

INVESTOR PRESENTATION

Building Prosperity in Africa



AUDITED RESULTS FOR THE
YEAR ENDED 31ST DECEMBER 2017
20TH MARCH 2018

@dangotecement



www.dangotecement.com



Overview of Dangote Cement



Investment Highlights

Sub-Saharan Africa's largest cement producer

45.6Mta capacity across 10 countries

Largest company in West Africa by market capitalisation; ₦4,516bn / US\$12.58bn*



Only one of three companies

Subsidiary of Dangote Industries Limited, a leading African conglomerate

International shareholder base

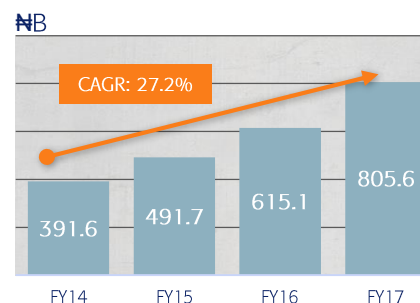


Industry-leading financial performance with exceptional EBITDA margins of 48%, despite recent macro-economic slowdown in Nigeria

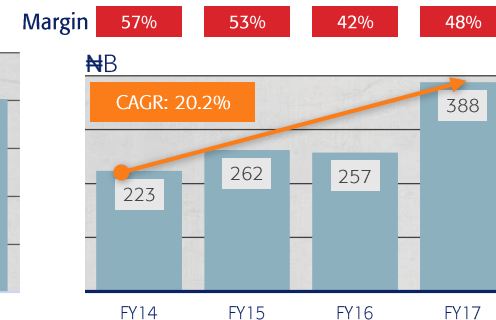
Strong financial profile including low leverage and significant operational scale

* As at 20th March 2018

Revenue

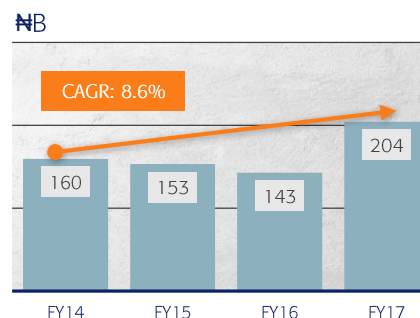


EBITDA

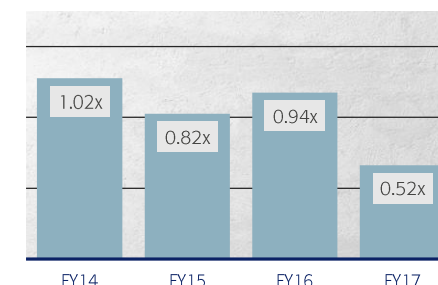


Margin: 57% 53% 42% 48%

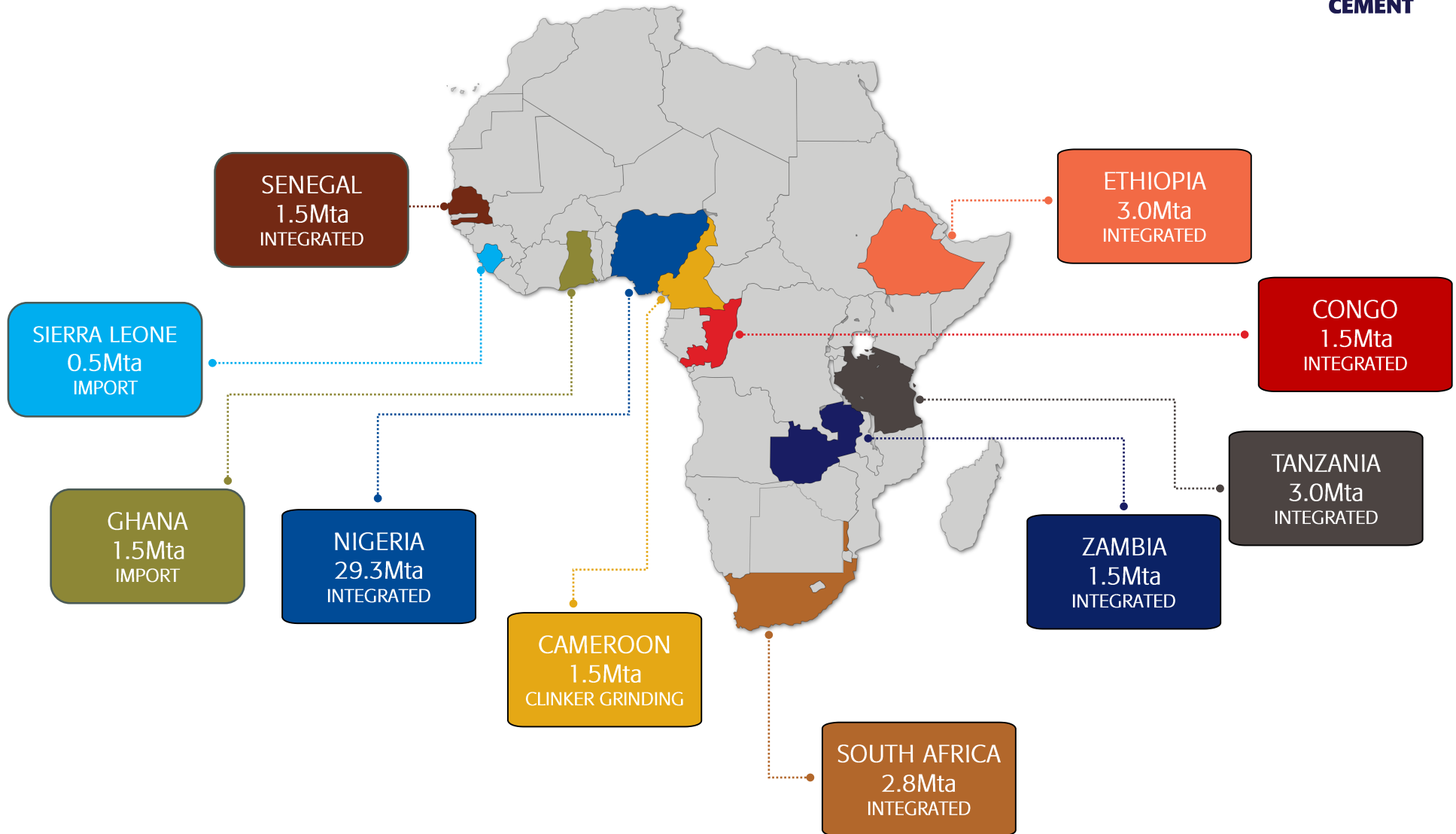
Net Income



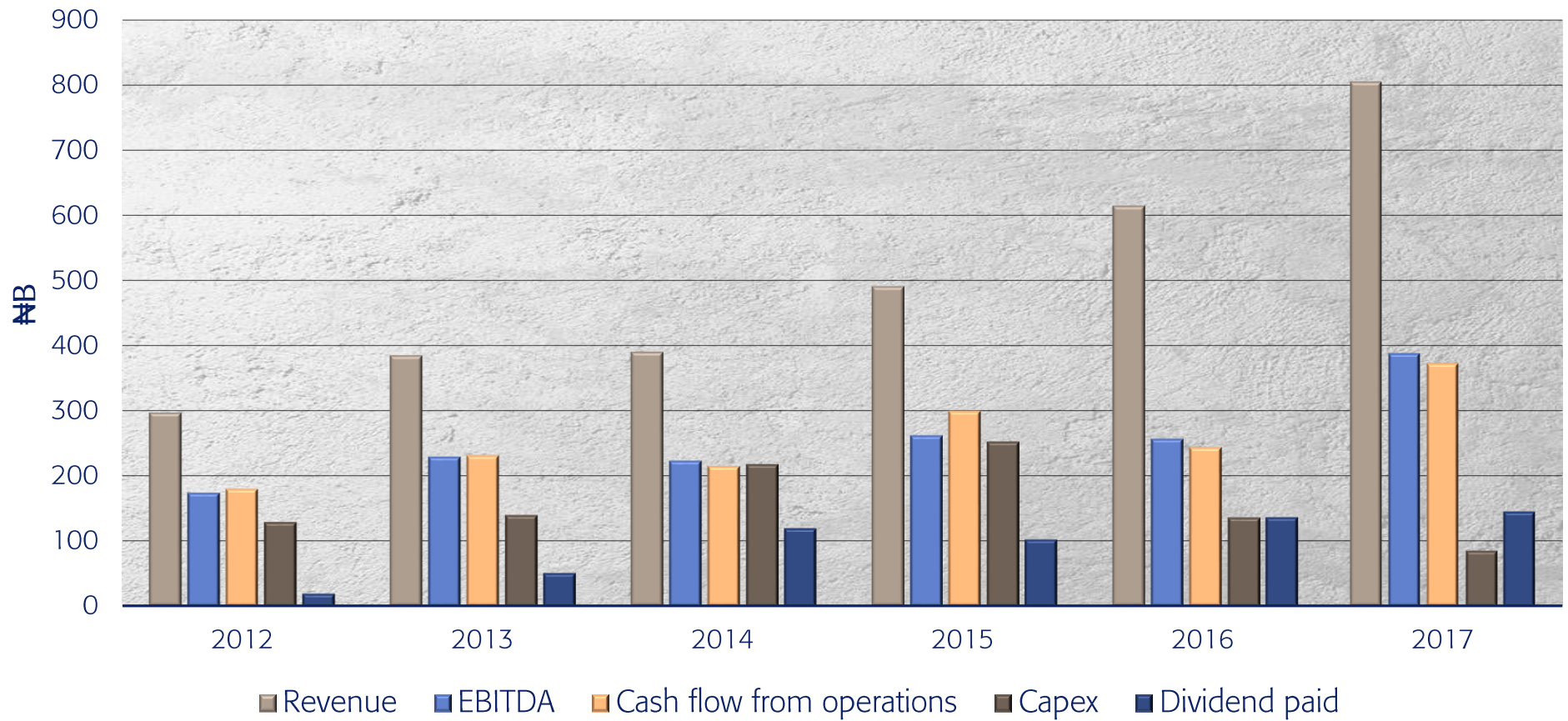
Net Debt / EBITDA



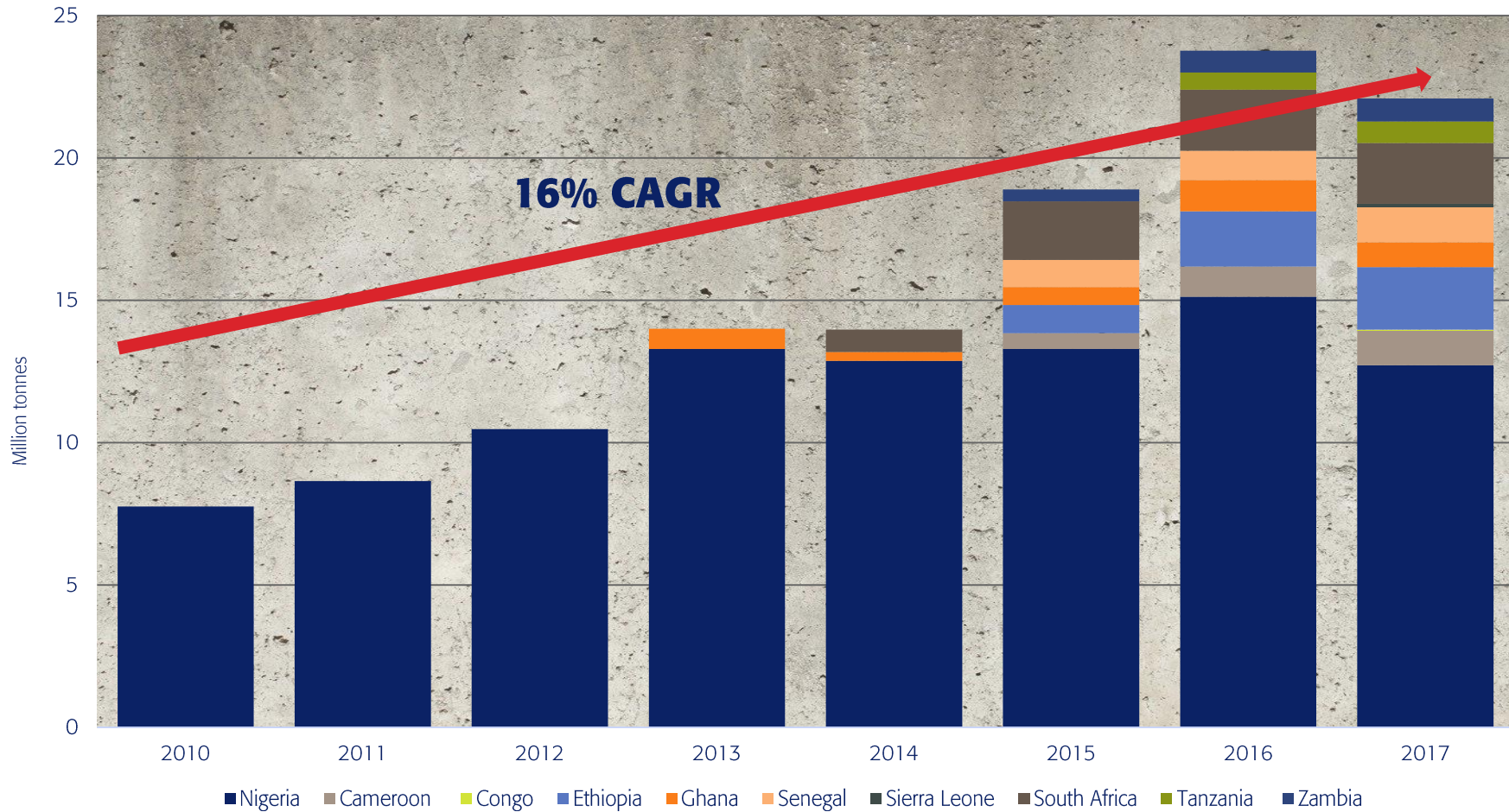
Our Capacity



Strong Financial Performance



Strong Volume Growth



Why Cement in Sub-Saharan Africa?



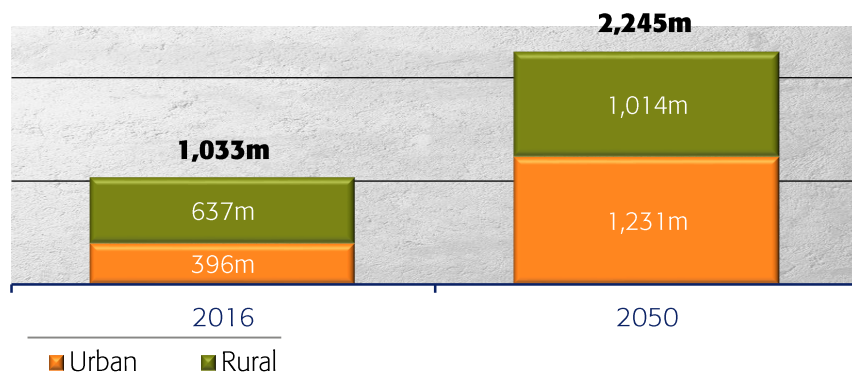
African Cement Market

Positive Long-Term Mega Trends

- Increasing demand for cement as urbanisation continues across the continent, demanding more infrastructure, housing and commercial building
- Increasing political stability enabling rapid economic growth
- Steady population growth, younger and more mobile population drive the need for building
- Emerging middle-class, increasing consumerisation and access to credit
- Historical SSA GDP growth of 4.0% between 2010 – 2016, expected to recover to 2.9% in 2017

Rapid Urbanisation Presents Strong Opportunity

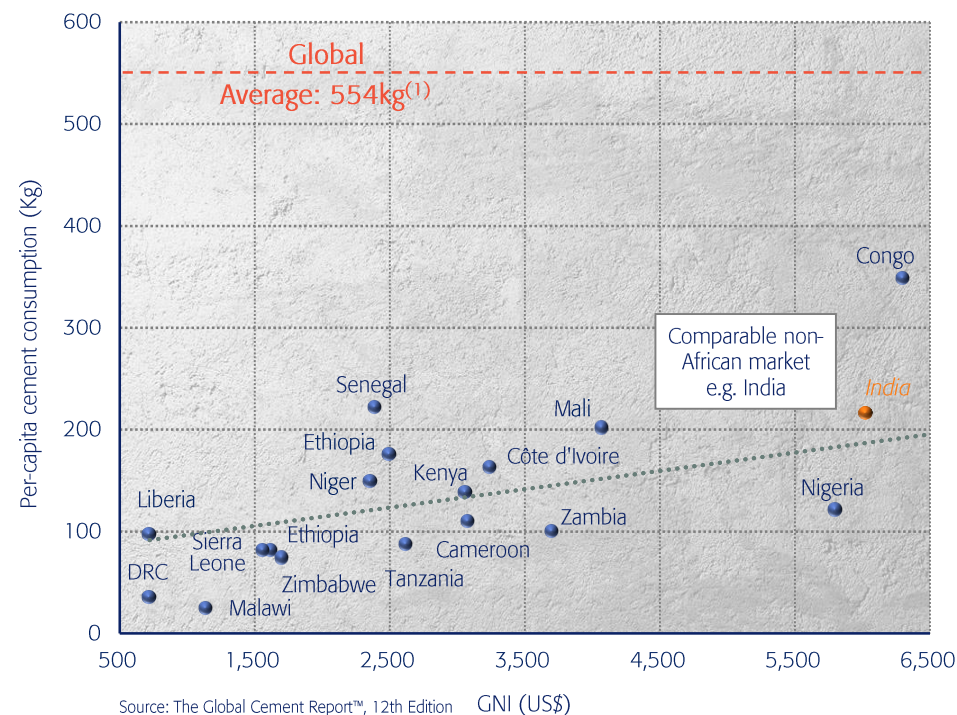
- Over 1.2bn people are forecast to live in urban areas by 2050, which is 4x America's current population



Rising Infrastructure Investment across Africa

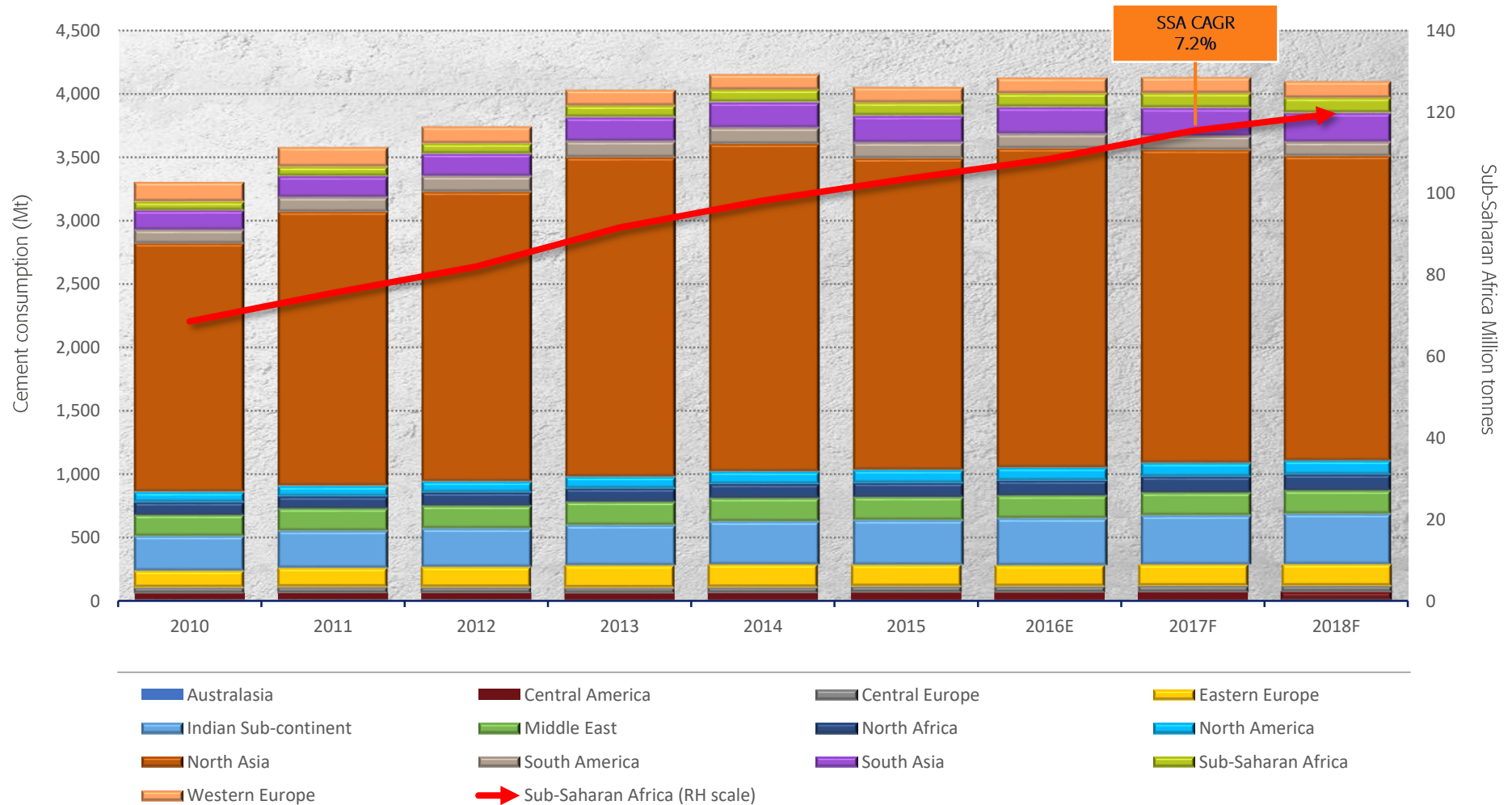
- Current trends in Africa suggest that total infrastructure spending between 2016 – 2040 will be \$4,300bn, and could go as high as \$6,000bn if African economies match their best-performing peers

Materially Lower Per-Capita Cement Consumption in Sub-Saharan Africa



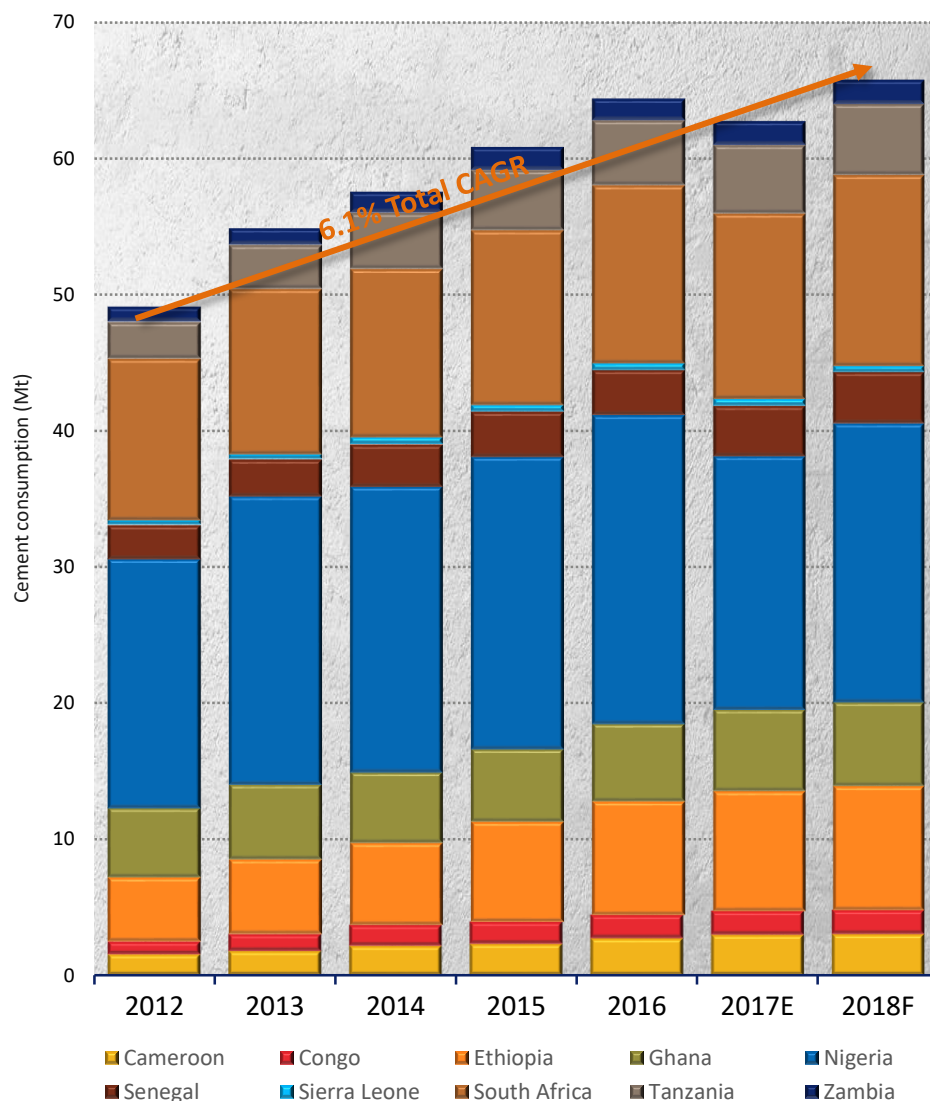
SSA Demand Growing Strongly

Global Cement Consumption 2010-2018F (Million tonnes)



Source: The Global Cement Report™, 12th Edition

Operations in Growth Markets

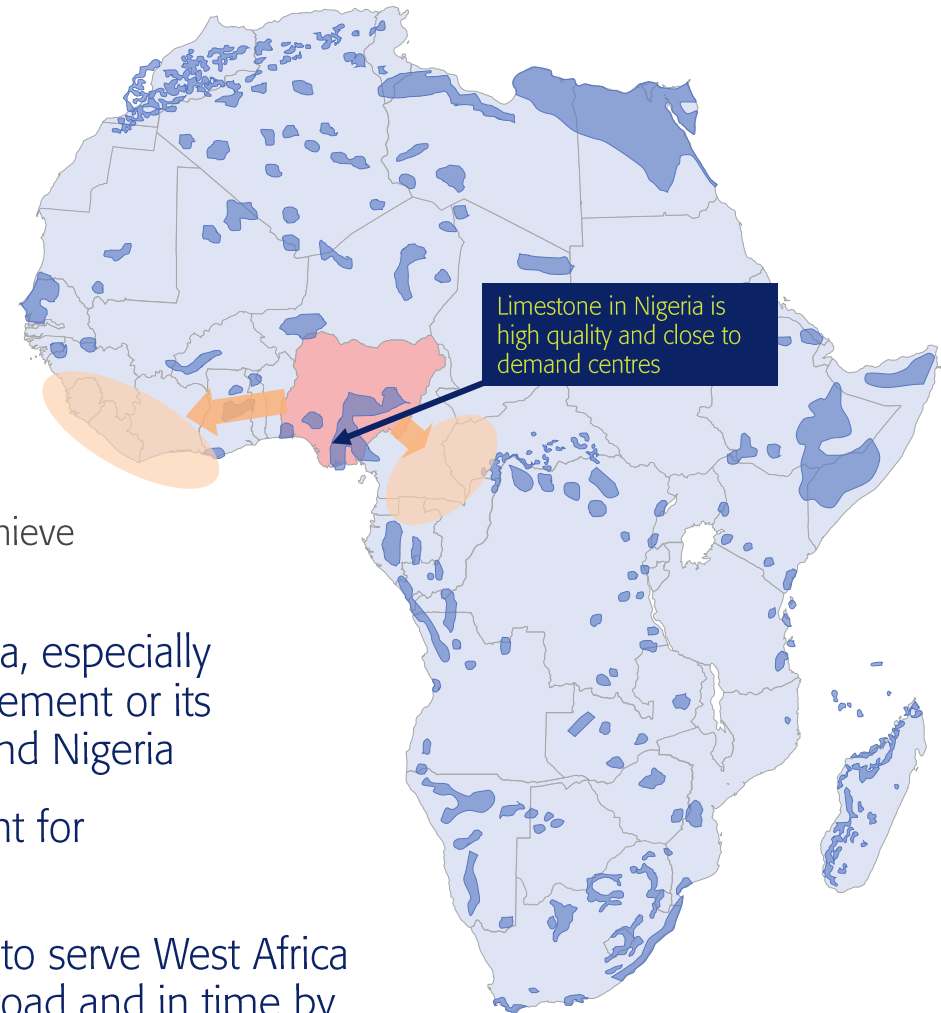


GDP growth	2012	2013	2014	2015	2016	2017E	2018F
Cameroon	4.6%	5.6%	5.9%	5.8%	4.4%	4.0%	4.6%
Congo	3.8%	3.3%	6.8%	2.6%	-2.7%	-3.6%	2.8%
Ethiopia	8.7%	9.9%	10.3%	10.4%	8.0%	8.5%	5.5%
Ghana	9.3%	7.3%	4.0%	3.9%	4.0%	5.9%	8.9%
Nigeria	4.3%	5.4%	6.3%	2.7%	-1.5%	0.8%	1.9%
Senegal	4.5%	3.6%	4.3%	6.5%	6.6%	6.8%	7.0%
Sierra Leone	15.2%	20.7%	4.6%	-20.6%	4.9%	6.0%	6.1%
South Africa	2.2%	2.5%	1.7%	1.3%	0.3%	0.7%	1.1%
Tanzania	5.1%	7.3%	7.0%	7.0%	6.6%	6.5%	6.8%
Zambia	7.6%	5.1%	4.7%	2.9%	3.0%	4.0%	4.5%

Source: IMF Regional Economic Outlook, October 2017

Strategic Raw Material Access

- Limestone is the key and irreplaceable ingredient of all types of modern cement
- Commercially viable deposits of limestone are relatively scarce across many parts of Africa
 - Ideally need high-quality limestone to be near demand centres, fuel and distribution network
- Nigeria has a relative abundance of quality limestone especially in key southern regions near to demand centres, export facilities
 - Nigeria also has good-quality coal that we will mine to achieve self-sufficiency in fuel
- Absence of limestone in much of West and East Africa, especially coastal states, forces those countries to import bulk cement or its intermediate product, clinker, usually from Far East and Nigeria
- Limestone reserves close to existing facilities, sufficient for many decades of operation
- Dangote Cement plans an 'export to import' strategy to serve West Africa and Cameroon from Nigerian factories, exporting by road and in time by sea



Strategic Goals



OUR VISION

To be a global leader in cement production, recognised for the quality of our products and services and for the way we conduct our business

OUR GOAL

To deliver superior and sustainable risk-adjusted returns on our investments

Strategic Pillars

Focus on Optimising Efficiency of Existing Assets

Sustained focus on achieving a higher degree of self-sufficiency in key raw materials, fuels and services in order to reduce any loss of value through outsourcing

Continue to Grow Market Share in Existing Markets

Become one of the two largest cement producers and achieve a market share of at least 30% in each of the markets where we operate

Tap High-Value Export Markets

Focus on export markets with high cement prices to increase sales, particularly in foreign currencies, to mitigate foreign currency rate fluctuation and availability risk

Prudent Further Expansion into High Growth Sub-Saharan Africa Cement Markets

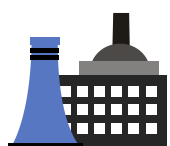
Grow and diversify across the attractive SSA cement market, continuing to focus on selective future growth undertaken in a financially prudent manner with a strict application of internal return criteria and requirements

Adhere to High Standards of Corporate Governance and Improve Sustainability

Continual adherence to high standards of corporate governance to achieve international recognition and standing and enable the Group to successfully access the global financial markets, whilst reducing our impact on the environment

High Level of Business Integration

Operating Challenges in Africa



Power Availability



Fuel Supply



Control of Logistics



Access to Labour

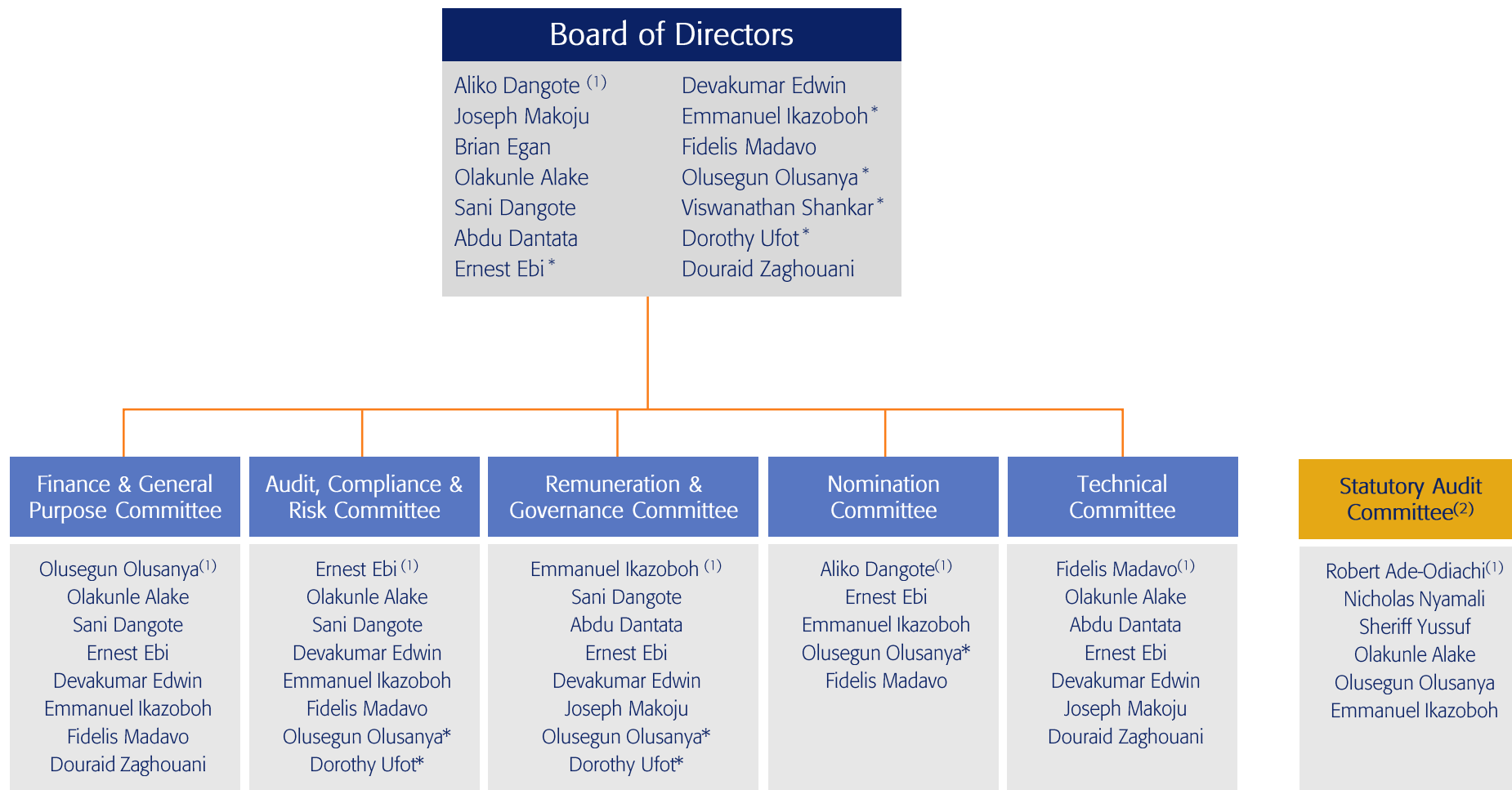
Our Operating Strategy

- Developed internal power generation capabilities to become self-sufficient in markets where the electrical grid is poorly developed or nonexistent
 - On-site power plants at production facilities in Nigeria, Senegal, Tanzania and Zambia
-
- Converted kilns in Nigeria to use coal and gas interchangeably as opposed to gas/LPFO, diversifying fuel supply, reducing costs
 - Source coal from parent company's mining operations, making kiln fuel supply more reliable and related costs more predictable
-
- Operate a transportation fleet of over 9,200 trucks which enhances reach and helps sustain market share by limiting reliance on third party for distribution and facilitates export strategy
 - Use of other in-house inputs such as bags manufactured by affiliate companies
-
- Strong focus on the professional development of employees, offering training opportunities to our workforce through the Dangote Academy
 - Efficient administrative function, make extensive use of local talent at factories
-

Competitive Advantages



Board and Committees



Note: * denotes Independent Non-Executive Directors.

1. Chairman of Committee.

2. The Statutory Audit Committee is not a Committee of the Board.

Investor Presentation

2017 Results



Building Prosperity in Africa



FY 2017 Highlights

FINANCIAL

- Group revenue up 31.0%
- Group EBITDA up 50.9% at margin of 48.2%
- Nigeria EBITDA up 49.1% with strong margin improvement to 65.3%
- Pan-African EBITDA up 48.5% at 14.8% margin
- Earnings per share up 32.7% to ₦11.65
- Dividend up 23.5% to ₦10.50

OPERATIONAL

- Pan-African sales volumes up 8.4%
- Strong performances in Cameroon, Ethiopia and Senegal
- 1.5Mta new capacity in Congo
- 0.5Mta new capacity in Sierra Leone

Year to 31 st December	2017	2016	Change
Sales volumes	'000t	'000t	%
Nigeria	12,724	15,128	(15.9%)
Pan-Africa	9,365	8,639	8.4%
Inter-company sales	(174)	(192)	(9.4%)
Total	21,915	23,575	(7.0%)
Revenues	₦m	₦m	%
Nigeria	552,364	426,129	29.6%
Pan-Africa	258,444	195,028	32.5%
Inter-company sales	(5,266)	(6,054)	(13.0%)
Total	805,582	615,103	31.0%
EBITDA	₦m	₦m	%
Nigeria	360,759	241,969	49.1%
Pan-Africa	38,276	25,744	48.5%
Inter-company and central costs	(10,888)	(10,500)	3.7%
Total	388,147	257,243	50.9%
EBITDA margin*	%	%	
Nigeria	65.3%	56.8%	8.5pp
Pan-Africa	14.8%	13.2%	1.6pp
Group	48.2%	41.8%	6.4pp

* Before central costs and eliminations

Year in Detail

	Q1 2017	Q2 2017	Q3 2017	Q4 2017	FY 2017	FY 2016	% change
Sales volumes	'000t	'000t	'000t	'000t	'000t	'000t	
Nigeria	3,770	3,085	2,774	3,095	12,724	15,128	(15.9%)
Pan-Africa	2,342	2,401	2,280	2,342	9,365	8,639	8.4%
Inter-company sales	(87)		(54)	(33)	(174)	(192)	
Total	6,025	5,486	5,000	5,404	21,915	23,575	(7.0%)
Revenues	₦m	₦m	₦m	₦m	₦m	₦m	% change
Nigeria	152,355	139,040	124,718	136,251	552,364	426,129	29.6%
Pan-Africa	58,715	65,732	67,406	66,591	258,444	195,028	32.5%
Inter-company sales	(2,904)	(262)	(1,225)	(835)	(5,226)	(6,054)	
Total	208,166	204,510	190,899	202,007	805,582	615,103	31.0%
EBITDA	₦m	₦m	₦m	₦m	₦m	₦m	% change
Nigeria	98,679	91,410	80,367	90,299	360,759	241,969	49.1%
Pan-Africa	7,483	12,149	12,698	5,946	38,276	25,774	48.5%
Inter-company and central costs	(3,159)	(2,890)	(2,434)	(2,404)	(10,888)	(10,500)	
Total	103,003	100,669	90,631	93,841	388,147	257,243	50.9%
EBITDA margin*	%	%	%	%	%	%	
Nigeria	64.8%	65.7%	64.4%	66.3%	65.3%	56.8%	
Pan-Africa	12.7%	18.5%	18.8%	8.9%	14.8%	13.2%	
Group	49.5%	49.2%	47.5%	46.5%	48.2%	41.8%	

* Before central costs and eliminations

Group Financial Overview

Income Statement

Year to 31 st December	2017 ₦m	2016 ₦m	% change
Revenue	805,582	615,103	31.0%
Cost of sales	(351,290)	(323,816)	8.5%
Gross profit	454,292	291,287	56.0%
<i>Gross margin</i>	56.4%	47.4%	20.3pp
EBITDA	388,147	257,243	50.9%
<i>EBITDA margin</i>	48.2%	41.8%	6.4pp
EBIT	304,208	182,493	66.7%
<i>EBIT margin</i>	37.8%	29.7%	8.1pp
Finance income	35,926	43,817	(18.0%)
Finance cost	(52,711)	(45,381)	16.2%
Profit before tax	289,590	180,929	60.0%
Income tax (expense)/credit	(85,342)	(38,071)	124.2%
Profit for the period	204,248	142,858	43.0%
Earnings per share	11.65	8.78	32.7%



Impact of Tax Change

- Company remains confident that Pioneer applications will be approved by NIPC
- Pioneer tax relief taken for the two-year extension on Lines 1&2 Ibese and Line 3 Obajana.
 - Original three-year application was approved by NIPC and extension should be granted as the Company has complied with the Pioneer requirements.
 - Credit taken in 2017 of ₦8.3B (2016: ₦24.0B, 2015: ₦27.8B)
- Pioneer tax relief not taken for the original three-year application on Lines 3&4 Ibese and Line 4 Obajana.
 - Have complied with the PSI requirements and applications await NIPC approval.
 - Provision taken in 2017 of ₦62.2B (2016: ₦43.8B, 2015: ₦28.1B)
 - Provision will be reversed on receipt of NIPC approval
- Tax charge of 25.6% in Nigeria for 2017

Previous treatment

Obajana	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Line 1											
Line 2											
Line 3											
Line 4											
Ibese	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Line 1											
Line 2											
Line 3											
Line 4											

New treatment, pending NIPC approval

Obajana	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Line 1											
Line 2											
Line 3											
Line 4											
Ibese	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Line 1											
Line 2											
Line 3											
Line 4											

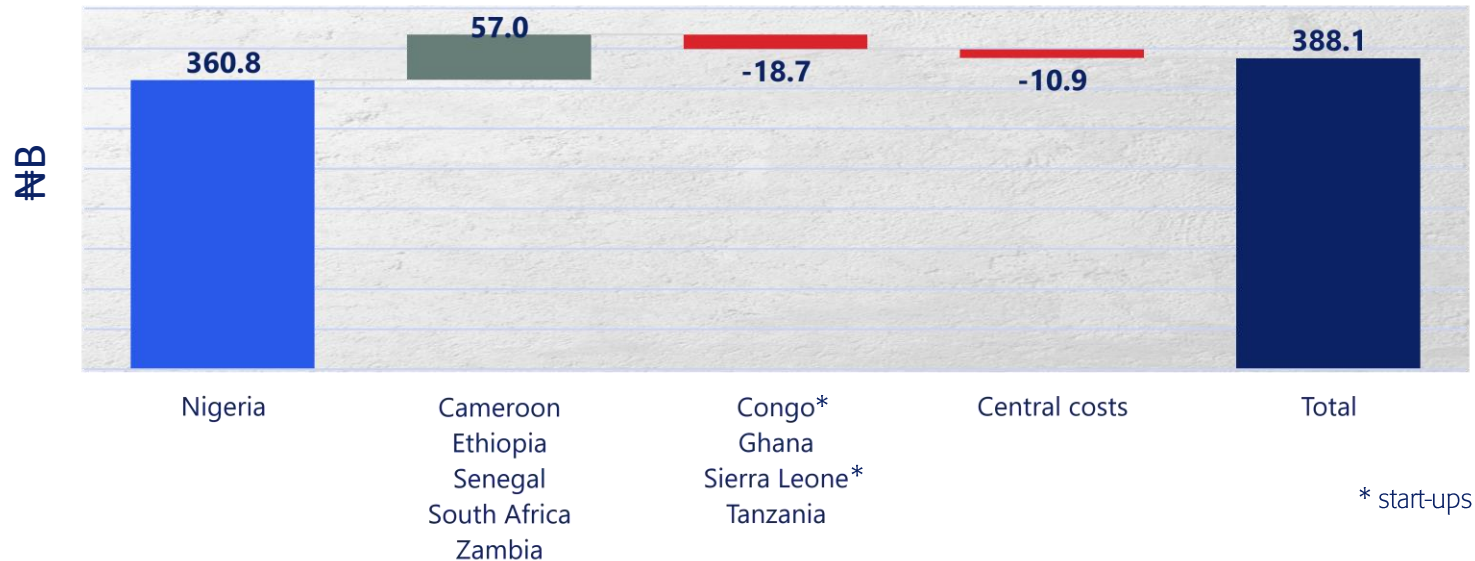
Tax exempt status taken in accounts

Tax exempt status taken in accounts, on two-year Pioneer extensions, awaiting NIPC approval

Tax-exempt status not taken in accounts, awaiting NIPC approval

EBITDA Development

Profitability

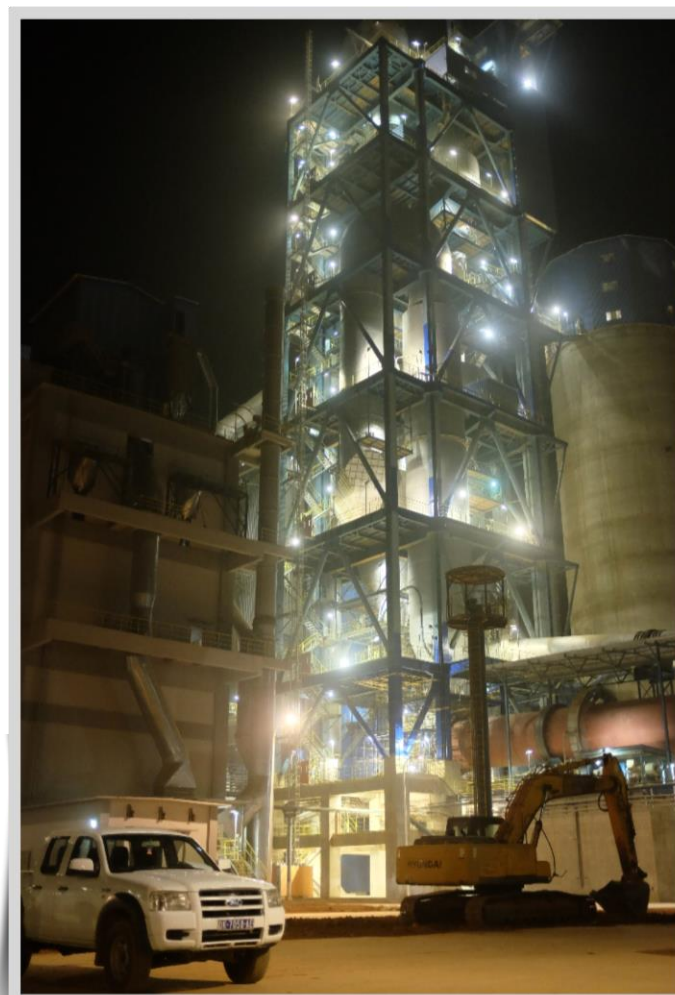


- Impact of loss-making operations just breaking even would increase Pan-African margin to 22%
- Levers of EBITDA improvement in 2018:
 - Tanzania fuel switch to gas
 - Sierra Leone, Congo progressing from start-up phase to profitability
 - Improved cost/pricing in Ghana

Group Financial Overview (cont'd)

Movement in Net Debt

	Cash ₦m	Debt ₦m	Net debt ₦m
As at 1st January 2017	115,693	(356,465)	(240,772)
Cash generated from operations before changes in working capital	379,701		379,701
Changes in working capital	(31,351)		(31,351)
Income tax paid	(3,213)		(3,213)
Additions to fixed assets	(85,621)		(85,621)
Other investing activities	(1,639)		(1,639)
Change in non-current prepayments	(22,332)		(22,332)
Net interest payments	(39,222)		(39,222)
Net loans obtained (repaid)	2,591	(2,591)	-
Dividend paid	(144,844)		(144,844)
Other cash and non-cash movements	(1,376)	(13,038)	(14,414)
As at 31 st December 2017	168,387	(372,094)	(203,707)



Group Financial Overview (cont'd)

Balance Sheet

	As at 31/12/17 Nm	As at 31/12/16 Nm
Property, plant and equipment	1,192,140	1,155,711
Other non-current assets	57,089	66,084
Intangible Assets	6,355	4,145
Current Assets	241,912	187,471
Cash and Cash Equivalents	168,387	115,693
Total Assets	1,665,883	1,529,104
Non-current liabilities	121,153	125,308
Current liabilities	391,276	321,803
Debt	372,094	356,465
Total Liabilities	884,523	803,576
Net Assets	781,360	725,528



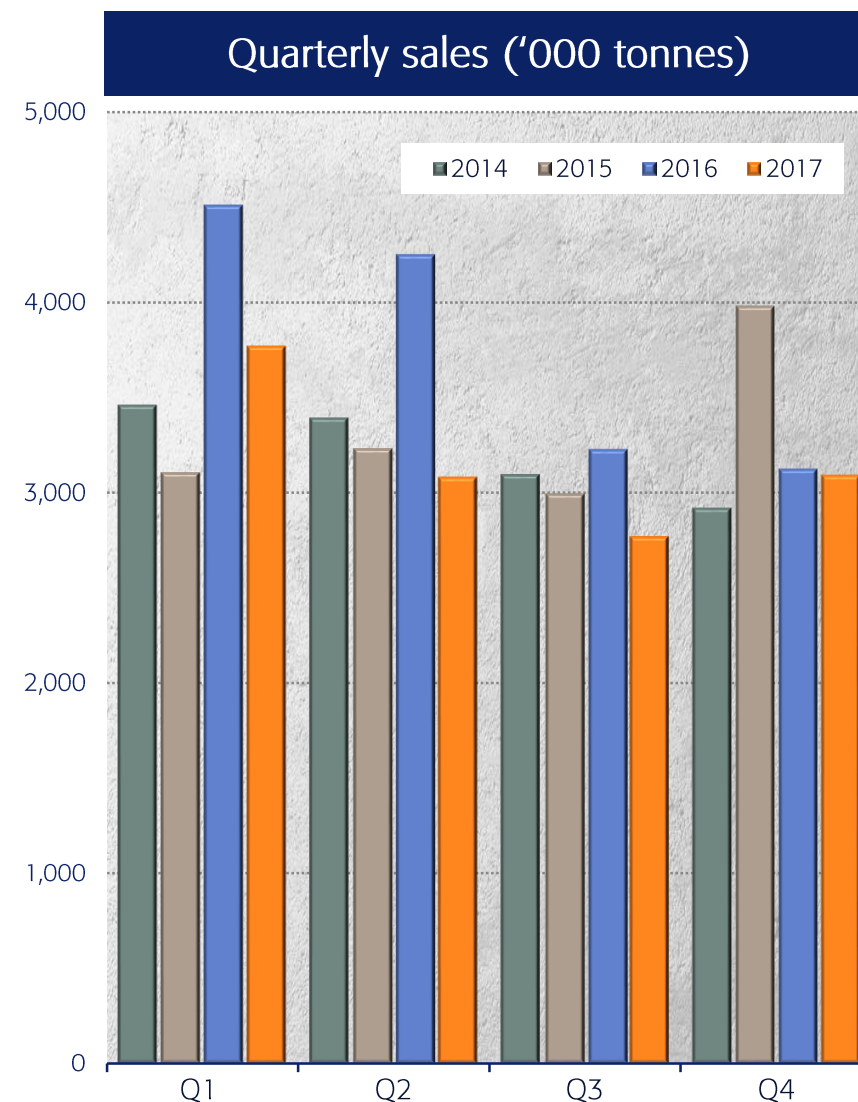
Strong Nigeria Performance

- Revenues up 29.6% despite fall in volumes
 - Estimated 65% market share
- EBITDA up 49.1%
 - Helped by better fuel mix
- Coal and gas use increased
 - Own-mined coal now available to all plants
 - Significantly reduced importation of coal, use of LPFO
- Exports increased to more than 700Kt
 - Ghana 174Kt
 - Niger 322Kt
 - Togo 218Kt

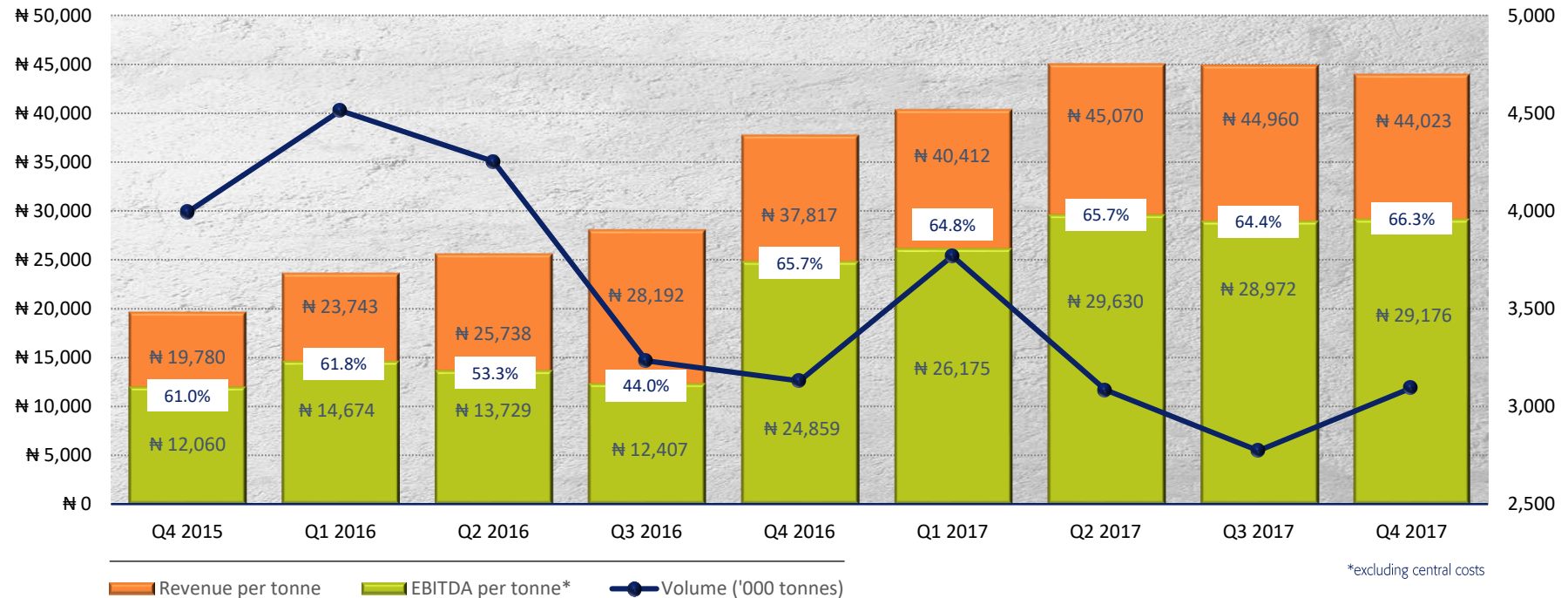
Nigeria performance

Year to 31 st December	2017	2016	Change
Volumes* (Kt)	12,724	15,128	(15.9%)
Revenue* (₦m)	552,364	426,129	29.6%
EBITDA* (₦m)	360,759	241,969	49.1%
EBITDA margin*	65.3%	56.8%	

* Before corporate costs and inter-company eliminations



Strong Improvement in Nigeria EBITDA / Tonne

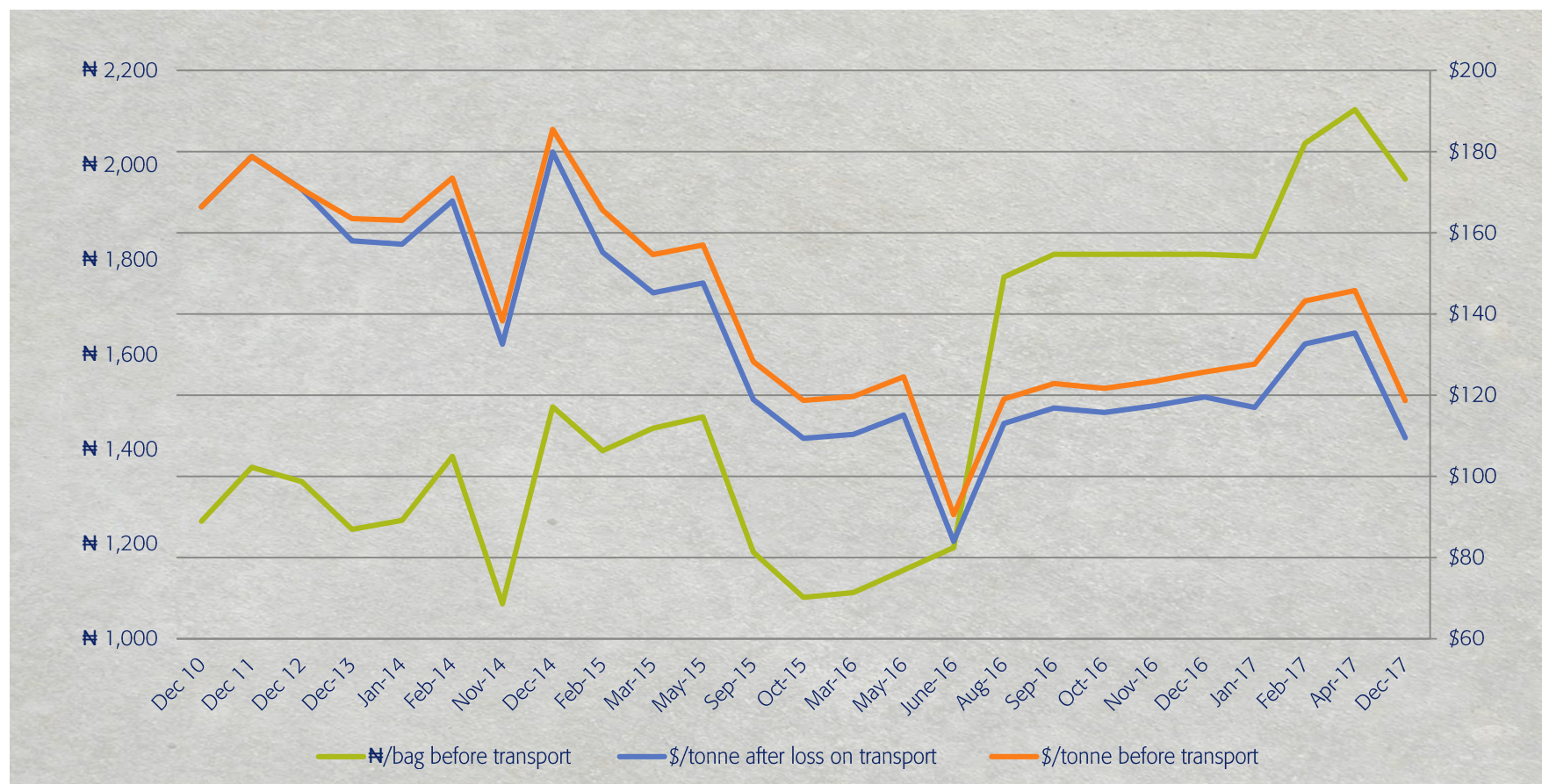


EBITDA momentum maintained in Q4 2017

- Strong per-tonne EBITDA maintained despite lower volumes, price cut in August
- Improved fuel mix with decreased use of imported coal and LPFO

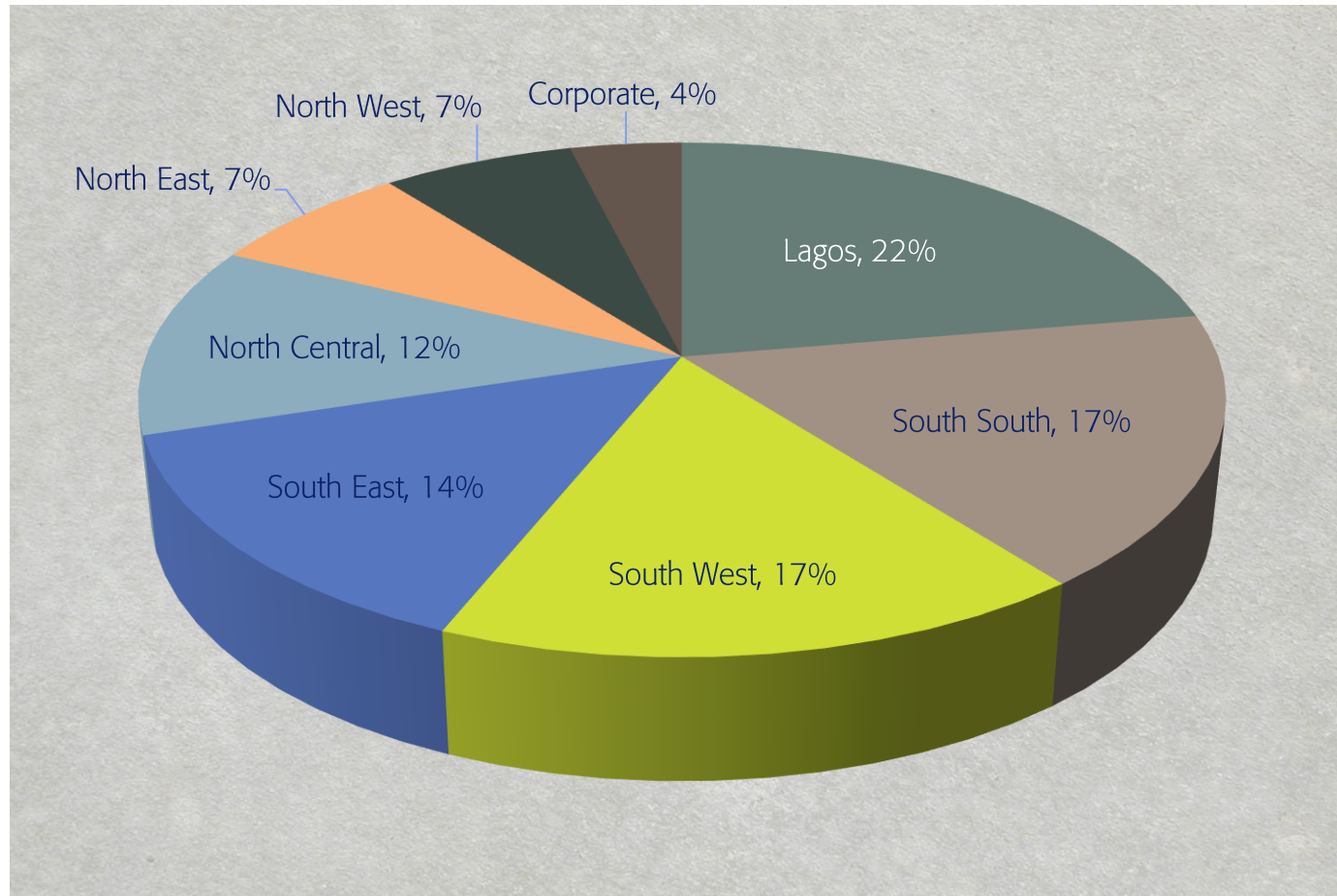
Nigeria Price Development

Ex-factory price after discounts and other rebates



Conversion from Naira to US\$ is at spot rate

Nigeria's Key Markets, 2017



Better Nigeria Fuel Mix Reduces Costs

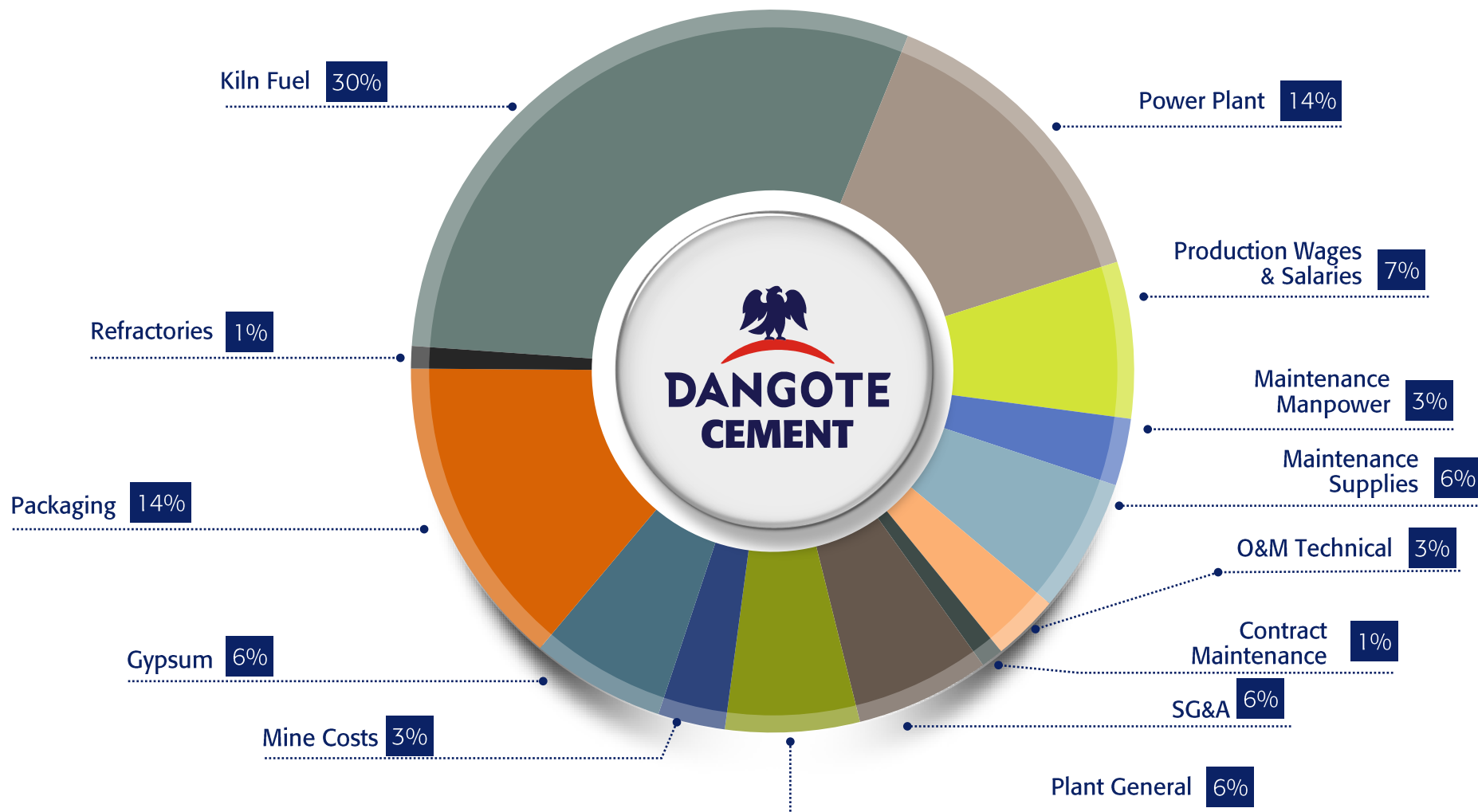


Fuel mix				
Year to 31 st December	Obajana		Ibese	
	2017	2016	2017	2016
Gas	60%	45%	61%	41%
Coal	38%	26%	38%	43%
LPFO	2%	29%	1%	16%
TOTAL	100%	100%	100%	100%

Relative cost of fuels vs gas per tonne of clinker		
As at December 2017	Obajana	Ibese
Own-mined coal	0.8x	0.9x
Imported coal	1.7x	1.4x
Gas	1.0x	1.0x
LPFO	2.7x	2.0x

Nigeria Cash Cost Analysis

% of average cash costs per tonne, 2017



Cash cost was approximately **\$35/tonne** in FY2017

65% of cash costs are US Dollar based, though less than 20% paid in Dollars

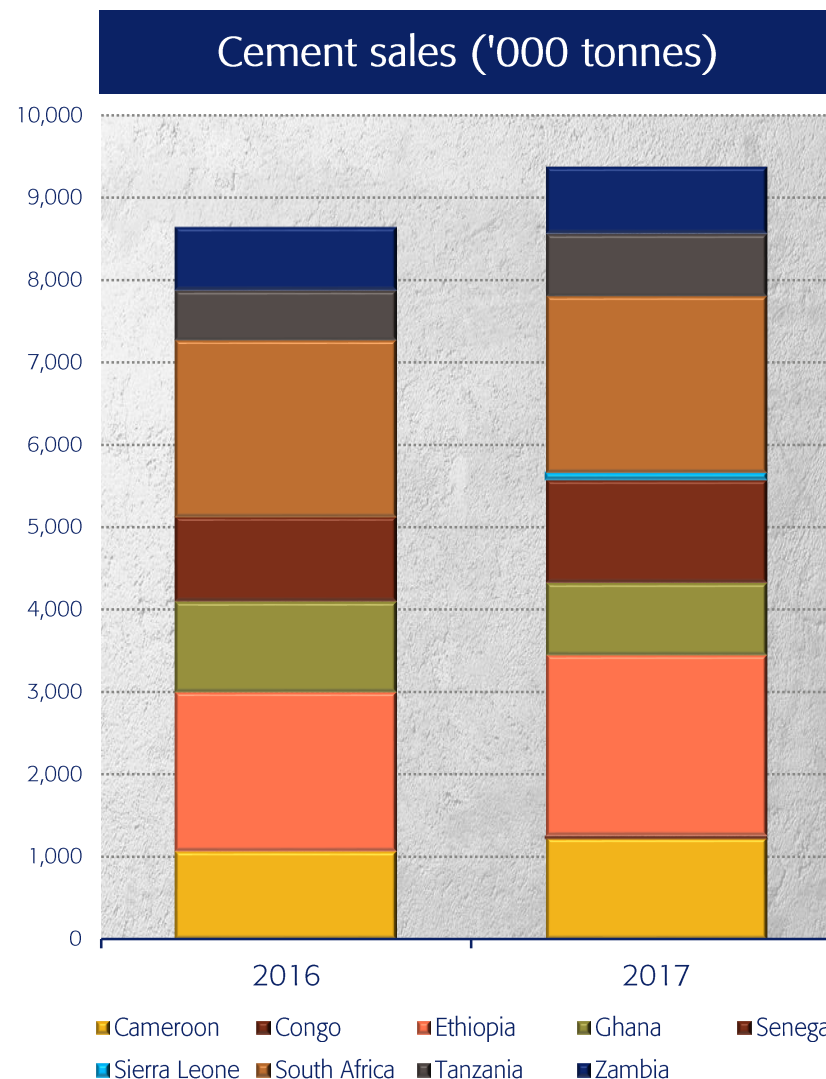
Pan-Africa Growing Well

- Sales volumes up 8.4% to 9.4Mt
- Revenues up 32.5% to ₦258.4B
- EBITDA up 48.5%, higher volumes and pricing
- Strong performances in key markets
 - Cameroon sales volumes up 14.8%
 - Ethiopia volumes up 13.2%
 - Senegal volumes up 21.4%
- Congo, Sierra Leone onstream

Pan-Africa performance

Year to 31 st December	2017	2016	Change
Volumes sold (Kt)	9,365	8,639	8.4%
Revenue (₦m)	258,444	195,028	32.5%
EBITDA* (₦m)	38,276	25,774	48.5%
EBITDA margin	14.8%	13.2%	

* Before corporate costs and eliminations



Country Updates



Cameroon

4.0% GDP growth estimate by IMF for 2017

Housing, infrastructure, football driving cement demand

1.2Mt cement sold, up 14.8%

Estimated 46% market share

Increasing brand recognition, strengthening relationships with distributors

Pricing averaged \$106 across 2017



Congo

1.5Mta plant came onstream late September

Largest plant in Congo

Ideal location to reach capital

Will reduce dependence on imported cement

32Kt sold in 2017



Ethiopia

IMF estimates 8.5% GDP growth in 2017

Growth & Transformation Plan driving major projects

2.2Mt sold from Muger plant, 13% higher than 2016

Represents 88% capacity utilisation

Market share 22% at end of 2017

Margin improvement initiatives underway with logistics and energy use

Country Updates



Ghana

Strong economic growth forecast to support expanding oil and gas industries, 5.9% GDP estimated for 2017

0.9Mt cement sold in 2017

Nearly 0.2Mt imported from Nigeria



Senegal

1.3Mt cement sold in 2017, up 21% on 2016

Coal shortage affected Sept. production, but issue resolved

Plant at 83% capacity utilisation

Strong success of our new 32.5R product

Exporting to Mali and Gambia

Strong margins through excellent plant management



Sierra Leone

Economy recovering from Ebola, GDP growth expected at 6.0% in 2017

Steady start after 0.5Mt import facility opened in Q1 2017

91Kt cement sold

Strong marketing drive through retailer outreach/sign-up, TV/radio ads

Country Updates



South Africa

Economy remains subdued with just 0.7% growth in 2017

Cement sales only marginally lower than 2016

Price increases in Feb, Aug

Improved political situation may reduce uncertainty, encourage new investment



Tanzania

Strong 6.5% GDP growth expected for 2017

Large infrastructure projects driving cement demand

Sales volumes up 25% to 0.8Mt

Market share estimated at 14%

Gas gensets expected in March, with immediate uplift to margins

Kilns dual firing on coal/gas from Q2 2018



Zambia

IMF estimates 4.0% GDP growth for 2017

Ndola plant sold 0.8Mt, up 5%

Estimated 40% market share

Retail market constrained by tight monetary policy

Assumed O&M control from Sinoma

Investor Presentation

APPENDIX



Building Prosperity in Africa

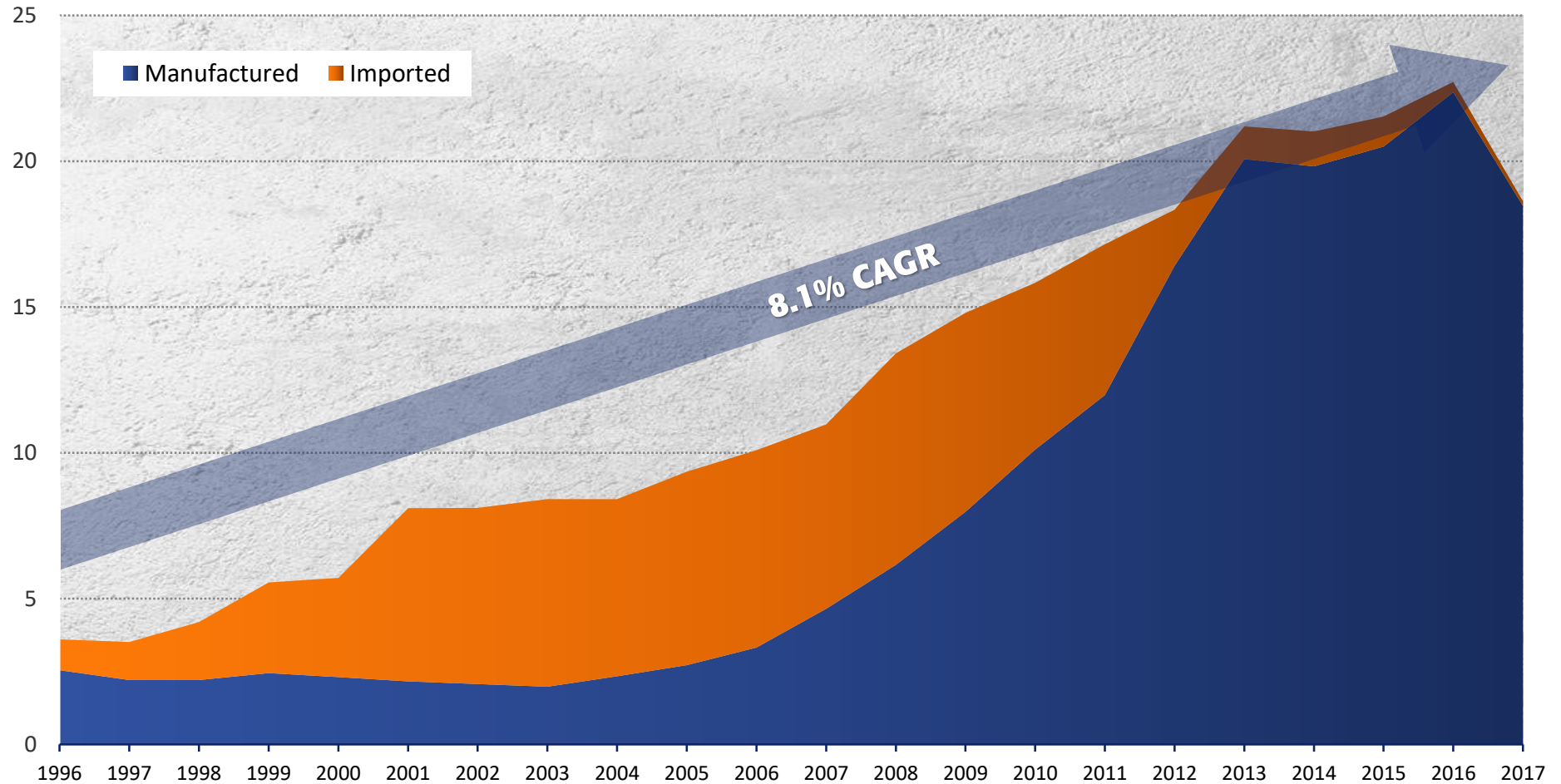


Sustainability



- First Sustainability Report published in 2017 Annual Report
- Reporting guided by:
 - Nigerian Stock Exchange requirements on sustainability reporting
 - Cement Sustainability Initiative
 - Global Reporting Initiative G4 Sustainability Reporting Guidelines
- Focus upon:
 - Carbon disclosure
 - Emissions monitoring
 - Responsible use of fuel and raw materials
 - Employee health and safety
- Work in progress
 - 2016: Benchmark industry standard reporting, identify relevant reporting standards, develop pilot monitoring studies
 - 2017: Review pilot studies, develop policies and finalise KPIs, staff training
 - 2018: Roll out monitoring and reporting system across entire business, data assurance, regular management reviews
 - 2018: Produce first Sustainability Report

Nigerian Cement Consumption, 1996-2017



Regional Cement Consumption Trends

	2010	2011	2012	2013	2014	2015	2016E	2017F	2018F	CAGR 2010-18F
	Mt	Mt	Mt	Mt	Mt	Mt	Mt	Mt	Mt	%
Australasia	13.1	13.2	11.9	10.5	11.2	11.3	11.4	11.8	12.0	-1.1%
Central America	50.3	51.7	53.4	52.9	55.0	58.1	59.1	60.6	61.3	2.5%
Central Europe	43.1	46.5	42.5	41.3	42.8	44.7	45.1	45.8	46.1	0.8%
Eastern Europe	131.7	148.9	160.0	175.0	177.8	170.9	164.7	168.8	169.6	3.2%
Indian Sub-continent	273.9	293.5	303.4	318.1	340.6	351.4	372.0	387.2	397.4	4.8%
Middle East	167.1	176.7	180.6	185.0	184.0	182.3	179.6	179.3	183.0	1.1%
North Africa	102.3	96.3	105.1	106.5	112.0	112.6	117.6	127.5	127.5	2.8%
North America	80.0	81.0	87.4	90.8	98.2	101.7	103.0	106.9	109.4	4.0%
North Asia	1,959.7	2,161.2	2,283.4	2,517.9	2,582.3	2,458.4	2,517.1	2,469.7	2,402.3	2.6%
South America	109.1	118.7	125.4	130.8	131.7	127.0	116.4	113.4	114.6	0.6%
South Asia	156.5	165.9	176.2	187.1	196.9	209.0	208.6	217.4	225.5	4.7%
Sub-Saharan Africa	68.6	75.6	82.1	91.7	98.3	103.6	108.5	115.4	119.7	7.2%
Western Europe	156.4	156.0	134.6	125.8	124.3	125.3	126.1	129.3	131.6	-2.1%
Total	3,311.7	3,585.2	3,745.7	4,033.5	4,155.1	4,056.1	4,129.3	4,133.1	4,099.9	2.7%

Source: International Cement Review / www.CemNet.com

Investment in Plants

	\$m
Obajana	1,895
Ibese	1,440
Gboko	561
NIGERIA	\$3,897m
Cameroon	138
Congo	312
Ethiopia	521
Senegal	358
Sierra Leone	52
South Africa	330
Tanzania	540
Zambia	358
PAN-AFRICA	\$2,609m
TOTAL	\$6,506m



NB. Total investment in Nigeria is \$5.3B including coal mills, logistics and other capital projects

Country Statistics & Information



Cameroon Congo Ethiopia Ghana Nigeria Senegal Sierra Leone South Africa Tanzania Zambia

Demographic & economic

Population (m)	23.3	4.6	99.4	27.4	182.2	15.1	6.5	54.5	53.5	16.2
Estimated GDP Growth 2017	4.0%	-3.6%	8.5%	5.9%	0.8%	6.8%	6.0%	0.7%	6.5%	4.0%
Urbanisation %	52.0%	64.0%	17.0%	51.0%	50.0%	47.0%	41.0%	62.0%	30.0%	40.0%

Cement market

Total capacity	4.3Mta	3.2Mta	15.6Mta	9.9Mta	43.7Mta	8.2Mta	1.6Mta	20.5Mta	11.0Mta	3.9Mta
2016 cement consumption (Mt)	2.7Mt	1.7Mt	8.3Mt	5.7Mt	22.7Mt	3.3Mt	0.5Mt	13.0Mt	4.8Mt	1.6Mt
Cement per capita (Kg)	111	349	82	202	122	222	82	234	88	101

Dangote presence

Location	Douala	Mfila	Mugher	Tema	Obajana, Ibese, Gboko	Pout	Freetown	Aganang Delmas	Mtwara	Ndola
Type	Grinding	Integrated	Integrated	Bulk import	Integrated	Integrated	Bulk import	Integrated	Integrated	Integrated
Capacity (Mta)	1.5 ²	1.5 ¹	2.5 ¹	1.5 ³	29.3 ¹	1.5 ³	0.5 ²	2.8 ⁴	3.0 ¹	1.5 ¹
Estimated share of capacity	40%	47%	16%	15%	67%	18%	36%	14%	27%	38%
Kiln fuel	n/a	Coal	Coal	n/a	Gas/Coal	Coal	n/a	Coal	Coal/Gas	Coal
Power	Grid	Coal	Grid	Grid	Gas/Diesel	Coal	Grid	Grid	Diesel/Gas	Coal

Sources: Dangote Cement estimates, Global Cement Report XII, World Bank
1,2,3,4 DCP ranking by capacity in country



PREMIUM
BOARD

LISTED

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