



**INVEST
TANZANIA**

PRESIDENT'S OFFICE PLANNING AND INVESTMENT

AN OVERVIEW OF TANZANIA'S INVESTMENT OPPORTUNITIES NETHERLANDS



2026

MAIN FOCAL POINT FOR INVESTORS

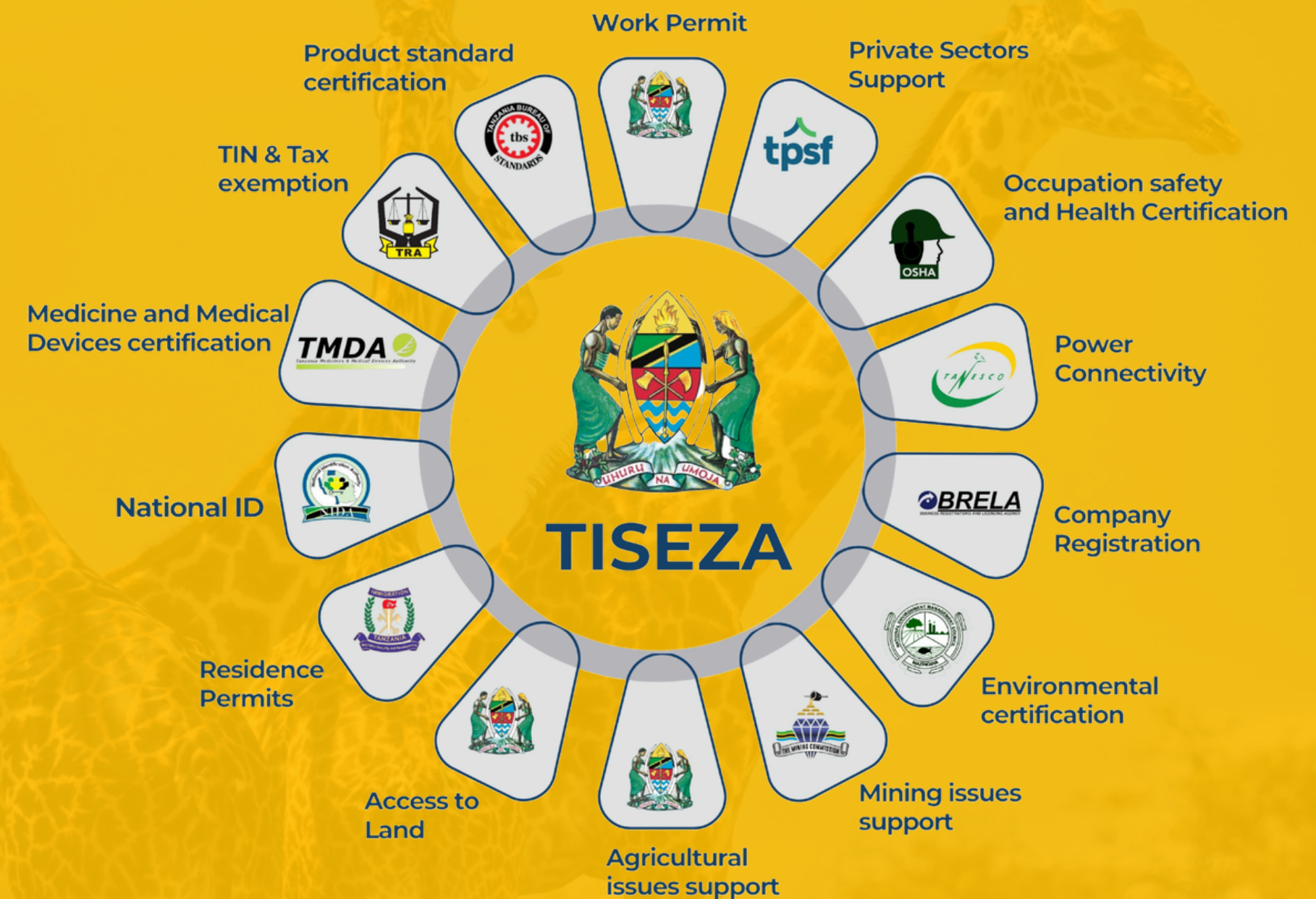
The Tanzania Investment and Special Economic Zones Authority (TISEZA) is a newly established entity designed to streamline investment processes and attract both domestic and foreign investors.

It was established through Act No. 6 of 2025 which repealed the Tanzania Investment Act, 2022, the Export Process Zones Act, 2002 and the Special Economic Zones Act, 2006.

It consolidated the functions of the Tanzania Investment Centre (TIC) and the Export Processing Zones Authority (EPZA).

It is responsible for coordinating, promoting and facilitating investments in Tanzania Mainland, streamlining investment facilitation under the One Stop Facilitation Centre to simplify registration of investors, licencing aftercare services providing for designation, development, management and operations of special economic zones as well as developing a land bank for investment, etc

ONE STOP FACILITATION CENTRE Your Gateway to Investment in Tanzania





WHY INVEST IN TANZANIA?



Rich Natural Resources

Tanzania is endowed with 44 million hectares of arable land with an estimated 29.4 million hectares suitable for irrigation. Coastline of 1,424 Kilometres along the Indian Ocean, World Class tourist attractions.



Peace & Political Stability

Tanzania is Multiparty Democracy since 1992 – having witnessed Five Transfer of leadership through a peaceful transition, free and Fair Elections. Global Peace Index 2022 rated Tanzania as the 5th most peaceful country in Africa and 58th Globally which assures investment Sustainability and Profitability.



Economic Stability

GDP growth rate 6.0% with per capital income 1,239.2 USD with inflation rate of 4.2% offering a stable macroeconomic environment and consistent growth across key sectors



Strategic Geographical Location

URT is Bordering 8 Countries, 6 of which are Land Locked countries of Uganda, Rwanda, Burundi, DRC, Zambia and Malawi which rely on Tanzania as the most efficient point for passage of Goods. It is accessible through the Indian Ocean, which gives it trade links to Europe.



WHY INVEST IN TANZANIA?



Access to Affordable Labour

Young, Educated, and Productive Workforce: With a literacy rate of over 80%, Tanzania offers a dynamic, trainable, and industrious labour force to support sustainable business growth.



Infrastructure Developments

Regional Logistics and Innovation Hub: Strategically located with 3 international airports and 4 modern seaports, Well developed SGR Network in East Africa, Tanzania serves as a gateway to Eastern, Central, and Southern Africa.



Global Market Access



AGOA (USA)

GDP~31Trillion,
Population 343M



UK

GDP3.96 Trillion,
Population 69.7 M



EBA (EU)

GDP~\$19T,
Population 448M

Tanzania is also under Bilateral, Trade and Investment Agreements with various countries including China, India, Germany and members of the European Union.

Strong Public-Private Engagement

1. INVESTMENT OPPORTUNITIES IN AGRICULTURE

AGRICULTURE AND AGRO-PROCESSING

SIZE OF THE MARKET

4% p.a.

Sector growth (2024)

23.4%

of GDP (2024)

65%

of employment (2022–23)

US\$ 3.5B

Export revenue (2023–24)

PRIORITY VALUE CHAINS

Coffee, rice and cashew offer strong production bases, established farmer networks and growing domestic, regional and export demand.

AGRO-PROCESSING OPPORTUNITIES

- Coffee: washing, roasting, soluble coffee and packaging
- Rice: irrigation, commercial farming, milling, fortification and packaging
- Cashew: kernel processing, grading, packaging and by-product utilisation



INVESTMENT FOCUS

- Modern processing plants and quality laboratories
- Storage, warehousing and cold-chain support
- Traceability, certification and export-ready packaging
- Outgrower systems, mechanisation and input finance

Tanzania's Cashew Nut Production Overview

Scale, concentration and policy momentum create a strong platform for processing-led investment.

400K+

tonnes produced in
2024/25

1M+

smallholder farmers

87%

from Mtwara, Lindi &
Ruvuma

2035

national ambition for full domestic
processing

THE SOUTHERN CASHEW BELT

MTWARA

Anchor processing hub
Production density +
port access

LINDI

Aggregation node
Storage + regional
processing

RUVUMA

Expansion zone
Outgrower models +
reactivation

INVESTOR THESIS

Tanzania has the raw
material.

The investable gap is
domestic processing, quality
systems, working capital and
direct EU buyer links.

From raw-nut scale to higher-value supply

The strongest growth path is better productivity plus domestic value addition—not large-scale land expansion.

VALUE LADDER

RAW NUTS
~USD 1.50/kg

PROCESSED KERNELS
USD 4–6/kg

BRANDED PRODUCTS
USD 8–12/kg

CURRENT STATUS

Most value exported

- 1 A large share of raw cashew nuts is processed outside Tanzania.

Capacity gap

- 2 Processing, certified facilities, energy and working capital remain constrained.

Policy tailwind

- 3 TMX price transparency, TISEZA facilitation and the 2035 processing ambition support investment.

PRODUCTION UPSIDE

Potential to double supply through orchard intensification

- Disease control & improved varieties
- Digital extension & lead-farmer systems
- Input finance & warehouse receipts
- Climate-resilient practices & insurance

Supply security = integrated outgrower partnerships

Build the EU-compliant cashew value chain

Priority opportunities combine processing, traceability, circular economy and enabling infrastructure.



EU investor roles

Processors & off-takers • DFIs / ECAs • Equipment and technology firms • Certification providers • Logistics and circular-economy investors

A practical EU investor pathway

Structure the opportunity, secure facilitation and build EU compliance into the project from day one.

- ✓ **Select entry segment**
Processing, quality platform, by-products, outgrowers or logistics
- ✓ **Choose site & partners**
Mtwara, Lindi or Ruvuma; engage local sponsor, AMCOs and buyers
- ✓ **Prepare concept note**
Define CAPEX, revenue model, supply plan, offtake and support needs
- ✓ **Engage facilitation**
Confirm TISEZA / CBT support, land or industrial-park route, licences and tax treatment
- ✓ **Validate & launch**
Buyer sounding, pre-feasibility, finance, certification roadmap and phased implementation

EU MARKET-READINESS CHECKLIST

- ✓ **Food safety** HACCP plus BRCGS, IFS or FSSC 22000 pathway
- ✓ **Product assurance** Aflatoxin, pesticide-residue and moisture testing
- ✓ **Traceability** Batch-level records, supplier audits and farmer mapping
- ✓ **Social compliance** Ethical labour practices; Sedex / SMETA where required
- ✓ **Commercial security** RCN supply, working capital and EU buyer offtake
- ✓ **Operating resilience** Reliable energy, maintenance and export logistics

Immediate action: convert the selected opportunity into a bankable pre-feasibility package.



Premium origins with
room for much more
value addition

European partners can combine specialty sourcing with traceability, processing and origin brands.

Tanzania Coffee Potential

400,000+

Coffee-farming households

90%

Smallholder-based production

70% Arabica

Premium origin and specialty potential

30% Robusta

Soluble and ingredient potential

Competitive position

Recognised Arabica profiles from Kilimanjaro, Arusha, Mbeya, Songwe, Ruvuma and other origins support quality-differentiated supply.

Value gap

Most exports remain green coffee. Roasting, packaging, branding and premium positioning still occur mainly outside Tanzania.

Coffee Production Performance

Productivity, processing quality and EU compliance determine the sector's near-term competitiveness

Traditional Arabica yield

200–400 kg/ha

Improved practices can raise Arabica yields to 600–3,000 kg/ha.



Traditional Robusta yield

450–550 kg/ha

Improved practices can raise Robusta yields to 800–2,000 kg/ha.



EUDR deadlines

EU market-access requirement

Large and medium operators: 30 December 2026.
Micro and small operators: 30 June 2027.



Priority opportunities for European investors

The strongest entry points combine quality improvement, compliance and downstream value capture



Washing stations and CPUs

USD 0.5–2m each

Equipment, operations, buyer offtake and traceability partnerships

Curing and dry milling

USD 5–15m

Milling, grading, lot segregation, quality control and export preparation

EUDR traceability

USD 1–3m pilot

Farm mapping, risk screening, digital chain of custody and audit systems

Outgrower platforms

USD 2–5m pilot

Seedlings, inputs, extension, farmer records and buyer-linked procurement

Roasting and brands

USD 3–10m

Roasting, packaging, private label and regional retail distribution

Additional potential

Soluble coffee, climate-controlled storage, clean energy, water treatment and quality laboratories

Agribusiness projects Pipeline

Four private sector projects across food processing, farm inputs, coffee and rice

PROJECT	INVESTMENT FOCUS	FINANCING NEED	PARTNERSHIP / FINANCING ROUTE
Agro-food Park Tanfroz	Cold chain, food processing, horticulture and blue economy	€10m	Grant / blended finance; joint venture, equipment and technology
Plant Biodefenders	Bio-inputs for coffee, cashew and rice; expand production and distribution	€1m	Equity / grant; partners for technology, sales and distribution
Soraya / Kanono Coffee	Coffee cultivation, milling, roasting, packaging and export	€1.783m	Debt / equity / grant; joint venture and market partners
Kilombero Rice Simba Group	Rice production and processing with renewable bioenergy	€1.783m	Debt / equity; joint venture and equipment partners

Financing needs are published project asks. Tanfroz lists total project cost above €10m; the other three list costs of €1m, €1.783m and €17.1m.

2. Tanzania's Multimodal Corridor System

Tanzania's transport investment case is built around an integrated multimodal corridor network linking the Indian Ocean coast to landlocked regional markets.

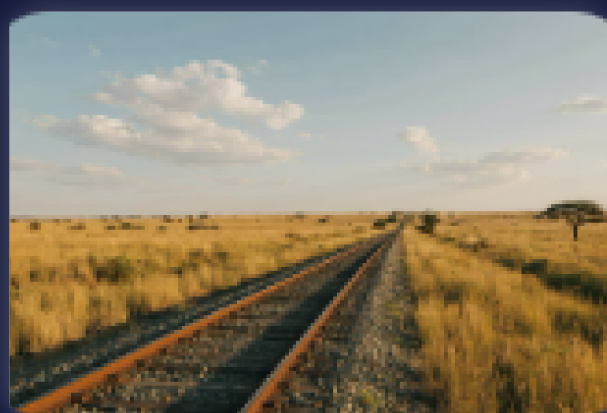
Dar es Salaam Gateway

Port, rail, road, airport, urban logistics and national consumption hub - the anchor of the entire system.



Central Corridor

Dar es Salam -- Morogoro -- Dodoma Tabora -- Isaka -- Mwanza / Kigoma, linking the coast to western Tanzania and Great Lakes markets.



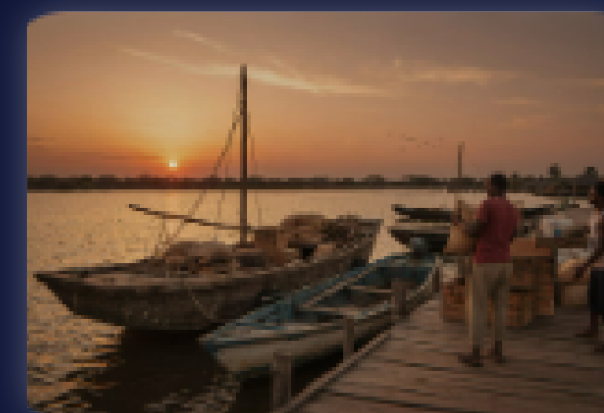
Southern / TAZARA Corridor

Dar es Salaam--Iringa--Mbeya--Tunduma, serving Zambia, Malawi and southern Tanzania's agro-industrial zones.



Lake Zone & Coastal Nodes

Mwanza as a lake-port logistics hub for Uganda and Rwanda; Bagamoyo and Mtwara as longer-term industrial platforms.



The investable opportunity is corridor-based: move cargo faster, store it better, clear it inland, preserve quality and connect production zones to regional markets.

Dar es Salaam Port: Throughput Efficiency & Hinterland Connectivity

Dar es Salaam Port is the anchor of Tanzania's logistics system. The next investment phase focuses on **efficiency, cargo evacuation and hinterland connectivity** – not greenfield terminal construction.

Investment Context

The World Bank's Dar es Salaam Maritime Gateway Project reported **USD 336.76 million disbursed** by September **2024** – **94.3%** of combined **IDA** and **FCDO** financing. DP World holds a **30-year** concession to operate and modernise the multipurpose terminal, with initial investment above **USD 250 million** and potential up to USD 1 billion over the concession period.

EU Investor Opportunities

- Cargo evacuation systems and rail-linked container yards
- Inland container depots and bonded warehousing
- Cold-chain handling and bulk/break-bulk logistics
- Port digitalisation and cargo tracking platforms
- Equipment supply, maintenance and terminal services

SGR: The Freight Backbone Creating Inland Opportunities

Tanzania's Standard Gauge Railway is fundamentally changing the economics of inland freight and creating a new generation of logistics investment opportunities.

541km

Phase 1 Operational

Dar es Salaam–Dodoma section launched in 2024 at a reported cost of USD 3.1 billion

2,561km

Planned Network

Full SGR network planned to connect coast to Lake Zone and beyond

\$2.33B

Syndicated Financing

Standard Chartered arranged financing in 2026 for the Makutupora–Isaka sections

EU Investor Opportunities Enabled by SGR

Intermodal Terminals

Rail-Linked
Warehousing

Inland Container Depots

Freight Aggregation
Centres

Cold-Chain Terminals

Digital Rail-Cargo Systems

The investable opportunity is not only railway construction — it is the inland logistics ecosystem that SGR makes commercially viable.

Other logistics investment opportunities

Beyond ports and rail, opportunities connect road corridors, farms, industry and airports to domestic and export markets.

Road and border freight

Truck service plazas, transit yards, bonded facilities and fleet platforms along the southern corridor.

Industrial zones

Port-adjacent, Bagamoyo, SGR-linked and southern nodes for warehousing and value-added logistics.

Digital trade

Cargo visibility, customs integration, corridor data and warehouse management systems.

Cold chain

Temperature-controlled storage, refrigerated transport and monitoring for food, seafood and pharmaceuticals.

Airport cargo

Cold rooms, cargo handling and logistics services at Dar es Salaam, Kilimanjaro and other gateways.

Urban mobility

Bus operations, electric fleets, depots, ticketing and last-mile services.

FEATURED PROJECT

DSM Corridor Ship Chandelling | Wholesale cold storage and sorting

Dar es Salaam facility for perishables · €1.5m–€2.0m financing need · Debt / grant, joint venture, technology and equipment partners

3. Tanzania's Critical Minerals Positioning

Tanzania's strongest near-term proposition is a **sequenced critical minerals and green industrial platform** - combining advanced resource projects with the infrastructure, processing and ESG systems that EU buyers increasingly demand.

Near-Term Strengths

- Advanced graphite project pipeline
- Major nickel-copper-cobalt anchor at Kabanga
- Indian Ocean export access via Dar es Salaam and southern ports
- Central Corridor logistics position
- Government commitment to beneficiation and local value addition
- Growing EU interest in responsible African partnerships

Where EU Investors Can Participate



Tanzania's EU proposition is responsible minerals plus industrial ecosystem development - not mining equity alone.

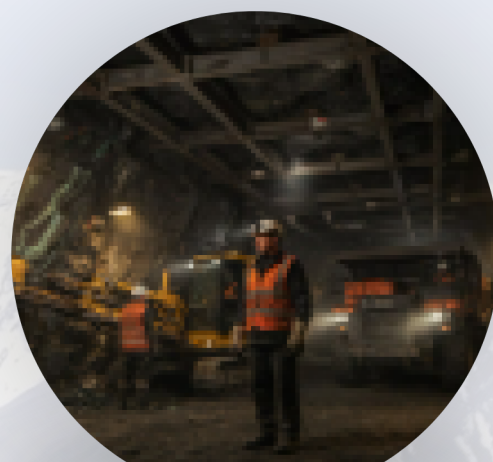
Critical Minerals Base

Tanzania combines **advanced resource projects with wide industrial development potential**, creating demand for EU industrial, infrastructure, technology and ESG partnerships across multiple mineral value chains.



Graphite

Mahenge, Chilalo, Lindi Jumbo and Epanko represent advanced projects generating demand for processing, logistics, certification, energy and ESG systems.



Nickel – Kabanga

One of Tanzania's most significant critical minerals anchors, with nickel, copper and cobalt exposure and a potential role in future battery-linked supply chains.



Rare Earths – Ngualla

Demonstrates Tanzania's strategic rare-earth potential; EU engagement is most realistic through specialist services, environmental management and future downstream partnerships.



Emerging Areas

Lithium exploration, battery applications and mining services should be treated as staged opportunities requiring project-specific validation.

Anchor Projects Creating Demand for EU Industrial Partnerships

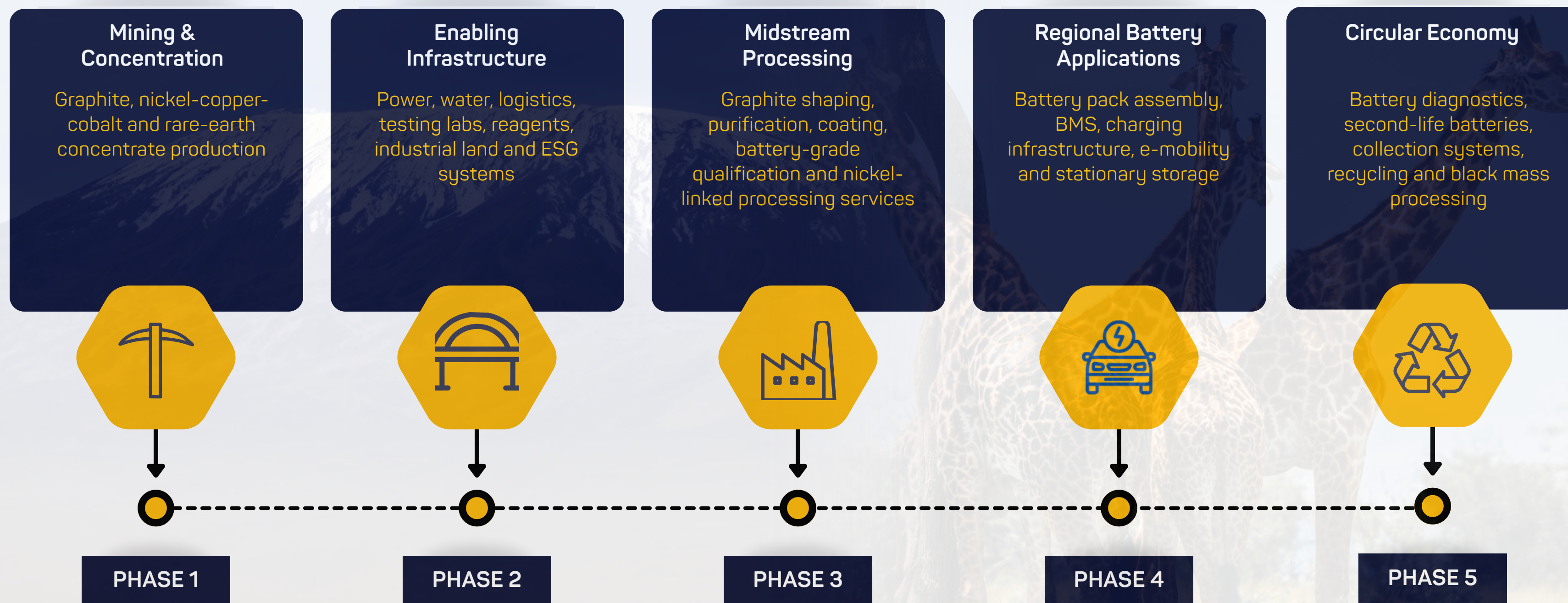
Tanzania's existing critical minerals projects are significant not only as resource assets, but because they **generate immediate demand for adjacent EU investment, services and infrastructure.**

Anchor Project	EU-Relevant Industrial Demand
Kabanga Nickel	Engineering, hydromet expertise, power, water, reagents, logistics, ESG systems and technical services
Mahenge Graphite	Graphite logistics, processing, qualification, environmental services, power and water infrastructure
Chilalo Graphite	Specialist graphite handling, testing, export preparation and downstream qualification
Lindi Jumbo	Operating supply-chain services, logistics, quality assurance and industrial support
Epanko Graphite	Strategic mineral services, environmental management, logistics and future downstream partnership potential
Ngualla Rare Earths	Strategic mineral services, environmental management, logistics and future downstream partnership potential

EIB Global signed cooperation agreements in 2026 with EcoGraf and Andrada Mining to support early-stage graphite and lithium projects in Tanzania and Namibia — confirming institutional EU engagement.

Tanzania's Sequenced Industrialisation Pathway

Tanzania's opportunity is best understood as a **phased, step-by-step industrialisation pathway** – allowing EU investors to enter at multiple points in the value chain without relying on mine equity.



Industrial Corridors and Processing Nodes

Tanzania's critical minerals proposition depends on connecting resource areas to industrial sites, ports, power, water and logistics corridors. The opportunity is corridor-based industrial development, not isolated mineral extraction.

Dar es Salaam



Export gateway, port logistics, bonded warehousing, testing, certification and industrial services for the primary Indian Ocean corridor.

Mtwara and Southern Corridor



Graphite export logistics, southern minerals processing and strategic links to Mozambique and Malawi supply chains.

Central Corridor – Isaka / Kahama / Buzwagi



Mineral logistics, processing services, engineering supply chains and potential green-metals industrial platform serving landlocked resource areas.

Dodoma and Central Areas

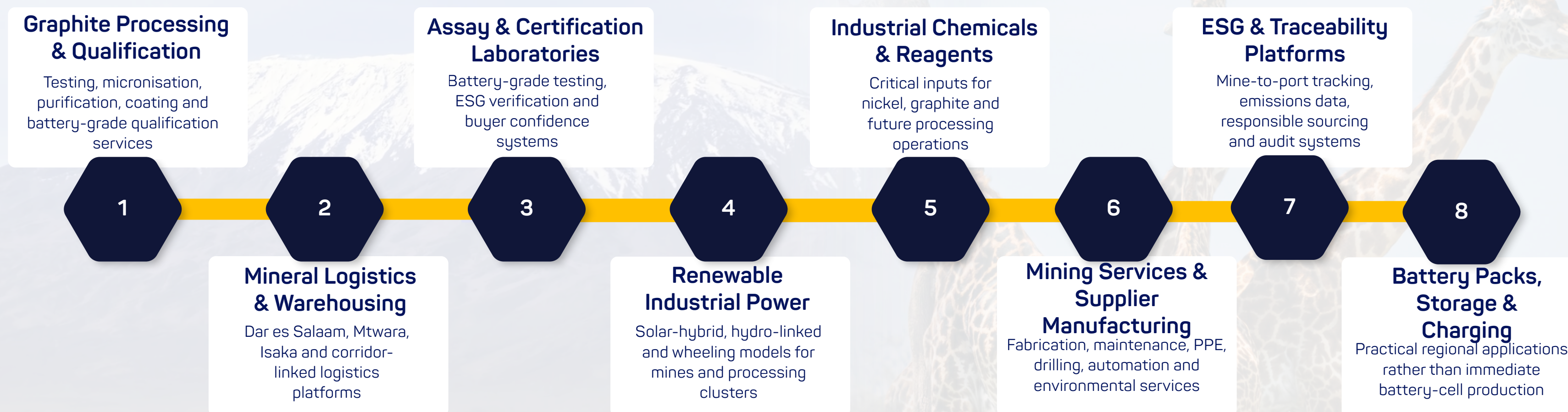


Potential for light manufacturing, battery pack assembly, training, e-mobility components and stationary storage deployment.



EU Investor Opportunity Segments on Critical Minerals

Eight distinct, actionable segments exist for EU investors across Tanzania's critical minerals value chain – each matching different investor mandates, capabilities and risk profiles.



INVESTMENT CATERGORIES

A

Normal Investors

Minimum Capital Requirement:



Foreign investors
TZS 1.5B



Local investors
TZS 150M

B

Strategic Investors

Minimum Capital Requirement:



Foreign investors
USD 50M



Local investors
USD 20M

C

EPZ Investors

At least 80% of goods produced/processed should be for export.
Investment inside SEZ Industrial Park or in Standalone



Foreign investors
TZS 1.5B



Local investors
TZS 150M

D

SEZ Investors

Goods produced/processed should be for export or local market.
Investment MUST be in SEZ Industrial Park



Foreign investors
TZS 1.5B



Local investors
TZS 150M

FISCAL INCENTIVES

UNDER THE GENERAL INVESTMENT SCHEME

01 PROJECT CAPITAL GOODS

Zero import duty on capital goods
Zero import duty on raw materials

02 DEEMED CAPITAL GOODS

75% import duty exemption

03 DEPRECIATION ALLOWANCE

37.5% to 5%, depending on the class of depreciable asset

04 STRATEGIC INVESTORS

VAT exemption
Withholding tax exemption on interest from foreign loans

05 PRIORITY MANUFACTURING

Corporate income tax reduced to 20% for the first five consecutive years

Applicable to pharmaceuticals, textiles and leather products

Clear incentives for project establishment, strategic investment and priority manufacturing

FISCAL INCENTIVES UNDER SEZ/EPZ SCHEME

Exemption from payment of corporate tax for the initial period of ten (10) years.

Exemption from payment of withholding tax on rent, dividends, interest and interest in foreign bank loans for the initial period of ten (10) years.

Exemption from payment of all taxes and levies imposed by the Local Government Authorities (LGAs) for products produced in the SEZ-Export Processing Zones for the initial period of ten (10) years.

Exemption from payment of import duty, VAT and any other tax charged on importation of one administration vehicle, Ambulance, Fire Fighting vehicle, and two staff buses in the Special Economic Zones.

VAT and Import duty exemption on Goods of Capital Nature.

Exemption from payment of Wharfage charges/Port Services.

OTHER NON-FISCAL INCENTIVES

01 AUTOMATIC IMMIGRATION QUOTA

Initially 10 expatriates during project implementation, and additional based on project size and other factors

02 LAND DERIVATIVE RIGHT

Foreigners have security of tenure under TISEZA Derivative Title for 98 years

03 ACCESS TO SERVICES UNDER THE ONE STOP FACILITATION CENTRE

All licenses and permits to be procured hassle-free at TISEZA Premier investors' service centre;

04 UNCONDITIONAL (FREE REPATRIATION) TRANSFERABILITY OF FUNDS

Transfer of funds is allowed through any authorized bank in freely convertible currency of: Net Profits, Repayment of Foreign Loans, Royalties, Fees Charges in Respect of Foreign Technology, etc.

05 ACCESS TO INTERNATIONAL ARBITRATION:

Tanzania is a Member of MIGA (Multilateral Investment Guarantee Agency) and The International Centre for Settlement of Investment Disputes (ICSID)

06 OTHER INCENTIVES – SEZ/EPZ

- Building permits issued within 24 Hours;
- TISEZA Regional market access support to connect investors with buyers and distributors in EAC and SADC countries; and
- TISEZA officers stationed at all Regional and main ports of exit to facilitate cross-border transit processes

TANZANIA'S COMPREHENSIVE INVESTOR PROTECTION FRAMEWORK

Investment Facilitation.

Through One Stop Facilitation Centre, investors enjoy streamlined and fast-tracked services for project registration, licensing, and operational approvals to ensure quick setup and smooth business operations.

Dispute Resolution:

Tanzania provides a transparent and fair legal framework for resolving investment-related disputes through domestic courts, arbitration mechanisms, and international Centre for settlement of Investment disputes.

Investment Guarantees.

Investors are guaranteed Unconditional Transfer of Net Profits, Dividends attributed to Investment, Repayment of foreign Loan, Payment of Personal Emoluments, Capital, Royalties and Fee charges in respect of imported Foreign Technology.

Risk Mitigation&Incentives.

Investors can receive fiscal and non-fiscal incentives.

INTERNATIONAL RECOGNITION AWARDS



6 January 2012

The New York Times awarded Tanzania the 7th position among 45 top destinations to visit.



July 2020

The World Bank Officially Promoted Tanzania to a lower middle income country.



8 May 2024.

Recognised as Best Investment Promotion Agency in Africa at the Annual Investment Meeting (AIM) 2024 in Abu Dhabi



2024

World Association of Investment Promotion Agencies (WAIPA) Special Least Developed Countries Award for use of ICT in investment facilitation



IMF

The International Monetary Fund (IMF) has estimated Tanzania to have the largest Economy in East Africa by 2028



2025

World Association of Investment Promotion Agencies (WAIPA) "Investment Excellence"



The First Winner of the Category of the Best Investment Promotion Agency in African Region 2024



WAIPA Special LDC Award for Use of ICT in Supporting Investments in 2024

FOR MORE INFORMATION CONTACT US

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