

ガボン共和国投資庁(ANPI)長官セミナー

**「投資先としてのガボンの魅力と
その投資環境、日本企業への期待について」**

2026年3月24日(火) 14:00~15:30



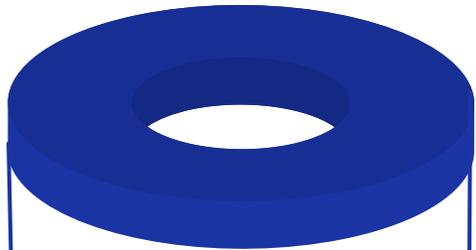
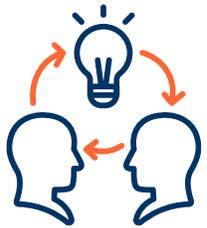
**EXCLUSIVE PRESENTATION FOR JAPANESE
PARTNERS.**

MARCH 2026

**PRESENTATION EXCLUSIVE POUR LES PARTENAIRES JAPONAIS,
MARS 2026**

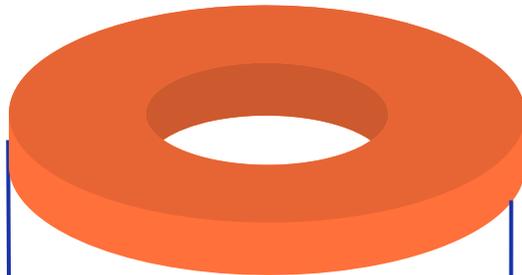
TODAY'S MEETING OBJECTIVES

From first contact to loyal advocacy



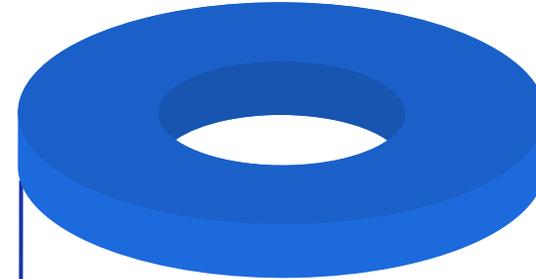
SHARING

Gabon's current situation and Reforms Orientation



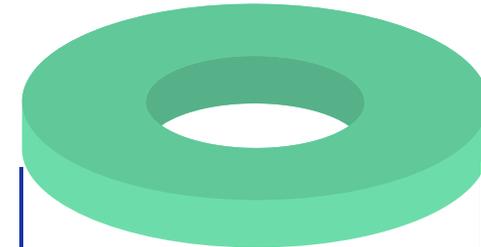
OPPORTUNITIES FOR JAPANESE COMPANIES

Presentation of realistic investments opportunities for Japanese investors



LISTEN

Listen your Inquiries and link it to our next Dialogue



FOLLOW UP

Commit to have a consistent follow up with the Japanese companies



INVEST IN GABON

AGENCE NATIONALE DE PROMOTION DES INVESTISSEMENTS

OUR AGENDA TODAY

AGENDA DU JOUR



GABON OVERVIEW

PRÉSENTATION GÉNÉRALE DU GABON



POLITICO-ECONOMIC REFORMS

RÉFORMES POLITICO-ECONOMIQUES



WHY INVESTING NOW?

POURQUOI INVESTIR MAINTENANT?



REALITY OF INVESTMENTS FRAMEWORK

REALITÉ DU CADRE DES AFFAIRES



INCORPORATION KEY INFORMATION

*INFORMATION CLÉES À SAVOIR SUR
L'IMPLANTATION*



CHALLENGES AND IMPROVEMENTS PLAN

DÉFIS ET PLAN D'AMÉLIORATION



PRIORITY SECTORS

SECTEURS PRIORITAIRES



NEXT STEP FOR JAPANESE COMPANIES

PROCHAINE ETAPE POUR LES ENTREPRISES JAPONAISES



Q&A

QUESTIONS-RÉPONSES



INVEST IN GABON

AGENCE NATIONALE DE PROMOTION DES INVESTISSEMENTS

GABON OVERVIEW

PRÉSENTATION GÉNÉRALE DU GABON



INVEST IN GABON
AGENCE NATIONALE DE PROMOTION DES INVESTISSEMENTS

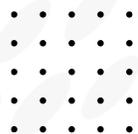


GABON IN THE WORLD



**High Grade Ore Manganese
Producer**

7.4 MT PRODUCED IN 2023



**Tropical Veneer Sheets
Producer and Exporter**

3.4 MILLION M3 PRODUCED / YEAR



**Highest GDP per Capita in
Central Africa**

**\$8,230 in 2024
(World Bank data)**

**GDP in 2024
3,4 (World Bank)**



FDI Flux 2023-2025 - Flux IDE : 2023-2025



New Investments
Nouveaux Investissements

General Trend
FDI remains stable at around 1-1.5 billion USD per year, with an upward momentum in 2025

Tendance générale
USD par an, avec une dynamique haussière en 2025 Les IDE restent stables autour de 1-1,5 milliard

In 2024, FDI flows reached approximately 1.145 billion USD, of which Greenfield projects accounted for an estimated 976 million USD — representing the vast majority of incoming investments

En 2024, les flux IDE ont atteint ≈ 1,145 milliard USD, dont des projets Greenfield estimés à 976 millions USD soit la grande majorité des investissements entrants.

Conclusion: Over the 2023–2025 period, Gabon attracted an average of between 1.1 and 1.5 billion USD in FDI per year, confirming its relative attractiveness in Central Africa, despite a more challenging international environment.

Conclusion : Sur la période 2023-2025, le Gabon a capté en moyenne entre 1,1 et 1,5 milliard USD d'IDE par an, confirmant son attractivité relative en Afrique centrale, malgré un contexte international plus contraignant.



Sectoral Breakdown of FDI in Gabon — 2023–2025

Répartition sectorielle estimée des IDE au Gabon sur 2023-2025

Sector/ <i>Secteur</i>	FDI Share/ <i>Part des IDE</i>	Annual amount/ <i>Montant annuel</i> (base : 1,14 Md USD)	Main Investors/ <i>Principaux investisseurs</i>	Challenges/ <i>Enjeux</i>
Oil/ <i>Pétrole</i>	55 % – 60 %	630 – 684 millions USD	France (TotalEnergies, Perenco), China (Sinopec/Addax)	Sustaining production, offshore exploration and developing Deep offshore
Mining/ <i>Mines</i>	20 % – 25 %	228 – 285 millions USD	France (Eramet/Comilog), China, India	Local processing of manganese and iron
Agro-Industry/ <i>Agro-industrie</i>	8 % – 10 %	90 – 114 millions USD	Singapour (Olam), agro-industry firms	Economic diversification and food security
Infrastructure/ <i>Infrastructures</i>	10 % – 12 %	114 – 137 millions USD	China, Morocco, International funds, PPP	Logistics, energy and transport development



GABON

KEY FIGURES AT A GLANCE | 2023–2024



MACROECONOMIC

GDP Growth (2024)

3.4%

Year-on-year expansion

GDP per Capita

\$8,230

Current USD

Inflation (2023)

3.6%

Down from 5.8% peak

Public Debt

70.5%

of GDP — above CEMAC limit

FDI Inflows (2024)

\$1.14Bn

incl. \$976M Greenfield

Oil Export Share

70%

of total exports

DEMOGRAPHICS & SOCIAL

Population (2023)

2.4M

2023 estimate

Urbanization Rate

>90%

Highest in Africa

Unemployment

21.5%

Overall rate

Youth Unemployment

38%

Key social challenge

Poverty Rate

35.2%

Living on <\$6.85/day

Life Expectancy

66.2

years — 2023

KEY ECONOMIC SECTORS

Oil / GDP Share

25%

70% of exports

Forest Coverage

91.3%

of national territory

Timber / GDP

3.2%

#1 private employer

Timber Jobs

15,000

Direct employment

High Ore Manganese Rank

#1

World producer

CO₂ Absorbed/yr

140 MT

Major carbon sink

INFRASTRUCTURE & DIGITAL

Mobile Penetration

85%

SIM cards up to 149%

Internet Usage

62%

Population aged 15+

Paved Roads

~20%

Of national network

Hydro Potential

6,000

MW — largely untapped

Carbon Credits

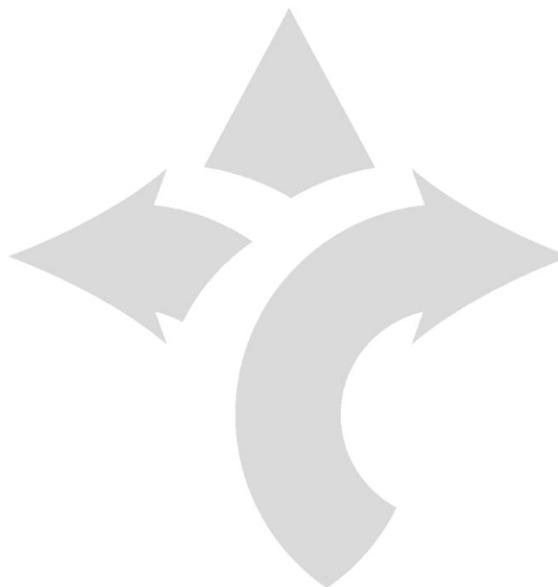
90 MT

REDD+ potential

Oil Budget Share

45%

Of public revenues



GABON KEY FIGURES 2023-2024

GABON - CHARTS & VISUAL DATA

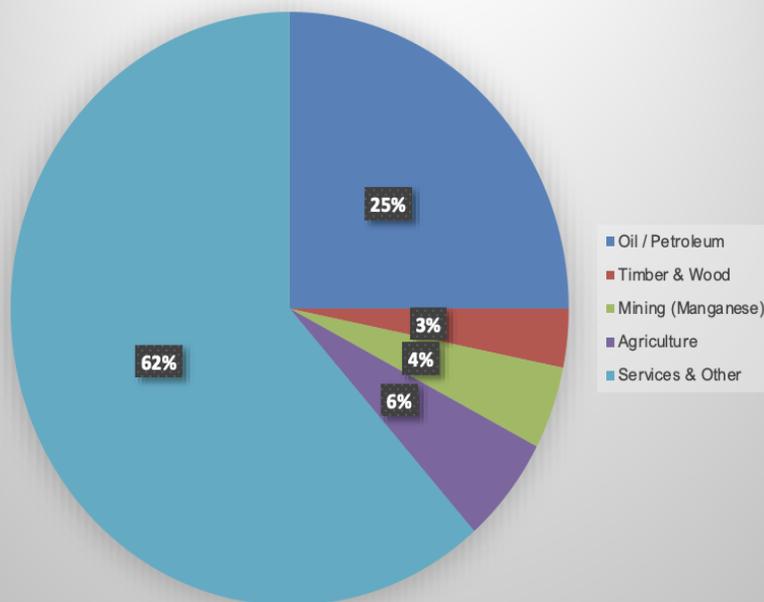
Economic Sectors — % of GDP

Sector	% of GDP
Oil / Petroleum	25
Timber & Wood	3.2
Mining (Manganese)	4.5
Agriculture	5.8
Services & Other	61.5

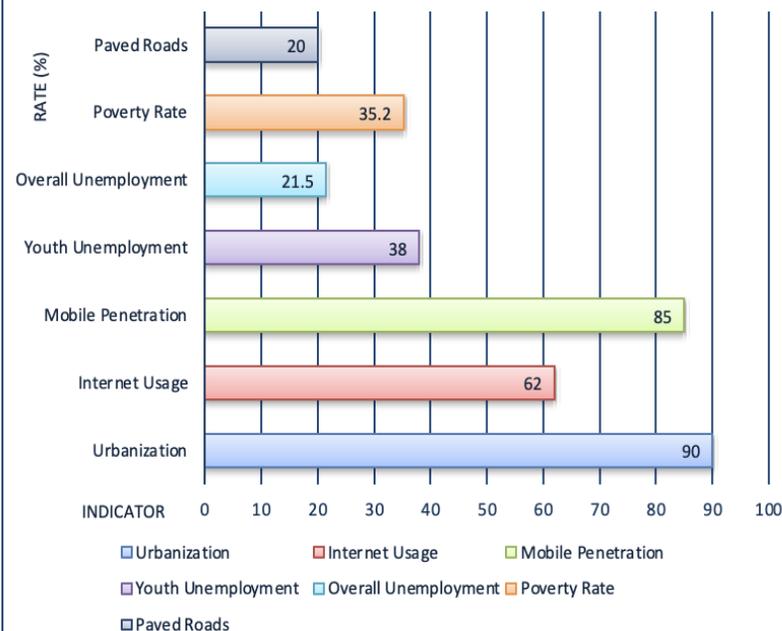
Key Social Indicators (%)

Indicator	Rate (%)
Urbanization	90
Internet Usage	62
Mobile Penetration	85
Youth Unemployment	38
Overall Unemployment	21.5
Poverty Rate	35.2
Paved Roads	20

Gabon GDP by Sector



Gabon Social Indicators (%)



POLITICO-ECONOMIC REFORMS

RÉFORMES POLITICO-ECONOMIQUES



INVEST IN GABON
AGENCE NATIONALE DE PROMOTION DES INVESTISSEMENTS



GABON'S CURRENT SITUATION: REFORMS AND RECENT KEYS CHANGES

LA SITUATION ACTUELLE DU GABON: RÉFORMES CLÉES ET CHANGEMENTS RÉCENTS

POST-TRANSITION GOVERNANCE GOUVERNANCE POST-TRANSITION

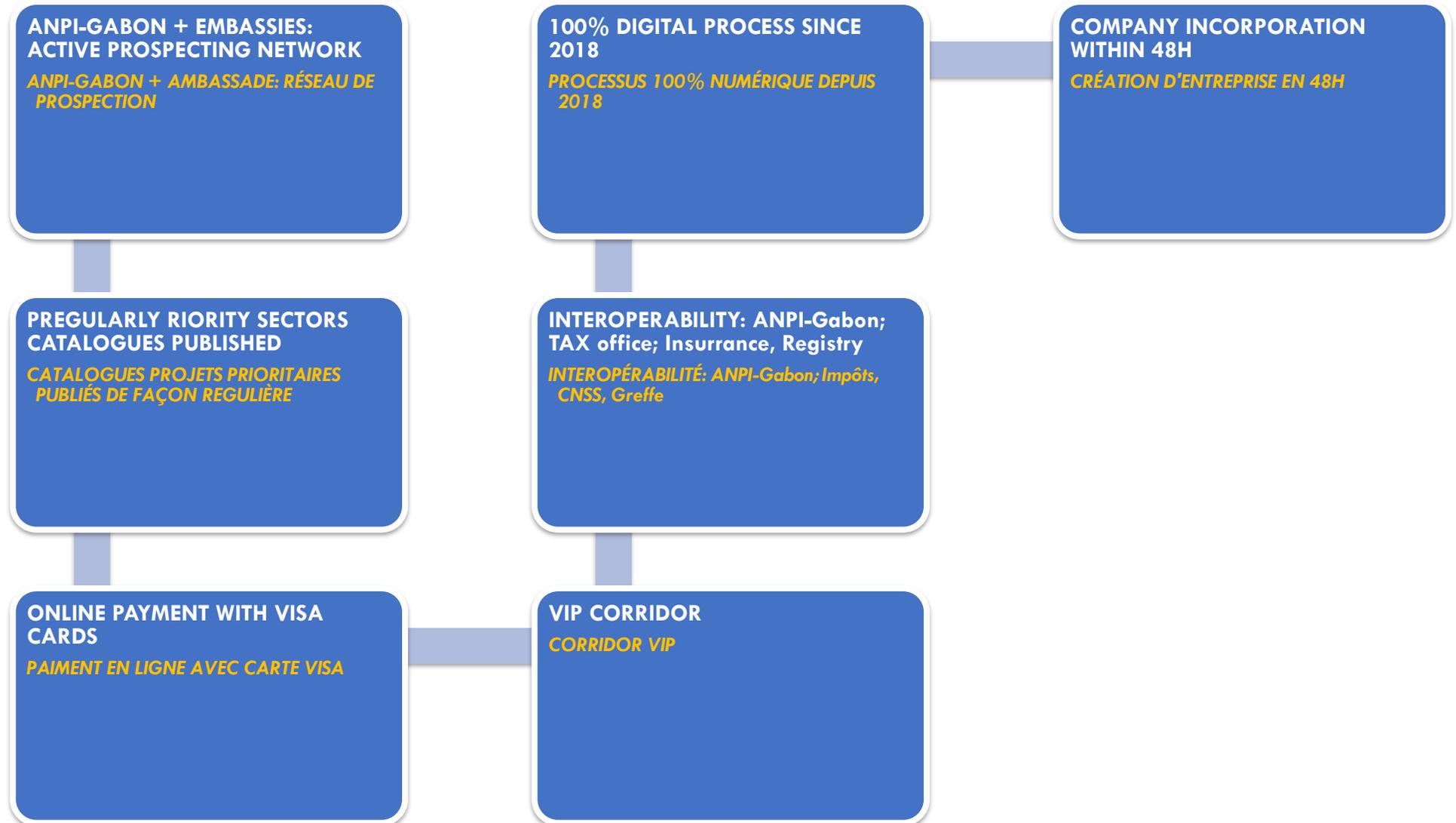
- ❑ Institutional stability and continuity guaranteed
Continuité institutionnelle assurée
- ❑ Economic Diplomacy driven at the highest level by the Head of State
Diplomatie économique dirigée au plus haut niveau par le Chef de l'État
- ❑ Active and deliberate diversification of international partnerships
Diversification active et assume des partenariats internationaux
- ❑ Active National Growth and Development Plan (PNCD 2026-2030)
Plan National de Croissance et de Développement (PNCD 2026-2030 en vigueur.

STRUCTURAL REFORMS RÉFORMES STRUCTURELLES

- ❑ **Digital Administration:** incorporation of companies within 48H with a 100% digital process. Single ID across all tax and social administrations
Digitalisation: GNI&NIP: Processus 100% numérique (Interopérabilité Impôts, CNSS, Greffe).
- ❑ **Secured Legal Framework** for Public- Private partnerships and public procurement.
Cadre PPP : Ordonnance 2015: Cadre legal sécurisé pour les PPP (concessions & partenariats
- ❑ **Arbitration:** National Arbitration Chamber created. International arbitration clauses strictly authorized.
Arbitrage: Chambre Nationale & Recours: Création de la Chambre d'Arbitrage nationale. Clauses d'arbitrage international autorisées.



ONE-STOP-SHOP COUNTER : GUICHET NUMÉRIQUE DE L'INVESTISSEMENT



ONE-STOP-SHOP COUNTER : GUICHET NUMÉRIQUE DE L'INVESTISSEMENT



REALITY OF INVESTMENTS LEGAL FRAMEWORK

RÉALITÉS DU CADRE LÉGAL DES AFFAIRES



LEGAL GUARANTEES & TAXATION

GARANTIES & SÉCURISATION DES INVESTISSEMENTS



Arbitration & Judiciary Resolution *Arbitrage & Résolution des Litiges*

- National Arbitration Chamber established and operational
Chambre d'arbitrage nationale créée et opérationnelle
- Permitted international Arbitration clauses (ICSID)
Clauses d'arbitrage international autorisées (CIRDI...)
- Memoranda of Understanding signed with the State: inviolable commitments
MOU signés avec l'État : engagements inviolables



Incentives *Fiscalité & Incitations*

- General Tax Code: Key stable Tax principles
Code Général des Impôts : grands principes stables
- Finance Law: Incentives updated annually:
Loi de Finances : incitations actualisées chaque année
- Special investments Zones: Customs and Tax exemptions
Zones d'Investissement Spéciales : exonérations douanières & fiscales
- No double taxation in discussion
Non-double imposition Japon-Gabon : discussions engagées



Capital Repatriation *Rapatriement des Fonds*

- Guaranteed 100% Capital Repatriation
Rapatriement des dividendes possible et garanti
- BEAC Regulations : Declaration from 10M XAF
Réglementation BEAC : déclarations > 10 M XAF
- Authorized Euros & Dollars Transactions with Euro-XAF parity guaranteed (monetary stability)
Transactions en euros et en dollars autorisées avec Parité Euro-XAF garantie (stabilité monétaire)



Fiscal incentives in Special Investments Zones *Foncier & Zones Industrielles*

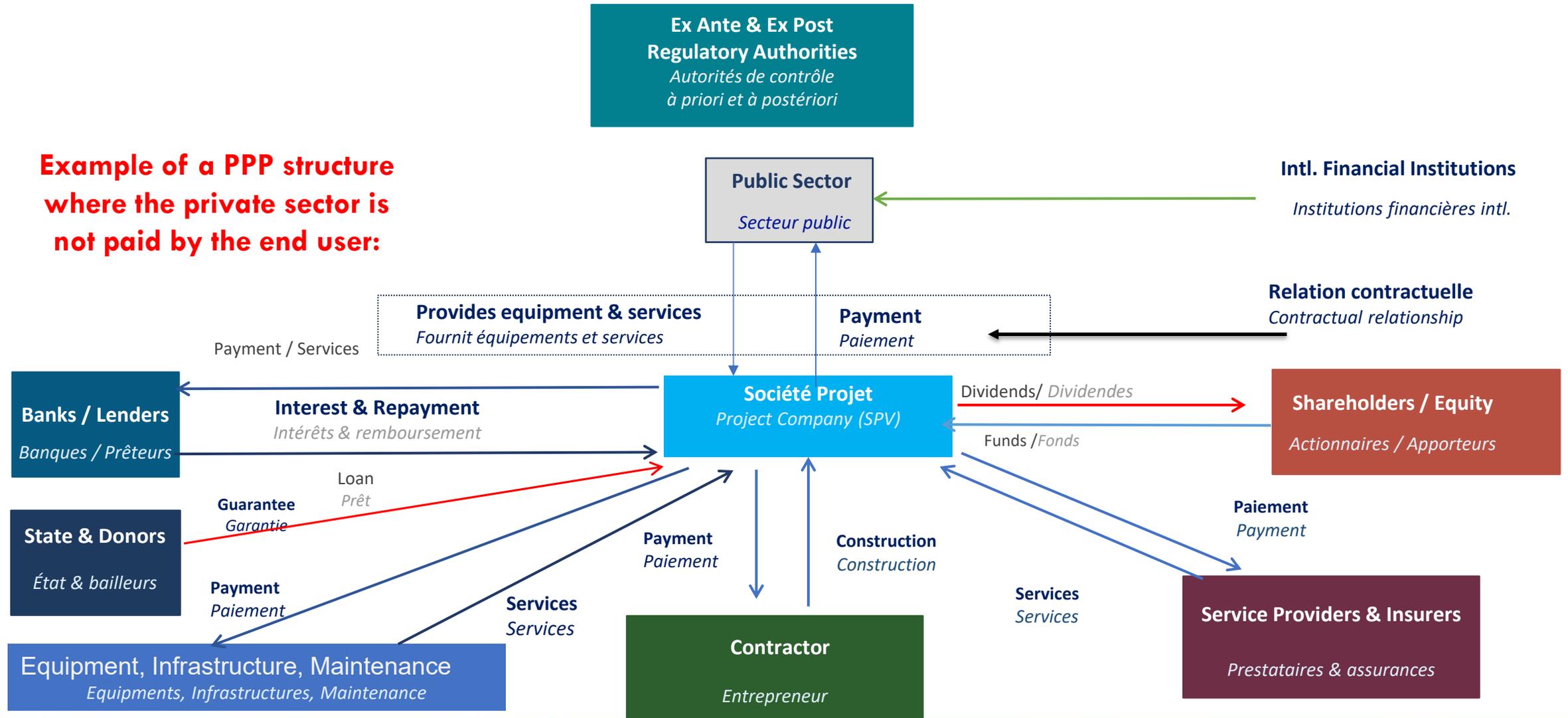
- Nkok Special Economic Zone: Serviced plots and lands
Zone Économique Spéciale de Nkok : terrains viabilisés
- Likolo & Lambaréné: Available Industrial Zones
Likolo et Lambaréné : zones industrielles disponibles
- ANUTTC&SNI: Public Real Estates Institutions
ANUTTC & SNI : autorités foncières nationales
- State's Partners Vehicles → Secured land access
Partenariat véhicules d'État → accès foncier sécurisé



PPP CONTRACTUAL & FINANCIAL FLOW DIAGRAM

SCHÉMA DES FLUX CONTRACTUELS ET FINANCIERS D'UN PPP

Example of a PPP structure where the private sector is not paid by the end user:





FGIS

Sovereign Fund, Co-Investment.



GABON POWER COMPANY

SEEG

SOCIETE DE PATRIMOINE

Energy

PPP Partners for Water & Electricity Infrastructures and Consumption



SEEG



STATE VEHICLES & ACTORS



CAISTAB

Agriculture, Coffee & Cacao projects

AGADEV



Carbon Credit Management

SOCIÉTÉ ÉQUATORIALE DES MINES(SEM)



Strategic Minority partner (10%) ensuring institutional anchoring.



ASSALA ENERGY



GOC



GABON OIL

ANUTTC, SNI & CDC



Lands acquisition
PPP Housing Projects



INVEST IN GABON

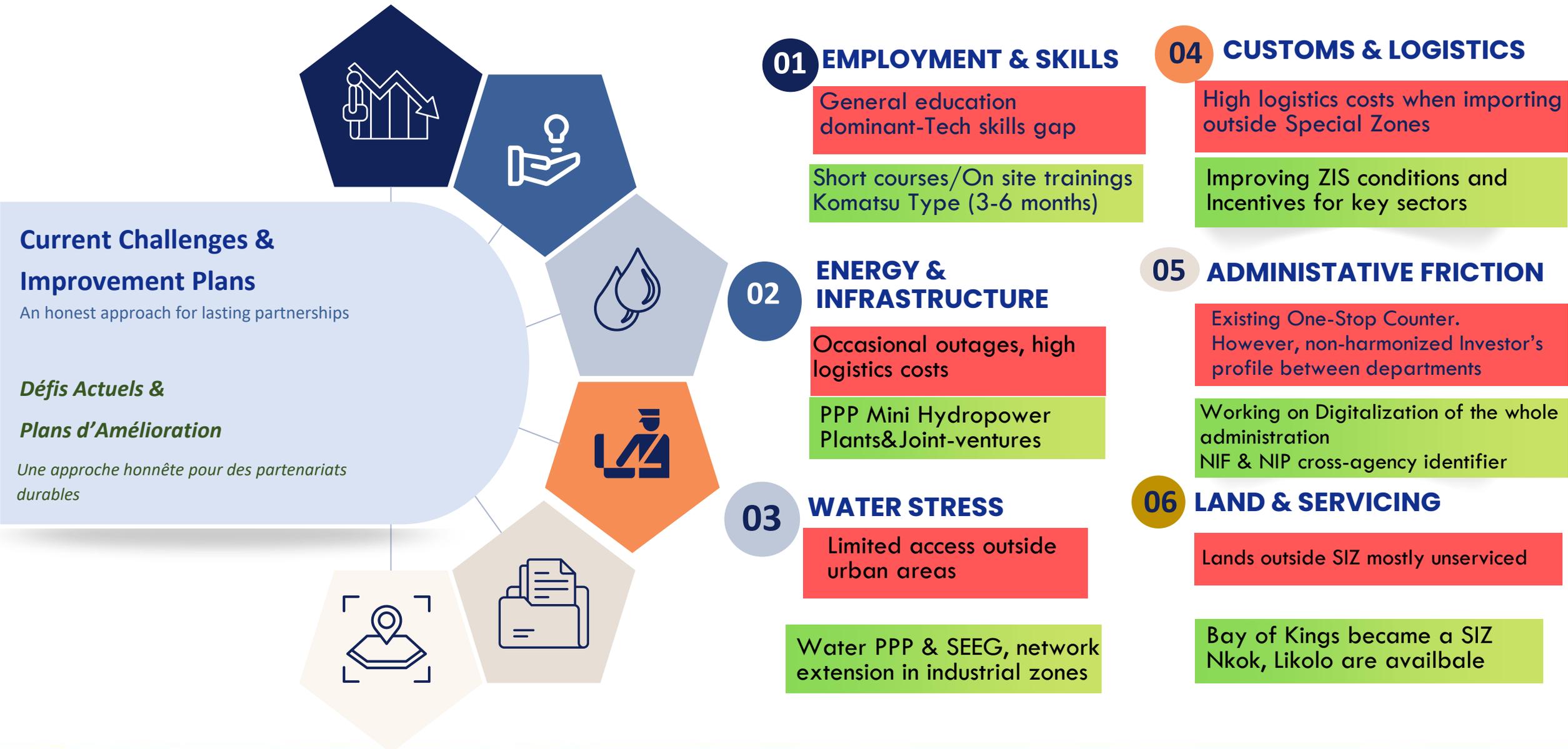
AGENCE NATIONALE DE PROMOTION DES INVESTISSEMENTS

CHALLENGES AND IMPROVEMENT PLAN

DÉFIS ET PISTES D'AMÉLIORATION



CURRENT CHALLENGES & IMPROVEMENT PLANS



WHY INVESTING IN GABON?
POURQUOI INVESTIR AU GABON?



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WHY JAPAN? WHY INVESTING NOW?: POURQUOI LE JAPON? POURQUOI INVESTIR MAINTENANT?

BLUE OCEAN STRATEGY: LA STRATEGIE OCÉAN BLEU



100% Foreign capital: No local Capital requirement, LLC(SARL) SAS (Simplified Stock Company) SA(PLC, Public Limited Company) Creation under OHADA Law
100% Capital Etranger. Aucune obligation de capital local, SARL SAS, SA sous droit africain OHADA



Maximum growth margin. Leverage today's post-Transition Gabon to capture tomorrow's sovereign yields
*Marge de croissance maximale
Profitez du Gabon post-Transition aujourd'hui pour capter les rendements souverains de demain.*



Market largely unexplored by Japan. Opportunity to set industry standards before competition intensifies
Un marché peu explore par le Japon. Opportunité d'établir des standars industriels avant l'intensification de la concurrence.



Needs perfectly aligned with japanese expertise: infrastructure, tech transfer, and industrial transformation
Des besoins parfaitement alignés avec l'expertise Nippone. Forte demande en infrastructures, tranferts technologiques et transformation industrielle.

PRIORITY SECTORS FOR JAPANESE COMPANIES

***SECTEURS PRIORITAIRES POUR LES
ENTREPRISES JAPONAISES***



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INVEST IN GABON: REALISTIC OPPORTUNITIES FOR JAPANESE COMPANIES



INVESTIR AU GABON: OPPORTUNITÉS RÉALISTES POUR LES ENTREPRISES JAPONAISES



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MAJOR INVESTMENTS LOCATIONS



INVESTMENT PRIORITY SECTORS FOR JAPANESE COMPANIES: MINING & TIMBER

Mining & Timber: *Mine & Bois*

❑ **Strict local transformation mandate from 2029**

Obligation de transformation locale dès 2029

Opportunity:

- ✓ Manganese extraction & high-value timber for the Japanese Market
- ✓ Ecolodge Building
- ✓ Timber local Processing plants and value-added exports

Opportunité:

- ✓ *Exploitation du Manganèse et filière bois à forte valeur ajoutée pour le marché japonais*
- ✓ *Construction des Ecolodges*
- ✓ *Usines de traitement du bois et export à valeur ajoutée.*



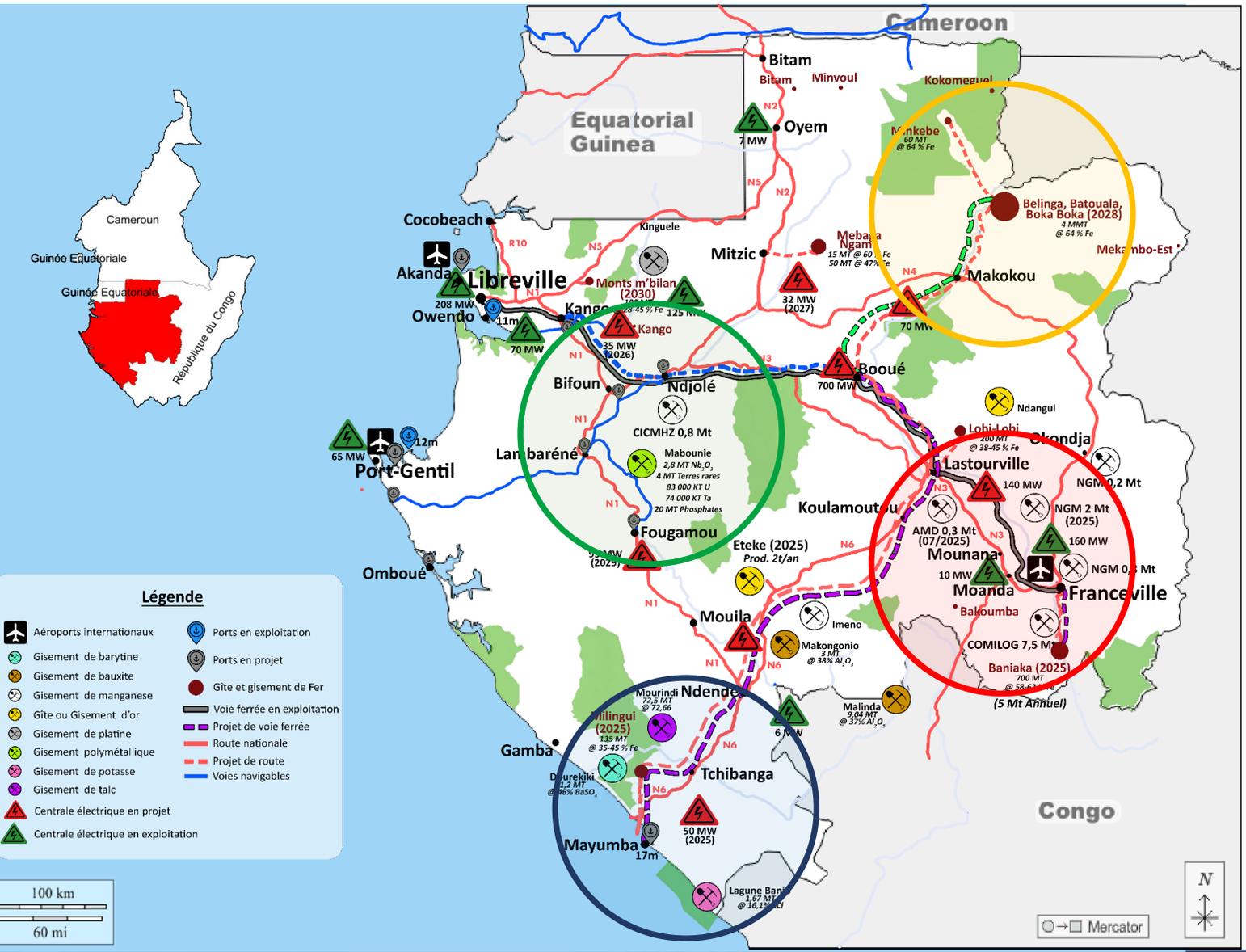
SECTEURS PRIORITAIRES D'INVESTISSEMENT POUR LES ENTREPRISES JAPONAISES



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KEY MINING CENTERS



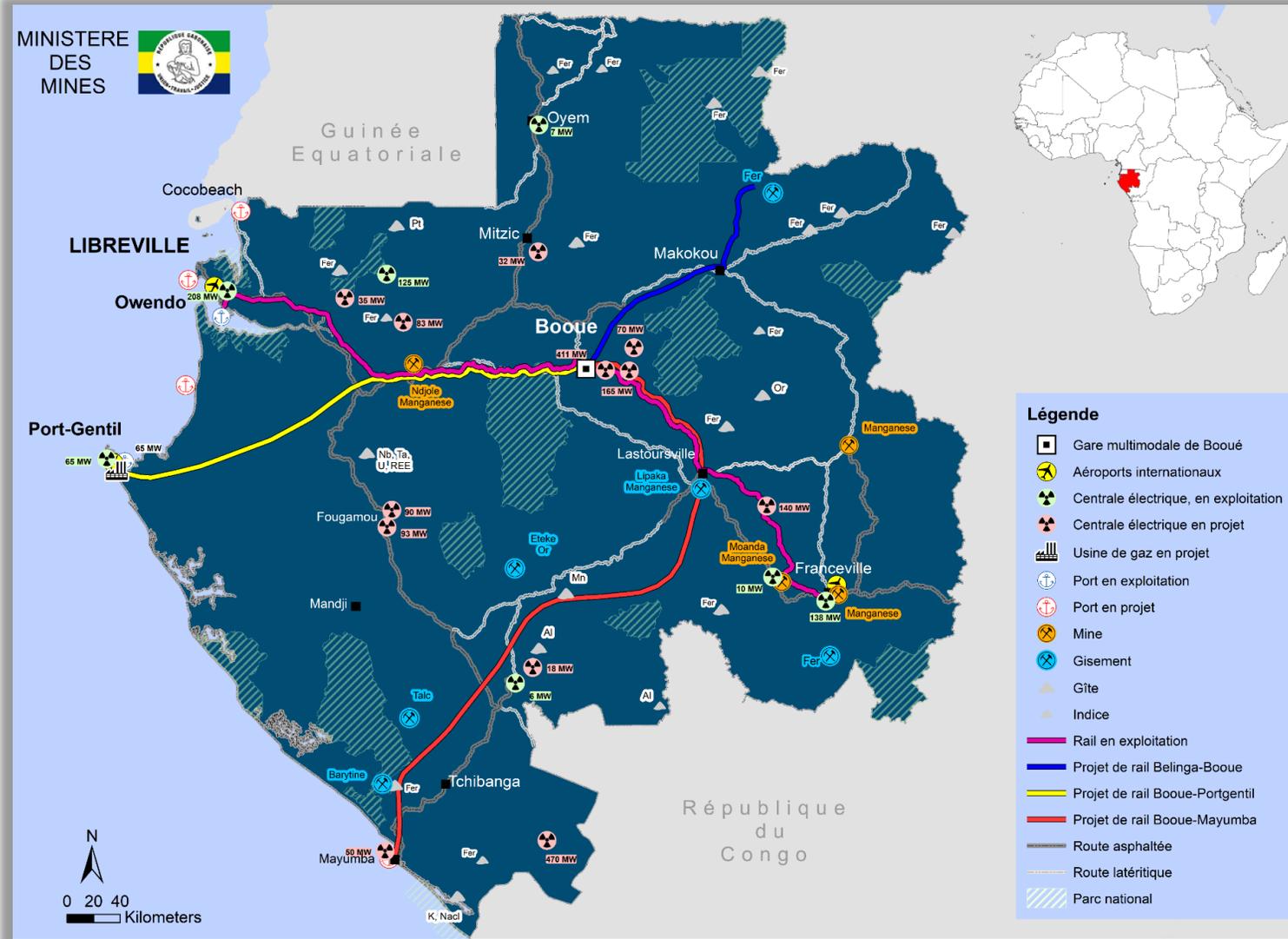
Main Minerals

- Manganese (Mn)
- Iron (Fe)
- Potasse
- Gold
- Or
- Potasse
- Nobium
- Uranium
- Diamond

Identified transport needs :

- Mn: 15 million tons
- Fe: 50 million tons

KEY STRENGTHS OF THE MINING SECTOR



- Stable mining code with multiple tax incentives
- A stable legal framework inherited from the Napoleonic civil code
- Fixed exchange rate pegged to the euro
- Hydroelectric potential of 11,000 megawatts
- Aerial surveys covering over 356,000 km²
- Analysis of waterways and soils over 25,000 m²
- 56% geological mapping coverage at a scale of 1:200,000
- Mineral potential maps at a scale of 1:200,000
- An accessible geological and mining database
- Around twenty mining targets subject to exploration permits
- A library
- A broad base of expertise in mining and geology fields

INVESTMENT PRIORITY SECTORS FOR JAPANESE COMPANIES: AGRO-INDUSTRY

Agro-Industry: *Agro-industrie*

- ❑ National food security: Poultry importation ban from 2027

Sécurité alimentaire nationale : Interdiction de l'importation du Poulet de chair dès 2027

Opportunity:

- ✓ Agricultural mechanization, precision agri-tech and fertilizers
- ✓ Rice Cultivation, Soy, Maize, Agricultural fund in process
- ✓ Poultry

Opportunité:

- ✓ *Mécanisation agricole, agri-tech de précision et production de fertilisant*
- ✓ *Soja, maïs, pisciculture, élevage. Fonds agricole en cours.*
- ✓ *Élevage du Poulet de Chair*



SECTEURS PRIORITAIRES D'INVESTISSEMENT POUR LES ENTREPRISES JAPONAISES



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INVESTMENT PRIORITY SECTORS FOR JAPANESE COMPANIES: ENERGY

Energy : *Energie*

❑ National grid modernization

Modernisation du Réseau National

Opportunity:

- ✓ Hydropower Dam Construction
- ✓ Energy Transportation lines
- ✓ Equity stakes and tech transfers (e.g., cables/pylons with SETEG)

Opportunité:

- ✓ *Construction de Barrages Hydroélectriques*
- ✓ *Lignes de Transport d'Énergie*
- ✓ *Prise de participation et transferts de technologie(ex: production de cables et poteaux avec la SETEG)*



SECTEURS PRIORITAIRES D'INVESTISSEMENT POUR LES ENTREPRISES JAPONAISES



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INVESTMENT PRIORITY SECTORS FOR JAPANESE COMPANIES: INFRASTRUCTURES

INFRASTRUCTURES

☐ SMART CITIES: Libreville 2

Opportunity:

- ✓ Construction d'une Smart city
- ✓ Roads & Bridges

☐ PORTS:

Opportunity:

- ✓ Construction of a Deep Sea Port

☐ RAILWAY: BELINGA

Opportunity:

- ✓ Construction of the Railway Belinga-Port d'Owendo



SECTEURS PRIORITAIRES D'INVESTISSEMENT POUR LES ENTREPRISES JAPONAISES



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121 M USD

Total Japan → Gabon imports (2023)
Total importations Japon → Gabon (2023)

2,87 %

Japan's share of Gabon imports
Part du Japon ds imports Gabon

4,21 Md USD

Total importations Gabon (2023)
Total Gabon imports (2023)

7e

Global supplier
Fournisseur mondial



Vehicles & Mobility

Véhicules & Mobilité

~35 M\$

29%

utility vehicles, Toyota, Nissan,
Mitsubishi, 4x4, pick-ups,
Véhicules utilitaires



Equipment

Machines & Équipements

~28 M\$

23%

construction equip., pumps
Engins BTP, groupes



Electrical

Electronique & Électrique

~22 M\$

18%

cables, transformers,
instruments
Câbles, transformateurs



Metallurgy

Acier & Métallurgie

~18 M\$

15%

tubes, sheets, profiles
Tubes, tôles, profilés



Precision Instruments

Instruments de précision

~12 M\$

10%

optics, medical, metrology
Optique, médical

- Opportunity of Vehicle & Motorcycle assembly in SIZ/ Opportunité d'Assemblage véhicules & motos ausein des ZIS
- Local Manufacturing of Cables & electrical equipment / Fabrication locale des Câbles & équipements électriques
- Production of Metal profiles & structures / Production de Profilés & structures métalliques
- Machine tools & Construction Equip(PNCD big projects)/ Machines-outils & équipements BTP(Grands chantiers PNCD)



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SECTORS BANNED FOR FOREIGNERS

SECTEURS INTERDITS AUX ETRANGERS

With the aim of organizing and rebalancing informal trade, while supporting economic operators toward formalization, certain economic activities have been prohibited to foreign nationals since August 12, 2025.

Dans l'objectif d'organiser et de rééquilibrer le commerce informel, tout en soutenant les opérateurs économiques vers la formalisation, certaines activités économiques sont interdites aux étrangers depuis le 12 Août 2025.

⚠ Proximity retail trade

Le commerce de proximité ;

⚠ **Non-licensed** money transfer services;

Les envois d'argent non agréés ;

⚠ Repair of mobile phones and small electronic devices;

La réparation de téléphones et petits appareils ;

⚠ Street hairdressing and cosmetic/beauty services;

La coiffure et les soins esthétiques de rue ;

⚠ **Unauthorized** artisanal gold panning;

L'orpaillage artisanal non autorisé ;

⚠ **Informal** intermediation in the purchase of harvests/crops;

L'intermédiation informelle dans l'achat de récoltes ;

⚠ Operation of small workshops or gaming machines without registration

L'exploitation de petits ateliers ou machines de jeux sans enregistrement

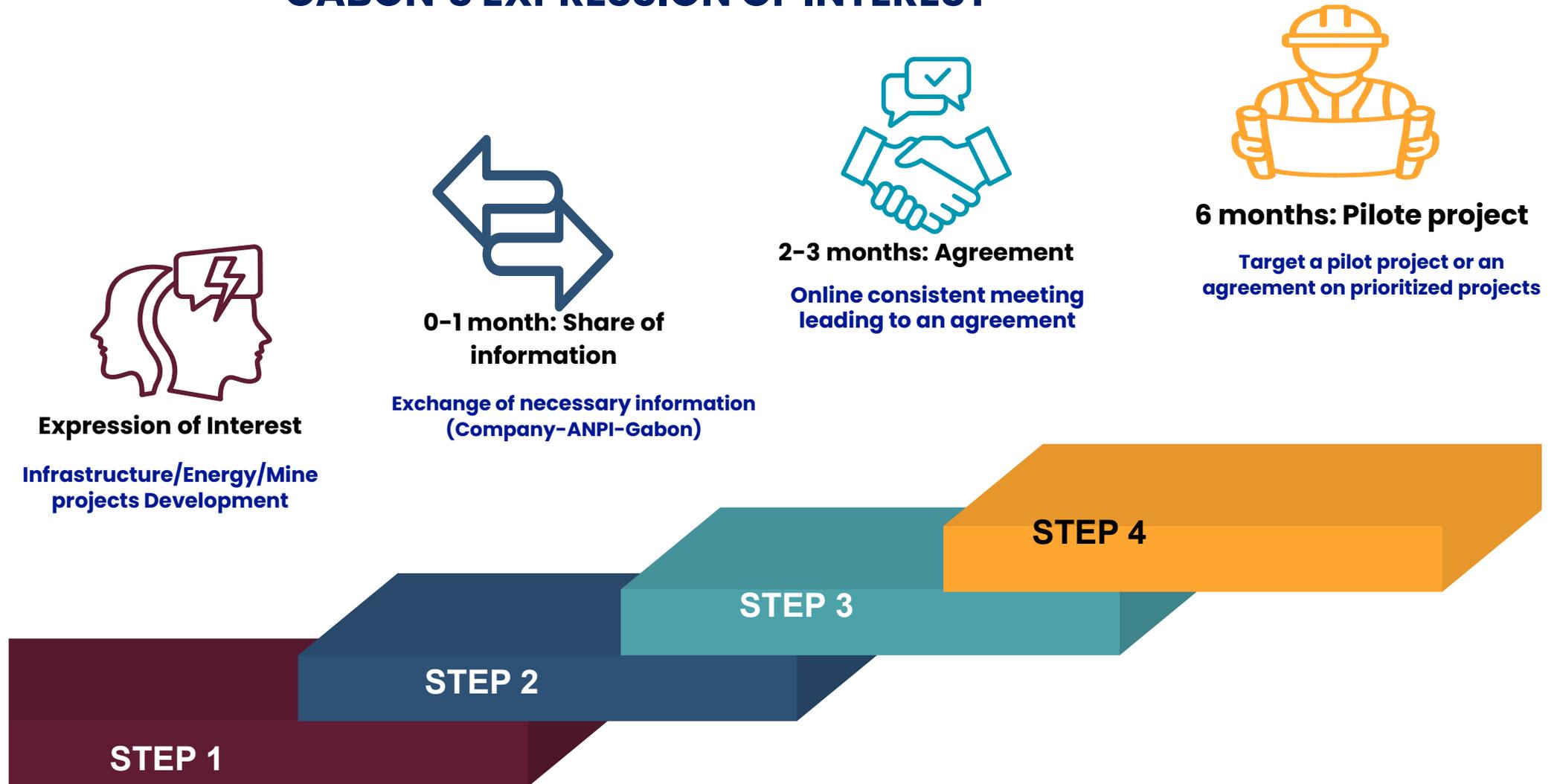
ROAD MAP/NEXT STEP FOR JAPANESE COMPANIES

***PLAN D'ACTION/ PROCHAINE ÉTAPE POUR LES ENTREPRISES
JAPONAISES***



CONCRETE PROPOSAL TO JAPANESE COMPANIES

GABON'S EXPRESSION OF INTEREST



CONCLUSION

Beyond numbers, Gabon is a country in motion:

- Reforms underway
- Special Industrial Zones expanding
- Investment Code advancing
- The foundations are set

Now is the time to co-create



THANK YOU FOR YOUR ATTENTION

ARIGATO GOZAIMASU



INVEST IN GABON
AGENCE NATIONALE DE PROMOTION DES INVESTISSEMENTS



Q&A



THE INVESTOR CIRCUIT

Operational procedures for Investment' facilitation and promotion by l'ANPI-GABON



Expression of interest

Contacting potential investors and receiving the official expression of interest



Investor qualification process

Qualification of the requests and Due Diligence .



Invitation to come to Gabon

Official invitation to come and meet Officials and ressource people in Gabon



Signatures

establishment of the Memorandum of Understanding (MoU) to facilitate and supervise exchanges and negotiations, which could lead to the final decision to invest



Project's launching

Insure the follow up with the appropriate institutions until the project launching

SUCCESS STORIES





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CATALOGUES

GABON INVESTMENT OPPORTUNITIES



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MERCI
THANK YOU



INVEST IN GABON

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