

# The Africa Future

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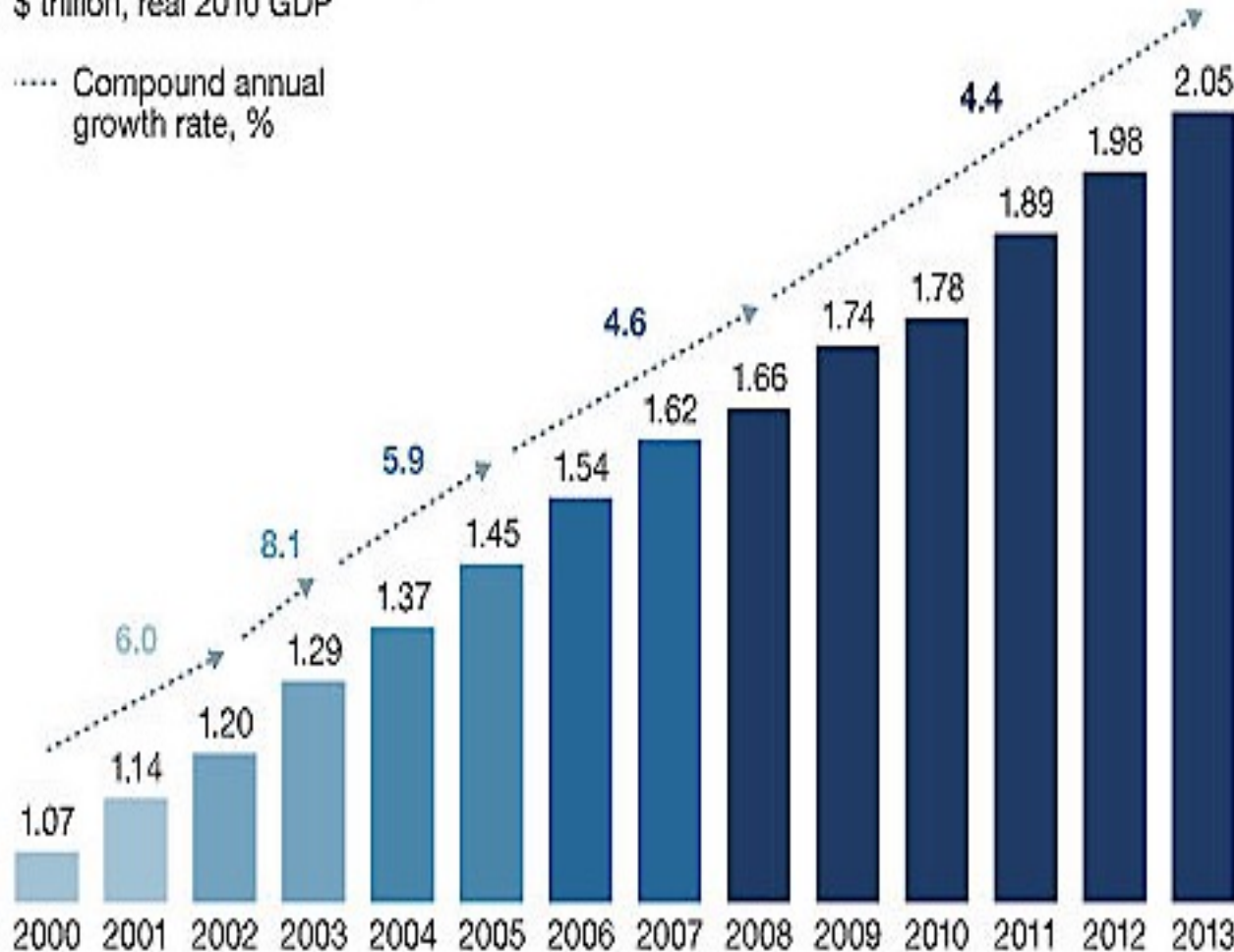
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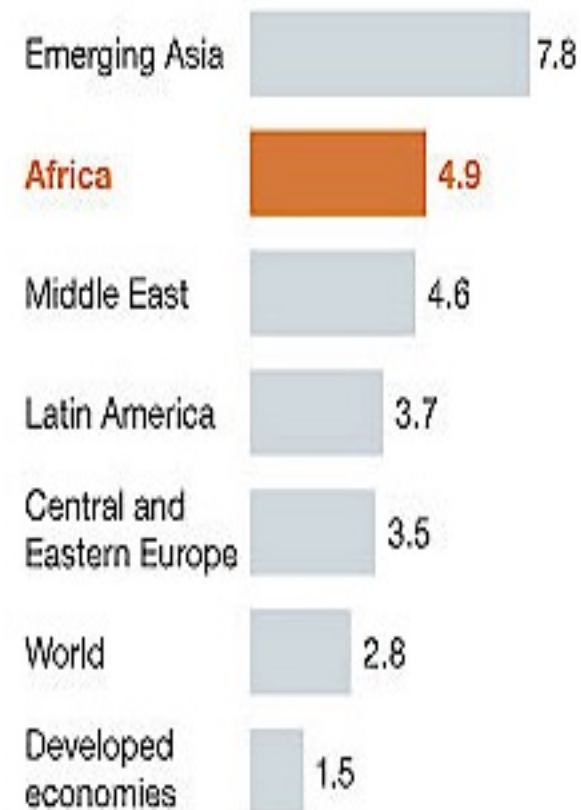
# Africa's Amazing 15 Years

African annual GDP, 2000-13,  
\$ trillion, real 2010 GDP

..... Compound annual  
growth rate, %



Real GDP compound annual growth,  
2000-13, %



Source: IHS; McKinsey Global Institute

# IMF Growth Forecasts - Selected

IMF	2014	2015	2016
World	3.4	3.1	3.6
Advanced Economies	1.8	2.0	2.2
US	2.4	2.6	2.8
Euro Area	0.9	1.5	1.6
Japan	-0.1	0.6	1.0
Emerging Economies	4.6	4.0	4.5
China	7.4	6.8	6.3
India	7.3	7.3	7.5
Brazil	0.1	-3.0	-1.0
Russia	0.6	-3.8	-0.6
Sub-Saharan Africa	5.0	3.8	4.3
South Africa	1.5	1.4	1.3
Nigeria	6.3	4.0	4.3

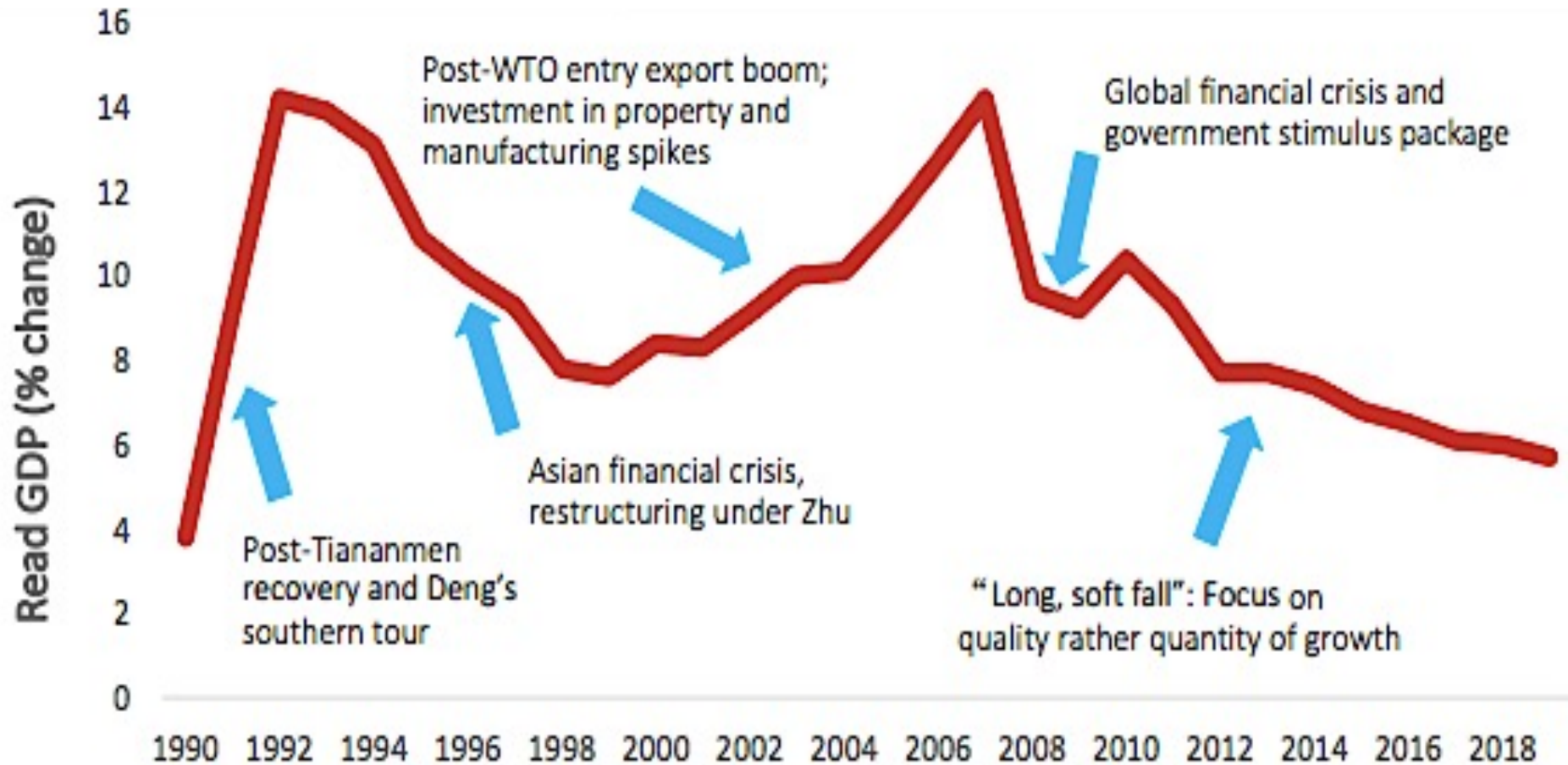
# Commodities at a 13-Year Low



Source: Bloomberg



# China's Long, Soft Fall



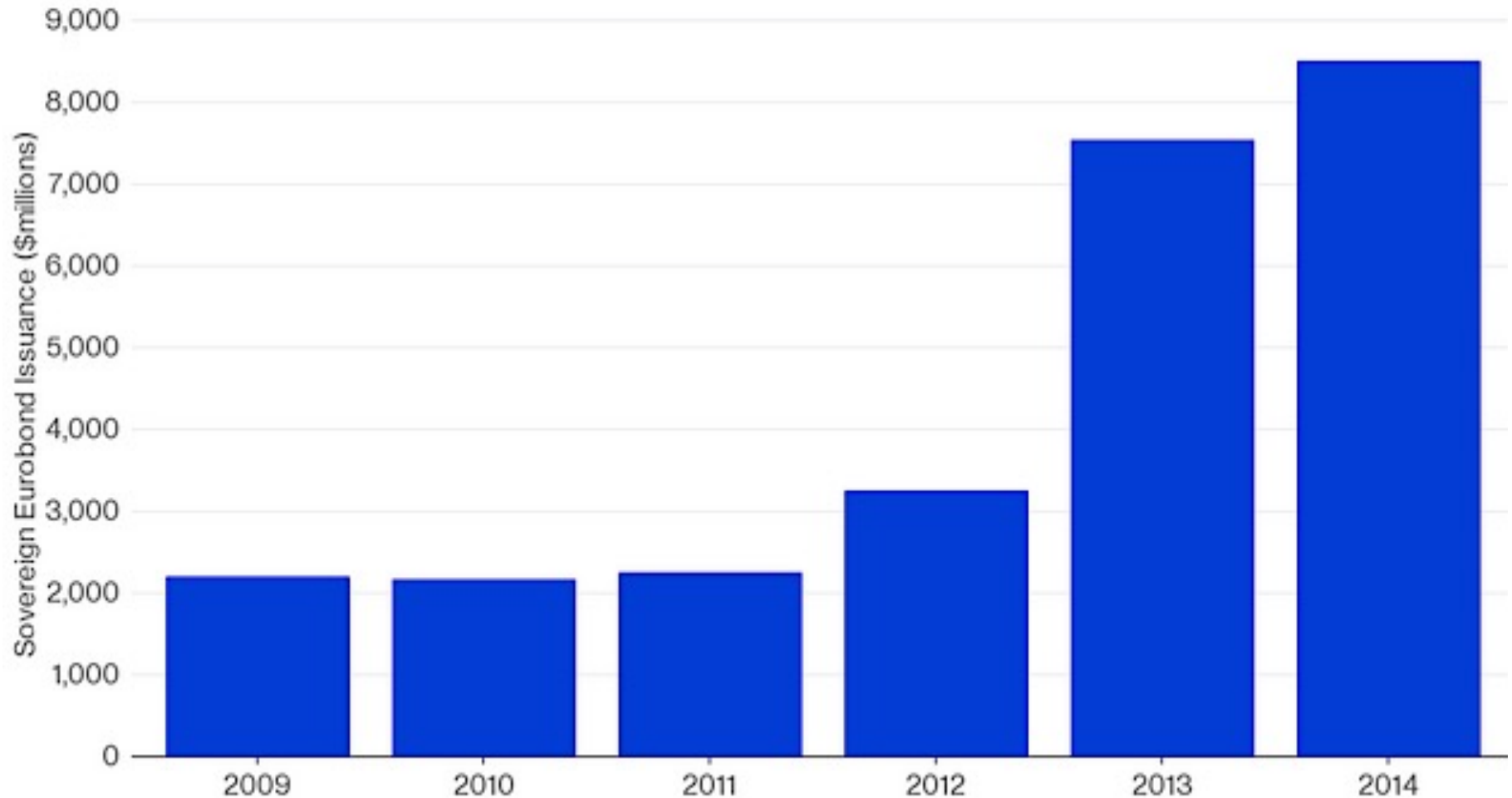
# Oil & Commodities Halt Nigeria's Growth



Source: Bloomberg

# Foreign Debt Soars in Africa

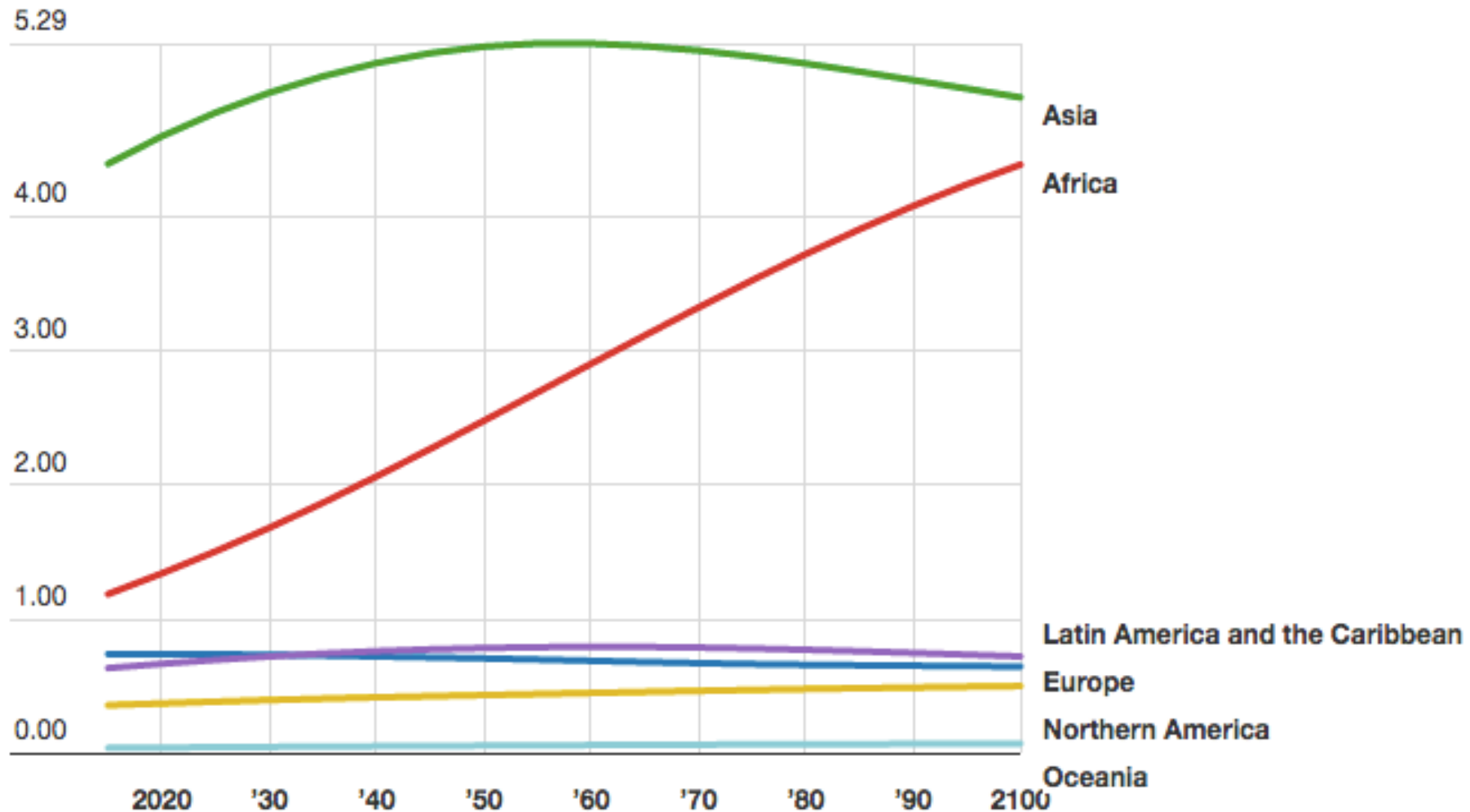
Countries borrow more in dollars



Source: Bloomberg

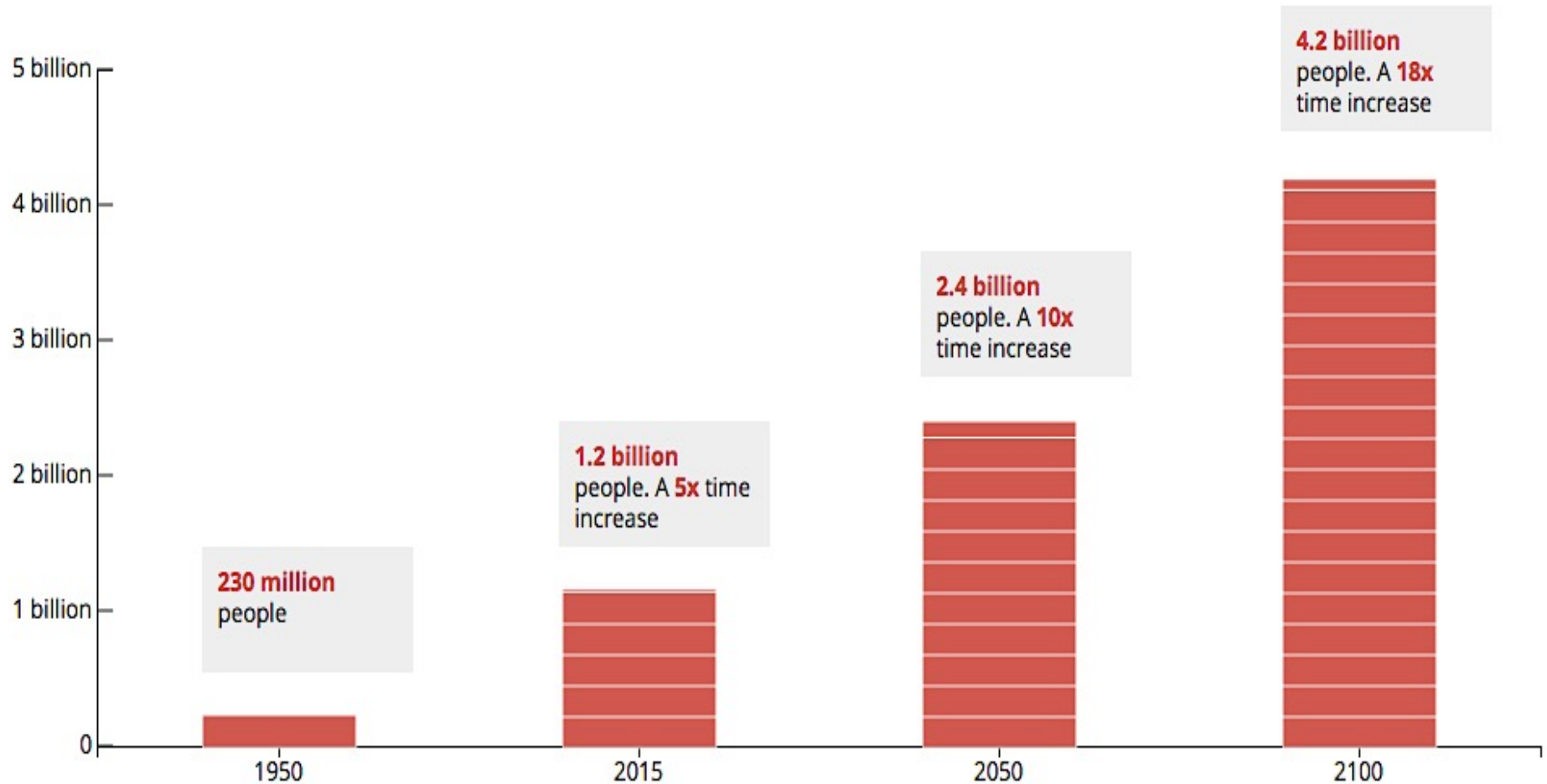
# By 2100, over 80% of the World will Live in Africa or Asia

UN Regional Population Projections (Billions, 2015 - 2100)



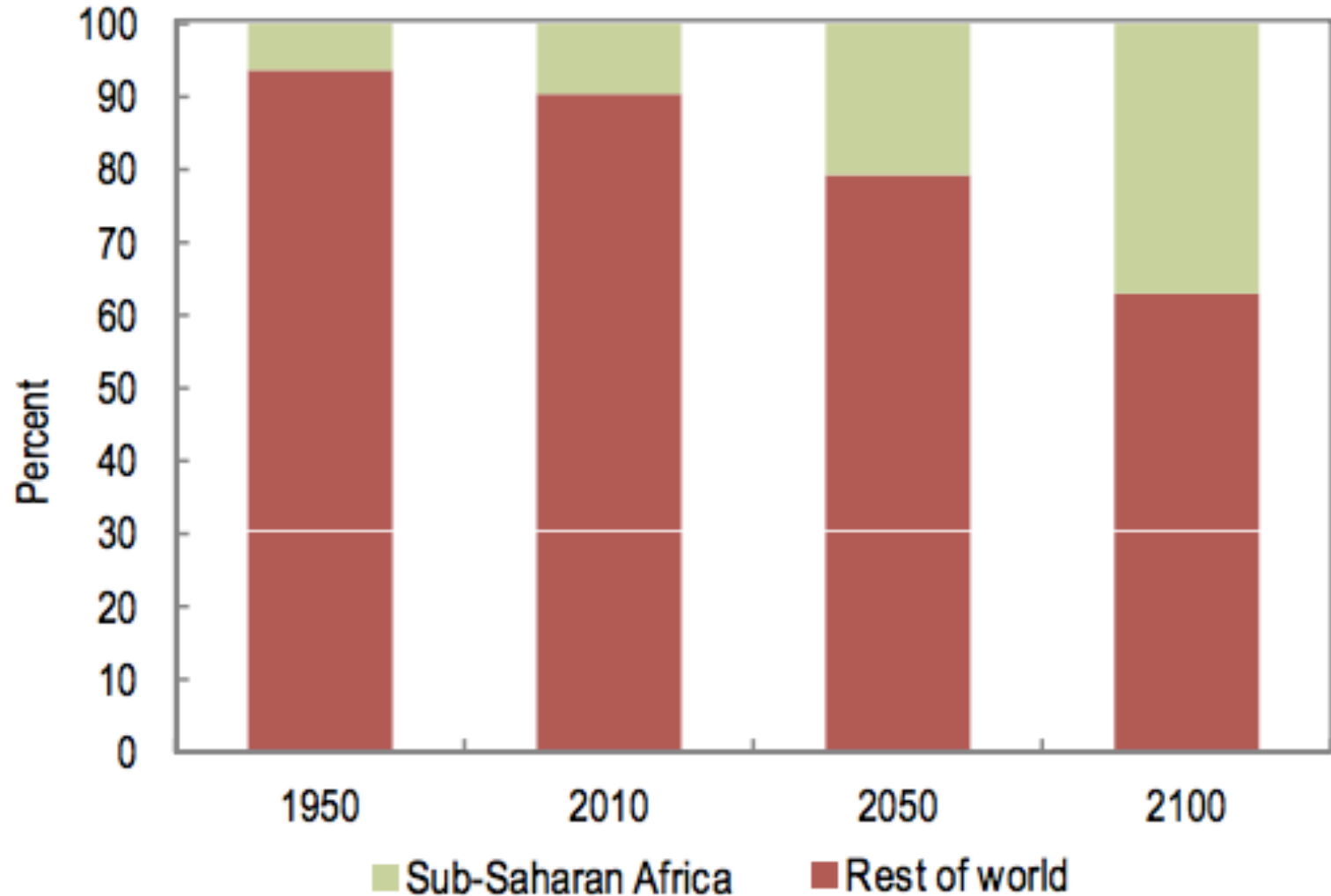


# Africa's Population Rising Fastest



Source: Unicef 2015

# Africa's Share of World's Labour Force



Source: United Nations, World Population Prospects, 2012.

# Nigeria's Population Explodes by 2100

## 10 biggest countries by population, 1950-2100, millions

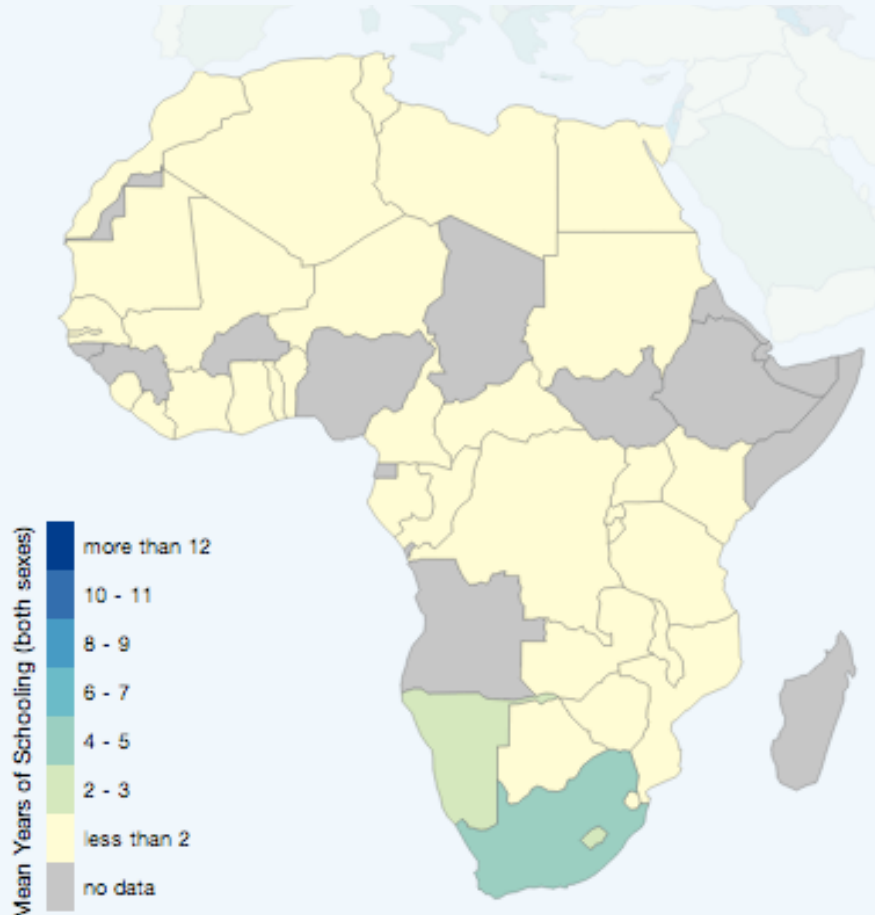
Countries in **red** = first appearance in the top 10

Country	1950	Country	2015	Country	2050	Country	2100
China	544	China	1376	India	1705	India	1660
India	376	India	1311	China	1348	China	1004
USA	158	USA	322	Nigeria	399	Nigeria	752
Russia	103	Indonesia	258	USA	389	USA	450
Japan	82	Brazil	208	Indonesia	321	Congo	389
Germany	70	<b>Pakistan</b>	189	Pakistan	310	Pakistan	364
Indonesia	70	<b>Nigeria</b>	182	Brazil	238	Indonesia	314
Brazil	54	<b>Bangladesh</b>	161	Bangladesh	202	<b>Tanzania</b>	299
United Kingdom	51	Russia	143	<b>Congo</b>	195	Ethiopia	243
Italy	47	<b>Mexico</b>	127	<b>Ethiopia</b>	188	<b>Niger</b>	209

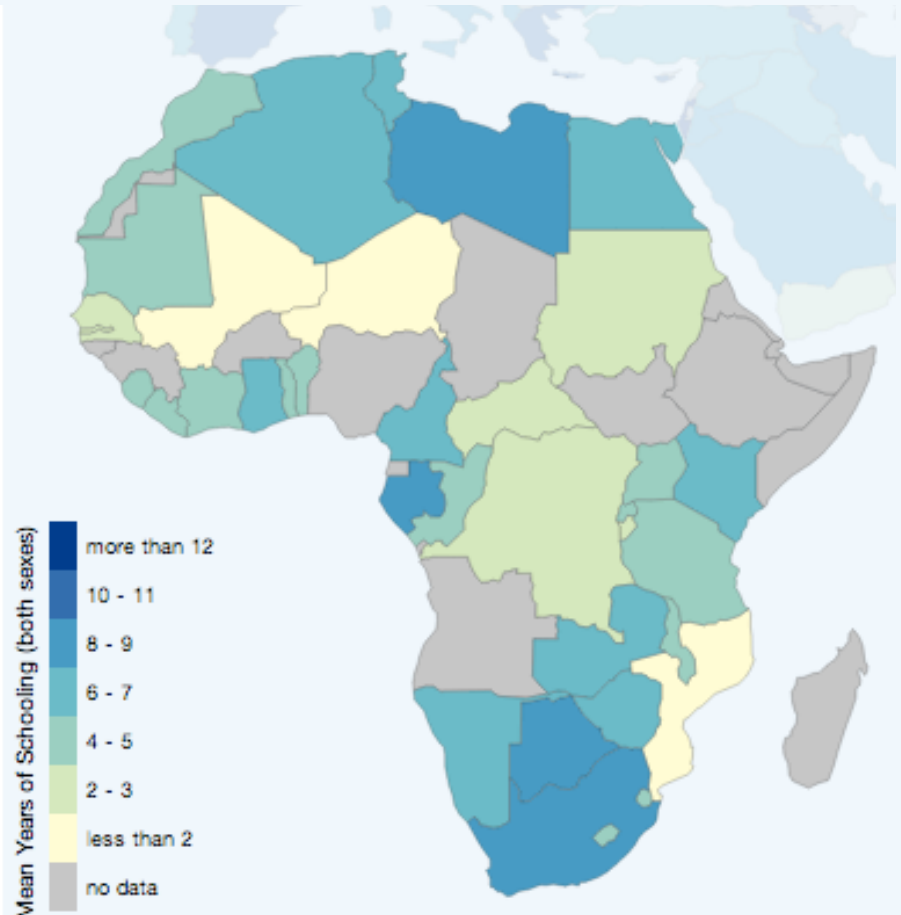
Source: United Nations 2015

# Longer & Longer in School

## 1950

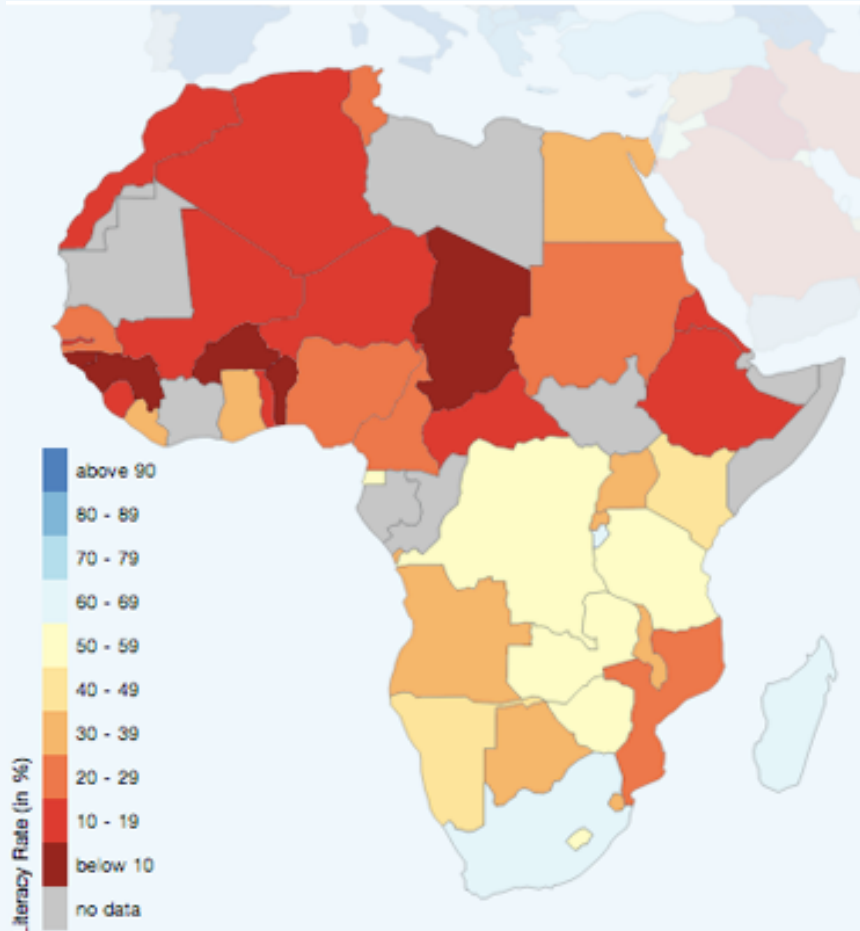


## 2010

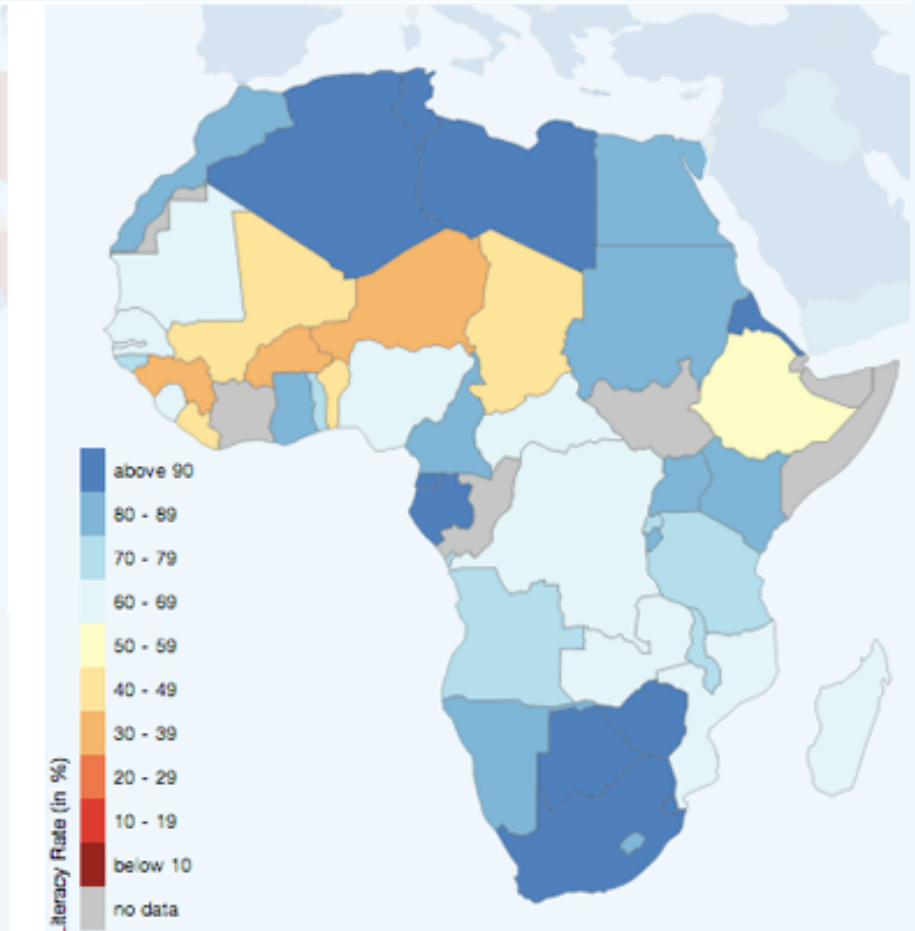


# A Doubling of Literacy

Literacy Rate  
of the older generation (65+ years)

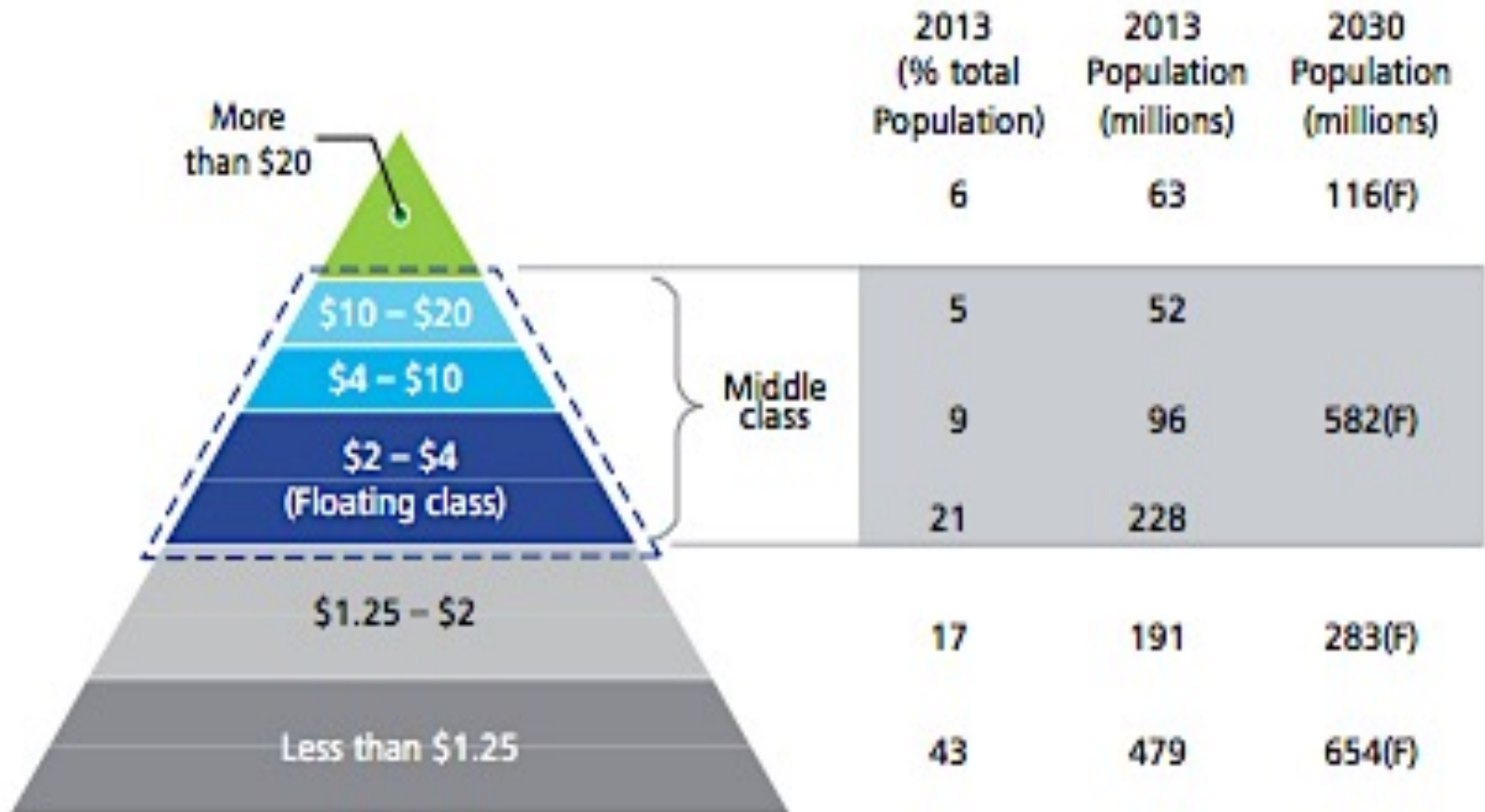


Literacy Rate  
of the younger generation (15-24 years)



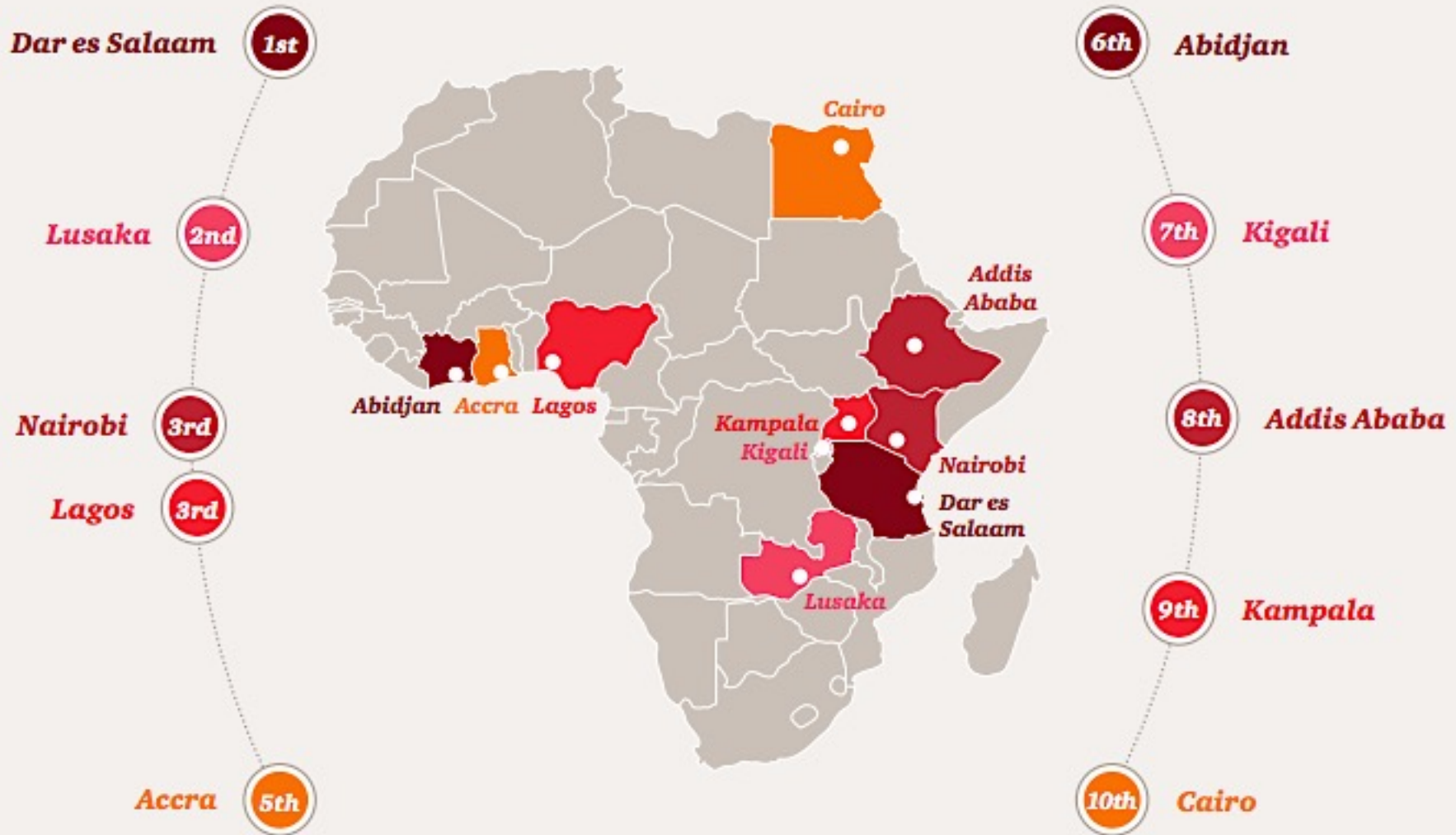


# A Middle-Class – but Different and maybe Vulnerable



Source: UN data, African Development Bank, Deloitte analysis

# African Cities of Opportunity



# Intra-Trade, Transport & Power Critical

Power, Transport and Trade Integration (Africa), 2010 – 2020

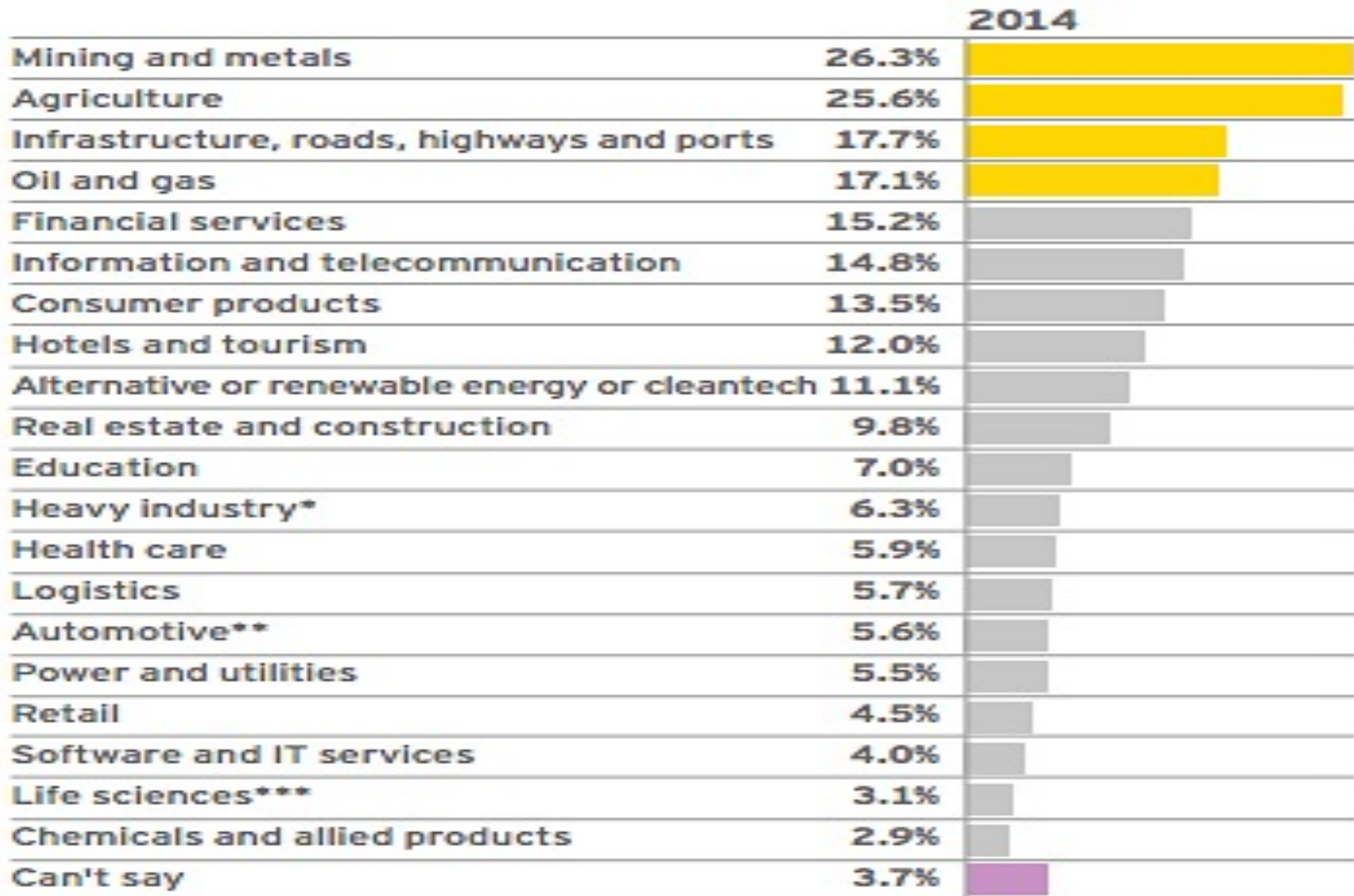


2020

Total Intra-trade:	\$216 billion
Power Interconnection Investment:	\$50 billion
Regional Transport Investment (road, rail):	\$30 billion
ICT Infrastructure Development:	\$60 billion

- ↔ Planned Electricity Interconnections
- Road Infrastructure development
- Trilateral Free Trade Agreement (T-FTA)

# Beyond Extraction: Attractive Sectors for the future



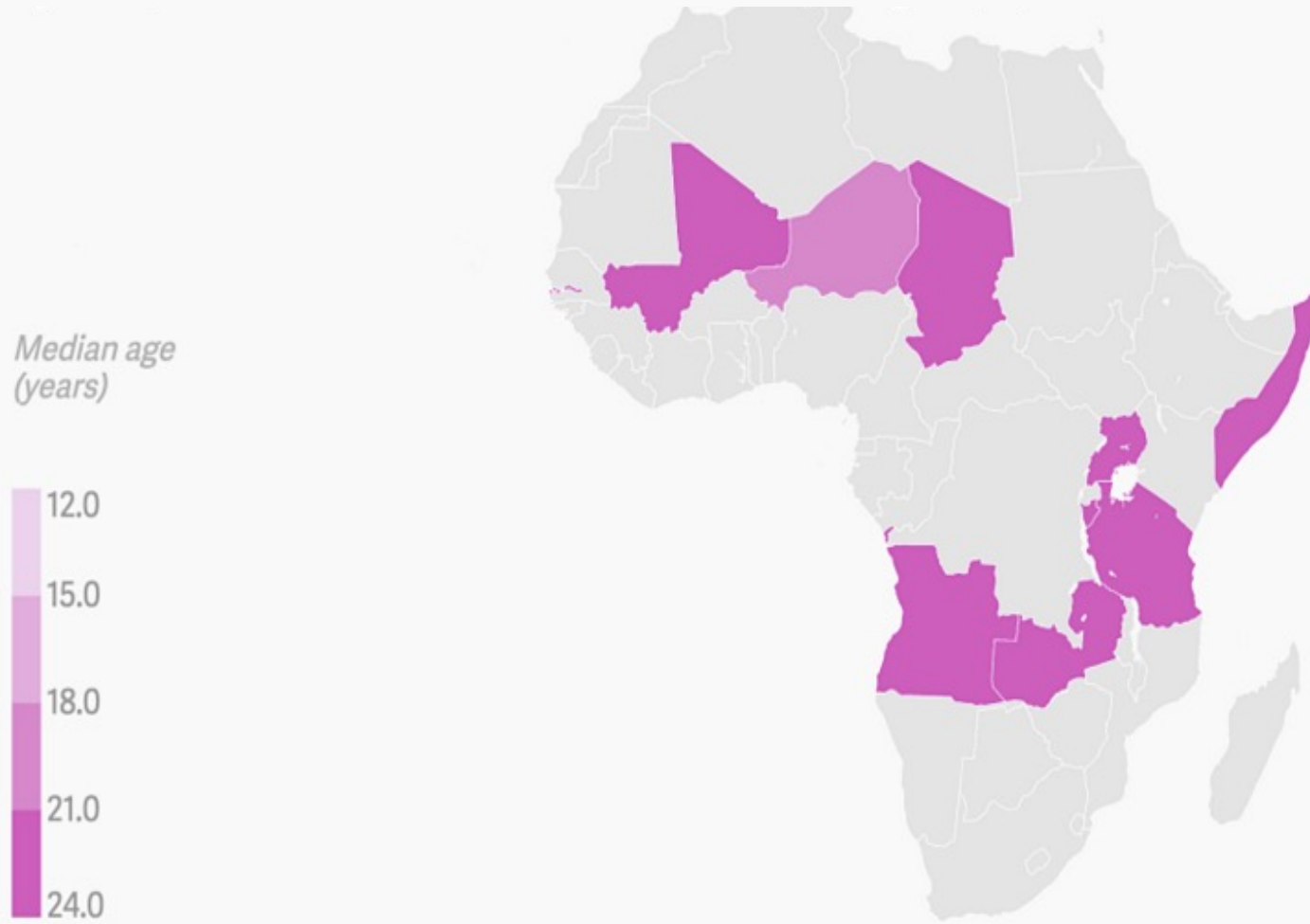


# Top Africa Retention Factors

	Central Africa	Eastern Africa	French Speaking Sub-Sahara Africa	Southern Africa	Western Africa
1	Competitive employee benefits	Learning & development opportunities	Competitive employee benefits	Learning & development opportunities	Organisational philosophy that recognises and pays for performance
2	Learning & development opportunities	Job security	Variable pay	Job security	Job security
3	Career growth opportunities and job advancement	Organisational philosophy that recognises and pays for performance	Career growth opportunities and job advancement	Variable pay	Quality of managers & leadership
4	Job security	Competitive employee benefits	Learning & development opportunities	Competitive employee benefits	Variable pay
5	Competitive fixed pay	Quality of managers & leadership	Job security	Competitive fixed pay	Employer brand

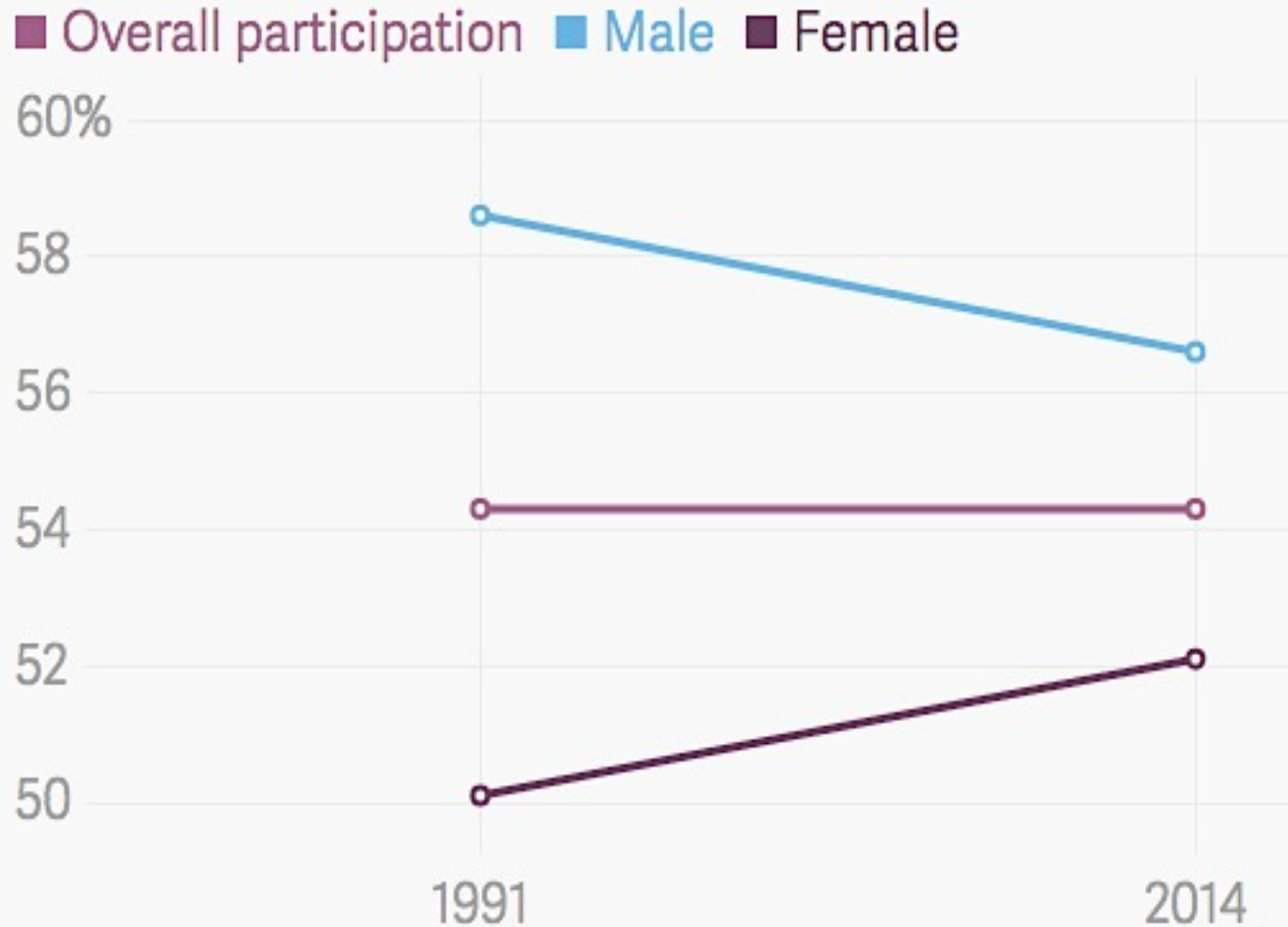


# The Youngest Populations in the World by 2050

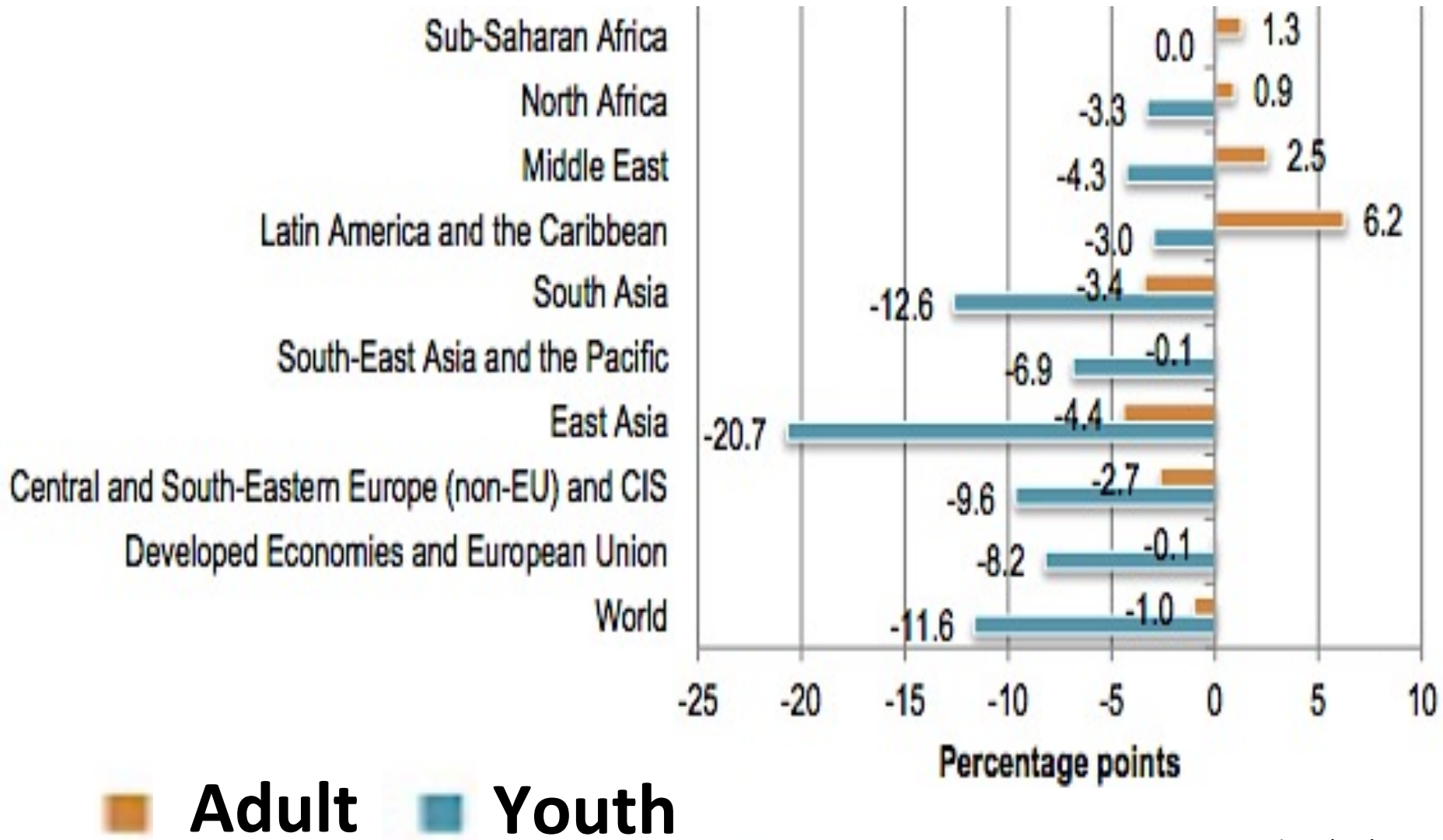


Quartz | qz.com

# Youth Labour Force Participation Remains Low

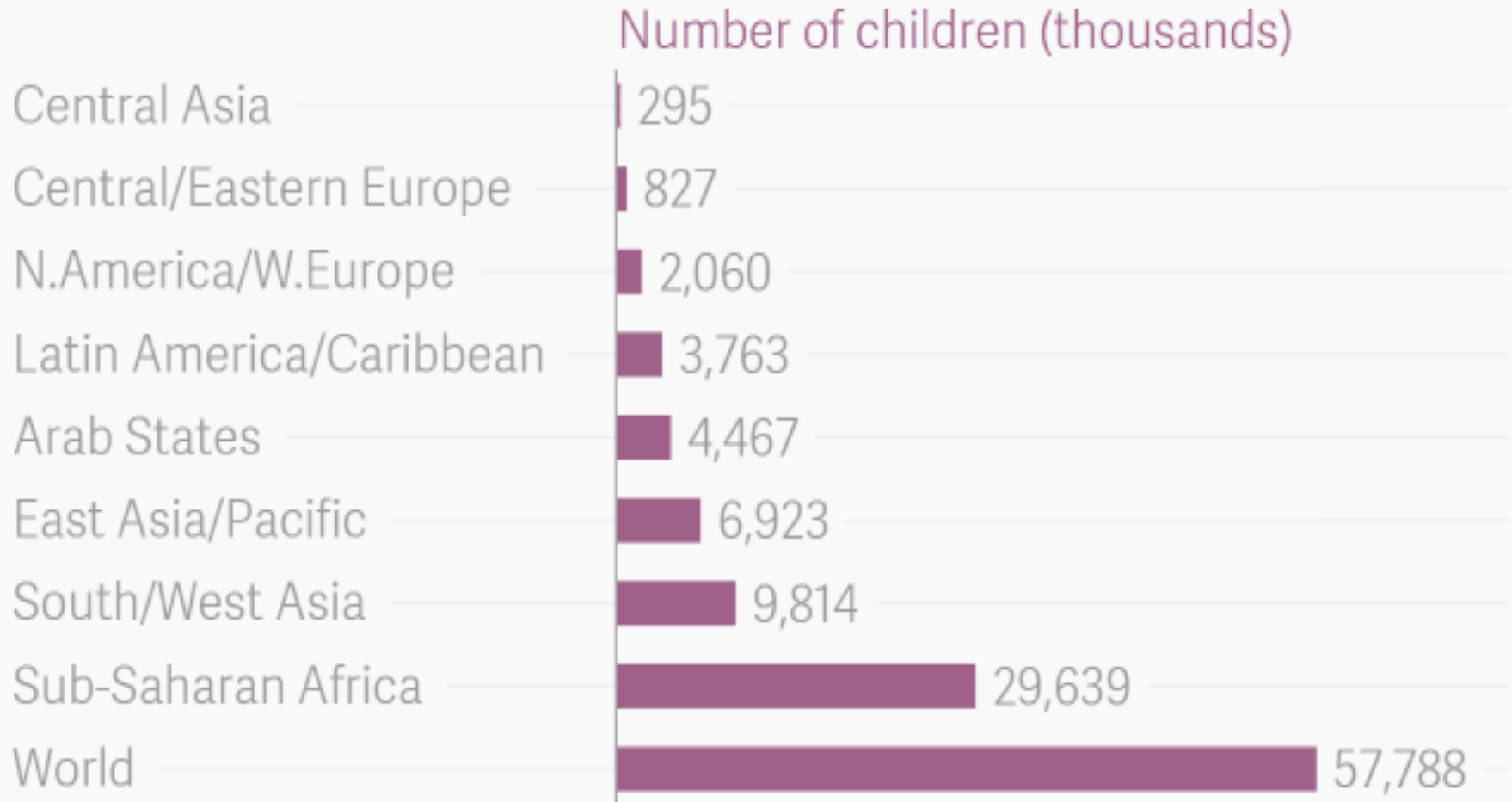


# Africa's Youth Sees Little Employment Growth

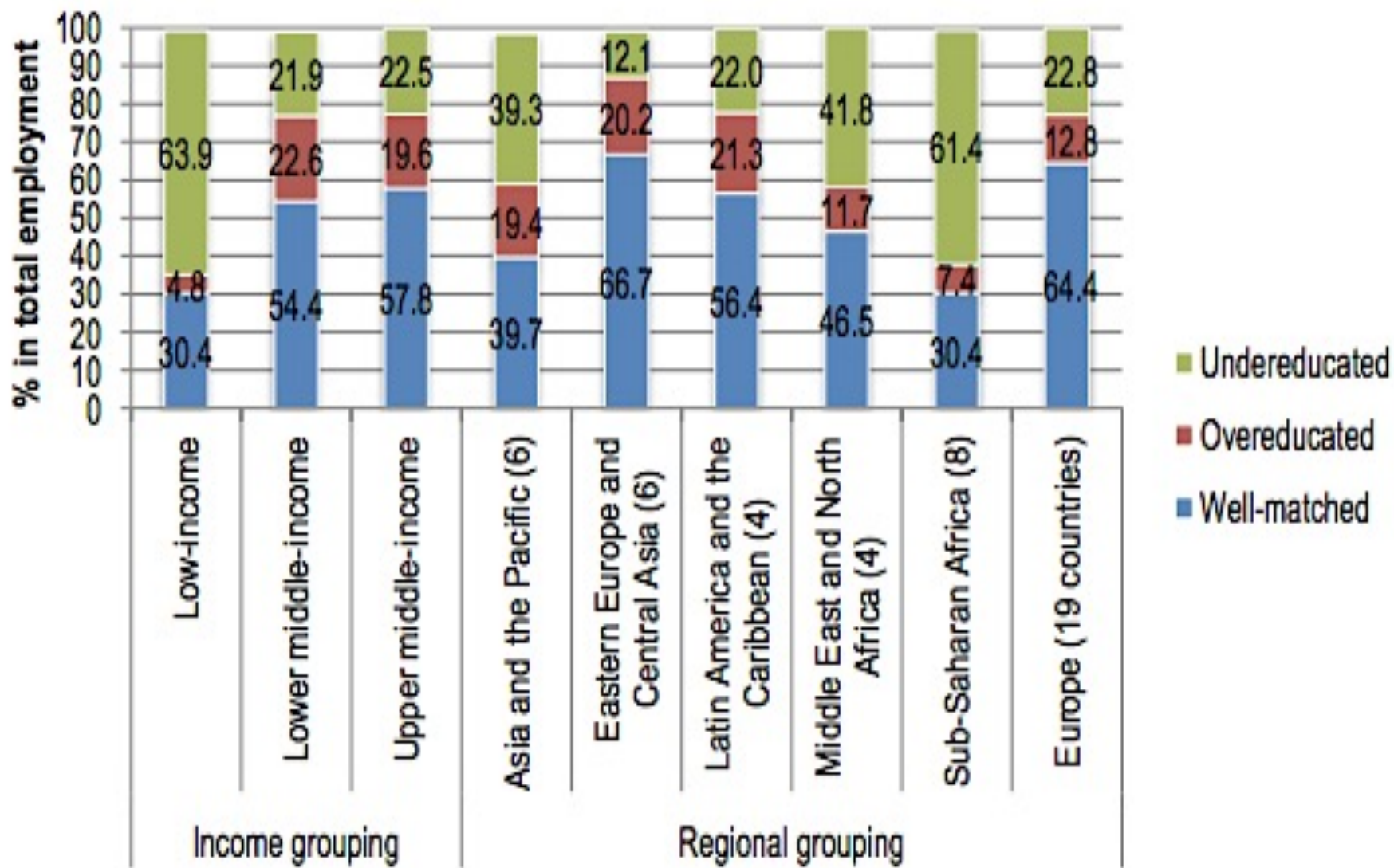


Source: International Labour Organization 2015

# Half of World's Kids Out of School in Africa

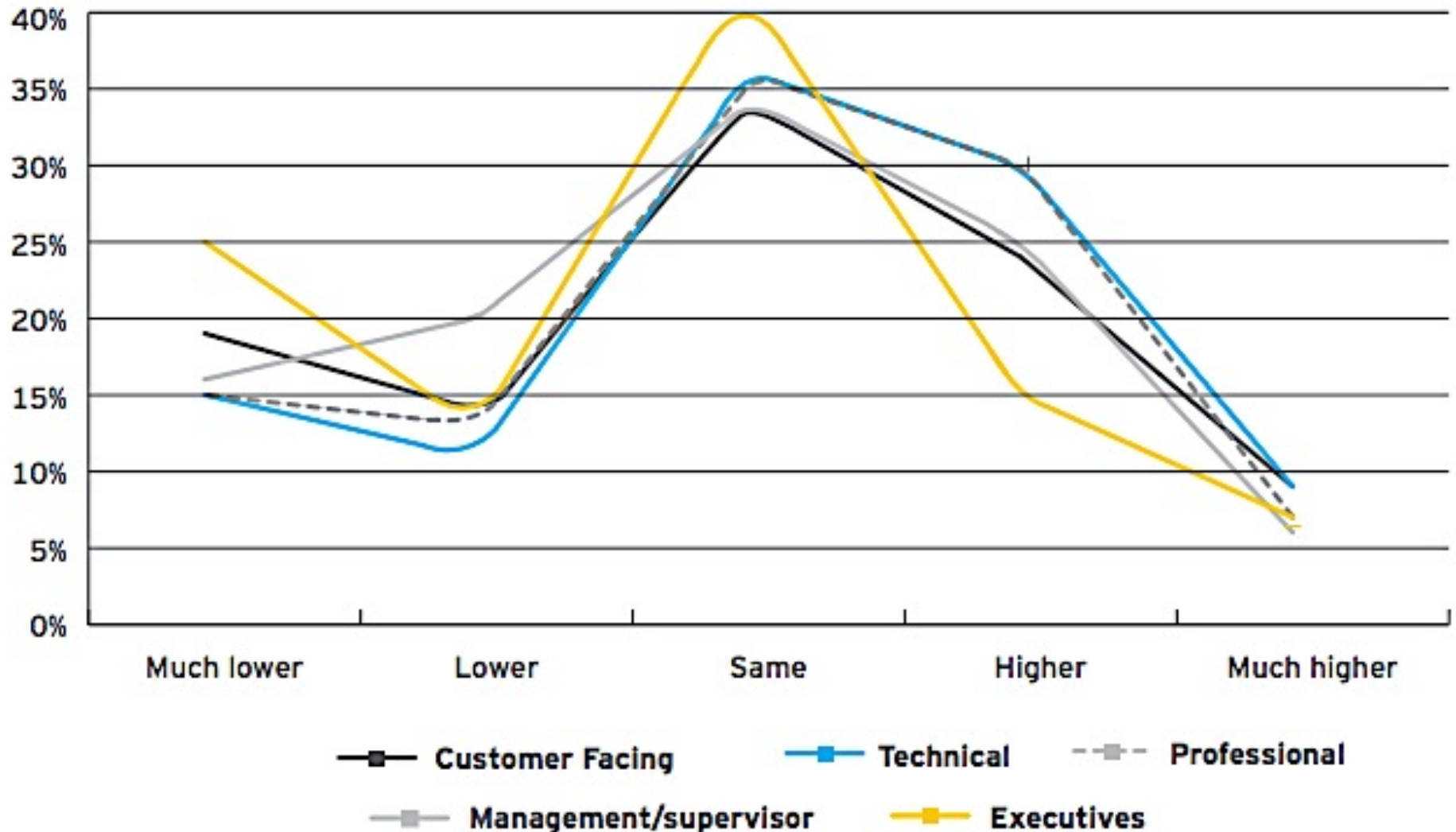


# Qualifications Mismatch of Youth





# Estimated Recruitment Needs - 2015



# THANK YOU

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