



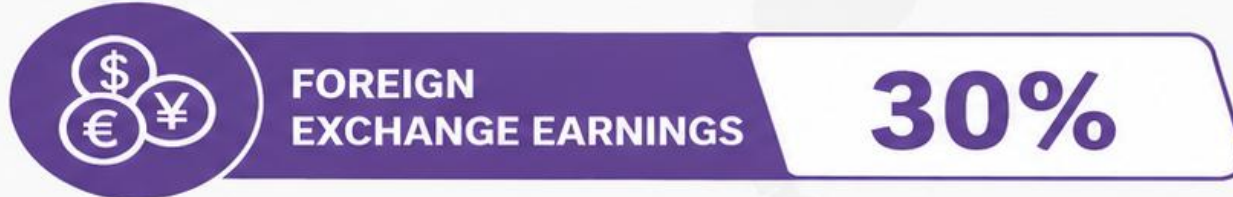
TANZANIA EUROPEAN UNION THEMATIC INVESTMENT ROAD SHOWS

02 - 06 October, 2026

INVEST IN AGRIBUSSINESS- IN TANZANA

UNITED REPUBLIC OF TANZANIA | MINISTRY OF AGRICULTURE | EU ROADSHOW

Tanzania Agriculture:



Our Vision

Feed Ourselves,
Feed Others Commercially



Government commitment to Agricultural Transformation through:

- ❖ Tanzania Agriculture Master Plan 2050 (AMP 2050)
- ❖ Agenda 10/30
- ❖ Tanzania Development Vision 2050

• WE FOCUS ON:

- Increased agricultural productivity
- Mechanization and modern technologies
- Irrigation and water management
- Agro-processing and value addition
- Storage and logistics
- Agricultural finance
- Market linkages and exports



- **Priority Investment Opportunities**
Rice, coffee and cashew nuts value chains



• Rice Value Chain

Investment needed: Cost-Saving Technologies along the Rice Value Chain

Key investment areas:

- Mechanization
- Land preparation
- Planting
- Weeding
- Harvesting and threshing
- Water management



Tanzania Rice production & Infrastructure development

Average Annual Production

2.48M MT

Consistent baseline above 2M MT/year

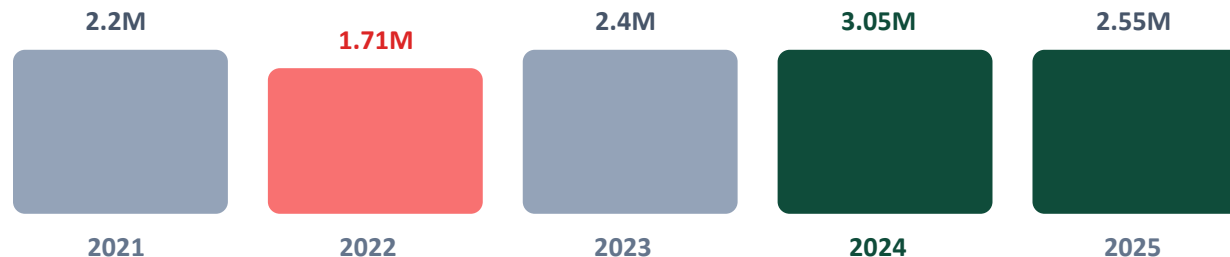
Peak Production (2024)

3.05M MT

Record harvest expansion

5-Year Production Trajectory (Metric Tonnes)

Source: MoA Tanzania



Infrastructure & Storage Expansion

78 New Warehouses: Under ASDP II program in key irrigation schemes.

NFRA Capacity Upgrades:

- **Sumbawanga Zone:** 38,500 MT to 83,500 MT capacity.
- **Shinyanga Zone:** 14,500 MT to 44,500 MT capacity.

Rice Export Dynamics & African Markets

DOMINANT MARKET SHARE



66%

Total export share absorbed by Uganda

TOP BUYER VOLUME



227,580 MT

Uganda 5-year annual average purchase

REGIONAL PARTNERS



102,317 MT

Combined Kenya & Rwanda annual exports

1 Primary EAC Markets

Uganda: 227,580 MT / year (66% market anchor)

Kenya: 53,829 MT / year average

Rwanda: 48,488 MT / year average

2 Regular Regional Buyers

DR Congo & Burundi: Consistent recurring buyers

Zambia & Sudan: Expanding corridor trade

Global Outreach: Sierra Leone, Djibouti, Singapore

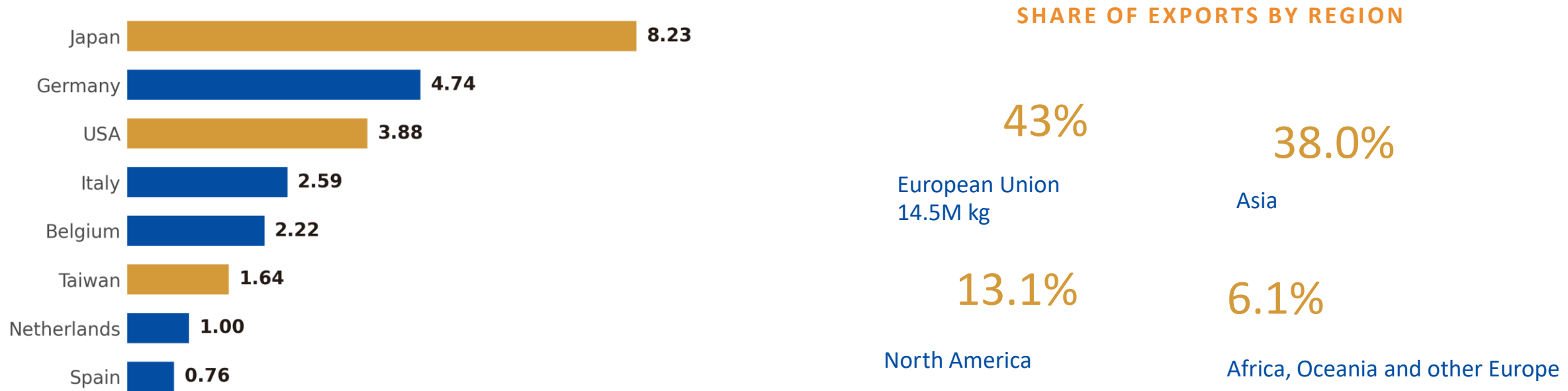
3 Investment Opportunity

EAC Food Basket Anchor: Tanzania provides critical food security to East Africa.

EU Partnership Potential: Value-addition, commercial milling, and cold-chain logistics.

• Where Tanzanian coffee went in 2025/26

Top destinations, million kg ■ EU markets



❖ Total exports: **75,984,213 Tons** worth **\$413.42 M**. Asia and North and North America together take 51%, so EU buyers compete for supply

• Coffee Value Chain



Key opportunities

- ❖ More than **600 AMCOS**
- ❖ Improved coffee quality
- ❖ Traceability
- ❖ Compliance
- ❖ Branding
- ❖ Access to international markets
- ❖ EUDR compliance

TANZANIA COFFEE BOARD · INVESTMENT PROPOSAL FOR EU TRADERS

- Investing in Tanzania's premium coffee supply- EU trader partnership

Long-term forward sales with organised cooperatives, backed by importer capital that is recovered through the same coffee deliveries.

43%

of Tanzania's coffee exports went to the EU in 2025/26, its #1 market

9–13%

estimated annual growth of the European specialty market

600+

coffee cooperatives (AMCOS), alongside 110 estates

\$413M

export earnings from Arabica and Robusta in 2025/26

The opportunity is ready for immediate engagement through Expressions of Interest (EOI).

• Positioning Tanzanian Arabica and Robusta in Europe

ARABICA • WASHED SPECIALTY

Tanzanian Arabica

Story High-altitude farms in Kilimanjaro, Arusha, Mbeya, Mbeya, Songwe and Ruvuma.

Promote Single-origin micro-lots, peaberry, raised-bed dried and innovative processes.

Target Specialty roasters and premium retail across Western and Eastern Europe.

ROBUSTA • FINE ROBUSTA POTENTIAL

Tanzanian Robusta

Story Kagera smallholder coffee, fully traceable to the farm.

Promote Quality-graded lots positioned as fine Robusta, lifting its \$4.63/kg average

Target Espresso and blend roasters, including in Italy, a major major destination.

• Cashew Value Chain



Project: Maranje Cashew Industrial Park

Investment components:

- ❖ Cashew kernel processing
- ❖ Cashew Nut Shell Liquid (CNSL) and other by-products
- ❖ Drying facilities
- ❖ Warehouses
- ❖ Food laboratories
- ❖ Complementary industrial activities

- **Indicative investment: USD 137 million**
Equivalent: Approximately TZS 343.4 billion
- **Objective:** Increase domestic processing, value addition and employment.

Where Tanzanian cashew kernels went in 2025/26

MARKET MIX

Top destination markets • quantity exported (million kg)

1.51

China

1.34

Netherlands

0.43

Algeria

0.35

India

0.20

Kenya

0.18

Vietnam

0.17

Kuwait

0.15

Austria

0.15

United Arab
Emirates

0.14

EXPORT FOOTPRINT

31 destination markets • 5.57M kg • \$31.32M FOB value

European Union

29.3%

1.63M kg

Asia

33.7%

1.88M kg

Africa

15.3%

0.85M kg

Middle East

11.7%

0.65M kg

North America

0.7%

0.04M kg

• Food Security & Grain Storage

Project: Enhancing National Food Reserve Capacity

Investment components:

- ❖ Warehouses
- ❖ Storage infrastructure
- ❖ Logistics
- ❖ Commodity management
- ❖ PPPs

- Current capacity: approximately **776,000 MT**
- Target by 2030: **3 million MT**



From irrigation potential to bankable, resilient agricultural production



PARTNERSHIP & INVESTMENT AREAS

- **Irrigation infrastructure**

Rehabilitation and construction of schemes, canals, dams and water storage.

- **Efficient irrigation technology**

Solar-powered pumping, drip and sprinkler systems, and water-saving solutions.

- **Commercial production & value chains**

Irrigated production linked to aggregation, storage, processing and markets.

- **Climate resilience & skills**

Water management, technical services, farmer training and climate-smart practices.

Government commitment: irrigation is a pillar of agricultural transformation, climate adaptation and food security.

• Public-Private Partnerships



- ☐ PPPs
- ☐ Joint ventures
- ☐ Co-investment
- ☐ Other partnership models

Priority infrastructure



- ❖ Storage
- ❖ Irrigation
- ❖ Agro - processing
- ❖ Logistics
- ❖ Agricultural infrastructure

• Call for Investment Partnerships

Key actions

- ❖ Investor engagement with the Ministry
- ❖ Access detailed project information
- ❖ Submit Expressions of Interest
- ❖ Develop project follow-up mechanisms
- ❖ Facilitate investor discussions



NFRA

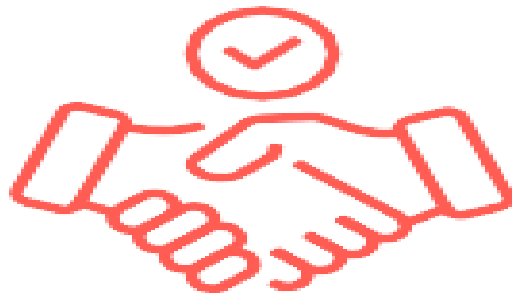


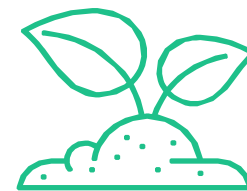
"The Farmers' Bank"



PARTNER WITH TANZANIA TO TRANSFORM AGRICULTURE

“Let us work together to transform Tanzania's agriculture into a modern, commercial, productive, inclusive and globally competitive sector.”





Thank you