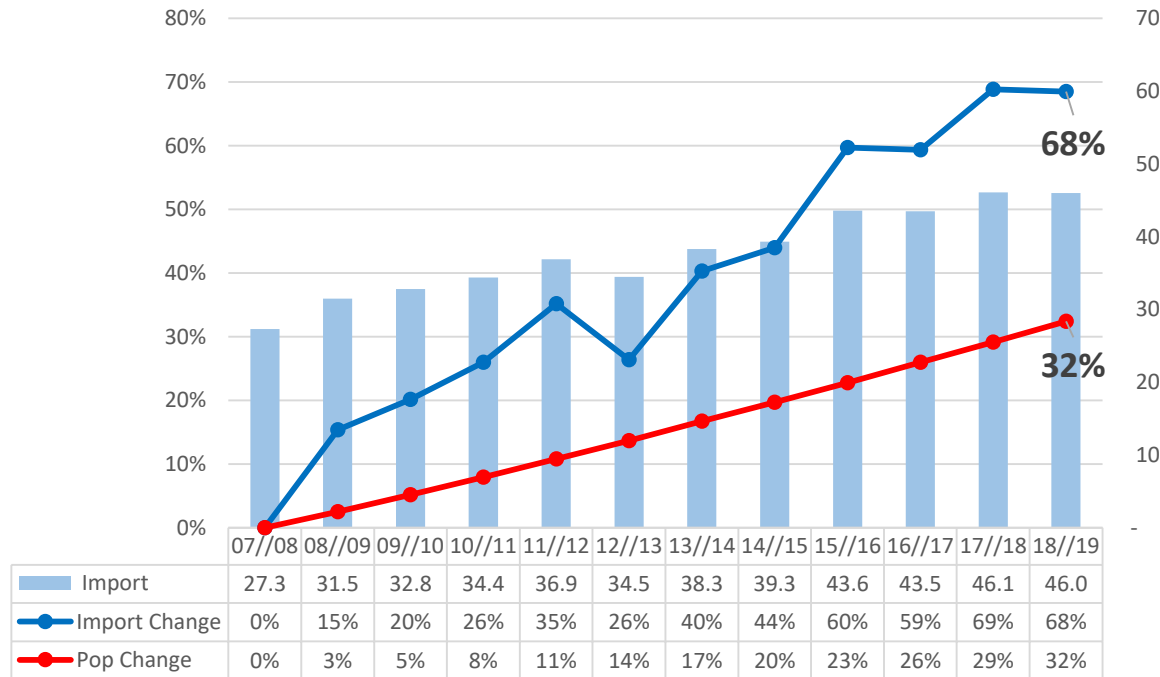
## FERTILIZER

- Fertilizer production and sales in Argentina
- Fertilizer port operations in Brazil

# Africa Wheat Import vs Population Growth

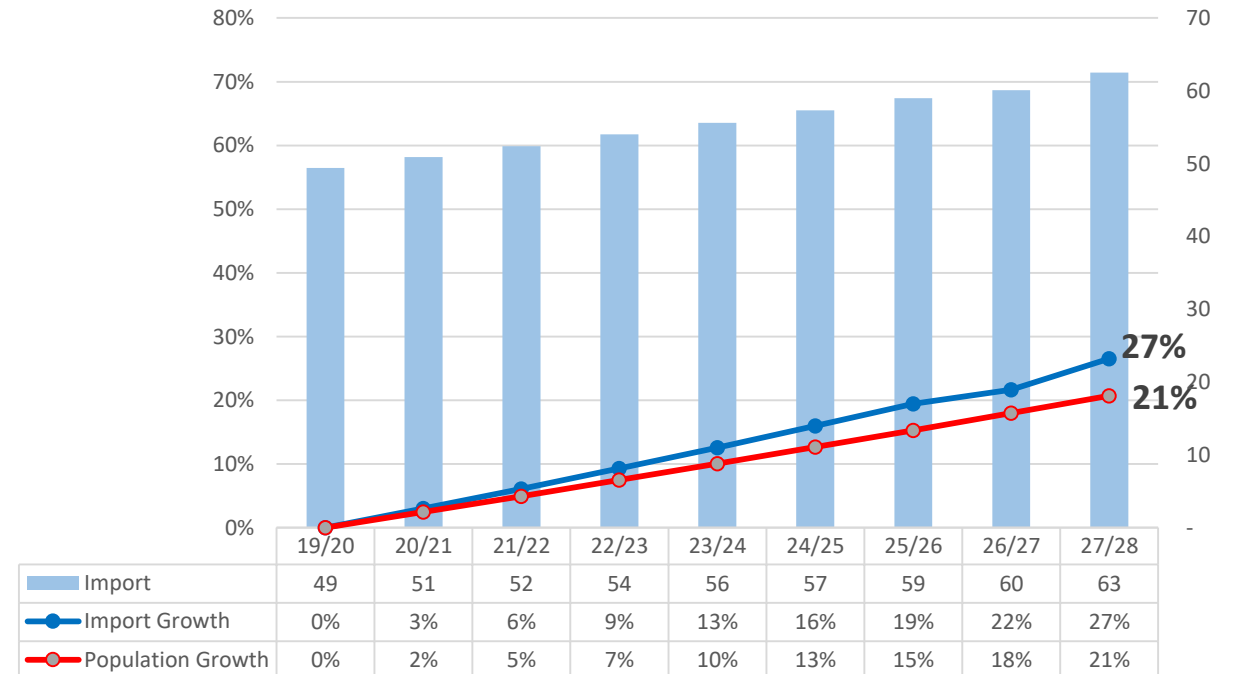
- Last ten years + 18mt

Africa Import vs Population Growth - Last Ten



- Next ten years + 14mt

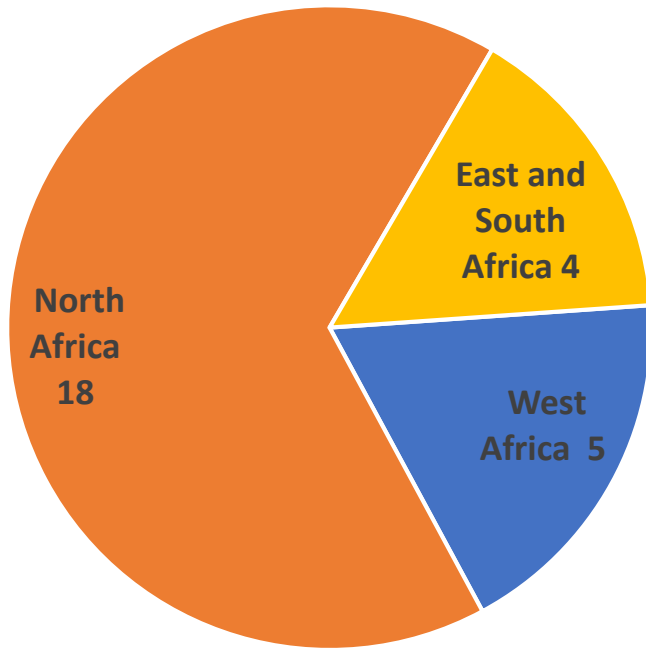
Africa Import vs Population Growth - Projections



# Africa Wheat Import

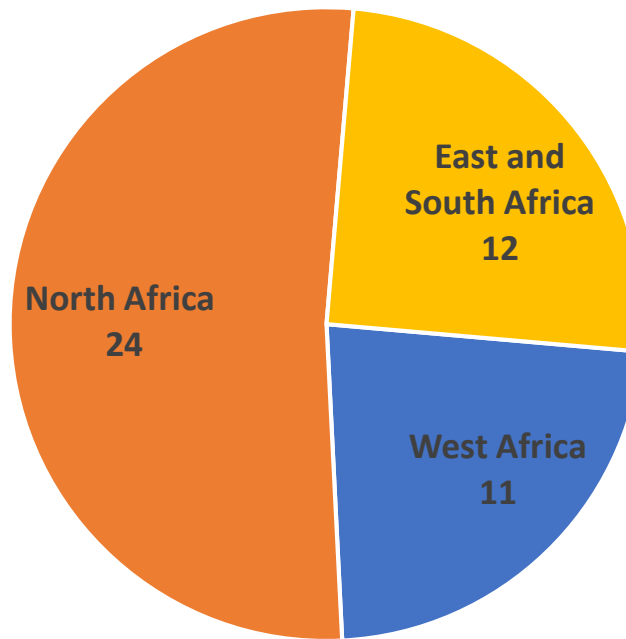
**2007/2008 – 27mt**

2007/2008 Import



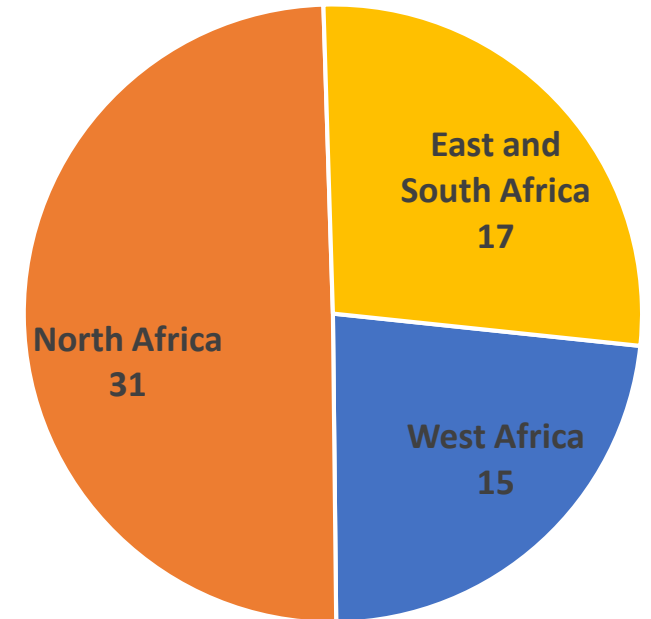
**2018/2019– 47mt**

2018/2019 Import



**2027/2028– 63mt**

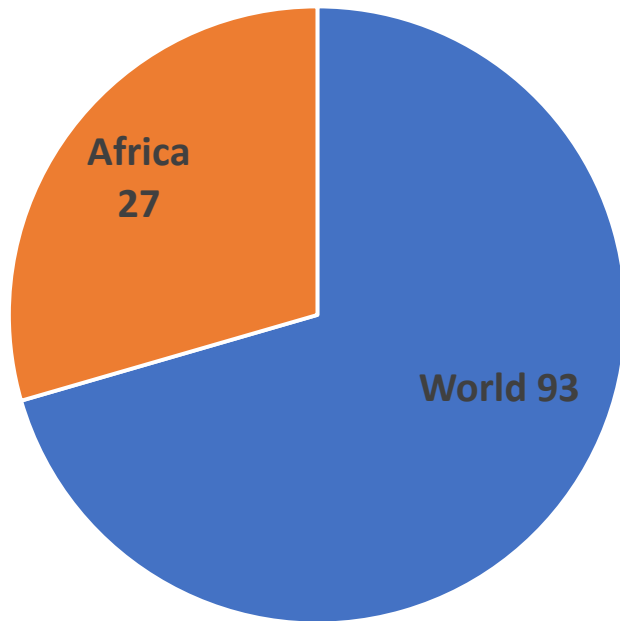
2027/2028 Import Projection



# Africa Wheat Import vs World Trade

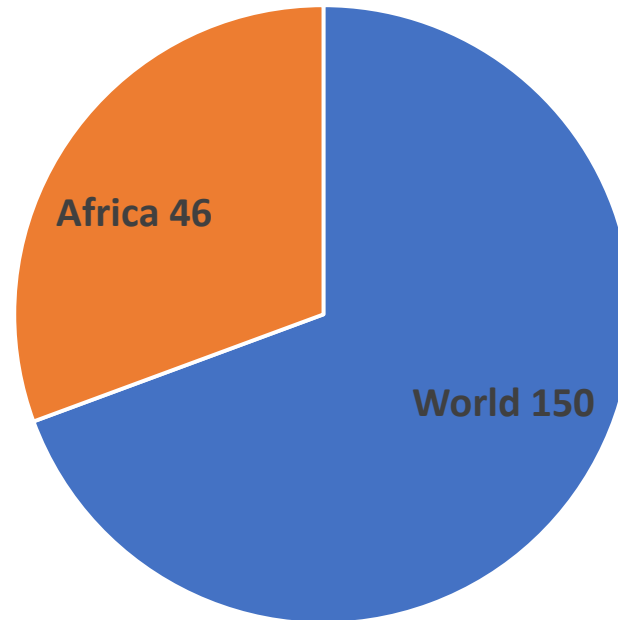
- **2007/2008 29%**

2007/08 Wheat Import



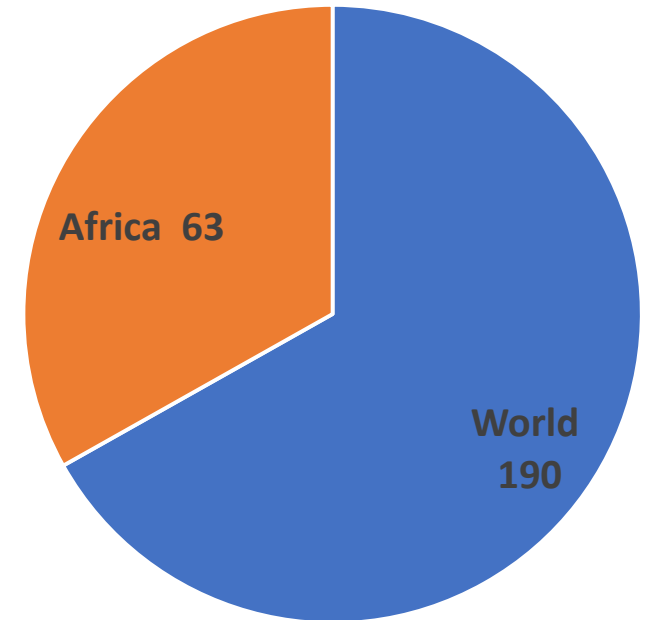
- **2018/2019 30%**

2018/09 Wheat Import



- **2027/2028 33%**

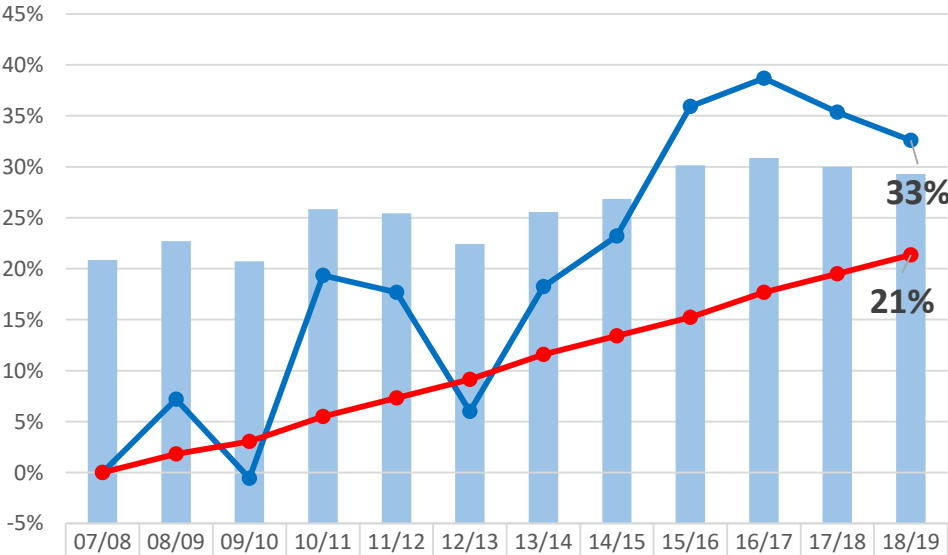
2027/28 Projections



# North Africa Wheat Import vs Population Growth

- Last ten year + 6mt

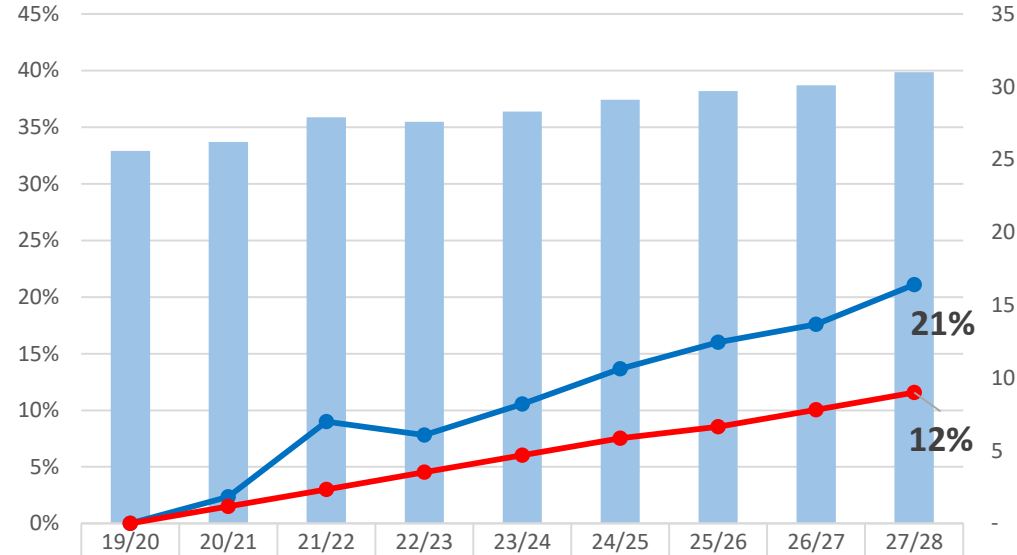
North Africa Import vs Population Growth - Last Ten



Import	18	19	18	22	21	19	21	22	25	25	25	24
Import Growth	0%	7%	-1%	19%	18%	6%	18%	23%	36%	39%	35%	33%
Population Growth	0%	2%	3%	5%	7%	9%	12%	13%	15%	18%	20%	21%

## In ten years + 5mt

North Africa Import vs Population Growth - Projection

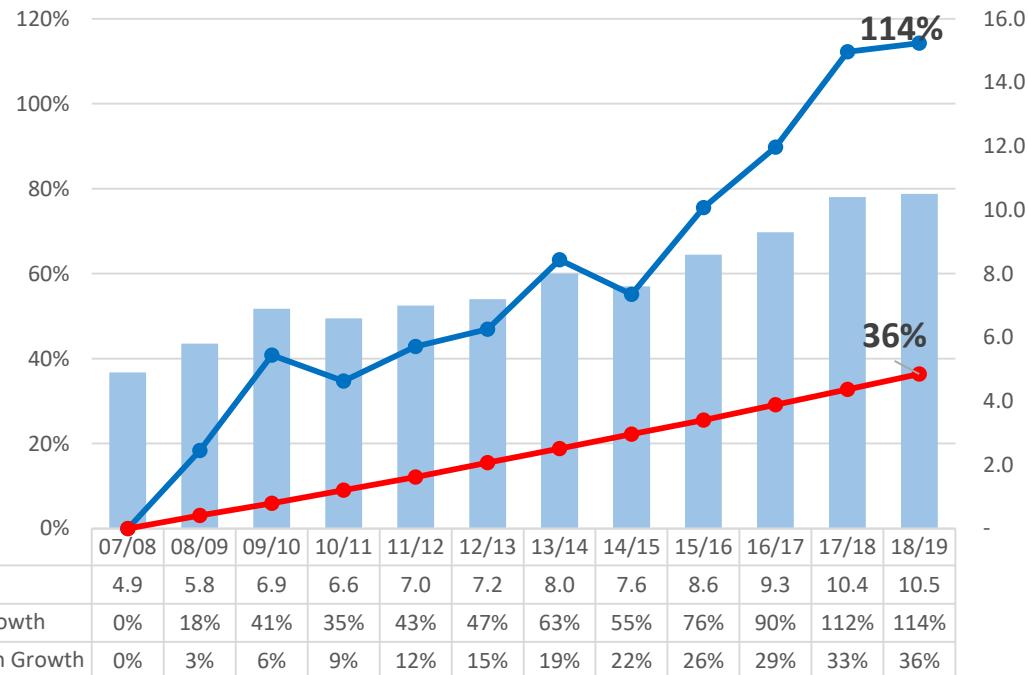


Import	26	26	28	28	28	29	30	30	31
Import Growth	0%	2%	9%	8%	11%	14%	16%	18%	21%
Population Growth	0%	2%	3%	5%	6%	8%	9%	10%	12%

# West Africa Wheat Import vs Population Growth

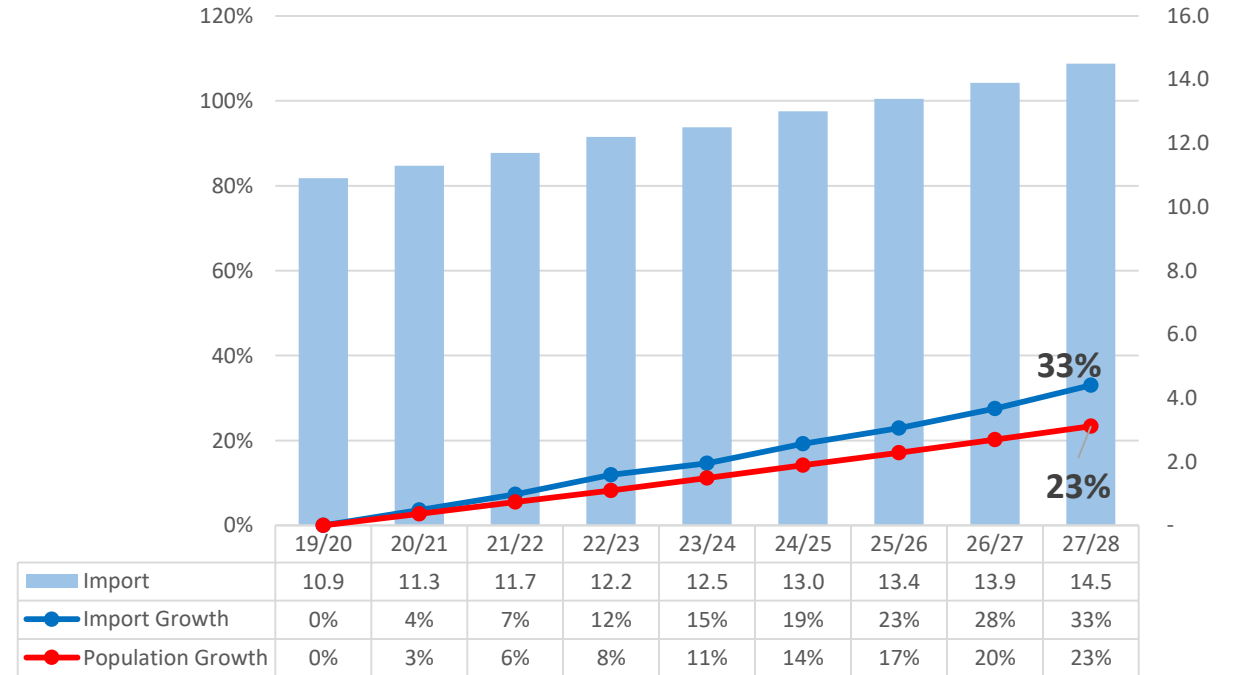
## Last ten years + 6mt

West Africa Import vs Population Growth - Last Ten



## In next ten years + 4mt

West Africa Import vs Population Growth - Projections

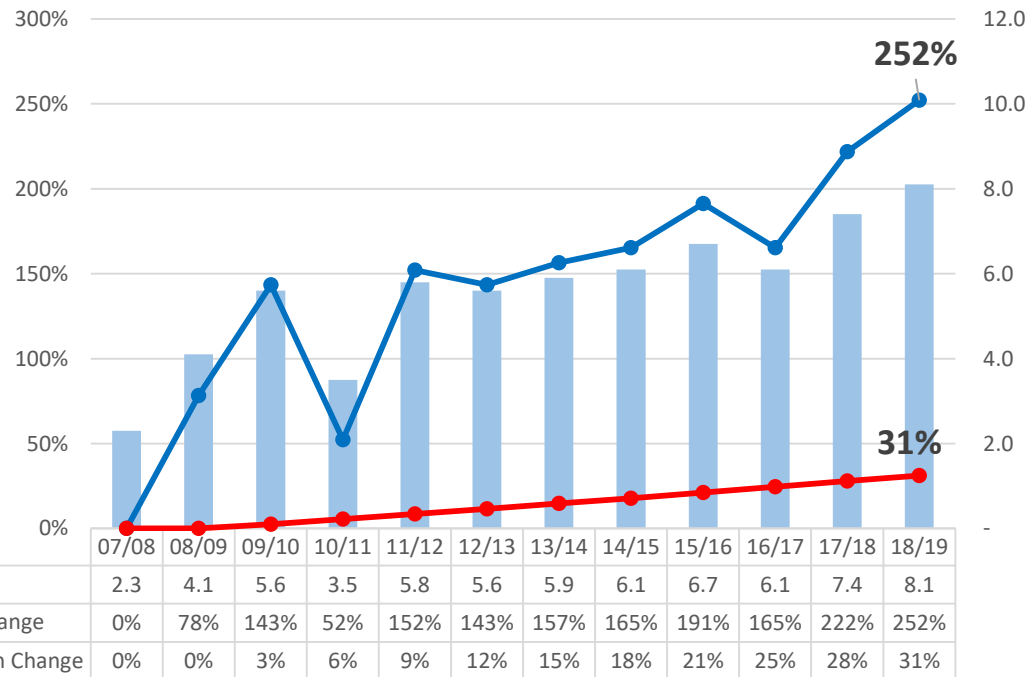




# East Africa Wheat Import vs Population Growth

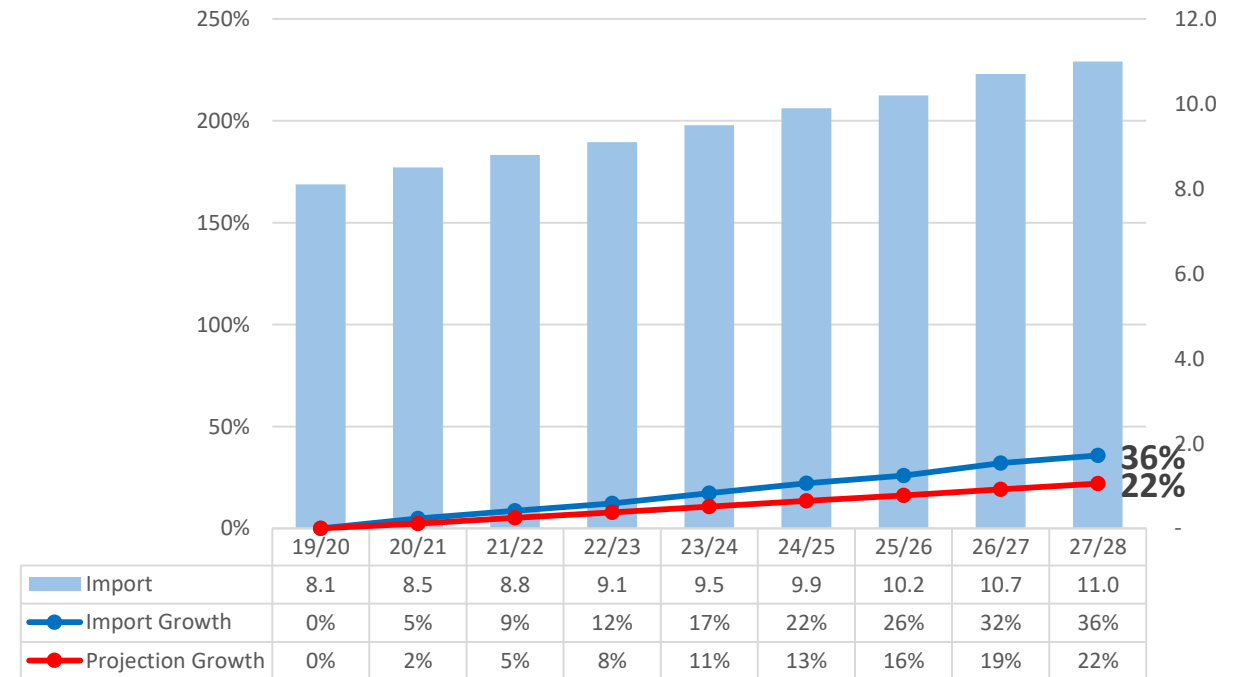
- Last ten years +6mt

East Africa Import vs Population Growth - Last Ten



- Next ten years +3 mt

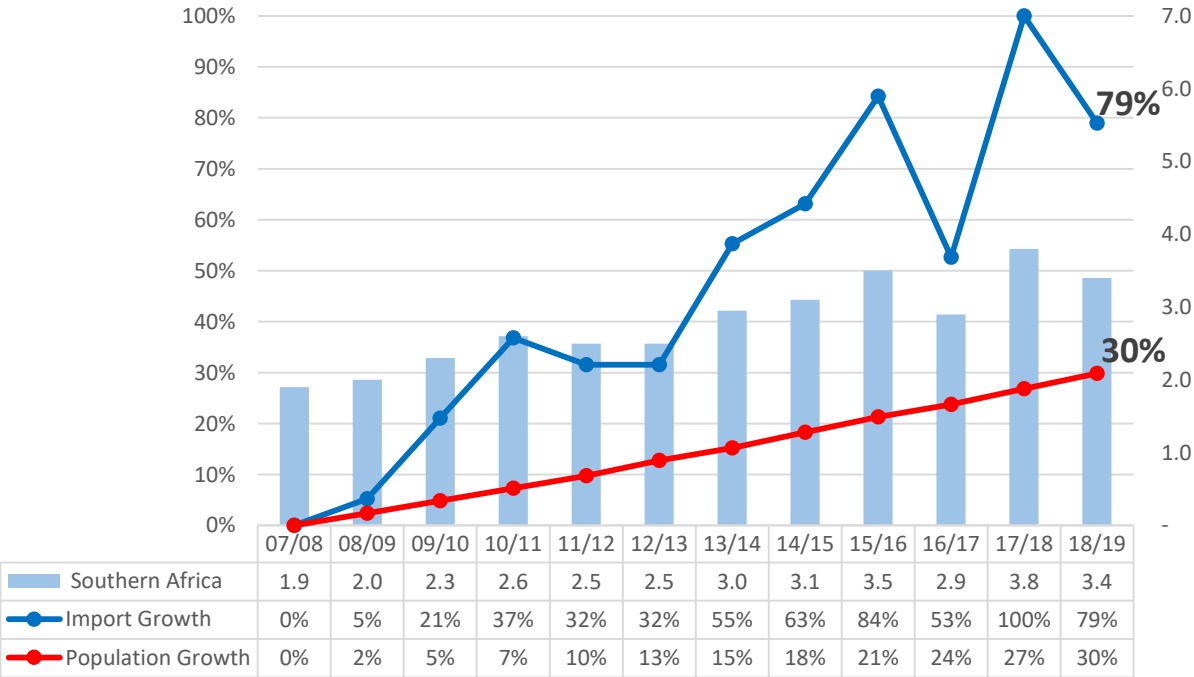
East Africa Import vs Population Growth - Projection



# Southern Africa Wheat Import vs Population Growth

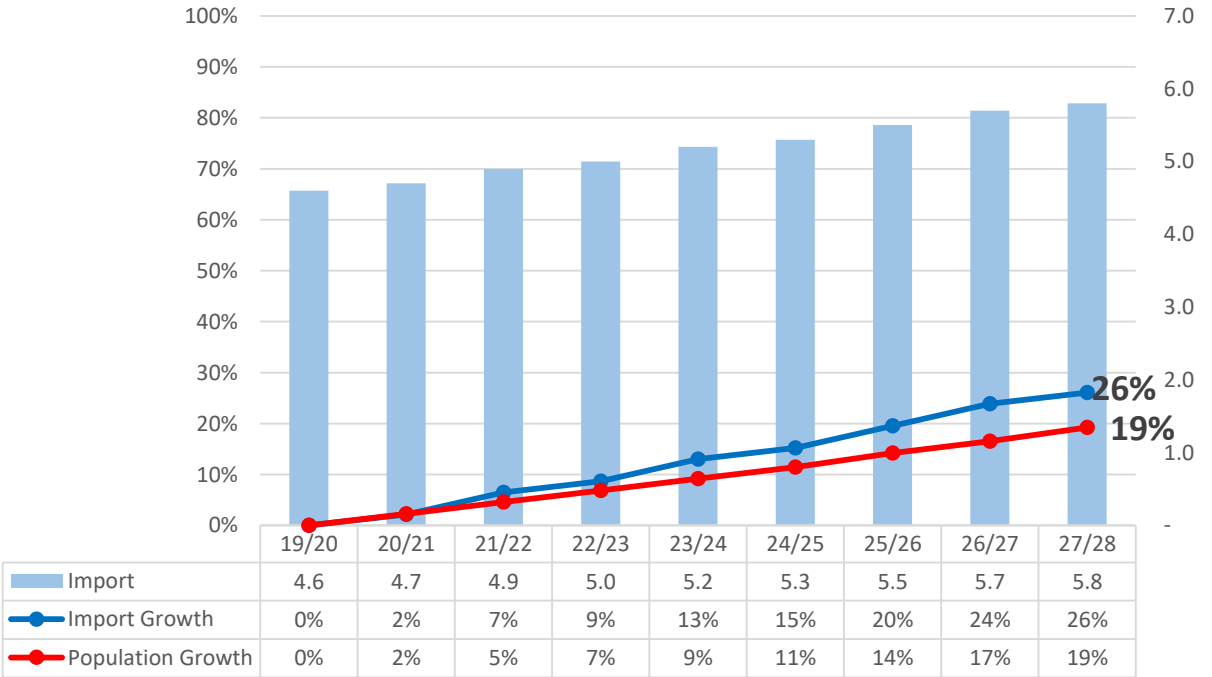
- Last ten years +1,5mt

Southern Africa Import vs Population Growth - Last Ten



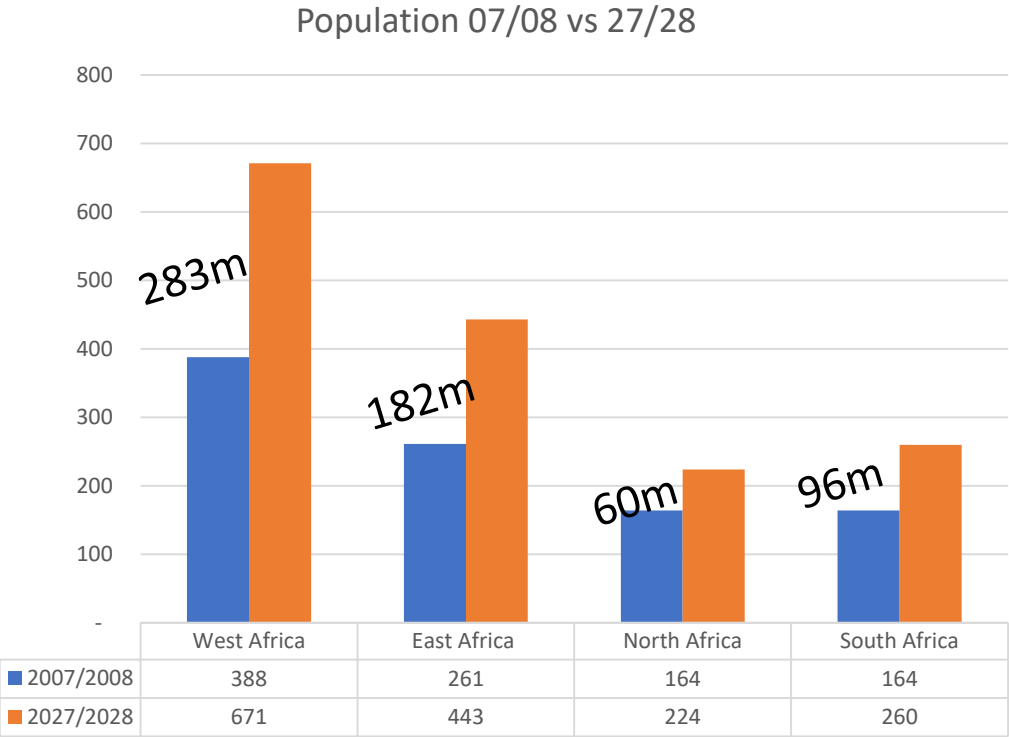
- In ten years + 0,8mt

Southern Africa Import vs Population Growth - Projection

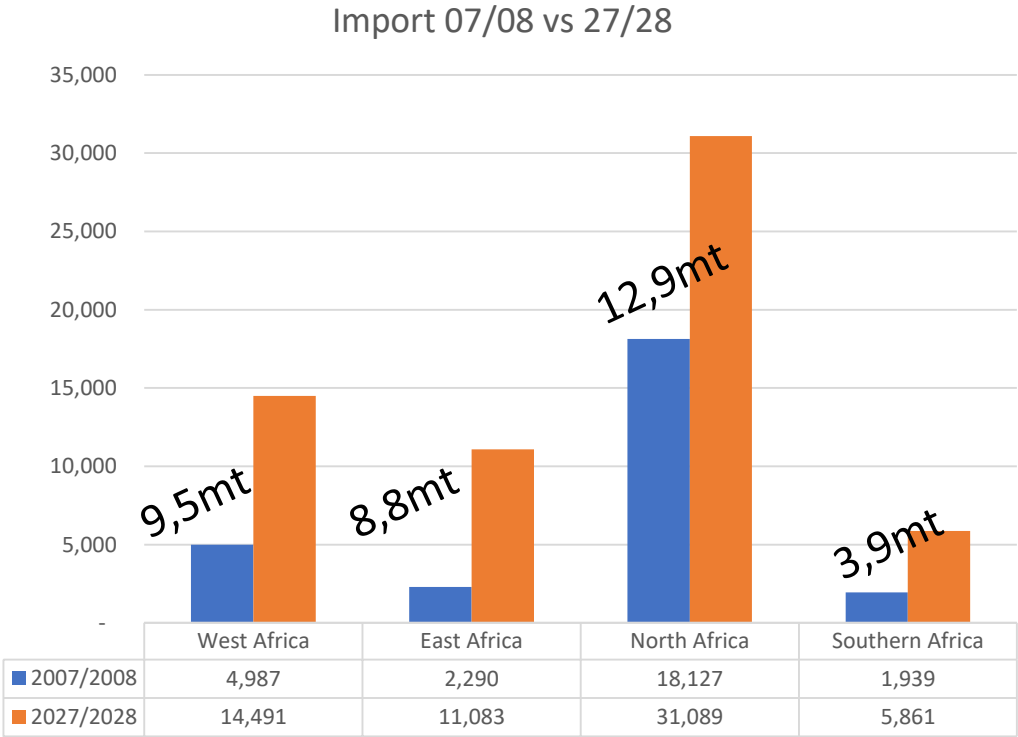


# Import Growth Driven by Population

- 2007/2028 population growth + 621m

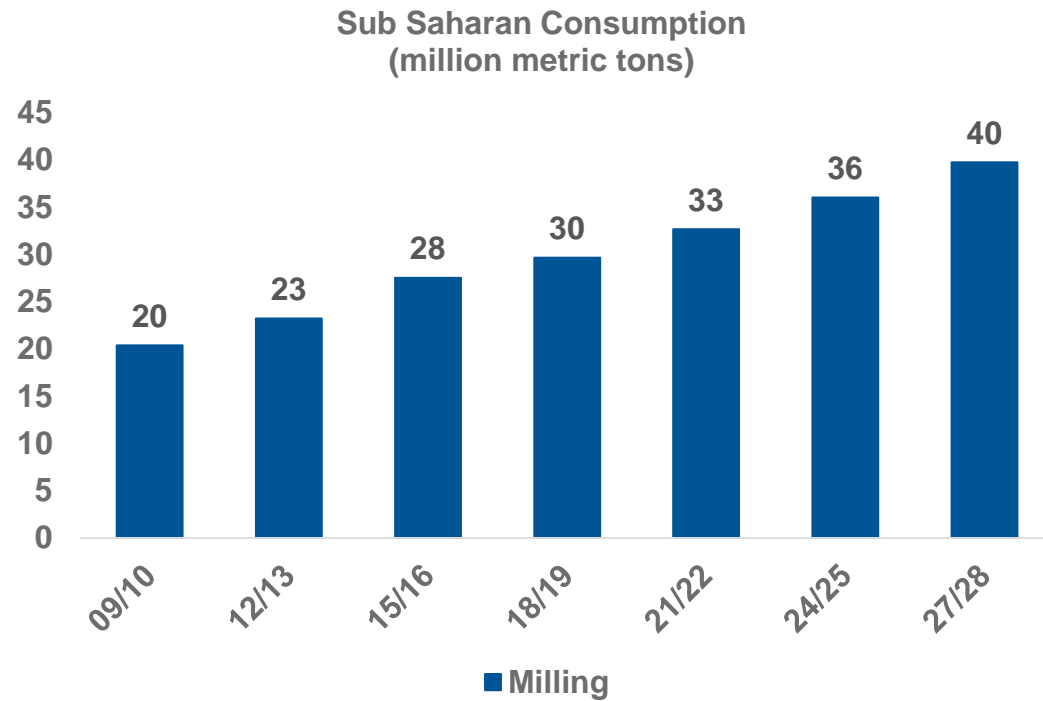


- 2007/2028 Import growth + 26mt



# Wheat Consumption Growth Driving Imports

- Consumption increases 20mt



- Domestic production increases 2mt

