



**THE UNITED REPUBLIC OF TANZANIA  
PRESIDENT'S OFFICE  
REGIONAL ADMINISTRATION AND LOCAL GOVERNMENT**

# **DAR ES SALAAM REGION INVESTMENT GUIDE**







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Resilient nations.*



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# ABBREVIATIONS AND ACRONYMS

AGOA	African Growth and Opportunity Act
BRELA	Business Registration and Licensing Agency
CoET	College of Engineering and Technology
CSOs	Civil Society Organisations
DART	Dar Rapid Transit Agency
DMDP	Dar es Salaam Metropolitan Development Project
DPs	Development Partners
EAC	East African Community
EBA	Everything But Arms
EPZA	Export Processing Zones Authority
EPZs	Export Processing Zones
EU	European Union
FAO	Food and Agriculture Organisation
FBO	Faith-Based Organisation
FCC	Fair Competition Commission
FYDP	Five-Year Development Plan
GDP	Gross Domestic Product
GoT	Government of Tanzania
ICTs	Information Communication Technologies
IIDS	Integrated Industrial Development Strategy
IMF	International Monetary Fund
ISOs	Industry Support Organisations
ITC	International Trade Centre
LGAs	Local Government Authorities
MoA	Ministry of Agriculture
MIGA	Multilateral Investment Guarantee Agency
MIT	Ministry of Industry and Trade
MLF	Ministry of Livestock and Fisheries
MSes	Micro and Small Enterprises
MoW	Ministry of Water
NEEC	National Economic Empowerment Council
NEMC	National Environment Management Council
NGOs	Non-Government Organisations

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PPCP	Public-Private Community Partnership
PPP	Public-Private Partnership
RALG	Regional Administration and Local Government
RECs	Regional Economic Communities
SADC	Southern African Development Community
SEZs	Special Economic Zones
SGR	Standard Gauge Railway
SIDP	Sustainable Industrial Development Policy
SOE	State – Owned Enterprises
TNBC	Tanzania National Business Council
TANESCO	Tanzania Electric Supply Company
TANROADS	Tanzania National Roads Agency
TANTRADE	Tanzania Trade Development Authority
TAZARA	Tanzania Zambia Railway Authority
TBS	Tanzania Bureau of Standards
TCCIA	Tanzania Chamber of Commerce, Industry and Agriculture
TCT	Tourism Confederation of Tanzania
TDU	Textiles Development Unit
TEMESA	Tanzania Electrical, Mechanical and Electronics Services Agency
TMDA	Tanzania Medicine and Medical Devices Authority
TMEA	Trademark East Africa
TPA	Tanzania Ports Authority
TRA	Tanzania Revenue Authority
TRIMS	Trade-Related Investment Measures
TVETDP	Technical and Vocational Education and Training Development Programme
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNIDO	United Nations Industrial Development Organisation
VAT	Value-Added Tax
WB	World Bank
WTO	World Trade Organisation

## DEMONSTRATION OF COMMITMENT FROM THE HIGHEST LEVEL OF GOVERNMENT



"As our country achieves the status of a middle-income economy, the impetus is placed on continuing to build a Competitive and Industrial Economy for Human Development to achieve the objectives of the vision with the following qualities: improving the living conditions of Tanzanians; the existence of peace, security and unity; good governance and the rule of law; the existence of an educated and learning society; and building a strong and competitive economy."

**Her Excellency, Samia Suluhu Hassan.**

*The President of the United Republic of Tanzania.*

*Keynote to the Tanzania Five Year Development Plan, June, 2021.*



"A Five-Year Development Plan is determined to make Tanzania a major business hub for land-locked countries that use the port of Dar es Salaam to ship their cargoes"

**His Excellency, Dr. Philip Isdor Mpango,**

*Vice President of the United Republic of Tanzania.*

*Remarks provided at the Port of Singapore during the Bloomberg New Economy Forum held in Singapore from 15 to 20 November 2021*



"The 21st Century is going to identify itself with intensifying competitive business environment in which businesses that will triumph are those with relevant industrial products and services, modern technologies and human resource that is imbued with respective skills, work ethics and innovativeness. Industrialisation is the basic requirement and core secret for business to survive in the 21st Century. It is in this wisdom that the Fifth Phase Government of the United Republic of Tanzania has embraced industrialisation

as its ultimate goal. The success of this goal calls for regional administrations to focus on the provision of conducive business environment necessary to facilitate business operations and flow of investments."

**Hon. Kassim Majaliwa Majaliwa,**

*Prime Minister of the United Republic of Tanzania.*

*Opening remarks at the Business and Investment Forum, Tabora Region, on 21 November 2018*



# FOREWORD



Welcome to invest in Dar es Salaam Region, the leading business centre in Tanzania. The region is blessed with investment potentials in both economic and social sectors.

Dar es Salaam Region has prepared an investment guide that unveils investment opportunities available within its environs. The guide is in line with the vision of the region and the associated Dar es Salaam regional and local government authorities (LGAs) development plans.

It is also aligned with the national investment policy and national development frameworks such as Tanzania Development Vision 2025, the Third Five-Year Development Plan (FYDP III) 2021/22-2025/26 and Sustainable Development Goals (SDGs). The region's priorities are consistent with national goals and strategies of an industrial-led economy.

Information contained in the guide is valuable for prospective local and foreign organisations as well as groups and individuals interested to invest in Dar es Salaam Region. I believe that understanding of available resources and investment potentials through this guide will attract investors to effectively utilise the untapped resources and investment opportunities in the region.

The expected outcome of investments is acceleration of economic growth, improvement in quality of life and well-being of the people in the region and national at large. The region's administration will assure maximum support and cooperation to interested investors. Maximum security and friendly business environment will be provided by the Regional Secretariat and its local government authorities.

The regional administration will play more of a facilitative role, while execution of projects will be done by LGAs in terms of location, economic services etc. LGAs will take up the implementation role only, not the financing

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of projects. This means LGAs will provide space, involve the private sector and themselves in undertaking investments (i.e. private investments, others under public-private partnership arrangements, and strategic investments under public ownership).

The regional administration will provide the overall oversight function, while councils will implement the proposed investments in collaboration with investors. More details on identified strategic investment opportunities are given in Part Three of this Guide.

The Gross Domestic Product (GDP) in Dar es Salaam Region is by far higher compared to other regions. The region is strategically located on the coast of Indian Ocean, accounting for the highest amount of exported and imported goods through its port that serves the country and other land-locked neighbouring countries with a tremendous increase in external trade each year.

In line with that, the Regional Secretariat and its local government authorities are now implementing the strategies to diversify the economy and make Dar es Salaam Region a centre for technology and innovations.

The preparation of this guide was participatory, involving key stakeholders from the Government and private sector in the region. The ESRF team that assisted in preparing this guide received full cooperation from the regional team under the former Regional Commissioner (RC), Mr. Abubakar Mussa Kunenge, Regional Administrative Secretary, Mr. Hassan Abbas Rungwa, Assistant Administrative Secretary, Dr. Elizabeth Mshote, and Mr. Valence Urassa, Regional Environmental Management Expert. The ESRF team also received cooperation from the district teams under district commissioners, the City Director and municipal directors. I am grateful for their commitment to the task.

On behalf of Dar es Salaam regional authorities, I would like to express my sincere gratitude to the United Nations Development Programme (UNDP) for the financial support and to the Economic and Social Research Foundation (ESRF) for developing this guide. I would like to specifically acknowledge Prof. Haidari Amani, Dr. Oswald Mashindano, Mrs. Margareth Nzuki, Mr. Mussa Martine and Mr. James Kasindi for their commitment and technical support that collectively resulted in the completion of this guide.

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Lastly, we wish to invite innovative domestic and foreign investors to join hands with us in exploiting the region's opportunities on the basis of mutual benefits in various areas. We look forward to cooperating with you in making Dar es Salaam Region a vibrant investment destination in Tanzania.



**Hon. Amos G. Makalla**  
**Regional Commissioner**  
**Dar es Salaam Region, Tanzania**

# DAR ES SALAAM AT A GLANCE

Name of the region	Dar es Salaam
<b>Postal code</b>	11000 (see <a href="https://www.tcra.go.tz/postcode.php.htm">https://www.tcra.go.tz/postcode.php.htm</a> )
<b>Website</b>	<a href="http://www.dsm.go.tz">www.dsm.go.tz</a>
<b>Postal address</b>	P O Box 5429, Kigogo Rd, Dar es Salaam
<b>Location</b>	Located between 6 and 7 degrees south of the Equator and between longitudes 33.33 and 39 degrees east of Greenwich, lies along the western coast of Indian Ocean
<b>Area of the region</b>	1,628 square kilometres (water area comprises 235 square kilometres, while land area comprises 1,393 square kilometres)
<b>Population</b>	5,401,814 (2020 projections) <sup>1</sup>
<b>Population density</b>	3,133 persons per square kilometre (2012 Population Census)
<b>Population growth rate</b>	5.6% per year
<b>Ecological zones</b>	<ul style="list-style-type: none"> <li>i) The upland zone comprising hilly areas to the west and north</li> <li>ii) The middle plateau</li> <li>iii) The lowlands, which include Msimbazi Valley, Jangwani, Mtoni, Africana and Ununio areas</li> </ul>
<b>Climate</b>	The region experiences a modified type of equatorial climate. It is generally hot and humid throughout the year. It has a wet and dry climatic condition
<b>Rainfall patterns</b>	Annual rainfall is approximately 1,100 mm (ranging between 800 mm and 1,300 mm annually) with a bimodal rainfall distribution
<b>Temperature</b>	Dar es Salaam has a mean annual maximum temperature of 31°C and a mean annual minimum temperature of 21°C

<sup>1</sup> NBS (2019). Sub-National Population Projection for Year 2013 to 2021 Based on 2012 Population and Housing Census

<b>Administrative set up</b>	The region has five districts, i.e. Ilala, Kinondoni, Temeke, Kigamboni and Ubungu, with five local government authorities, namely Dar es Salaam City Council, Kinondoni, Temeke, Kigamboni and Ubungo municipal councils
<b>GDP</b>	TZS 22,577,225 Million in 2018
<b>GDP per capita</b>	TZS 4,348,990 in 2018
<b>Human Development Index (HDI)<sup>2</sup></b>	0.72 in 2015
<b>Gender Development Index</b>	0.83 in 2015
<b>Water accessibility</b>	85% in 2019
<b>Major economic activities</b>	Manufacturing, transport and communication, trade, hospitality industry, fisheries and urban agriculture
<b>The economy</b>	The region accounts for more than 17 percent <sup>3</sup> of the national GDP since 2013 and is the leading economy in the country
<b>Contents and organisation of the guide</b>	This investment guide is organised in five parts: part one gives reasons for investors to choose Dar es Salaam Region as an investment destination; part two presents the socio-economic profile of Dar es Salaam so as to equip potential investors with adequate information about the region, which are essential in making investment decisions; part three presents priority investment opportunities in the region; part four pinpoints specific issues related to facilitation, processes, requirements, and incentives for investment in Tanzania in general and in Dar es Salaam Region in particular; and part five provides important contacts in Dar es Salaam Region that will help potential investors in making follow up of opportunities in which they want to invest.

<sup>2</sup> Tanzania Human Development Report 2017 accessed at <http://hdr.undp.org/sites/default/files/thdr2017launch.pdf>

<sup>3</sup> NBS (2019). Regional GDP

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**Priority  
investment  
opportunities**

Establishment of integrated industrial park; production of packaging materials; leather and leather products production; establishment of a specialised skills development institute; construction of a fish processing plant; providing medical laboratory equipment and supplies such as syringes and cotton wool; establishment of a modern health diagnostic centre; creating a centre for innovation/technology hub, ship building and ship repairing services; establishment of Dar es Salaam City Park; establishing solid wastes management facilities; creation of business parks; construction of modern markets and researched facilities; beach tourism and related investments; establishment of wildlife zoos; development of rivers and valleys; construction of abattoirs and modern fish markets; establishment of fish farming; construction of modern bus stand and related facilities; establishment of modern sports arenas; modern agriculture practices; investing in the chicken value chain; and real estate development.

# DISCLAIMER

This guidebook was published to provide potential investors with essential information regarding investment opportunities and investment processes in Dar es Salaam Region. It does not in any way give exhaustive information or detailed practical instructions; rather, it points out sources of other information in both private and public sectors.

Most of or all information contained in this guidebook was derived from consultations with regional and district government officials, the private sector and other non-state actors. Depending on the nature of investment, potential investors are expected to conduct feasibility studies and/or environmental impact assessment prior to actual investments.

Materials in this guidebook should therefore be used only for the intended purposes and not for defence in a legal dispute or in any matter of that nature. The guide is presented in good faith and in cognisance of the 2018 Amendment to the Statistics Act (2015).

Where a datum point used in this guide unknowingly contradicts an official statistic, it should be deemed an error and the official statistic should be assumed to be correct.



# **REASONS FOR INVESTING IN DAR ES SALAAM REGION**

## **1.1 Dar es Salaam Region in the Broader Tanzanian Context**

Dar es Salaam Region is part of Tanzania; it benefits from and depends on the country's conducive investment and trade policies, political stability and well-prepared development frameworks based on the National Development Vision 2025. Tanzania, with its large and growing domestic population, strategic location, abundance of natural resources and internal political stability, presents a uniquely attractive investment opportunity. According to NBS population projections, the country has a population of about 58 million people in 2020 and an annual population growth rate of 2.7 percent.

Tanzania has abundant natural resources, including agricultural land, water bodies such as ocean, lakes and rivers, springs, mineral resources, tourist attractions including biodiversity and unique landscapes, such as Mount Kilimanjaro, Ngorongoro Crater and Serengeti National Park, which attract tourists from all over the world. In addition, its location on the east coast of Africa gives it a comparative advantage in providing trade and transport services to neighbouring, land-locked countries.

Several measures have been taken to create a conducive business environment to encourage local and foreign investment. The country has created a stable and attractive macro- and micro-economic climate with single-digit inflation.

There are on-going reforms in fiscal and monetary policy, as well as improvements in the business climate through legal and regulatory reform aimed at streamlining procedures and freeing business from unnecessary bureaucracy. The combination of various policies and strategies has fostered economic growth of Tanzania, which has sustained an average annual rate of 6-7 per cent economic growth since the late 1990s.

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## 1.2 Investment Climate and Trade Policy in Tanzania

Since the liberalisation of the economy beginning mid-1980s and picking up by early 1990s, the Government has recognised the role of the private sector (both local and foreign) as the engine of growth and key drivers of economic transformation and poverty eradication. This important role of the private sector has been further emphasised in the Third Five-Year Development Plan (FYDP III) (2021/22-2025/26), which has put some special emphasis on, among others, effective participation of the private sector in developing industries and enterprises that spur economic growth and create jobs.

The Government of Tanzania uses the World Trade Organization's (WTO's) Trade-related Investment Measures (TRIMs) to encourage investments in line with national priorities, and to attract and regulate foreign investment. Trade development instruments that Tanzania has adopted include export processing zones (EPZs), investment code and rules, export development/promotion and export facilitation. EPZs were established by the 2002 EPZ Act and are open to both domestic and foreign investors, particularly in agribusiness, textiles and electronics sectors.

The Export Processing Zones Authority (EPZA) governs both export processing zones (EPZs) and special economic zones (SEZs). The Government has encouraged both local and foreign investors to take advantage of the investment opportunities under EPZA for their benefits and for the benefit of the country. There are three categories of licences issued by EPZA:

- i) Developer's licence (for investment in infrastructure development, including construction of industrial buildings and warehouses, development of internal roads, landscaping and fencing and the provision of utilities)
- ii) Operator's licence (for investors who are undertaking manufacturing operations, including manufacturing, processing breaking bulk, re-packaging, re-labelling and trading)
- iii) Service provider's licence (for investors who are providing services and utilities to EPZ and SEZ investors within the zone, including banking, insurance, as well as information and communication technologies [ICTs]).

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EPZA also oversees incentive packages such as exemptions from corporate tax and withholding tax on rent; dividends and interest; remission of customs duty, value-added tax (VAT) and other taxes on raw materials and capital goods; and exemption from VAT on utilities and levies imposed by local authorities. In addition, working permits for foreign staff can also be obtained. More information can be found on the website [www.epza.go.tz](http://www.epza.go.tz) and email address is [info@epza.go.tz](mailto:info@epza.go.tz).

The Special Economic Zones Act of 2006 authorised the establishment of special economic zones (SEZs) to encourage Greenfield investments in light industry, agro-processing industry and agriculture. The country's well formulated development-cum-strategic frameworks have contributed to continuous real GDP growth of about 7 percent for over a decade and is a member of what the World Bank has dubbed the "7 percent Club", a group of countries forecast to achieve 7 percent or more real GDP growth for the next decade.

Investments in Tanzania are guaranteed against nationalisation and expropriation through various agreements of protection and promotion of investments, such as the Multilateral Investment Guarantee Agency (MIGA), of which Tanzania is a member. Tanzania also offers access to major markets of the world, such as America (e.g. Africa Growth Opportunity Act [AGOA]); Europe (e.g. Everything But Arms [EBA]); Asia (e.g. India); Middle East; and China; all done through special bilateral trade and investment agreements and arrangements.

Tanzania is also a member of two major regional economic communities (RECs): the Southern African Development Community (SADC); and the East African Community (EAC). Both RECs are growing stronger, and so investors in Tanzania will have the advantage to accessing both domestic and regional markets as well as export markets in the European Union, the United States, the growing Asian economies of China and India, and in the Middle East, to mention only the leading ones. The domestic market is significant, given Tanzania's population of about 58 million people in 2020, growing at a rate of 2.7 percent per annum, as well as a growing middle class.

Briefly, the following are among the reasons why one should invest in any region of Tanzania, including Dar es Salaam:

- 
- There is a high degree of investment security because of unparalleled political stability that is strife-free without ethnic division, democratic rule that respects diversity of opinion and a strong tradition of constitution and rule of law
  - The country has maintained business-friendly macro-economic stability with low inflation (around 5%), stable exchange rates supported by unrestricted and unconditional transfers of profits, loan repayments, emoluments, royalties, fees and charges
  - There is a commitment to ensuring simplified bureaucracy, streamlined through the acclaimed services of the Tanzania Investment Centre, which is a one-stop Government facilitation agency serving registered investors and businesses
  - The Government of Tanzania is committed to, and has successfully undertaken economic liberalisation and diversification measures commended by the World Bank and IMF, with business-supportive legislation continually being improved through genuine dialogue between the Government and the private sector
  - There is a well-balanced package of incentives to investors and additional negotiated benefits to strategic investors
  - The economy is rapidly emerging as the most effective entry point and gateway for trade into eastern, southern and central Africa
  - There are lucrative investment opportunities in infrastructure and value-adding facilities that are among the fastest growing segments of the economy
  - The Government is committed to ensuring investment guarantees and settlement of disputes. Investments in Tanzania are guaranteed against political risks, nationalisation and expropriation
  - The existence of stable financial acts and policy that provide opportunities to private sector to get capital from local and foreign financial institutions. Foreign business operating in Tanzania may obtain credit from domestic financial institutions up to the limits established by the Bank of Tanzania. Major banks like Standard Chartered Bank, Citibank, Exim, Stanbic, ABSA Bank (formerly traded as Barclays Bank), KCB Bank, Bank of Africa, Azania Bank, Citibank, Akiba Bank, BancABC and Diamond Trust Bank, have invested in Tanzania. Other banks with branches in Dar es Salaam Region are CRDB Bank PLC, NBC Limited, National Microfinance Bank Limited, and TPB Bank. Investors in Dar es Salaam can also access facilities from development financing institutions such as Tanzania Agriculture Development Bank (TADB) and TIB Bank.

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## 1.3 Reasons to Invest in Dar es Salaam Region

Below is a brief as to why an investor should choose Dar es Salaam Region as an investment destination:

### a) Strategic location and economic infrastructure

One competitive advantage of Dar es Salaam Region is its strategic geographical location. It is connected directly to the Tanzania-Zambia Highway, which gives it direct trade links to neighbouring countries like Zambia, Malawi and Democratic Republic of Congo (DRC). Dar es Salaam connects the central corridor which is significant in transporting cargo to the north-western countries, namely Rwanda, Burundi, Uganda and northern part of DRC. It is also an important hub for two closely “logistics” corridors, i.e. the TAZARA and Uhuru (TANZAM) corridors. Both the TAZARA and TANZAM Corridors revolve around the Dar es Salaam Harbour/Port, with a railway to Zambia running about 1,860 kilometres.

It stretches some 970 kilometres in Tanzania and passes through 5 regions of Dar es Salaam, Pwani, Morogoro, Iringa and Mbeya, the latter three being some of the most fertile agricultural areas in the country, dubbed among the “big six” or grain basket of Tanzania. It ends at New Kapiri Mposhi in Zambia, linking to the Zambian railway system. The TAZARA Corridor is connected by a good road to the Mtwara Development Corridor in the southern regions of Tanzania. There is an interface of the Central Railway line and TAZARA at Kidatu, whereby exchange of rail cargo to southern Africa can take place. The corridor provides alternative connectivity between the coastal parts and the southern parts of Tanzania.

The region’s economic infrastructures are well established. These include Julius Nyerere International Airport (JNIA); water transport through the Indian Ocean; roads and railways, including the standard gauge railway, which is being constructed and will transect the central corridor of Tanzania and planned to reach Rwanda; reliable supply of electricity; telecommunication services including the Internet, etc. The region has also an abundant and variety of natural resources, ranging from beautiful beaches, marine reserves, unique eco-system forests and the like, which are essential for investing in tourism and related activities.

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## **b) Population and markets**

According to the National Bureau of Statistics' population projections<sup>4</sup>, the population of Dar es Salaam in year 2020 is 5,401,814 and expected to be a mega city (10 million people) by year 2030. The rapid increase in population, coupled with the growth of a middle-income class, provides a market for goods and services in the region.

## **c) Land for investments**

Given the diversity of economic sectors and their potentials for attracting investments, Dar es Salaam Region, through its local government authorities has set aside land for specific targeted investments as shown in part three of this guide.

For instance, Kigamboni Municipal Council has surveyed about 784 hectares of land at Pemba Mnazi and other 563 hectares at various places for industrial development and other investments; Dar es Salaam City Council has surveyed 512 hectares for various investments, including development of Dar es Salaam City Park, construction of shopping malls, modern markets, modern bus stand, tourist hotels, etc.; 491 hectares in Kinondoni Municipality; 64 hectares in Ubungu Municipality; and 68 hectares in Temeke Municipality.

LGAs will also facilitate investors to acquire land for investments by escorting them to see the areas allocated and helping in getting title deeds.

## **d) Peace and Security**

Tanzania has built a reputation for long-standing peace, political stability, national unity and social cohesion in an environment of democracy and political and social tolerance, in marked contrast to its Central and East African neighbours.

Like the rest of the country, Dar es Salaam Region enjoys peace and political stability that offer a safe environment for investments.

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<sup>4</sup> NBS (2019). Sub-National Population Projection for Year 2013 to 2021 Based on 2012 Population and Housing Census.

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## **e) Commitments by Dar es Salaam Secretariat and local government authorities**

Dar es Salaam Region is committed to facilitating the process of investment, particularly in collaboration between investors and key partners. The region will ensure establishment of desks at the regional and council levels for providing correct information to potential investors.

The region and its LGAs will develop a strategy for the implementation of this investment guide and will pick some selected opportunities, as well as conduct feasibility studies and develop business plans for bankable projects, while continuing to explore all possible sources of financing for the proposed investments to take place.

### **1.4 The Guide's Target Groups**

Making decisions by prospective investors on where and in which sector to invest requires adequate information, and so is the ability by public officials to provide correct information on investment opportunities to interested parties. The main targets for this guide are therefore national and international individuals and firms interested in starting new businesses or acquiring existing ones in various sectors; investors resident within the region with businesses and seek to either expand their current operations or venture into new businesses; and Government ministries responsible for facilitating business owners. Specifically, the following are the beneficiaries of the guide:

- Investors, business owners and stakeholders, agricultural crop estates, medium-to-large farms and value adding and marketing entities intending to invest in Dar es Salaam designated industrial and business areas
- Ministry of Industry and Trade (MIT)
- Prime Minister's Office (Investment)
- Primary stakeholders across value chains, including individual entrepreneurs, importers and exporters of input and output factors and agriculture crops, as well as livestock keepers and fisher folks
- Government ministries, agencies, LGAs, EPZA, and state-owned enterprises (SOEs) (e.g. those responsible for agriculture, industries, trade, finance, and international cooperation)



- 
- Academia/researchers in Tanzania
  - Institutions such as Tanzania National Business Council (TNBC), Tanzania Chamber of Commerce, Industry and Agriculture (TCCIA), pension and provident funds investing in agriculture and industries, and other support institutions
  - Institutions overseeing the management of quality and safety issues, such as Tanzania Bureau of Standards (TBS) and Tanzania Medicines and Medical Devices Authority (TMDA)
  - Public organisations such as Textiles Development Unit (TDU), Business Registration and Licensing Agency (BRELA), Tanzania Revenue Authority (TRA), Fair Competition Commission (FCC), National Economic Empowerment Council (NEEC), Tanzania Trade Development Authority (TANTRADE), industry support organisations (ISOs), agricultural and industrial extension services providers etc., which provide information and data, monitoring and evaluation and other business support services
  - Selected civil society organisations (CSOs), non-government organisations (NGOs) and development partners (DPs), such as the Food and Agriculture Organisation (FAO), United Nations Development Programme (UNDP), World Bank (WB), United Nations Conference on Trade and Development (UNCTAD), International Trade Centre (ITC), European Union (EU), United Nations Industrial Development Organisation (UNIDO), TradeMark East Africa (TMEA), Confederation of Tanzania Industries (CTI), etc.
  - Financial institutions (deposit and non-deposit taking institutions).

## PART TWO

# SOCIO-ECONOMIC PROFILE OF DAR ES SALAAM REGION

This part highlights geographical location, surface area, population and demographic pattern, administrative units, topography and land use patterns, climate, productive sectors and other socio-economic elements of Dar es Salaam Region.

## 2.1 Geographical Location

Dar es Salaam Region lies along the western coast of the Indian Ocean. It is situated between 6 and 7 degrees south of the Equator and between longitudes 33.33 and 39 degrees east of Greenwich. It borders with Pwani Region in the North, West and South, and the Indian Ocean to the East.

## 2.2 Surface Area

The total surface area of Dar es Salaam Region is 1,628 square kilometres, which is equivalent to 0.18 percent of the entire Tanzania Mainland area of 885,987 square kilometres. The water area accounts for 235 square kilometres while land area is 1,393 square kilometres equivalent to 85.6 percent.

*Figure 1: Map Indicating the Location of Dar es Salaam Region in Tanzania*



**Source:** ESRF (2020)

**Table 1: Distribution of Surface Area, Land Area and Water Area by District:  
Dar es Salaam Region, 2020**

District	Area (sq.km)			Percent of Surface Area (%)
	Land Area	Water Area	Total	
Ilala	208	112	320	19.7
Kinondoni	321	20	341	20.9
Temeke*	240	103*	343*	21.1
Kigamboni	414	-	414	25.4
Ubungo	210	-	210	12.9
<b>Total</b>	<b>1,393</b>	<b>235</b>	<b>1,628</b>	<b>100.00</b>

**Note:** \* Water area for Temeke District includes water area for Kigamboni District. The actual number will be determined once the water area of 103 square kilometres is split between Temeke and Kigamboni districts, which were originally one district

**Source:** Dar es Salaam Regional Commissioner's Office, 2020

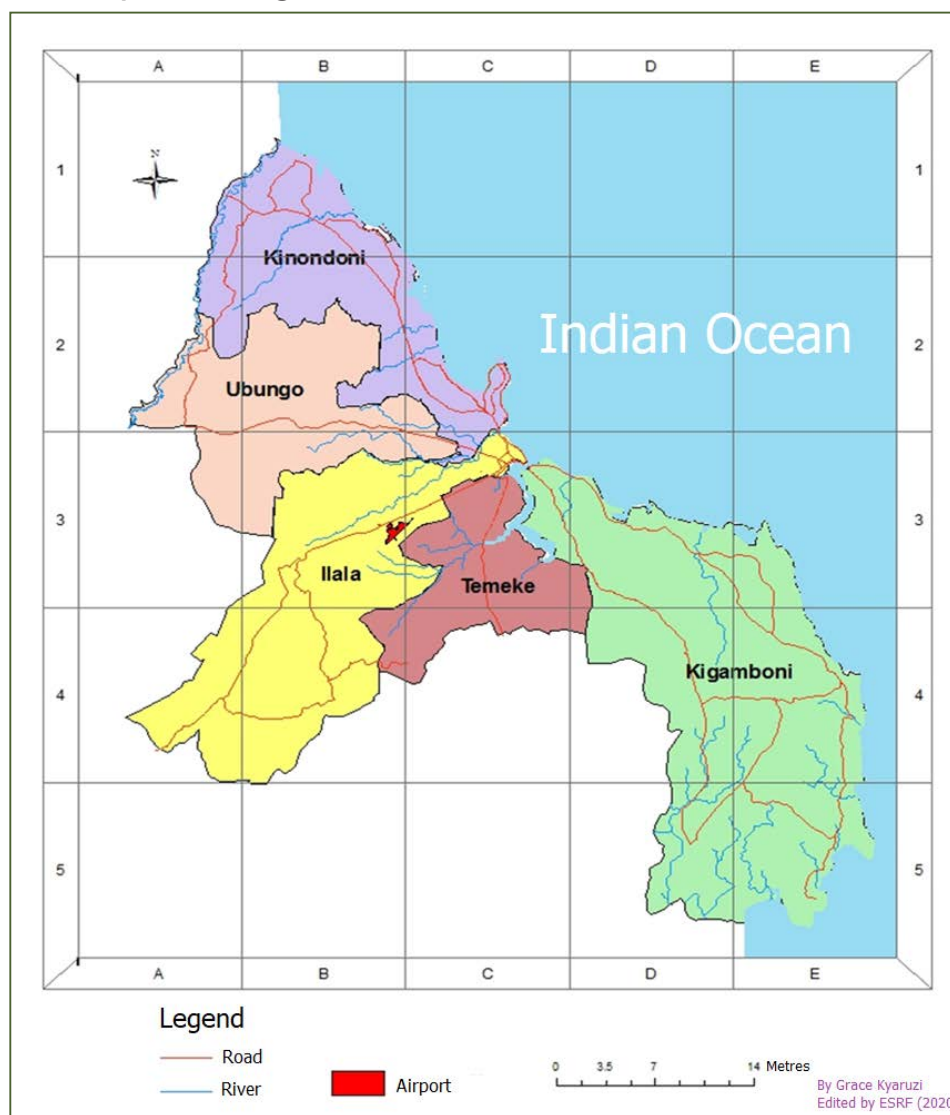
## 2.3 Administrative Units

Dar es Salaam Region was established in 1973 and declared a purely urban area according to Local Government Urban Authorities Act No. 8 of 1982. The Region is among 26 Regions of Tanzania Mainland. In a bid to implement the Public Service Reform Programme, the region has been divided into five districts, i.e. Ilala, Kinondoni, Temeke, Kigamboni and Ubungo with five local government authorities, namely Dar es Salaam City Council, Kinondoni, Temeke, Kigamboni and Ubungo municipal councils. The region is further sub-divided into 12 divisions, 102 wards, 564 *mitaa* and 10 electoral constituencies.

**Table 2: Administrative Units in Dar es Salaam Region, 2020**

District	Division	Ward	Mitaa	Electoral Constituencies
Ilala	3	36	159	3
Kinondoni	2	20	106	2
Temeke	2	23	142	2
Kigamboni	3	9	67	1
Ubungo	2	14	90	2
<b>Total</b>	<b>12</b>	<b>102</b>	<b>564</b>	<b>10</b>

*Figure 2: Map Showing Administrative Units of Dar es Salaam Region*



**Source:** Edited by ESRF (2020) from Dar es Salaam Regional Commissioner's Office, 2020

## 2.4 Population

According to the 2012 National Population and Housing Census, Dar es Salaam Region had a total population of 4,369,541 and projected to having increased to 5,401,814 in 2020 with an average annual population growth rate of 5.6 percent. The rate is above the national population growth rate of 2.7 percent. The higher population growth rate is mainly due to rural-urban immigration and a fertility rate of 4.5 percent, which also plays a significant factor in increasing the population in the region. Dar es Salaam is expected to become a mega city with a population over 10 million by year 2030.

**Table 3: Population Distribution by District**

District	Actual Population - 2012 Population and Housing Census			Projected Population for Year 2020		
	Male	Female	Total	Male	Female	Total
Kinondoni	451,653	478,028	929,681	556,971	586,865	1,143,836
Ilala	595,928	624,683	1,220,611	742,778	774,354	1,517,132
Temeke	587,857	618,092	1,205,949	730,206	764,870	1,495,076
Kigamboni	81,199	81,733	162,932	100,948	101,271	202,219
Ubungu	409,149	436,219	845,368	506,888	536,663	1,043,551
<b>Total</b>	<b>2,125,786</b>	<b>2,238,755</b>	<b>4,364,541</b>	<b>2,637,791</b>	<b>2,764,023</b>	<b>5,401,814</b>

**Source:** NBS (2019). *Sub-National Population Projection for Year 2013 to 2021 Based on 2012 Population and Housing Census*

## 2.5 Climate, Soil and Vegetation

Dar es Salaam Region experiences a modified type of wet and dry equatorial climate. It is generally hot and humid throughout the year with an average temperature of 29°C. The highest temperature season is from October to March, during which temperatures rise up to 35°C. It is relatively cool between May and August, with temperature around 25°C.

The region has an annual rainfall of approximately 1,100 mm (ranges between 800 mm and 1,300 mm annually) with a bimodal rainfall distribution associated with southward and northward movements of the inter-tropical convergence zone. The long rains (*masika*) occur from mid-March to the end of May and the short rains (*vuli*) from mid-October to late December. Although June to September is typically a dry season for most parts of the country, coastal areas tend to receive a small amount of rainfall over this period.

Dar es Salaam Region is mostly covered by sandy soil, with main natural vegetation such as coastal palm groves, coastal shrubs, miombo woodland, coastal swamps and swampy mangrove trees and reeds. Prolonged human interference has reduced the diversity of woodland and scrub.

## 2.6 Ecological Zones

The region is divided into three ecological zones, namely the upland zone comprising hilly areas to the west and north; the middle plateau; and the lowlands, which include Msimbazi Valley, Jangwani, Mtoni, Africana and Ununio areas.

## 2.7 Regional Economy

As shown in the socio-economic profile of the region (part two of this guide), Dar es Salaam has a vibrant and diversified economy depending mainly on manufacturing, transport and communication, trade, hospitality industry, fisheries and urban agriculture.

According to National Bureau of Statistics (NBS), Dar es Salaam's Gross Domestic Product increased from about TZS 10.55 trillion in 2012 to about TZS 22.58 trillion in 2018, which is an increase of TZS 12.03 trillion. Dar es Salaam's contribution to GDP has been more than 17 percent from 2013 to 2018. Per capita income also increased from TZS 2,419,087 in 2012 to TZS 4,348,990 in 2018.

*Table 4: Gross Domestic Product (GDP) and Per Capita Income for Dar es Salaam (2012-2018)*

Year	GDP at Current Market Prices			Per Capita Income at Current Market Prices (TZS)	
	Tanzania Mainland (Million)	Dar es Salaam Region (Million)	(%) Share Contribution	Tanzania Mainland	Dar es Salaam Region
2012	62,318,659	10,552,067	16.93	1,429,327	2,419,087
2013	72,977,200	12,609,695	17.28	1,628,955	2,732,836
2014	82,603,388	14,207,783	17.20	1,793,387	2,909,594
2015	94,349,316	16,231,329	17.20	1,990,492	3,138,377
2016	108,362,324	18,425,324	17.00	2,225,099	3,369,642
2017	118,744,498	20,546,951	17.30	2,327,395	4,096,858
2018	129,364,353	22,577,225	17.45	2,458,496	4,348,990

**Source:** NBS (2019). *Regional GDP*



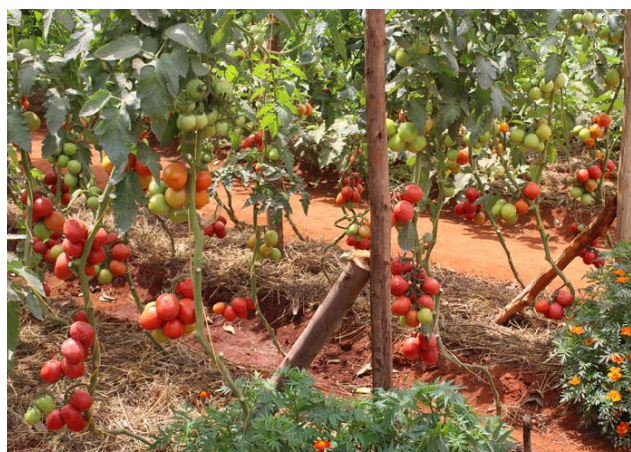
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## 2.8 Productive Sectors

Dar es Salaam Region is endowed with economic potentials in industrial production and business transactions. Major productive sectors include industries, transport, trade, tourism and fisheries. Other sectors are agriculture, livestock, forestry and mining.

### 2.8.1 Agriculture (Crop Farming)

Dar es Salaam has 67,300 hectares of arable land. Agricultural activities are mostly practised in peri-urban areas. Urban agriculture, including plant and animal husbandry, is an integral part of the local food system in Dar es Salaam, providing fresh vegetables including Chinese, cabbage, tomatoes, spinach, amaranths and a variety of other greens, sweet potato,



paddy, cassava, maize, pulses, and fruits such as cashew, coconut, banana, pineapple, papaya, spices and mushrooms. The characteristics of the region's peri-urban agriculture sector is quite variable, reflecting an engagement of low, middle and high-income groups. In recent years, high-income groups have become increasingly involved in peri-urban agriculture, mainly in horticulture crops.



Table 5: Food Crop Production Trend at Regional Level for 2015/16 - 2017/18

No.	CROP	YEAR											
		2015/16				2016/17				2017/18			
		Target		Actual		Target		Actual		Target		Actual	
		Ha	Tonnes	Ha	Tonnes	Ha	Tonnes	Ha	Tonnes	Ha	Tonnes	Ha	Tonnes
1	Cassava	835	7,515	808	16,908	835	7,515	510	3,939	835	7,515	514	4,239
2	Rice	905	1,810	784	2,419	905	1,810	560	552	905	1,810	423	1,880
3	Sweet potatoes	607	6,677	596	2,956	607	6,677	589	3,994	607	6,677	539	6,566
4	Maize	441	882	283	373	441	882	253	171	441	882	152	319
5	Cowpeas	617	309	608	290	596	298	162	147	217	109	170	150
6	Pigeon peas	31	22	27	145	31	22	224	20	30	21	21	23
TOTAL		3,436	17,215	3,106	23,092	3,415	17,204	2,298	8,822	3,035	17,014	1,818	13,176

**Source:** Dar es Salaam Regional Commissioner's Office 2020

Table 6: Cash Crop Production Trend at Regional Level for 2015/16 - 2017/18

No.	CROP	YEAR											
		2015/16				2016/17				2017/18			
		Target		Actual		Target		Actual		Target		Actual	
		Ha	Tonnes	Ha	Tonnes	Ha	Tonnes	Ha	Tonnes	Ha	Tonnes	Ha	Tonnes
1	Cashewnut	581	280	1.54	2118.84	296	280	18	146.89	102	81	28	25.8
2	Coconut	668	3440	79.62	2684.65	145	600	48.7	638.86	138.8	600	68.8	803.2
3	Orange	76	912	44	146.9	76	912	8.9	23	76	912	38	338.2
4	Pineapple	535	630	264.02	153.96	535	630	11.85	122.2	135	1620	126.28	1375.36
5	Raw banana	45	315	29.21	1746.47	45	315	15.1	78.6	45	315	43.52	223.24
6	Pawpaw	67	670	61.76	119	67	670	22.9	90.4	67	670	102.02	817.24
7	Passion	35	245	25	144	35	245	15.7	31	35	245	22	292
8	Mango	444	300	427.6	5293.1	20	300	7516.9	1192	73.4	300	65.4	615
9	Water melon	576	1180	572	10059.1	812.7	1180	878.8	10841.5	916.5	1180	903.7	12011.6
10	Amaranthus	560	8145	315.67	6313.5	1426	16482	757.04	10582.6	1234.1	20339	892.24	13118.92
11	Cucumber	385.4	678	366.3	2232.8	140.5	678	171.8	1579	112	670	102.7	1215
12	Chinese cabbage	114	1140	102.84	996.5	114	1140	320	1830.5	114	1140	211.46	1691.68
13	Sweet potato leaves	200	2000	189.5	1450.3	200	2000	263.5	2502	200	2000	300.03	3400.24
14	Cassava leaves	30	300	28.05	24	30	300	48	367	30	300	26.7	218
15	Okra	691.3	2344	65.1	2506.45	434	1290	155.41	1890.5	299.5	1191	63.59	971
16	Egg plant	20	500	11.23	38.29	20	500	67.22	1885.3	20	500	19.91	447
17	Collards	35	350	27.2	17.2	35	350	128.2	870	35	350	88.85	977.5
18	Sweet pepper	47	470	42.41	33.37	47	470	80.42	621.2	47	470	43.62	345.9
19	African egg plant	27	270	24.59	66.9	27	270	60.8	762	27	270	61.8	618
20	Tangerine	14	176	11.5	10.5	14	176	3	6.2	14	140	4	33
21	Lemon	13	130	4.2	5.5	13	130	6	8	13	130	5	40
TOTAL		5,164	24,475	2,693	36,161	4,532	28,918	10,598	36,069	3,734	33,423	3,218	39,578

Source: Dar Es Salaam Regional Commissioner's Office 2020

## 2.8.2 Livestock

Livestock keeping is one of the economic activities undertaken in Dar es Salaam Region. Animal husbandry contributes to household income and local food system in the region. Eggs, poultry, milk, and meat are supplied locally. In 2019, the



region had about 3,321,336 livestock out of which 15,220 were indigenous cattle, 34,793 exotic cattle, 17,982 indigenous goats, 4,544 exotic goats, 5,811 sheep, 20,739 pigs, 72 donkeys, 3,182,113 chickens, and 40,062 ducks. Livestock at district level are given in the table below.

**Table 7: Number of Livestock in Dar es Salaam Region in 2019**

Type of Livestock		Ubungo District	Kigamboni District	Temeke District	Ilala District	Kinondoni District	Total
Cattle	Indigenous	213	12,360	30	2,617	-	15,220
	Exotic (Dairy)	7,114	8,263	2,427	7,558	9,431	34,793
Goats	Indigenous	250	10,519	2,164	2,617	2,432	17,982
	Exotic (Dairy)	2,668	1,043	261	510	62	4,544
Sheep		1,460	3,415	271	220	445	5,811
Pigs		3,848	1,296	1,203	12,457	1,935	20,739
Donkeys		30	39	-	3	-	72
Poultry	Chickens	110,508	189,503	148,412	1,436,192	1,297,498	3,182,113
	Ducks	10,482	7,762	9,363	11,502	953	40,062
	<b>Total - Poultry</b>	120,990	197,265	157,775	1,447,694	1,298,451	3,222,175
<b>Total</b>		<b>136,573</b>	<b>234,200</b>	<b>164,131</b>	<b>1,473,676</b>	<b>1,312,756</b>	<b>3,321,336</b>

**Source:** Regional Commissioner's Office, 2020

The quality of livestock products like meat, milk, hides and skins and other related products depends mostly on availability, status and quality of infrastructure, such as crushes, abattoirs, hide and skin sheds, slaughter slabs, livestock market or auctions and accessibility to water. By 2019, Dar es Salaam Region had 7 slaughter slabs and managed to slaughter about 382,810 cattle, 89,229 goats, and 27,855 sheep. All the slaughtered animals were sold and their hides and skins were also marketed.

**Table 8: Number of Slaughter Slabs, Animals Slaughtered and Marketed Hides and Skins in 2019**

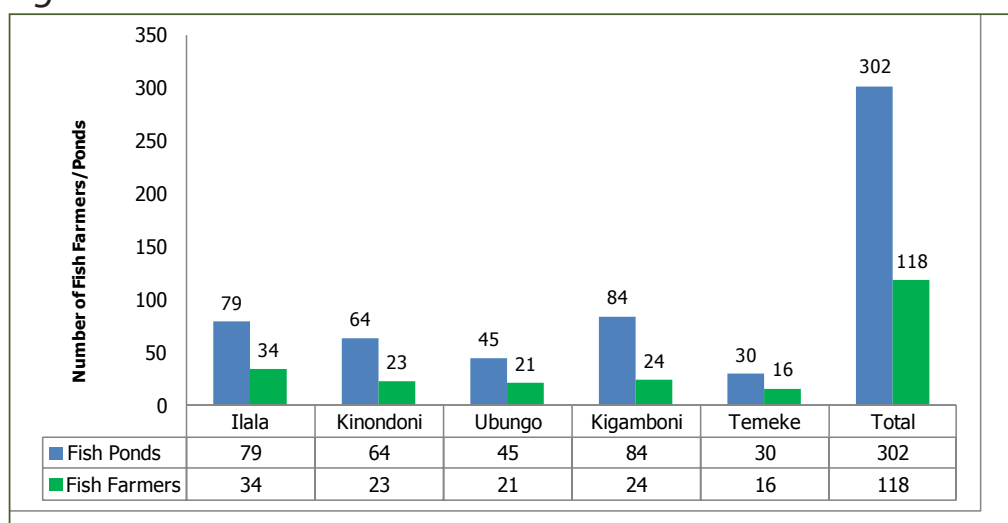
District	Number of Slaughter Slabs	Number of Animals Slaughtered			Marketed Hides and Skins		
		Cattle	Goats	Sheep	Cattle Hides	Goats Skins	Sheep Skins
Ubungo District	1	47,400	5,565	0	47,400	5,565	0
Kigamboni District	1	501	0	0	135	0	0
Temeke District	1	10,561	0	0	10,561	0	0
Ilala District	3	307,610	83,664	27,855	307,610	83,664	27,855
Kinondoni District	1	16,738	0	0	0	0	0
<b>Total</b>	<b>7</b>	<b>382,810</b>	<b>89,229</b>	<b>27,855</b>	<b>365,706</b>	<b>89,229</b>	<b>27,855</b>

**Source:** Regional Commissioner's Office, 2020

### 2.8.3 Fisheries

Dar es Salaam Region has a 112-kilometer coastline extending from Pemba Mnazi in Kigamboni District to Mbweni in Kinondoni District. The coastline is well endowed with mangrove forests and coral reefs, offering ideal ecological habitats for vibrant fish resources. In 2019, the region had 22 fish landing sites, 7,581 fishermen and 1,186 fishing vessels. Fish farming is an upcoming activity - in 2019 there were about 302 fish ponds and 128 fish farmers. There are 15 small-scale fish processing plants actively involved in fish value addition of fish and fisheries products.

**Figure 3: Fish Farmers and Fish Ponds in Dar es salaam in 2018**



**Source:** Data Computed from Dar es Salaam Regional Commissioner's Office, 2019

A number of fish species is caught and sold fresh at several fish markets and landing sites. One of the notable markets is Dar es Salaam Ferry Fish Market. Most common fish species available, depending on the season, include the following: shark and rays (*papa/taa*), blue fish/parrot fish/wrasses (*pono*), red snapper (*fuatundu*), groupers/rock cods (*chewa*), tuna (*jodari*), kingfish (*nguru*), solefish (*gayogayo*), marlins (*nduwaro*), sea catfish (*hongwe*), mackerel (*kibua*), barracudas (*mzia/msusa*), sardines (*dagaa*), rabbit fish (*tasi*), carangids (*kolekole*), needle fish (*mkule*), butterfly fish (*kipepeo*), milkfish (*mwatiko*), halfbeak fish (*chuchunge*), emperor fish (*changu*), goatfish (*mkundaji*), bream fish (*koana*) and cobia (*songoro*).

It is also not uncommon to find imported fish such as mackerels and Lake Victoria fresh-water fish (tilapia and Nile perch) being sold in various parts of Dar es Salaam Region.

Other fish resources are high-value shellfish products such as lobsters, octopus, prawns and crabs, which are mostly destined for export markets thus contributing significantly to Government revenue through export royalty.





Table 9: Fish Production in Tonnes in Dar es Salaam for 2011 - 2018

District	Type	2011	2012	2013	2014	2015	2016	2017	2018	Average
Ilala	Fresh Fish	5945.70	4274.00	5002.30	3126.87	4453.00	4304.40	10211.50	542.80	4732.57
	Frozen Fish	2475.50	2134.10	1175.20	1,051.7	1474.20	4415.10	3460.00	2070.20	2457.76
	<b>Total</b>	<b>8421.20</b>	<b>6408.10</b>	<b>6177.50</b>	<b>3126.87</b>	<b>5927.20</b>	<b>8719.50</b>	<b>13671.50</b>	<b>2613.00</b>	<b>6883.11</b>
Kigamboni	Fresh Fish						2934.2	3452	3855.2	3413.80
	Frozen Fish									-
	<b>Total</b>						<b>2934.2</b>	<b>3452</b>	<b>3855.2</b>	<b>3413.80</b>
Temeke	Fresh Fish	2653	2947	2960	2728	3027	275	137	139	1858.25
	Frozen Fish									-
	<b>Total</b>	<b>2653</b>	<b>2947</b>	<b>2960</b>	<b>2728</b>	<b>3027</b>	<b>275</b>	<b>137</b>	<b>139</b>	<b>1858.25</b>
Ubungo	Fresh Fish						92.5	143	170.9	135.47
	Frozen Fish						576.7	720.8	811	702.83
	<b>Total</b>						<b>669.2</b>	<b>863.8</b>	<b>981.9</b>	<b>838.30</b>
Region	Fresh Fish	8598.7	7221	7962.3	5854.87	7480	7606.1	13943.5	4707.9	7921.80
	Frozen Fish	2475.5	2134.1	1175.2	1051.7	1474.2	4991.8	4180.8	2881.2	2545.56
	<b>Total</b>	<b>11074.2</b>	<b>9355.1</b>	<b>9137.5</b>	<b>6906.57</b>	<b>8954.2</b>	<b>12597.9</b>	<b>18124.3</b>	<b>7589.1</b>	<b>10467.36</b>

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Given the increasing demand for fish and fish products, the sub-sector offers a unique investment opportunity in both fisheries and aquaculture value chains. The region is setting up a conducive business environment, such as improving marketing infrastructure in order create sufficient pulling force on the value chains. Another prime investment opportunity is sport fishing, which can be a popular activity among tourists.

#### 2.8.4 Forest Products and Beekeeping

There are forest reserves and mangroves in Dar es Salaam Region at Mabwe Pande, Mbweni, Kunduchi, Ununio, Msasani and Kawe in Kinondoni District; Kimbiji, Tungi Songani, Vijibweni - Mwalimu Nyerere Bridge, and Somangira in Kigamboni District; Zingiziwa, Kitunda, Kinyerezi, Chanika and Salender Bridge in Ilala District; and in Mtoni Kijichi, Kurasini, Toangoma and Kizinga in Temeke District. This helps to protect the environment and is also a tourist attraction.



Beekeeping, though practised at a small scale, is also one of the economic activities in the region. Modern beehives are found in the region to a large extent, but bee products have been recorded in small quantities.

#### 2.8.5 Minerals



There are no large mineral deposits discovered in Dar es Salaam Region. However, small-scale salt mining is practised along the coast line of the Indian Ocean. Sand and construction aggregates are also mined in some of the areas. There is an ongoing exploration at Kimbiji in Kigamboni District for confirming the presence of gas and fuel in that area.

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Being one of the market centres, Dar es Salaam Region receives minerals from other parts of the country. The region established a minerals market on 17 July 2019 with a total of fifty (50) traders. For the months of July - October 2019, the market sold 5,718,255.49 grams of minerals worth TZS 6,457,909,819. This market is important in the sense that it assures traders of getting essential services timely; provides security to the assets and traders engaged in mining; reduces auditing concerns to mineral exporters by establishing an audit section within the market; and improves Government revenue collection. There is a huge potential for value addition through mineral products given that most of the materials are sold in Dar es Salaam.

### 2.8.6 Tourism

Dar es Salaam Region is virtually the centre of eastern tourist circuit that stretches from the coastal towns of Kilwa, Mafia, and Bagamoyo up to Tanga. Dar es Salaam Region is endowed with numerous places of interest and tourist attractions, including tourist hotels that are increasing rapidly. There are several beaches, hotels and resorts which have been established along the coast line of the Indian Ocean and in the islands. Also, there are landmarks, museums, a zoo, art galleries and cultural centres.



**Museums:** Dar es Salaam Region has two of the five museums comprising the National Museum of Tanzania consortium, namely the National Museum proper and Makumbusho Cultural Centre and Village Museum. The National Museum is dedicated to the history of Tanzania; most notably, it exhibits some of the bones of *Paranthropus Boise* that were among the findings

of Dr Louis Leakey at Olduvai Gorge. Makumbusho Cultural Centre and Village Museum, located in the outskirts of the region on the road to Bagamoyo, showcases traditional huts from 16 different Tanzanian ethnic groups. There are also displays of traditional cultivations, and traditional music and dance shows are held daily. In 2016, there was a breakthrough discovery in Northern Tanzania by a scientist from the University of Dar es Salaam, of footprints



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thought to be of a hominid that predates homo sapiens. Close to the National Museum are also the botanical gardens, with tropical plants and trees.



**Beaches:** There are beaches on Msasani Peninsula north of Dar es Salaam and in Kigamboni to the south. Day trips from the city to the nearby islands of the Dar es Salaam Marine Reserve and to a spot for snorkelling, swimming and sunbathing are popular. Seven kilometres north of the region, is Bongoyo Island Marine Reserve,

which offers good snorkelling and diving sites for those who want to explore the water. The reserve boasts of its beautiful beaches, secluded islands and many varieties of marine species. Bongoyo Island Marine Reserve is well worth a visit and is a great way to spend a day out and see the coast. Another island worth visiting is Mbudya Island with similar characteristics as Bongoyo Island Marine Reserve.

**Culture:** Dar es Salaam is Tanzania's most prominent region in arts, fashion, media, music, film and television and a leading financial centre. The region is the leading arrival and departure point for most tourists who visit Tanzania, including the attractive hotels, national parks for safaris and the island of Zanzibar (Unguja and Pemba). Dar es Salaam is also the largest and most populous Kiswahili-speaking city in the world.

**Central Business District:** Dar es Salaam is Tanzania's most important region for both business and Government. The region contains high concentrations of trade and other services, as well as manufacturing compared to other parts of Tanzania, which has a large percent of its population in rural areas.



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Downtown includes small businesses, many of which are run by traders and proprietors whose families originated from the Middle East and the Indian sub-continent and whose settlement on the Tanzanian coast has had long-standing trading relations.

The Dar es Salaam Central Business District is made up of Kisutu, Kivukoni, Upanga, Mchafukoge and Kariakoo areas. All these areas making up the downtown are found in Dar es Salaam City Council. Kivukoni has the region's important fish market, the Magogoni fish market. Kivukoni also is the place where Tanzania's central bank, the Bank of Tanzania, is located, so is the Dar es Salaam Stock Exchange. Kisutu has businesses and offices and is the location of Dar es Salaam central railway station, the PSPF Tower and the TPA Tower.

**Landmarks:** Restaurants, shops, office buildings, and Government buildings are all common features of Tanzania's urban centre. During the German occupation in the early 20<sup>th</sup> century, Dar es Salaam was the centre of colonial administration and the main contact point between the agricultural mainland and the world of trade and commerce in the Indian Ocean and the Swahili Coast. Remnants of colonial presence, both German and British, can still be seen in the landmarks and architecture around the region. The National Museum, the Village Museum and many colourful markets are well worth a visit. Numerous historical landmarks, including St Joseph's Cathedral, the White Fathers' Mission House, the Botanical Gardens, and the old State House make for an interesting walking tour around the waterfront and city centre.

## 2.8.7 Industrial Development

Dar es Salaam is the leading zone in manufacturing activities in Tanzania. The region has about 27.6 percent of industrial and manufacturing value added, and 43.1 percent of the total of manufacturing value added in the country<sup>5</sup>. Industrial development in Dar es Salaam



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<sup>5</sup> NBS and MITI (2016) Census of Industrial Production 2013: Analytical Report, Dar es Salaam: Tanzania

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Region is a result of a friendly environment for investors in terms of access to services and infrastructure such as electricity, water, roads, international airport, secure markets, transportation of raw materials, and availability of skilled and semi-skilled labour.

On the whole, the economic development of Dar es Salaam Region is highly contributed not only by economic factors such as being a port gateway of the country and transport networks, but also by other advantages such as location of most of the private institutions that are agents of employment and migration in a wider perspective.

According to the National Bureau of Statistics (NBS), the grouping of enterprises as micro, small, and medium (MSMEs) and large is based on the criteria of capital outlay and number of people employed. This is in line with international recommendations that have been adopted in Tanzania to categorise industries as micro, small, medium, and large-scale. The classification of industries is as follows:

- Micro-scale: 1 - 4 staff employed and capital outlay (TZS) of less than 5 Million
- Small-scale: 5 - 49 staff employed and capital outlay (TZS) of 5 - 200 Million
- Medium-scale: 50 - 99 staff employed and capital outlay (TZS) of 200 - 800 Million
- Large-scale: 100 staff employed or more and capital outlay (TZS) of more than 800 Million

Dar es Salaam Region has continued with a verification exercise of all industries established since November 2015 to identify operational and dormant ones so as to provide needed support.

These industries involve production of more than 140 products, including steel/metals, mechanical tools, machinery and spare parts, plastic, glass, construction material, chemicals and pharmaceuticals, electronics, food and beverage processing, textiles and clothing, printing, furniture, jewellery and leather goods. The number of industries in Dar es Salaam has increased during the 2015-2019 period as shown by the table below.

**Table 10: Number of New Industries built in Dar es Salaam Region 2015-2019**

S/N	Type of Industry	Districts					Total
		Ilala	Kinondoni	Temeke	Ubungu	Kigamboni	
1	Large	15	22	14	3	7	61
2	Medium	15	10	12	61	4	102
3	Small	5	7	5	5	3	25
4	Uncategorised due to lack of information on capital invested	5	1	18	1	6	31
5	Existing but not operational	2	0	6	5	1	9
<b>TOTAL</b>		<b>42</b>	<b>40</b>	<b>55</b>	<b>75</b>	<b>21</b>	<b>233</b>

**Note:** There are more than 2,000 micro-scale industries not presented in this guide since their physical verification has not yet been completed. The region is aware of the rapidly increasing micro-scale industries in various sectors though their recognition and potentials are not well tapped.

**Source:** Regional Secretariat 2019 Annual Report

## 2.9 Informal Sector

In Dar es Salaam the informal sector plays an important role in reducing urban unemployment, crime and violence, and serves as a breeding ground for new entrepreneurs, which also contributes to poverty reduction since its roots go deep into household economy especially the urban population, which comprises of many migrants from rural areas that are not capable of securing formal employment.

People engaged in the informal sector are mostly street vendors and *Machingas*<sup>6</sup> obtaining goods from retailers and wholesalers. The Government is committed to supporting people involved in this sector by ensuring easiness in doing their daily activities so that they can graduate to formal businesses. Some of the initiatives to formalise the informal sector include issuing identification cards to petty traders, demarcating specific areas and/or building to petty traders, enhancing help-desks for informal sectors in all LGAs, establishing special business centres for *Machingas* (e.g. Simu 2000 market at Ubungu and Machinga Complex in Ilala), etc.

<sup>6</sup> *Machinga* is a Kiswahili word for petty traders, specifically street vendors and hawkers



## 2.10 Social Services

### 2.10.1 Education

Dar es salaam Region has the most advanced facilities in the country for offering all levels of education from pre-primary level to tertiary level.

#### a) Primary and secondary education

As of May 2020, the region had 739 primary schools and 365 secondary schools. Over fifty percent (50.2%) of all 739 primary schools in the region were publicly owned. On the other hand, the private sector owned 368 primary schools. In the same period, 42.7 percent of all 365 secondary schools in the region were publicly owned and the private sector owned 209 secondary schools. At council level, Ilala District had the largest number of primary and secondary schools while Kigamboni District had the lowest.



**Table 11: Number of Schools by Ownership and by Council in Dar es salaam Region in 2020**

Council	Primary Schools				Secondary Schools			
	Public	Percent Public	Private	Total	Public	Percent Public	Private	Total
Dar es Salaam City Council	120	52.2	110	230	54	52.9	48	102
Kinondoni Municipal Council	76	51.4	72	148	29	34.9	54	83
Temeke Municipal Council	79	56.0	62	141	31	47.0	35	66
Kigamboni Municipal Council	34	57.6	25	59	14	29.8	33	47
Ubungu Municipal Council	62	38.5	99	161	28	41.8	39	67
<b>Total</b>	<b>371</b>	<b>50.2</b>	<b>368</b>	<b>739</b>	<b>156</b>	<b>42.7</b>	<b>209</b>	<b>365</b>

**Source:** Regional Commissioner's Office (Education Department), Dar es salaam Region, 2020

## b) Tertiary education

Dar es Salaam Region has 39 higher learning institutions (universities, colleges and institutes) with physical presence in the region providing tertiary education. They include the University of Dar es Salaam (UDSM), Ardhi University (ARU), Muhimbili University College of Health and Allied Sciences (MUCHS), Mzumbe



University (Dar es Salaam Campus), Kairuki University, Open University of Tanzania (OUT), International Medical and Technological University (IMTU), St Augustine University (SAUT), Aga Khan University, Tumaini University College, Kampala International University (KIU), Dar es Salaam University College of Education (DUCE), Dar es Salaam School of Journalism and St Joseph College of Engineering.

Other institutions are Dar es Salaam Institute of Technology (DIT), College of Business Education (CBE), Institute of Finance Management (IFM), Mwalimu Nyerere Memorial Academy, Institute of Social Work (ISW), Tanzania Public Service College, Marine Institute, and Mbeya University of Science and Technology (MUST). All universities, colleges and institutes enrol eligible students from all corners of the country and outside the country.

**Table 12: Number of Technical Colleges and Higher Learning Institutions in Dar es salaam Region, 2020**

Type of Institution	2020				Percent of Total
	Public	Percent of Public	Private	Total	
Universities	16	66.7	8	24	61.5
Technical colleges	1	100.0	-	1	2.6
Teachers' colleges	0	-	12	12	30.8
VETA	2	100.0	-	2	5.1
<b>Total</b>	<b>19</b>	<b>48.7</b>	<b>20</b>	<b>39</b>	<b>100</b>

**Source:** Regional Commissioner's Office (Education Department), Dar es salaam Region, 2020

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## 2.10.2 Health Services

The health sector in Dar es Salaam Region provides curative, preventive, rehabilitative and promotive health-care. Curative services are provided in dispensaries, health centres, mobile health services, hospitals, and referral hospitals. As of May 2020, the region had 744 health facilities of which 496 are dispensaries, 67 health centres, and 181 hospitals.

Hospitals include Muhimbili National Hospital, Ocean Road Hospital, Mwananyamala, Amana and Temeke district hospitals. The following table indicates the type, number and ownership of health-care facilities available in the region.





**Table 13: Distribution of Health-Care Facilities by Category of Facilities, Ownership and by LGAs in Dar es Salaam Region, 2020**

LGA	Hospitals					Health Centres					Dispensaries				
	Public	Private	FBO	Parastatal	Total	Public	Private	FBO	Parastatal	Total	Public	Private	FBO	Parastatal	Total
Dar es Salaam City Council	4	7	0	4	15	5	11	0	8	24	34	86	4	17	141
Kinondoni Municipal Council	38	92	20	2	152	2	8	0	0	10	32	67	16	2	117
Temeke Municipal Council	2	4	0	0	6	4	8	1	3	16	24	69	17	1	111
Kigamboni Municipal Council	0	1	0	0	1	2	1	1	1	5	18	4	5	1	28
Ubungu Municipal Council	1	2	3	1	7	4	4	3	1	12	17	67	13	2	99
<b>Total</b>	<b>45</b>	<b>106</b>	<b>23</b>	<b>7</b>	<b>181</b>	<b>17</b>	<b>32</b>	<b>5</b>	<b>13</b>	<b>67</b>	<b>125</b>	<b>293</b>	<b>55</b>	<b>23</b>	<b>496</b>

**Note:** FBO stands for faith-based organisation

**Source:** Dar es Salaam Regional Commissioner's Office, 2020

### 2.10.3 Water Services

Access to water services in Dar es Salaam has improved significantly from 68 percent in 2015 to 90 percent in 2020. Water sources for residents in Dar es Salaam Region are lower Ruvu, Upper Ruvu and Mtoni distribution plants. Others sources being boreholes, shallow wells and deep wells. All plants have the capacity of supplying 502,000 M<sup>3</sup> per day compared to the demand of 544,000 M<sup>3</sup> per day (about 92 percent).



There are about 420 *mitaa* served with piped water from Lower Ruvu, Upper Ruvu and Mtoni distribution plants and 144 *mitaa* are served by either private or community boreholes. These *mitaa* are found in 25 wards, namely Chamanzi, Buza, Makangarawe, Kilakala, Toangoma, Mbagala Kuu, Mianzini, Yombo Vituka, Kimbiji, Somangila, Pemba Mnazi, Mji Mwema, Kigamboni, Vijibweni, Kibada, Ukonga, Chamazi, Gongo la Mboto, Kitunda, Kivule, Majohe, Msongola, Pugu, Tungi, and Kisarawe II. Several projects are being undertaken by the Government and private sector to ensure 100 percent water access in Dar es Salaam. For instance, the Kimbiji Water Project with 20 large wells will have the capacity of producing enough water to serve Kigamboni District.

**Table 14: Percentage of Population Served with Safe and Clean Water, 2015 and 2020**

District	2015			2020		
	Total population in districts	Population served with clean water	Percent population served with clean water	Total population in districts	Population served with clean water	Percent population served with clean water
Kinondoni District	1,012,788	759,591	75	1,143,836	1,086,644	95
Ilala District	1,330,131	1,064,105	80	1,517,132	1,441,275	95
Temeke District	1,310,904	852,088	65	1,495,076	1,345,568	90
Kigamboni District	176,907	53,072	30	202,219	90,999	45
Ubungo District	922,882	507,585	55	1,043,551	887,018	86
<b>Total</b>	<b>4,753,612</b>	<b>3,236,441</b>	<b>68</b>	<b>5,401,814</b>	<b>4,851,505</b>	<b>90</b>

**Source:** LGAs in Dar es Salaam Region (Water Supply and Sanitation Department), 2020 and NBS (2019), Sub-National Population Projection for Year 2013 to 2021 Based on the 2012 Population and Housing Census

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## 2.11 Economic Infrastructure

The region's economic infrastructure has been tremendously improved and strategic investments are being made to further improve the infrastructure. Various efforts have been made by stakeholders to improve transportation in the Region. These include TANROADS, Tanzania Rural and Urban Roads Agency (TARURA), DMDP and DART, rail agencies (TRC and TAZARA), ferry operations (TEMESA) and the Tanzania Airport Authority (TAA).

### 2.11.1 Transport

Dar es Salaam, on a natural harbour on the Indian Ocean, is one of the hubs of the Tanzanian transportation system as the main railways and several highways originate in or near the city to provide convenient transportation for commuters.

#### i) Roads



To reduce congestion in Dar es Salaam Region, efforts have been made to expand the network of new roads and improve existing ones by increasing the number of lanes. For the period of 2016 to 2019 there has been an increase in road construction and maintenance from

4,689.22 kilometres to 5,153.86 kilometres, equivalent to an increase of 464.64 kilometres. Tarmac roads increased from 904.22 kilometres to 1003.74 kilometres, gravel roads from 985.87 kilometres to 1,170.68 kilometres, and soil roads from 2,798.13 kilometres to 2,979.44 kilometres.

This means by 2019, Dar es Salaam had 5,153.86 kilometres of roads, from which tarmac roads were 1,003.7 kilometres (equivalent to 19.5%), gravel roads were 1,170.68 kilometres (equivalent to 22.7%), and soil roads were 2,979.44 kilometres (equivalent to 57.8%). On other hand, out of 5,153.86 kilometres of roads in Dar es Salaam, 601.21 kilometres categorised as trunk

roads and regional roads were managed and served by TANROADS, 4,552.65 kilometres categorised as district and feeder roads were overseen by TARURA under the Regional Coordinator and the councils directors.

**Table 15: Distributions of the Length of Road Network by Type of Surface and by District, Dar es Salaam Region, 2019**

District	Tarmac (km)	Gravel (km)	Earth (km)	Total
<b>TARURA</b>				
Ilala District	118.35	264.81	638.21	1021.37
Kinondoni District	152.72	393.45	1026.02	1572.19
Temeke District	89.48	105.02	357.12	551.62
Kigamboni District	1.26	317.87	563.82	882.95
Ubungu District	40.72	89.35	394.27	529.34
<b>Total - TARURA</b>	<b>402.53</b>	<b>1170.68</b>	<b>2979.44</b>	<b>4552.65</b>
<b>TANROADS</b>				
<b>Total - TANROADS</b>	<b>601.21</b>	<b>-</b>	<b>-</b>	<b>601.21</b>
<b>Grand Total</b>	<b>1003.74</b>	<b>1170.68</b>	<b>2979.44</b>	<b>5,153.86</b>
<b>Percentage</b>	<b>19.48%</b>	<b>22.71%</b>	<b>57.81%</b>	<b>100%</b>

**Source:** Dar es Salaam Regional Commissioner's Office, 2020

The main public transport used by many residents in Dar es Salaam Region is provided by commuter buses (*daladala*). The Government has also introduced a bus rapid transport or metro bus system commonly known as '*Mwendo Kasi*' in Kiswahili under the Dar Rapid Transit (DART) project.



The metro buses are managed by UDART, which is a partnership company between *Usafiri Dar es Salaam* (UDA) and the Government. The bus rapid transit system began operation on 10 May 2016. It is branded as UDA-RT (*Usafiri Dar es Salaam - Rapid Transit*).





The Government has also constructed Mwajumu Nyerere Bridge across the Indian Ocean, which connects Kigamboni and Temeke municipalities. To reduce traffic, jam the Government has constructed Mfugale flyover along Mandela and Nyerere intersection at Temeke District. Also, the Government has constructed the Ubungo

interchange connecting Morogoro, Mandela and Sam Nujoma roads as well as the expansion of Kimara-Kibaha section of Morogoro Road from four to six lanes.

## ii) Railway

### ***Dar es Salaam commuter rail:***

Travel to urban and sub-urban parts of Dar es Salaam is provided by the Dar es Salaam commuter rail. The Government initiated an urban train service by upgrading existing routes from city centre to Ubungo and establishing train



transport between Dar es Salaam and Pugu stations, which transports approximately 25,000 passengers per day. This transport has enabled travellers to arrive at workplaces on time and reduced traffic congestion.

In line with this, the Government is conducting a feasibility study for construction of new railway lines between Pugu, Mbagala/Chamazi, Luguruni/Kibaha and Bunju/Kerege/Bagamoyo areas.

***Intra-city railway:*** This is through the central line railway. Tanzania Railways Limited 'Central Line' trains connect Dar es Salaam with Kigoma and Mwanza via Tabora. There is also a spur line from Tabora to Mpanda.

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**International railway:** Tanzania standard gauge railway is a railway system under construction, linking the country to the neighbouring countries of Rwanda and Uganda, and through these two, to Burundi and the Democratic Republic of the Congo. The new standard gauge railway (SGR) is intended to replace the old, inefficient metre-gauge railway system. This 1,435 mm (4 ft. 8 1/2 in) railway line is intended to ease the transfer of goods between the Port of Dar es Salaam and the cities of Kigali in Rwanda and subsequently to Bujumbura in Burundi, and to Goma in the Democratic Republic of the Congo. From the lake port of Mwanza, surface water ferries are expected to transport goods between Mwanza and Port Bell and Bukasa Inland Port in Kampala, Uganda's capital city. The SGR system in Tanzania, in conformity with neighbouring Rwanda and Uganda, is designed to use electricity to power its locomotives. The SGR is expected to accommodate passenger trains travelling at 160 kilometres (99 miles) per hour and cargo trains travelling at 120 kilometres (75 miles) per hour.

The Tanzania-Zambia Railway Authority, popularly known as TAZARA, is a bi-national railway linking the Southern Africa regional transport network to Eastern Africa's seaport of Dar es Salaam, offering both freight and passenger transportation services between and within Tanzania and Zambia.

### iii) Water transport

Dar es Salaam has the nation's largest and busiest port, handling more than 90 percent of Tanzania's international trade. The port is located on the west of the Indian Ocean at Kurasini Creek south east of Dar es Salaam's central business district. According to the International Association of Ports and Harbours, it is the fourth largest port on the African continent's Indian Ocean coastline after Durban, Mombasa and Maputo ports.



Dar es Salaam Port acts as a gateway for commerce and trade for Tanzania and numerous bordering land-locked states including Malawi, Zambia, Democratic Republic of Congo, Burundi, Rwanda and Uganda. About

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35 percent of cargo moving through the port is foreign owned and Dar es Salaam Port facilitates countries that rely heavily on it and gives them licences to operate their own cargo centres. The foreign cargo centres help countries to process cargo from their respective countries to increase efficiency and reduce costs. Tanzania Ports Authority (TPA) oversees the administration of seaports and inland lake ports in Tanzania.

In partnering with the private sector, the Government has continued to improve transport services at the port of Dar es Salaam by strengthening and deepening gates number 1–7, building new gates such as gates number 13 and 14 as well as a gate to serve vessels that are shipping cars (RoRo), and improving the cargo unloading system in Dar es Salaam by installing an electronic window system and installing meters for petroleum, so as to increase the level of performance, to just mention few.

Within Dar es Salaam there are three ferries from Kigamboni District to Ilala District: MV Magogoni, MV Kigamboni and MV Kazi, providing transport services 24 hours 7 days a week. There are also numerous ferries and boats making trips to Zanzibar and to islands close to Dar es Salaam. Since Dar es Salaam lies on the sea shore, investment in commuter vessels can be a viable venture. Vessels plying on the Indian Ocean can facilitate transportation of people and goods between the region's districts and the neighbouring districts of Mkuranga and Bagamoyo.

#### **iv) Air Transport**

Julius Nyerere International Airport (JNIA), located in Dar es Salaam is the largest and busiest airport of the four international airports in Tanzania. Terminal Three at JNIA was opened in mid-2019.



This terminal alone can handle 6.5 million passengers annually, more than twice the capacity of terminal two's 2.5 million.



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## 2.11.2 Media and Telecommunications

**Newspapers** in Dar es Salaam are often sold by people prowling through stationary traffic at road intersections. English-language ones, with online presences, include The Citizen The Guardian, and Daily News; Kiswahili dailies are *Habari Leo*, *Tanzania Daima*, *Mwananchi* and many more. Business Times is the financial and economic newspaper in the city established in 1988 and became the first private newspaper in Tanzania. Business Times owns Majira newspaper.

**Television stations:** Dar es Salaam is home to TBC, ITV, Sibuka, Channel Ten television station formerly known as Dar es Salaam Television (DTV), Azam TV, Clouds TV, Wasafi TV, and many more. There are also many online TVs, including Ayo TV.

**Internet access:** Installation of a trans-Indian Ocean backbone cable in 2009 has made Internet access much more readily available in Dar es Salaam in particular and in East Africa in general. End-users get internet services from Tanzania Telecommunications Company Limited through purchase of bandwidth for small ISPs.

Mobile-telephone access to the Internet via 3G, 3.75G and 4G is available in the region. Internet cafés are found in the region and free WiFi hotspots are found in various Government and non-government institutions as well as public transport. Internet access has enabled mobile banking.



**Telephones:** Mobile telephone companies, namely Airtel, Vodacom, Halotel, Tigo and Zantel, have invested heavily in the region. The region has full access to mobile networks.

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### 2.11.3 Energy

Demand for electricity in Dar es Salaam Region is 650 MW and this amount is received from the National Grid as an electricity supply to the region. From January 2016 to September 2019 the Government has implemented various electricity - related projects in Dar es Salaam, especially in the TANESCO regions of Ilala, South Kinondoni, North Kinondoni and Temeke.



The completed projects include Kinyerezi II, Temeke and Kigamboni. These projects involved construction of 33KV, 11KV and 0.4 KV electrical transmitters, installation of transformers as well as construction of small projects. Large power stations and distribution facilities have been upgraded and new facilities built.

Transformers with 15MVA, 33/11KV have been installed in each of power stations, with Muhimbili National Hospital being the new station. Implementation of these projects has significantly reduced/eliminated the problem of power outages. National gas electrical generation plants are under construction at Kinyerezi in order to complement the capacity of the existing national grid system so as to enhance stable power distribution.

The Julius Nyerere Hydro-power Project, also called Rufiji Hydro-electric Power Project, is a 2,115 megawatts hydro-electric dam under construction. The power station is expected to produce 5,920GWh of power annually that will support industrialisation and household consumption in Dar es Salaam Region and in Tanzania at large.

## PART THREE

# PRIORITY INVESTMENT OPPORTUNITIES IN DAR ES SALAAM REGION

This part presents priority investment opportunities identified by the region. The opportunities are grouped into regional level and council level priority investment opportunities. Land earmarked for investment is also presented in this part.

### 3.1 Land Earmarked for Investments in Dar es Salaam Region

Council	Location	Land Allocated (ha)	Investments Targeted
Dar es Salaam City Council	Jangwani near Msimbazi Valley	400	Construction of Dar es Salaam City Park
	Buguruni	0.53	Construction of a modern market
	Buguruni	1.5	Building a modern market, a parking lot for loading and offloading agricultural products, storage facilities, shopping mall, and banks
	Ilala Market	0.94	Building a modern market, a parking lot, a shopping mall, and banks
	Mchikichini Market	2.8612	Construction of a modern market, banks, and shopping malls
	Lukooni	6.12	Building a modern bus stand
	Chanika	100.45	Establishing an animal zoo
Kigamboni Municipal Council	Gezaulole (NAFCO Area)	100	Creation of a Centre for Innovation/Technology Hub
	Kisarawe II	100 plots	Establishing an integrated industrial park
	Kisarawe	31.719	Establishing a facility for ship building and ship repairing services
	Pemba Mnazi	784.84	Building a fish-processing plant, a factory for producing medical laboratory equipment and supplies, tourist hotels, etc.

	Near Bus Stand	0.5664	Construction of a modern wholesale market
	Buyuni	31.79	Building a modern fish market
	Mjimwema	0.459	Building a modern bus stand
	Tungi	6	Establishing a parking facility for heavy trucks (lorry park)
	Gezaulole	23	Establishing modern agriculture practice
	Kigamboni	216.4	Establishing boat riding, sport fishing, recreation facilities, tourist hotels, etc
		153	Construction of solid wastes management facility
<b>Kinondoni Municipal Council</b>	Mabwepande	35	Establishing a specialised skills development institute
	Bunju B and Mabwepande	50	Construction of modern markets
	Msasani and Ununio	15	Establishing modern fish markets
	Ununio, Mbweni, Kawe, Mbezi	101	Constructing recreation centres for children and adults
	Mabwepande	34	Building an abattoir
	Oysterbay in Kinondoni	50	Building tourist hotels
	Boko Basihaya	6.2716	Construction of a modern bus stand
		200	Constructing a solid wastes management facility
<b>Ubungo Municipal Council</b>	Ubungo Industrial Area	1.435	Building a factory for producing packaging materials
	Mbezi Luis	2.5	Constructing a modern market
	Mbezi Luis	1.225	Establishing a real estate management facility
	Kwembe	39	Constructing an abattoir
	Mbezi Luis	0.6	Construction of a shopping mall
		20	Establishing a solid wastes management facility
<b>Temeke Municipal Council</b>	Mbagala, Tandika and TAZARA	2.5592	Building modern markets
	Chamazi, Toangoma and Temeke Mwisho	23.9536	Constructing a bus stand
	Toangoma	42	Establishing a modern sports arena

## 3.2 Regional Level Priority Investment Opportunities

Based on availability of raw materials and/or availability of required infrastructure to support particular investment(s), Dar es Salaam Region has identified ten (10) key investment opportunities to be recognised and implemented at region

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level. These include: establishment of an integrated industrial park; production of packaging materials; leather processing and leather goods production; establishing a specialised skills development institute; building a fish processing plant; establishing a facility for production of medical laboratory equipment and supplies such as syringes and cotton wool; establishment of a modern health diagnostic centre; creation of a centre for innovation/technology hub; establishing a facility for ship building and ship repairing services; and investing in Dar es Salaam City Park. Regional level investment opportunities have two main attributes: first, it is their scale and scope, which transcend beyond those of individual local government authorities; and second, the opportunities are large enough to serve all local government authorities in the region. Specific details for each opportunity are given below.

## **A. Tourism sector**

### **1. Investment in Dar es Salaam City Park**

The rapid expansion of Dar es Salaam in terms of population growth, extension of built up areas and densification, puts pressure on all aspects of its living conditions. Public spaces in central areas of the region are becoming scarce and are largely hard surfaces without green cover or tree canopy. The streets are predominantly devoid of trees and other vegetation, and outside the city centre trees are still cut illegally for charcoal or provisional timber works.



The qualities of green spaces in lagoons, river basins and brooks that cross the city are degraded because of urban pressure, unplanned building activities, solid waste dumping, toxic industrial effluents and largely untreated sewage. The lack of soft landscaping, green spaces and tree cover is contributing negatively to the micro-climate of the region and its potential to absorb peak rainfall.



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The Government, in collaboration with some development partners and local communities, is developing strategic plans to transform the 400 hectares of the lower basin into one city park. The park will be well landscaped to make it attractive for the people of Dar es Salaam and for visitors; a refined design of the various terrace levels will be done to shape interesting spaces which allow for various park activities and planting conditions. The detailed landscape design stage will take into account the shape and angle of the terraces to make sure the shallow green slopes are durable and capable of withstanding extreme peaks of floods. This is done through *Strategic Management Framework* and *Detailed Plan* for Lower Msimbazi Basin, which presents an integrated development framework with the following objectives: 1) flood risk reduction and protection; 2) improved solid waste management; 3) improved eco-systems and biodiversity; 4) re-settlement of vulnerable people and businesses in flood risk areas; and 5) city park/special planning. A pipeline of investments to implement the framework has been developed, with priority cross-cutting interventions identified as:

- Removal of excess sediment in lower Msimbazi Basin, thereby increasing the channel capacity
- Widening and deepening of Msimbazi Channel to further enhance capacity
- Using the excess sediment to create erosion and flood protection terraces at various levels.



With the Msimbazi Strategy and Management Framework and the Detailed Plan for the Lower Basin as the guide, there is now the opportunity to mitigate the chronic issue of flooding in Msimbazi Valley. At the same time, there is an opportunity to breathe new life into the region by restoring the ecological

functions of the river basin and unlocking development potential through transforming parts of the currently hazardous low lands into safe, buildable space within the core of Dar es Salaam. The short-term time horizon for Stage 1 of the Msimbazi Opportunity Plan (MOP) is 2024. Over the five-year period between 2019-2024, the lower basin from Selander Bridge to the Kawawa Bridge can be transformed from a degraded area where people's lives, assets

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and infrastructure are highly vulnerable to flood risk, to a newly landscaped city park, where infrastructure assets are safeguarded, people are no longer in harm's way, and new terraced areas provide safe spaces for housing, commercial activities, sports and leisure.

Informed by scientific research, professional knowledge and community experience have established that Msimbazi Basin could perform at least eight (8) vital functions for the Region of Dar es Salaam:

- Discharge storm water
- Provide drinking and grey water
- Offer space and suitable conditions for biodiversity-rich coastal forest and mangrove vegetation
- Provide safe and healthy locations for settlement along the edges of the river plains
- Include space for public and private infrastructure assets
- Provide space for serviceable roads and bridges that cross the Msimbazi Basin as essential transport corridors
- Offer lands for growing healthy food in the flood plains for the city population
- Provide public, open-access spaces for sports and leisure activities.

### Overview of the investment opportunity in Dar es Salaam City Park

#### Key features



- Over the five-year period from 2019 to 2024, the lower basin from Selander Bridge to Kawawa Bridge can be transformed from a degraded area where people's lives, assets and infrastructure are highly vulnerable to floods, to a newly landscaped city park
- The Government will then invite investors to build a park that offers recreation and green space to city's residents and visitors. The park will include playgrounds, gardens, running and fitness trails or paths, bridle paths, sports fields and courts, public restrooms, picnic facilities etc.





	<ul style="list-style-type: none"> <li>▪ The park will be developed at Jangwani near Msimbazi Valley where part of 400 hectares will be available for that purpose</li> <li>▪ Interested individuals and firms will also take advantage of the developed valley to invest in related facilities such as hotels, water sports, etc.</li> </ul>
<b>Key investment rationale</b>	<ul style="list-style-type: none"> <li>▪ City parks help connect urban dwellers with their environment and may even preserve or restore natural areas close to pristine conditions.</li> </ul>
<b>Available support</b>	<ul style="list-style-type: none"> <li>▪ The Dar es Salaam 2012 - 2032 Master Plan notes the following: "Increasing the system of green areas: existing urban parks to be preserved, increased and improved; new parks to be realised, especially fluvial parks; a system of district or local parks to be implemented in adequate spaces".</li> </ul>

## B. Education sector

### 2. Creation of a centre for innovation/technology hub

Overview of the opportunity	
<b>Key features</b>	<ul style="list-style-type: none"> <li>▪ Investors are invited to establish a centre that would impact entrepreneur skills – the set of unique qualities that endow individuals and enable them to identify opportunities and take risks to see the idea through to realisation as a business</li> <li>▪ On technical skills, the centre of innovation will be well served by local tertiary institutions, producing graduates who are able to obtain jobs at locally invested tech institutions</li> <li>▪ Key elements of the innovation ecosystem should include: <ul style="list-style-type: none"> <li>✓ A facilitation platform or hub</li> <li>✓ Complementary resources and capabilities are also vital. These include knowledge resources, technology-related skills and funding to support</li> </ul> </li> </ul>



## Overview of the opportunity

	<p>the creation and commercialisation of products and services. This helps to ensure that each member of an innovation ecosystem derives value that is greater than what it can generate alone</p> <ul style="list-style-type: none"> <li>✓ Small and medium enterprises can work together with members of the ecosystem that specialise in knowledge creation through research and development – universities, for instance; in this way businesses gain the knowledge they need to develop high quality technical products or services.</li> <li>▪ About 100 hectares have been set aside at Gezaulole (NAFCO Area) in Kigamboni District for establishment of the proposed centre for innovation/technology hub.</li> </ul>	
<b>Key investment rationale</b>	<ul style="list-style-type: none"> <li>▪ Innovative entrepreneurs with technical skills are in short supply in Tanzania and there are few centres that encourage such behaviour. Instead, the economy is dominated by relatively few market players and many industries are not competitive</li> <li>▪ There is a need to change young people's mindset and encourage them to be innovative in starting businesses.</li> </ul>	
<b>Available support</b>	<ul style="list-style-type: none"> <li>▪ Tanzania Development Vision 2025</li> <li>▪ The Second Five-Year Development Plan 2016/17-2020/21</li> <li>▪ The Integrated Industrial Development Strategy.</li> </ul>	

## 3. Specialised Skills Development Institute

### Overview of the opportunity

<b>Key features</b> 	<ul style="list-style-type: none"> <li>▪ The investment will target skills needed to support the region's economic transformation agenda. This calls for skills development in a number of areas that would support productivity and quality of outputs in the following sectors: value addition (primary processing) for agricultural crops, milk, and fish; leather industry and leather-related value addition; technicians of various fields; fishing; various fields in arts including theatre; leadership in sports; production and marketing</li> </ul>
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## Overview of the opportunity

entrepreneurship; sorting, grading, packaging and branding of products; hospitality industry etc.

- More specifically, investors are invited to build specialised vocational education training institute for developing skills mentioned above and others to be identified by stakeholders
- The length of the training programme will vary from very short time (one month to twelve months) depending on the needed skills
- About 35 hectares of land at Mabwepande in Kinondoni Municipality have been allocated for this investment
- Investors are also expected to acquire land from private individuals or enter joint ventures with individuals who own land in Dar es Salaam City Council or Ubungo Municipal Council.



## Key investment rationale

- Third Five-Year Development Plan (FYDP III) 2021/22-2025/26, targets that by year 2020 the working population with high skills will have increased to 12.1 percent from 3.6 percent, while those with medium-level skills will have increased to 33.7 percent from 16.6 percent and the population with lower level of skills will have decreased from 79.9 percent to less than 54 percent. To achieve the set targets, specific actions are needed in the following aspects: promotion of employable skills, particularly for youth, women and people with disability; development of appropriate curricular; and training of skills and entrepreneurship including industry and labour market
- Need to create a pool of skilled and competitive workforce needed in the region by both public and private sectors
- The region's economic transformation agenda calls for skills development in a number of areas that would support productivity and quality of outputs in the following sectors: value



## Overview of the opportunity

addition for agricultural crops, leather industries and leather related value addition, construction technicians, production and marketing entrepreneurship, sorting, grading packaging and branding of products, hospitality industry among others. The duration of training will differ from training needs and the training will accommodate those who need hands-on skills such as primary processing of fruits and vegetables and green house farming

- The majority of horticultural/agricultural commodities are marketed in their raw forms, thus losing opportunities for higher earnings and for generating employment. Agro processing has a huge potential for increasing incomes through value addition, as well as increasing shelf life and access to food security through the establishment of small-scale agro processing enterprises and rural-based industries. Value addition activities in rural areas tend to increase local employment and incomes and usually have a positive impact on the local economy, mainly due to forward and backward linkages
- Training at various levels of skills requirement such as formal and entrepreneurial; promoting skills development for employability and sustainable livelihoods; strengthening and promoting apprenticeship and internship in the country; increasing the number of internship and apprenticeship programme in collaboration with employers and trade unions; formalise skills acquired through the informal system of learning; strengthening the Labour Market Information System; and strengthening in-house training in collaboration with employers and workers.

## Available support

- The National Employment Policy 2008, Education and Training Policy 2014, as well as skills development guidelines provide the framework for smooth implementation of intervention
- The Third Five-Year Development Plan (FYDP III) categorically recognises the important role of skills development as a major catalyst for transforming economies at national and sub-national levels. It is because of this recognition that Dar es Salaam Region and its sub-national level governments call for

### Overview of the opportunity

investment in building a skills-development training institute. To support establishment of such an institution, the Government has established a fund, whose sources include skills development levy paid by all employers. This is supported by the Education and Training Policy of 2014

- SIDO supports business development services (technical training courses, and business management and entrepreneurship training, among others), technology development services (product and technology development including the development and support of design skills, and the application of new technologies), among others
- Supportive institutions: College of Engineering and Technology (CoET) that was founded in 2001 through the transformation and integration of the Institute of Production Innovation (IPI) and the existing Faculty of Engineering (FoE) at CoET
- Technical and vocational education and training development programme (TVETDP).

## C. Health sector

### 4. Production of medical laboratory equipment and supplies, such as syringes and cotton wool

#### Overview of the opportunity

##### Key features



- Interested parties are invited to invest in the production of medical instruments and basic medical supplies like syringes and cotton wool
- Investors will utilise part of 784 hectares available at Pemba Mnazi in Kigamboni Municipal Council for this investment.

##### Key investment rationale

- To some extent Tanzania is dependent on imports of medical equipment and supplies, including medicines. This kind of investment will reduce dependence and cut down medical costs.





<b>Available support</b>	<ul style="list-style-type: none"> <li>Tanzania's health policy allows private sector investments in the health sector</li> <li>FYDP III has identified manufacturing of medicines and medical supplies as one of the country's top priorities.</li> </ul>
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## 5. Establishment of a modern health diagnostic centre

Overview of the opportunity	
<b>Key features</b> 	<ul style="list-style-type: none"> <li>Investors are invited to establish a large and modern health diagnostic centre</li> <li>The centre will diagnose all health issues in Tanzania, including those which will be received from neighbouring countries</li> <li>The investment can be done through public-private partnership (PPP) with Mnazi Mmoja Hospital in Dar es Salaam City Council.</li> </ul> 
<b>Key investment rationale</b>	<ul style="list-style-type: none"> <li>This investment will help to reduce pressure that may arise in the existing diagnostic centres in the country.</li> </ul>
<b>Available support</b>	<ul style="list-style-type: none"> <li>The Second Five-Year Development Plan (2016/17-2020/21).</li> </ul>

## D. Industrial sector

## 6. Establishment of an integrated industrial park



Overview of the opportunity	
<b>Key features</b>	<ul style="list-style-type: none"> <li>The region has allocated land at Kisarawe II in Kigamboni for establishment of industries</li> <li>There are about 10,000 plots of varying sizes that have been set aside for this investment</li> <li>The proposed industrial park is located close to transport, facilities including the Dar es Salaam Port, and highways</li> <li>The proposed industrial park will have the following complementary services and features:</li> </ul> 

	<ol style="list-style-type: none"> <li>1. <b>Cluster:</b> Assembling and repackaging machinery, equipment, and other industrial goods for value addition, e.g. farm machinery and implements, warehouses, distribution centres, factories, equipment, etc.</li> <li>2. <b>High technology clusters</b> (in the longer term)</li> <li>3. <b>Packaging and supply chain management facilities</b></li> <li>4. <b>Automotive zone</b></li> <li>5. <b>Agro processing industries</b> for value addition of horticulture products, meat processing and packaging, grain mills, etc.</li> <li>6. <b>Pharmaceutical industries</b> (drugs and medical equipment manufacturing).</li> </ol>
<p><b>Key investment rationale</b></p>	<ul style="list-style-type: none"> <li>■ The region is also positioning itself with the aim of becoming Tanzania's innovation capital. This will be done through attracting ICTs-linked investment and companies. All this will be built on strong public-private partnership in building the urban economy</li> <li>■ Industrial parks bring together complementary services and features that will benefit companies that occupy space there. Ports provide access for commodities and finished products to major industrial hubs for distribution. Cranes and other heavy lifting equipment available at the industrial park are used to transfer cargo to trucks and railroad cars. The cargo can also be stored at warehouses located within the industrial park. Manufacturers based in an industrial park that has port access can quickly procure the materials with which they need to produce goods</li> <li>■ Some other reasons for setting aside land for creating an industrial park include the following: <ul style="list-style-type: none"> <li>✓ Enhancing dedicated concentration of infrastructure in an area so as to reduce business expenses related with infrastructure</li> <li>✓ Attracting new businesses through provision of an integrated infrastructure in a location</li> <li>✓ Reducing environmental impacts of industrial wastes.</li> </ul> </li> </ul>

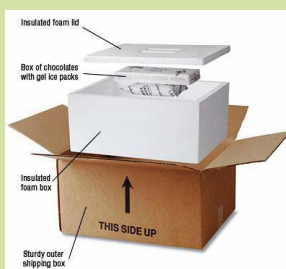


<b>Available support</b>	<ul style="list-style-type: none"> <li>▪ National and regional authorities</li> <li>▪ Integrated Industrial Development Strategy (IIDS) 2025</li> <li>▪ FYDP III.</li> </ul>
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## 7. Production of packaging materials

Overview of the opportunity	
<b>Key features</b> 	<ul style="list-style-type: none"> <li>▪ Investing in the production of appropriate packaging materials for various goods, so as to cater for the high demand of these materials from industrial and agricultural producers, particularly those who are in the horticulture sub-sector</li> <li>▪ The region has earmarked 1.435 hectares at Ubungo Industrial Area, in Ubungo Municipal Council for this investment</li> <li>▪ The proposed industry is expected to serve the whole region.</li> </ul>
<b>Key investment rationale</b> 	<ul style="list-style-type: none"> <li>▪ Appropriate packaging materials provide basic functions, i.e. simplified and easy-to-handle transportation; protection against external wear and tear; necessary legal information on packaged content and its use; facilitation of consumer's use and preservation of the environment</li> <li>▪ Packaging provides an opportunity to put a brand name on a product, thereby helping to separate the branded product from the 'faceless' and 'unbranded' competition and thus attracting more customers through contact information on the labels</li> <li>▪ Packaging materials currently in use do not meet quality and standards required by various products</li> <li>▪ Proper packaging materials will reduce post-harvest losses and elongate shelf life of some delicate produces, especially horticulture crops</li> <li>▪ The Government, through the Tanzania Bureau of Standards (TBS), has been calling for the private sector to invest in the production of packaging materials</li> <li>▪ This will meet demand for packaging materials emanating from expected investments in primary and secondary processing as well as establishment of modern markets and shopping malls. In this way, the Government policy to ban the use of plastic packaging materials will be easily abided to.</li> </ul>

## Available support



- This investment is in line with Government's industrialisation policy, which, among other things, promotes value addition at both primary and secondary levels
- Good infrastructure which includes roads networks, communication, electricity and markets; and 75 percentage import duty relief on Deemed Capital Goods including equipment's, utility vehicles and some building materials through TIC.

## 8. Leather and leather products production

### Overview of the opportunity

#### Key features



- Building a leather processing factory that will convert raw materials into grain leather (pre-tannery processing) to produce softened leather for the market
- Interested parties may also invest in the production of various leather goods
- Investors are expected to enter into joint ventures with private individuals owning land in Dar es Salaam City Council or any other council in Dar es Salaam to establish the proposed industry.



#### Key investment rationale



- Dar es Salaam Region is the main consumer of meat, so a large number of livestock (about 1,370), including cattle, sheep and goats, are slaughtered per day in the region
- The region's strategic location is aimed to serve its investors in minimising transportation time and costs to/ from international and local entities
- This will create new job opportunities (direct & indirect) in various activities related to the leather industry
- The region is best placed to provide marketing and promotion of factories locally and internationally through exhibitions and facilitating exports to international markets
- The region is best placed to promote integration with international supply chains
- Tanzania is the second African country with largest number of livestock, estimated at 25.6 million cattle, 16.7 million goats and 8.7 million sheep





- Tanzania exports raw and semi-processed hides and skins, particularly wet blue. The tanning process also ends on the lower stages, mainly producing up to wet – blue. The transformation to finished leather or crust is very minimal, ranging between 5 percent and 10 per cent per annum. Capacity for finished leather and manufactured leather products is low
- In order to protect local processing of leather, the Government has been taking various measures, including banning importation of raw hides and imposing high import duty on hide products
- Leather quantity is expected to increase with the modernisation of the slaughterhouses in Dar es Salaam and neighbouring regions
- There are very few leather processing plants in Tanzania, therefore more are needed. Existing plants are Moshi Leather industries; Tanzania Leather Industries; Afro Leather; Kibaha Tannery; Himo Tannery and Salex Tannery.

#### **Available support**

- The region provides superior infrastructure facilities and services to support the factories as well as the provision of safety and security for manufacturers and region's visitors
- Government priority to ban export of live animals
- Leather products in Tanzania are in line with the country's leather development strategy. Leather industry is also one of the key industries which FYDP III has singled out for promotion
- Reduced corporate tax rate from the normal 30 percent to 20 percent for a new entity dealing with processing of leather products
- Seventy-five percent (75%) import duty relief on deemed capital goods including equipment, utility vehicles and some building materials through TIC
- Renewed Government commitment to support development of leather sector through enforcement of laws and upgrading of rural extension services
- Direct VAT exemption on imported plant and machinery.



## 9. Fish processing

Overview of the opportunity	
<p><b>Key features</b></p> 	<ul style="list-style-type: none"> <li>▪ The region produces about 10,467 tonnes of fish per year, production is expected to increase with anticipated investments in fisheries of both territorial waters and exclusive economic zone, as well as marine culture</li> <li>▪ Fish catch is currently being processed mostly by small-scale fisher folks using traditional methods of drying, smoking and salting</li> <li>▪ This offers an investment opportunity of establishing a plant with innovative processing technologies for value addition of fisheries and aquaculture produce</li> <li>▪ About 784.84 hectares of land at Pemba Mnazi in Kigamboni Municipal Council have been allocated for industrial development and other investments, therefore investors will acquire part of the land for establishing the proposed processing plant. Also, investors are expected to enter into joint ventures or acquire land from private individuals who own land in Temeke Municipal Council to establish the proposed industry</li> <li>▪ The investor is expected to undertake a detailed feasibility study for the proposed processing plant, which is expected to serve Dar es Salaam Region and beyond.</li> </ul> 
<p><b>Key investment rationale</b></p>	<ul style="list-style-type: none"> <li>▪ More fish catch is expected from new investments in fisheries of both territorial waters and exclusive economic zone Anticipated investments are expected to increase production of fish, particularly high-valued tuna and tuna-like species</li> <li>▪ Investments in marine culture in areas of farming of finfish (including cages) as well as culture of prawns, mud crabs and sea cucumbers will generate additional raw materials for the proposed plant</li> <li>▪ Presence of fish-processing plants will act as an incentive to fisher folks and aqua farmers to produce more, as they will be assured of a ready market.</li> </ul>

<b>Available support</b>	<ul style="list-style-type: none"> <li>Value addition to fish is one of the prioritised investments in the Third Five-Year Development Plan (FYDP III) 2021/22-2025/26.</li> </ul>
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## E. Construction sector

### 10. Ship building and ship repairing services


Overview of the opportunity	
<b>Key features</b> 	<ul style="list-style-type: none"> <li>Investment in shipyards and docks for ship building and ship repairing along the coastline of Kigamboni</li> <li>About 31.719 hectares of land have been allocated at Kisarawe in Kigamboni Municipal Council for this investment.</li> </ul>
<b>Key investment rationale</b> 	<ul style="list-style-type: none"> <li>There are limited facilities for ship construction and repair services at major Eastern African ports of Djibouti, Mombasa, Madagascar and Maputo along the coast of the Indian Ocean</li> <li>Kigamboni has an ideal shipyard location for this investment.</li> </ul> 
<b>Available support</b>	<ul style="list-style-type: none"> <li>Tanzania trade and industrial policy with a focus on integrated markets needed by both exporters and importers.</li> </ul>

### 3.3 Council Level Priority Investment Opportunities

At council level, interested parties are invited to invest in solid wastes management; establishment of business parks; construction of modern markets and researched facilities; beach tourism and related activities; establishment of animal zoos; rivers and valleys development; establishment of abattoirs; construction of modern fish markets; fish farming; construction of modern bus stand and related facilities; modern sports arenas; establishment of modern agriculture practices; chicken value chain; and real estate development. Detailed information about council level priority investment opportunities is given below.

## A. Construction sector

### 1. Investing in establishment of business parks

Overview of the opportunity	
<p><b>Key features</b></p> 	<p>Interested parties are invited to invest in a business park, which will include: office buildings including professional, medical, or corporate offices or corporate campuses; retail establishments such as shopping centres, grocery stores, restaurants, banks, department stores, furniture outlets, warehouse stores, auto parts, lumber, hardware and home improvement retail, automobile sales, and other similar retail uses. The following councils have set aside land for that purpose:-</p> <p><b>Ubungu Municipal Council</b></p> <ul style="list-style-type: none"> <li>▪ The Council has set aside 0.6 hectare of land suitable for building a shopping mall Mbezi Luis</li> </ul> <p><b>Kigamboni Municipal Council</b></p> <ul style="list-style-type: none"> <li>▪ Kigamboni Municipal Council has allocated 24 hectares of land in Kigamboni District for establishing a shopping mall, commercial zone, agriculture market and fish market</li> <li>▪ The Council has also allocated 68 hectares of land in Kigamboni District for building a fish market, hi-tech industries, tourist hotels, a district hospital, and a district court</li> <li>▪ The piece of land previously owned by NAFCO, after being taken over by the Government, has been planned for investments of various commercial as well as non-commercial uses, especially for establishment of a business park/one-stop centre.</li> </ul> <p><b>Temeke Municipal Council</b></p> <ul style="list-style-type: none"> <li>▪ Temeke Municipal Council has set aside 2.516 hectares of land at Keko (VETA) and Toangoma suitable for establishing a business park.</li> </ul>
<p><b>Key investment rationale</b></p>	<ul style="list-style-type: none"> <li>▪ The rationale behind this investment is to provide for professional offices, retail or commercial businesses, and multi-family development in an attractive mixed-use environment that provides community and business opportunities</li> <li>▪ It will also generate employments and provide services.</li> </ul>

<b>Available support</b>	<ul style="list-style-type: none"> <li>▪ Policy and political support at national, regional and local levels</li> <li>▪ Land is available for building a shopping mall and a market</li> <li>▪ Good infrastructure, which includes roads and communication networks, electricity supply and ready markets</li> <li>▪ Seventy-five percent (75%) import duty relief on deemed capital goods including equipment, utility vehicles and some building materials through TIC.</li> </ul>
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## 2. Modern markets, shopping malls and related facilities

### Overview of the opportunity

<b>Key features</b>	<p>Building modern markets that contain efficient marketing infrastructure such as wholesale, retail and assembly markets and storage facilities, which are essential for cost-effective marketing, to minimise post-harvest losses and to reduce health risks.</p>  <p><b>Dar es Salaam City Council</b></p> <ul style="list-style-type: none"> <li>▪ Interested parties are invited to invest in building a modern market at Buguruni</li> <li>▪ Dar es Salaam City Council has allocated 0.53 hectare of land at Buguruni for this investment</li> <li>▪ Investing in constructing a modern market for mixed products, including food, at Ilala, Buguruni, Mchikichini and Kigogo-Sambusa suburbs</li> <li>▪ Dar es Salaam City Council has set aside 1.5 hectares of land at Buguruni for investing in:             <ul style="list-style-type: none"> <li>○ Construction of a modern market</li> <li>○ Building a parking lot for loading and offloading agricultural produce</li> <li>○ Construction of storage facilities</li> <li>○ Shopping Mall</li> <li>○ Establishment of banks</li> </ul> </li> </ul>
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- Ilala Market with 0.94 hectare of land has been allocated for:
  - A modern market
  - Parking lot
  - Shopping mall
  - Banks
- Mchikichini Market with 2.8612 hectares of land has been allocated for:
  - A modern market
  - Banks
  - Shopping malls

### **Kinondoni Municipal Council**

- Investing in modern markets at Bunju B and Mabwepande, where 50 hectares have been allocated for that purpose
- Modern markets along the beach are expected to boost fishery, tourism and export.



### **Ubungu Municipal Council**

- Investing in construction of a modern market estimated to cost TZS 8.036 billion
- The proposed market will include storage facilities for fruits and vegetables
- A modern market will be constructed at Mbezi Luis, where 2.5 acres have been allocated for that purpose,
- There is also a possibility of constructing a shopping mall at Mbezi Luis where 0.6 hectare of land has been set aside for this purpose.

### **Temeke Municipal Council**

- Construction of a modern market and shopping malls
- About 2.5592 hectares of land at Mbagala, Tandika and TAZARA have been allocated for this investment



	<p><b>Kigamboni Municipal Council</b></p> <ul style="list-style-type: none"> <li>▪ A modern wholesale market estimated to cost TZS 14.3 billion will be constructed on a plot of 0.5664 hectare of land near the bus stand</li> <li>▪ There are residential houses surrounding the area planned for investment and therefore social and utility services are in place.</li> </ul>
<p><b>Key investment rationale</b></p>	<ul style="list-style-type: none"> <li>▪ Modern markets play an important role in value chains, income generation, food security, and developing rural-market linkages</li> <li>▪ Value addition, especially for horticulture products, will be promoted</li> <li>▪ Over time, this process will tend to diversify production as a reflection of the changing demand to be signalled from this market</li> <li>▪ It will also be an avenue for promoting production of quality goods that meets required grades/standards: in the case of agricultural produce, farmers (crops, fishers, and livestock keepers) will most likely add value and earn higher returns</li> <li>▪ The existence of a modern market will promote increased urban and peri-urban agricultural production.</li> </ul>
<p><b>Available support</b></p>	<ul style="list-style-type: none"> <li>▪ Land for construction of modern markets is available</li> <li>▪ The current industrialisation focus of Tanzania supports and encourages such investments</li> <li>▪ Agriculture policies and the Second Agriculture Sector Development Programme (ASDP II) has prioritised marketing development for agriculture including promotion of agricultural value chains</li> <li>▪ Other available infrastructure includes communication network and electricity supply.</li> </ul>



### 3. Building modern fish markets

Overview of the opportunity	
Key features	<ul style="list-style-type: none"> <li>Modern fish markets will cater for various value chain channels, like fish marketing facilities (physical infrastructures for fish landings and wholesaling), retailers, processing activities for prolonging the shelf life of harvested fish such as drying fish and packing fish in ice etc.</li> </ul> 
	<p><b>Kinondoni Municipal Council</b></p> <ul style="list-style-type: none"> <li>Investors are invited to establish modern fish markets at Msasani and Ununio</li> <li>Kinondoni Municipal Council has allocated land at Msasani (5 hectares) and at Ununio (10 hectares) for this investment.</li> </ul> <p><b>Kigamboni Municipal Council</b></p> <ul style="list-style-type: none"> <li>Investors are invited to establish modern fish market at Buyuni Pemba Mnazi</li> <li>Kigamboni Municipal Council has allocated about 31.79 hectares of land for this investment at Buyuni Pemba Mnazi.</li> </ul>
Key investment rationale	<ul style="list-style-type: none"> <li>To make fish available to consumers at the right time and in the right place requires an effective marketing system</li> <li>Fishermen who catch fish by labouring overnight (from common-property water bodies) do not usually sell fish in retail markets; they need a market</li> <li>Modern fish markets are the dominant marketing channels (product route to ultimate consumer) for freshwater fish for domestic consumption.</li> </ul> 

## Available support

- Agriculture policies and the Second Agriculture Sector Development Programme (ASDP II) has prioritised marketing development for agriculture, including promotion of agricultural value chains
- United Republic of Tanzania, Agricultural Marketing Policy 2008.

## 4. Modern bus stand and related facilities

### Overview of the opportunity

#### Key features



#### Kinondoni Municipal Council

- The Council is inviting investors to build modern bus stand at Boko Basihaya under a public-private partnership arrangement
- The Council has set aside about 6.2716 hectares of land at Boko Basihaya suburb for this investment.



#### Dar es Salaam City Council

- Dar es Salaam City Council has allocated 6.12 hectares of land for investing in building a modern bus stand at Lukooni
- The bus stand will comprise hotels/restaurants, a shopping mall and banks
- Investment under public-private partnership arrangement is envisaged.

#### Kigamboni Municipal Council

- Investors are invited to construct a bus terminal that will comprise a shopping mall and a wholesale market at Mjimwema, where 0.459 hectare of land has been allocated for that investment
- The planned bus stand will be able to accommodate 320 buses at a time and the estimated cost for the project is TZS 2.5 billion
- Investors are also invited to construct a parking lot for heavy trucks (lorry park) at Tungi. The parking lot is planned to be constructed on 6 hectares of land previously used as a temporary dumpsite. The piece of land is surrounded by oil and gas tank farms, therefore a parking space for vehicles transporting gas and oil is highly needed.

	<b>Temeke Municipal Council</b> <ul style="list-style-type: none"> <li>Investors are invited to construct a bus stand at Chamazi, Toangoma and Temeke Mwisho, where 23.9536 hectares of land have been allocated for this investment.</li> </ul>
<b>Key investment rationale</b>	<ul style="list-style-type: none"> <li>Bus stations are a significant element in the operation of bus services. Bus stations provide complementing facilities for the benefit of passengers, such as food kiosks, public car parks, taxi bays and parking bays for bus operators to pick up and ferry passengers to their destinations. Where space allows, shopping malls may also be constructed</li> <li>A modern bus station with good management and environment will spur further economic activities in and around the bus station.</li> </ul>
<b>Available support</b>	<ul style="list-style-type: none"> <li>Councils have allocated land for the construction of bus stands and related facilities</li> <li>Bus stand facilities development is aligned with the objective number 2 of the Government's Third Five-Year Development Plan (FYDP III) 2021/22-2025/26, which aims to enhance human development and provisioning of quality services</li> <li>Seventy-five percent (75%) import duty relief on project deemed capital goods, including equipment, utility vehicles and some building materials through TIC.</li> </ul>

## 5. Modern sports arena

Overview of the opportunity	
<b>Key features</b> 	<b>Temeke Municipal Council</b> <ul style="list-style-type: none"> <li>Build a modern sports arena, a large flat area surrounded by seats used for sports or entertainment at Toangoma</li> <li>Temeke Municipal Council has set aside 42 hectares of land for this investment at various areas at Toangoma.</li> </ul>
<b>Key investment rationale</b>	<ul style="list-style-type: none"> <li>Dar es Salaam has very few sports facilities/infrastructure</li> <li>One of the noted benefits associated with the construction of a new sport facility is the creation of jobs</li> <li>The arena can include a variety of sports such as soccer, basketball, swimming, volleyball and netball, as well as recreation facilities.</li> </ul>

Overview of the opportunity	
Available support	<ul style="list-style-type: none"> <li>Tanzania Sports Development Policy encourages the public to invest in construction of sports stadia and related facilities</li> <li>The Third Five-Year Development Plan (FYDP III) advocates for investments in human development, and sports are one of the human development attributes.</li> </ul>

## 6. Real estate development

Overview of the opportunity	
<b>Key features</b> 	<b>Ubungu Municipal Council</b> <ul style="list-style-type: none"> <li>Investors are invited to invest in real estate in Ubungu Municipal Council through joint venture with local investors</li> <li>Ubungu Municipal Council has set aside 1.225 hectares of land at Mbezi Luis for this investment.</li> </ul>
<b>Key investment rationale</b>	<ul style="list-style-type: none"> <li>It assures market and income for real estate developers.</li> </ul>
<b>Available support</b>	<ul style="list-style-type: none"> <li>The Third Five-Year Development Plan (FYDP III) promotes infrastructure development</li> <li>The project area is likely to receive a lot of support, given existing political will.</li> </ul>

## B. Tourism sector

### 7. Beach tourism and related investments

Overview of the opportunity	
<b>Key features</b> 	<p>Investing in beach tourism by building hotels and other related man-made tourist attractions like beach sports, cultural tourism (dances, carvings etc.), and sport fishing.</p> <p><b>Kinondoni Municipal Council</b></p> <ul style="list-style-type: none"> <li>Interested parties are invited to invest in recreation centres for children and adults at Ununio, Mbweni, Kawe, Mbezi etc.</li> </ul>



	<ul style="list-style-type: none"> <li>▪ Kinondoni Municipal Council has set aside land at Ununio (30 hectares), Mbweni (25 hectares), Kawe (20 hectares), and Mbezi (26 hectares) for such facilities,</li> <li>▪ Investors are also invited to invest in building/operating tourist hotels at Oysterbay where 50 hectares have been set aside for that purpose.</li> </ul>  <p><b>Kigamboni Municipal Council</b></p> <ul style="list-style-type: none"> <li>▪ In order to boost beach tourism, investors are invited to build facilities for boat riding, sport fishing, recreation facilities etc. in Kigamboni</li> <li>▪ Investors are also invited to invest in building/operating tourist hotels in Kigamboni</li> <li>▪ About 50,216.4 hectares at various places in Kigamboni District have been set aside for construction of hotels</li> <li>▪ Also, Kigamboni Municipal Council has set aside 29.39 hectares of land at Pemba Mnazi for hotels construction.</li> </ul> <p><b>Temeke Municipal Council</b></p> <ul style="list-style-type: none"> <li>▪ Investors are invited to invest in modern hotels through joint ventures with local investors.</li> </ul>
<b>Key investment rationale</b>	<ul style="list-style-type: none"> <li>▪ Investments along the shoreline provide tourists with quick and easy access to the beach, water-related activities and scenic views of the sea (the primary reasons tourists flock to the coasts around the world)</li> <li>▪ One of the most important areas in terms of economic opportunity and natural and cultural resources is the region's extensive coast line</li> <li>▪ Districts with tourist attractions lack good tourism facilities, i.e. hotels and campsites, thus forcing tourists to travel fairly long distances from the attractions.</li> </ul> 
<b>Available support</b>	<ul style="list-style-type: none"> <li>▪ Ministry of Natural Resources and Tourism "Tourism Master Plan 2002" has identified urban waterfront from Ununio (North) to Ras Kimbiji (South) and islands of Mbudya, Bongoyo, Panganvini, Mwaktumbe, Kendwa and Sinda as potential for promoting tourism-related investments</li> </ul>

	<ul style="list-style-type: none"> <li>▪ A National Integrated Coastal Management Strategy has been formulated; the strategy provides detailed steps that need to be taken to ensure that coastal natural and cultural resources are utilised in a sustainable manner. One of the priorities of this strategy is to facilitate appropriate investment in emerging economic opportunities of the coast. Potential areas of investment include prawn and seaweed farming, fishing and, of course, coastal tourism</li> <li>▪ United Republic of Tanzania Guidelines for Coastal Tourism Development in Tanzania, 2014</li> <li>▪ The industry is supported by an Integrated Tourism Master Plan, which outlines strategies and programmes for the sector</li> <li>▪ Existence of Tourism Confederation of Tanzania (TCT), a private sector body that represents interests of the tourism private sector</li> <li>▪ The 1999 National Tourism Policy emphasises the need to improve, among others, communication and accommodation facilities as a means of attracting tourists.</li> </ul>
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## 8. Establishment of a wildlife zoo at Chanika

Overview of the opportunity	
<b>Key features</b>	<p><b>Dar es Salaam City Council</b></p> <ul style="list-style-type: none"> <li>▪ Interested parties are invited to invest in a zoo at Chanika to promote tourism</li> <li>▪ Dar es Salaam City Council has set aside 100.45 hectares of land for this investment</li> <li>▪ Interested parties may also invest in green house plants nursery.</li> </ul> 
<p><b>Key investment rationale</b></p> 	<p>Wildlife zoos assume five roles as the executor of the relationship between society and nature:</p> <ul style="list-style-type: none"> <li>▪ First, zoos take on the role of the “model citizen” by conveying a conservation message</li> <li>▪ Second, zoos are maintaining a viable and genetically diverse collection. Zoos are managed under the premise that wildlife conservation is of foremost importance</li> </ul>

### Overview of the opportunity

- Third, zoos directly influence the attitudes and behaviours of the community in relation to the conservation of plants, animals, and habitats. The urban location of zoos provides them with a unique opportunity to influence government policy
- Fourth, a zoo is a conservation mentor. Through mentoring efforts, future generations of citizens will be more aware of the benefits of long-term conservation.
- Fifth, zoos are a place for people to learn basic facts about organisms and their behaviour.



#### Available support

- United Republic Tanzania's Tourism Master Plan 2002 and the Wildlife Policy 2007.

## 9. Rivers and valleys development

### Overview of the opportunity

#### Key features

#### Kinondoni Municipal Council

- Kinondoni Municipal Council invites investors to develop rivers and valleys, including Kawe River for recreation and tourism
- Investors will also take advantage of the developed valley to invest in related facilities such as hotels, water sports, etc.



#### Key investment rationale

- Managed rivers and valleys help to connect urban dwellers with their environment and preserve or restore natural urban assets close to pristine conditions.

#### Available support

- The Dar es Salaam 2016 - 2036 Master Plan notes the following: "Increasing the system of green areas: existing urban parks to be preserved, increased and improved; new parks to be realised, especially fluvial parks; a system of district or local parks to be implemented in adequate spaces"
- This is in line with Tanzania's environmental policy.

## C. Agriculture sector

### 10. Modern agriculture practices<sup>7</sup>/precision agriculture centre

Overview of the opportunity	
<b>Key features</b> 	<b>Kigamboni Municipal Council</b> <ul style="list-style-type: none"> <li>Modern agriculture practice or precision agriculture centre is planned to be established at Gezaulole</li> <li>Kigamboni Municipal Council has allocated a total of 23 hectares for establishing a modern agriculture practice/precision agriculture centre</li> <li>The centre will promote best practices and innovation in farming.</li> </ul> 
<b>Key investment rationale</b> 	<ul style="list-style-type: none"> <li>There is high demand for horticulture products and other high-value agricultural foods in the fast-growing region of Dar es Salaam; the middle-class population is also growing fairly fast</li> <li>In addition to being an important source of fresh produce, meat and dairy products for consumers, urban farming plays a vital economic role as a source of income for producers and distributors, increases food security, prevents malnutrition, generates employment and alleviates poverty.</li> </ul> 
<b>Available support</b>	<ul style="list-style-type: none"> <li>Agriculture Sector Development Strategy II; Second Five-Year Development Plan 2016/17-2020/21</li> <li>Improvements made to transportation and storage facilities will have an incredible impact on the output of farms</li> <li>Advances in the Internet and online databases will make it possible for farmers to utilise scientific data and technology in their efforts to improve crop yields and keep up to date with cutting-edge methods of farming</li> </ul>

<sup>7</sup> The term 'modern agriculture' implies the advancement in terms of invention and innovation, stewardship, responsibility and meeting the environmental and global food challenge all at once.



## Overview of the opportunity

- Use of mobile devices and platforms:
  - Mobile applications that are integrated with remote sensors and other crop monitoring tools have increased efficiency while reducing costs of managing a piece of farm land
  - Cash payment via mobile phones is economically viable to farmers for value chains with high and expected volume transactional activity.

## 11. Poultry value chain

### Overview of the opportunity

#### Key features

#### Kinondoni Municipal Council

- Individuals and companies are encouraged to invest in chicken value chain, which will involve chicken production, hatchery, processing etc.

#### Kigamboni Municipal Council

- In Kigamboni, there is conducive and paramount area for chicken production. Most of residents in Kigamboni are engaged in chicken production at family level. More investors are invited to produce chicken commercially.



#### Key investment rationale

- There is high demand for chicken and related products in Dar es Salaam
- It will increase incomes for all people involved in the value chain.

#### Available support

- National Livestock Policy (2006) and Tanzania Livestock Master Plan support agro-processing industry.



## D. Fisheries sector

### 12. Fish farming

Overview of the opportunity	
<b>Key features</b>	<b>All Councils</b> <ul style="list-style-type: none"><li>Investing in cage fishing, fishponds, and fish hatcheries.</li></ul>
<b>Key investment rationale</b> 	<ul style="list-style-type: none"><li>The main reason being that the volume of fish for processing and other value additions has been declining, since most small-scale fisher folks cannot undertake deep-sea fishing. Therefore, in order to increase fish catch for processing and for home consumption, there is need to promote fish farming around the sea and at households. This will only be possible if an investor establishes fish hatcheries to supply households wishing to start fish farming</li><li>It will also increase the supply of fish for fish processing plants, along with increasing employment.</li></ul> 
<b>Available support</b>	<ul style="list-style-type: none"><li>Tanzania Fishery Policy of 2015</li><li>The Third Five-Year Development Plan (FYDP III) 2021/22-2025/26, and the Second Agriculture Sector Development Plan (ASDP II), both of which advocate for fish production and value addition.</li></ul>

### 13. Marine culture

Overview of the opportunity	
<b>Key features</b>	<b>All Councils</b> <ul style="list-style-type: none"><li>Unlocking potential of marine culture by effective utilisation of the abundant marine waters through pond and cage farming of marine finfish and culture of high-value shellfish and invertebrates such as prawns, mud crabs and sea cucumbers</li><li>Opportunities exist in fish farming/culture and support services such as production of aqua seed and aqua feed, provision of technical support services etc.</li></ul>

Overview of the opportunity	
<b>Key investment rationale</b> 	<ul style="list-style-type: none"> <li>▪ Fish catch from natural waters has long dwindled, as the finite fisheries resources not being able to keep pace with the fast-growing population. Thus, investment in marine culture is critical to increasing availability of aquatic products to meet the ever-increasing demand for fish and fish products for direct consumption within Dar es Salaam Region and beyond</li> <li>▪ The increase in production will also support growth of a vibrant fish processing industry due to abundance of raw materials.</li> </ul> 
<b>Available support</b>	<ul style="list-style-type: none"> <li>▪ Tanzania Fishery Policy of 2015</li> <li>▪ The Third Five-Year Development Plan (FYDP III) 2021/22-2025/26, and the Second Agriculture Sector Development Plan (ASDP II), both of which advocate for fish production and value addition.</li> </ul>

## 14. Ornamental fish

Overview of the opportunity	
<b>Key features</b> 	<b>All Councils</b> <ul style="list-style-type: none"> <li>▪ There is an opportunity for farming of ornamental fish due to increased demand for aquariums</li> <li>▪ Investment in ornamental fish will focus on long trailed wall-supported aquaria (roofed) which will accommodate several compartments of glass-built aquaria having various ornamental fish species in each compartment (glass tank). It is a one-way building (entrance and exit points)</li> <li>▪ The aquaria should be constructed in a way to allow children to visualise the fish. The wall can be constructed to allow as many aquariums as possible with multi-species of ornamental fish.</li> </ul>
<b>Key investment rationale</b>	<ul style="list-style-type: none"> <li>▪ Ornamental fish farming (new investment in aquaculture) is not well known to most people in the country, so the investment will attract more people to view and hence promote the industry. Also, because of this, the investment will generate funds by collecting entry fee (tourist point).</li> </ul>

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## Overview of the opportunity

### Available support

- Tanzania Fishery Policy of 2015
- The Third Five-Year Development Plan (FYDP III) 2021/22-2025/26, and the Second Agriculture Sector Development Plan (ASDP II), both of which advocate for fish production and value addition.

## E. Industrial sector

### 15. Solid waste management

Solid waste management is a serious challenge throughout Dar es Salaam. Generation of solid waste is increasing as the urban population grows. Total generation of solid waste is estimated at 1 kilogram per person per day, which translated into more than 6,000 tonnes per day in 2015 for the region.

That is equivalent to approximately 1.8 million tonnes per year. Although an estimated 60-70 percent of waste is composed of organic materials, only nominal amounts are currently composted.

In year 2019, Dar es Salaam Region was estimated to produce 4,600 tonnes of waste per day. About 45 percent of the waste produced is bio-degradable waste and the rest can be recycled. About 50 percent of the waste generated is sent to the Pugu landfill. The region, through its 6 councils in partnership with 200 companies and 76 groups deals with waste collection.

Manufacturing of organic fertilisers and energy production from solid waste: Given the voluminous production of solid waste in Dar es Salaam Region, investors need to consider converting these wastes into more useful products.

Such products are organic fertiliser and energy: organic fertiliser is produced from combination of crop/plant remains and animal waste/by-products (animal wool/hair, blood, horns, hooves, bones, hides and skins, fish remains post processing), while energy is produced by burning solid waste.

## Overview of opportunities in solid waste management

### Key features



- Three related investments are required, namely solid waste collection, construction of solid waste dumps, and processing of solid waste into energy, manure, briquettes, charcoal etc.

- The sources of solid waste include residential, commercial, institutional, and industrial activities.





Certain types of waste that cause immediate danger to exposed individuals or environments are classified as hazardous; these are discussed in the article hazardous-waste management

- Effective management of solid waste requires involvement/participation of all communities. This participation yields several benefits, including health and social benefits such as proper disposal of waste in special bins outside homes; reduction in the quantity of refuse dumped in rivers, on streets or burned; and reduction of odour generated from uncontrolled dumping of refuse in the neighbourhood
- In addition, community participation in urban waste disposal means involving key institutional actors in the process, such as micro and small enterprises (MSEs), district committees, non-government organisations (NGOs), local authorities and market women associations
- More than 1,676,000 tonnes of solid waste are generated every year.

### Dar es Salaam City Council

- Investing in wastes collection
- About 40,700 tonnes of solid wastes are generated every year.

	<p><b>Kinondoni Municipal Council</b></p> <ul style="list-style-type: none"> <li>▪ Solid waste will be obtained from houses, hotels, markets, etc.</li> <li>▪ About 439,920 tonnes of solid waste are generated every year</li> <li>▪ Kinondoni Municipal Council has allocated 200 hectares of land for establishing a solid waste processing facility.</li> </ul>  <p><b>Ubungu Municipal Council</b></p> <ul style="list-style-type: none"> <li>▪ Solid waste can be obtained at Kisopwa dumpsite</li> <li>▪ The district generates 278,208 tonnes of solid waste every year</li> <li>▪ Ubungu Municipal Council has allocated 140 hectares of land (120 hectares at Kisopwa) for the establishing a solid waste processing plant.</li> </ul> <p><b>Kigamboni Municipal Council</b></p> <ul style="list-style-type: none"> <li>▪ Solid wastes can be obtained at Pugu dumpsite</li> <li>▪ The district inhabitants generate about 80,640 tonnes of solid waste every year</li> <li>▪ Kigamboni Municipal Council has allocated about 153 hectares of land for the establishment of a solid waste processing facility.</li> </ul>
<p><b>Key investment rationale</b></p>	<ul style="list-style-type: none"> <li>▪ The whole of Dar es Salaam Region's economic activities are expanding very rapidly and so is the production of solid waste. The region is already generating a so much waste so that the existing dumps are unable to absorb them</li> <li>▪ Collection, treatment and disposal of solid material that is discarded because it has served its purpose or is no longer useful. Improper disposal of solid waste can create unsanitary conditions, and these conditions in turn can lead to pollution of the environment and to outbreaks of vector-borne disease—that is, diseases</li> </ul> 



	<p>spread by rodents and insects. The tasks of solid waste management present complex technical challenges. They also pose a wide variety of administrative, economic, and social problems that must be managed and solved. Proper disposal and utilisation of solid waste has a number of positive results, namely:</p> <ul style="list-style-type: none"> <li>○ Alternative source of energy for domestic and commercial uses</li> <li>○ Initiative to reduce climate change effects</li> <li>○ Increasing the life span of a landfill</li> <li>○ Reducing greenhouse effects</li> <li>○ Creating job opportunities.</li> </ul>
<b>Available support</b>	<ul style="list-style-type: none"> <li>▪ The National Environment Management Council (NEMC) provides guidance on how to handle solid waste</li> <li>▪ Policy supports collection, compression and recycling of solid waste</li> <li>▪ Seventy-five percent (75%) import duty relief on project deemed capital goods including equipment, utility vehicles and some building materials through TIC.</li> </ul>

## 16. Establishment of abattoir

Overview of the opportunity	
<b>Key features</b>	<div> <p><b>Ubungo Municipal Council</b></p> <ul style="list-style-type: none"> <li>▪ Investors are invited to establish a modern slaughter house (abattoir)</li> <li>▪ Ubungo Municipal Council has set aside 39 hectares of land at Kwembe for this investment.</li> </ul> </div> <div> <p><b>Kinondoni Municipal Council</b></p> <ul style="list-style-type: none"> <li>▪ Investors are invited to establish a modern abattoir</li> <li>▪ Kinondoni Municipal Council has set aside 34 hectares of land at Mabwepande for this investment.</li> </ul> </div>



## Overview of the opportunity

### Key investment rationale

- A well-designed and well-managed abattoir would improve the supply chain and promote commercial livestock production
- It is crucial to revitalise existing slaughter facilities, establishing new facilities, especially at strategic production and market points, and instituting the use of appropriate technologies
- The demand for high quality meat, processed meat products and by-products by domestic and export market is growing.



### Available support

- The Livestock Sector Modernisation Initiative of 2015 has components to support various value chains in the sector.

## PART FOUR

# FACILITATION, PROCESSES, REQUIREMENTS AND INCENTIVES

Most of the policies and laws, unless specified, are applicable nationally for specific sectors. Local government authorities, through the blessings of the region, town or district full councils, are mandated to enact by-laws and notices that must also be endorsed by the Minister responsible for Regional Administration and Local Government (RALG).

Below is a summary of issues related to facilitation, processes, requirements, and incentives for investment in Tanzania in general and specifically in Dar es Salaam Region.

## 4.1 Supportive Policies and Legal Environment

Key investment policies, laws, strategies, plans and programmes that are promoting investment in the region are presented below.

### 4.1.1 Policies, Legal, Institutional and Regulatory Considerations

#### a) Key policies

Policies to guide investment promotion and interventions in Dar es Salaam Region's relevant areas are: National Investment Promotion Policy (1996); National Agriculture Policy (2013); National Livestock Policy (2006); Sustainable Industrial Development Policy (SIDP) (1996-2020); National Trade Policy for Competitive Economy and Export-led Growth (2003); National Microfinance Policy (2000); National Forest Policy (1998); Bee Keeping Policy (1998); Small and Medium Enterprises Development Policy (2003); National Land Policy (1995); National Environmental Policy (1997); The Mineral Policy of Tanzania (2009); Tanzania Mining Industry Investor's Guide (2015); and Dar es Salaam Regional Authority Development Plans, as well as the political will of the region to attract investors.

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## **b) Key laws**

Major laws and regulations that guide investment promotion and activities in Dar es Salaam Region are: Tanzania Investment Act (1997); Tax Legislations; Land Act (1999); Village Land Act (1999); Mining Act (1998); Tanzania Bureau of Standards Act (2009); Tanzania Food and Drugs Act (2003) and Regulations; Plant Protection Act (1997) and Regulations; The Mining Act (2010); The Mining Regulations (2012); the National Environment Management Act (No.10 of 2004); the Environment Management (Environmental Impact Assessment and Audit) (Amendment) Regulations of 2018 and other sector Acts and relevant Dar es Salaam Region's by-laws.

### **4.1.2 Programmes, Strategies, and Plans**

Key programmes, strategies and plans are: Annual Regional Plans and Annual Reports; PO-RALG Reports; District Development Plans; the Third Five-Year Development Plan (FYDP III) 2021/22-2025/26; Agriculture Sector Development Strategy and Programme (ASDSP II) 2017-2022; Livestock Sector Development Programme (2011); Ministry of Industry, Trade and Investment's Reports; and Integrated Industrial Development Strategy (IIDS 2025). Others are the National Rice Development Strategy; Tanzania Agriculture and Food Security Investment Plan; and Agricultural Growth Corridor in Tanzania.

The above policies, regulatory frameworks, strategies and plans support the investment climate in Dar es Salaam Region by sound frameworks that offer an appropriate environment, which encourages investments in the region. The key issue is for the regional leadership to make sure that the processes and requirements outlined below are interpreted and adapted earnestly at regional and local levels. The leadership of Dar es Salaam Region is determined to doing that and to ensuring speedy implementation of prioritised investment opportunities, as well as putting in place a climate that is conducive to investing in the region.

### **4.1.3 Investment Options: Private, PPP, PPCP, and Joint Ventures**

Investment options available in Tanzania include individual private sector investments, public-private partnerships, public-private community partnerships and joint ventures.

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## **a) Public-Private Partnerships**

The Government recognises the role of private sector in bringing about socio-economic development through investments. Public-private partnership (PPP) frameworks provide an important instrument for attracting investments. Indeed, public-private partnerships (PPPs) have been identified as viable means to effectively address constraints of financing, management and maintenance of public goods and services.

The public sector, through public-private partnerships, is encouraged to maximise synergies between the public and private sectors in mobilising and deploying resources. The PPP approach has been widely used in other countries to finance infrastructure and other long-term investment projects. The approach is a way to merge public and private capital and expertise for public projects in which the private sector has interest in sharing ownership. The Public Private Partnership (Amendment) Act (2018) and PPP Regulations (2020) give areas of collaboration, which comprise investment capital, managerial skills and technology. Additionally, PPPs can enable the Government to fulfil its responsibilities in delivery of socio-economic goods and services by ensuring efficiency, effectiveness, accountability, quality and outreach of service.

The concept of PPP entails an arrangement between public and private sector entities whereby the private entity renovates, constructs, operates, maintains, and/or manages a facility in whole or in part, in accordance with output specifications. The private entity assumes associated risks for a significant period of time and, in return, receives benefits and financial remuneration according to agreed terms. PPPs constitute a cooperative venture built on the synergy of expertise of each partner that best meets clearly defined public needs through the most appropriate allocation of resources, risks and rewards.

Most PPPs implemented in Tanzania are concession arrangements for running existing enterprises with limited provisions for rehabilitation and new investments. It is worth noting that in the case of services, PPPs have been implemented successfully by faith-based organisations (FBOs) in education, health and water sectors for many years. Private sector participation in areas previously treated as the monopoly of the public sector has made major



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contributions to increasing the pace of growth and development in many countries.

### **b) Public-Private Community Partnerships**

This is a variant of PPP in that it includes communities/villages where the nature of a project requires that community resources (such as land) become part of a project in which both the public sector (particularly local government authorities) and the private sector are interested to invest.

### **c) Joint Ventures**

The Tanzanian Government encourages joint ventures between domestic firms or individuals and foreign investors. Many foreign firms have recently partnered with the Government; these include telecommunication services providers such as Airtel, Vodacom and Tigo, which have registered some notable successes. Others are National Development Corporation (energy), Tanzania Petroleum Development Corporation (bio-fuels), and the National Housing Corporation (real estate development).

## **4.2 Facilitation: Processes and Requirements**

Dar es Salaam Region and Central Government have set and are striving to improve the investment climate to attract and facilitate investment in the region, and ensure speedy decision making. The region has the obligation to interpret and adapt these processes, requirements and incentives for investment to fit the region's investment profile and priorities. These processes and requirements are subject to changes towards improvements from time to time.

### **4.2.1 Lead Institution**

Tanzania Investment Centre (TIC) is a one-stop agency of the Government of Tanzania established under the Tanzania Investment Act No. 26 of 1997 to promote, co-ordinate and facilitate investment in Tanzania. The Centre is a focal point for all investors and performs all liaison work for the investor from enquires stage right up to project start up. The minimum investment capital threshold for an enterprise to qualify for registration under the Centre is not

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less than US\$ 500,000 if foreign or joint venture owned, and US\$ 100,000 for domestic investors.

As a one-stop Government facilitation agency, TIC assists all investors to obtain permits, licences, approvals, and authorisation etc., required by other laws to set up and operate investment ventures in Tanzania.

***TIC contacts are:***

Headquarters: Executive Director, Tanzania Investment Centre, Plot No. 9A&B, Shaaban Robert Street, P.O. Box 938, Dar es Salaam, Tanzania, Tél: 255 22 2113365/116328-32 Fax: 255 22 2118253, Email: [information@tic.go.tz](mailto:information@tic.go.tz)

#### **4.2.2 Main Institutions Dealing with Investment in Tanzania and Dar es Salaam Region**

The main institutions dealing with investment issues in Dar es Salaam Region and in Tanzania at large are: Tanzania Investment Centre., Business Registration and Licensing Agency (BRELA), Tanzania Revenue Authority (TRA), Tanzania Electric Supply Company (TANESCO), Tanzania Bureau of Standards (TBS), Ministry of Industry and Trade (MIT), Tanzania Medicines and Medical Devices Authority (TMDA), Prime Minister's Office (Investment), water supply companies in respective regions, municipal authorities in respective districts (on land issues), Ministry of Water (MW), Ministry of Agriculture (MA) and Ministry of Livestock and Fisheries (MLF).

#### **4.2.3 Registration**

Registration of an investment can be undertaken at the local BRELA and TIC district, regional or national offices and requires the following documentation: (i) Memorandum and Articles of Association; (ii) Certificate of Registration or Certificate of Incorporation; (iii) Investment Feasibility Study; (iv) Certificate of Incentives in the case of projects approved by TIC; (v) Partnership Agreement (deed), in the case of a partnership; (vi) Lease Agreement; (vii) Business Enquiry Forms; (viii) IT 21 forms for companies and IT 20 forms for individuals; and (ix) Company and Operators' Certification of Registration for Tax Payer Identification Number (TIN).

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#### 4.2.4 Central Government Taxes

Taxes involved in investment projects in Dar es Salaam Region are various, and include the following:

##### a) Corporate Tax

Corporate tax is charged at the rate of 30 percent for both resident and non-resident investors. In case of newly listed corporate to the Dar es Salaam Stock Exchange, with at least 30 percent of its equity ownership issued to the public for three consecutive years from the date of listing, corporate tax is 25 percent for both resident and non-resident investors. Further, corporates with perpetual unrelieved losses for three consecutive years (excluding corporates conducting agriculture business, provision of health care or education), corporate tax is 0.3 percent of annual turnover for resident corporates.

Other incentives under corporate tax include a reduced rate from the normal 30 percent to 20 percent for a new entity dealing in manufacturing of pharmaceutical and leather products, and 10 percent rate for corporations investing in a plant for assembling motor vehicles, tractors and fishing auto boats.

##### b) Personal Income Tax

Residents are subjected to personal income tax where total annual income exceeds Tsh. 2,040,000/-. Income of a non-resident employee of a resident employer is subject to withholding tax of 15 percent. The total income of a non-resident individual is chargeable at the rate of 20 percent (the monthly income includes basic salary, overtime, bonus, commission and other allowances).

The skills and development levy (SDL) is payable by any employer who has four or more employees; the rate is 4.5 percent of the gross wage. Exempted employers from SDL include diplomatic missions, registered education institutions, charitable organisations, farm employment, and foreign institutions dealing with technical assistance and the United Nation Organisation and its agencies.

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### **c) Withholding Tax**

Withholding tax on dividends from corporations listed at the Dar es Salaam Stock Exchange is 5 percent for both resident and non-resident persons, while the rate on dividends from other corporations is 10 percent.

The rate withheld on interest is 10 percent, and on royalties it is 15 percent for resident and non-resident persons. Further, the rates withheld on management and technical services fees [mining, oil and gas] are 5 percent for residents and 15 percent for non-residents.

### **d) Value Added Tax (VAT)**

VAT is a consumption tax charged at a single rate of 18 percent. Registration is compulsory for any business that has a turnover of more than TZS 100 million per annum.

However, there is an exception to registration for firms dealing with professional services, as they are required to be registered for value-added tax regardless of their turnover. Applicants for VAT registration should complete Form Number VAT ITX245.02. E. A registered taxpayer is required to file a VAT return monthly.

Under VAT, incentives include zero rate for all exports, VAT deferment on plant and machinery, VAT exemption of imported plant and machinery by local manufacturers and processors of vegetable oils, textiles, pharmaceuticals and skins and leather products manufactured in Tanzania Mainland.

VAT returns are supposed to be filed on the 20<sup>th</sup> day of the month after a tax period. However, where the 20<sup>th</sup> day falls on a Saturday, Sunday or public holiday, the VAT return shall be lodged on the first working day following the Saturday, Sunday or holiday. For imports, VAT is payable at the time the import duty is due and payable in accordance with East African Community Customs Management Act, 2004.

Exports are zero rated under the VAT Act, 2014, which also provides for VAT exemption. Exempt supplies and imports are provided in the schedule to the VAT Act, Cap 148 r/w Finance Act 2017.

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## 4.3 General Investment Incentives

Investors registered by Tanzania Investment Centre pursuant to Tanzania Investment Act, 1997 (TIA, 1997) are accorded various investment fiscal and non-fiscal incentives as stipulated in various applicable tax and other laws.

Fiscal incentives under TIC include 100 percent import duty exemption on capital goods and 75 percent on deemed capital goods (regarding deemed capital goods, investor shall pay 25 percent of import duty due) Deemed capital goods that are eligible for exemption are specified depending on the project sector. Additional fiscal incentives may be granted to investments that meet strategic investor status provided for under Section 20 of TIA, 1997.

Non-fiscal incentives include five automatic immigrant quotas granted to a project during its implementation period, whereby additional quota may be granted based on project size, technology or any other agreements with the Government. EPZA also provides incentive packages according to Export Processing Zones Act No. 11 of 2002.

Investments in Tanzania are guaranteed against nationalisation and expropriation. Tanzania is a member of both the International Centre for Settlement of investment Disputes (ICSD) and Multilateral Investment Guarantee Agency (MIGA).

**Please Note:** Information on taxes and investment incentives explained above are subject to periodic changes, as the Government keeps on improving the investment climate in the country. Please contact Tanzania Revenue Authority ([www.tra.go.tz](http://www.tra.go.tz)) and Tanzania Investment Centre ([www.tic.go.tz](http://www.tic.go.tz)) for updates.

## 4.4 Access to Resources

### 4.4.1 Land for Investment in Tanzania

The Ministry of Lands, Housing and Human Settlements Development is mandated with land management in Tanzania. Land in Tanzania is under three categories, namely village lands, general lands and reserve lands.



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According to the Land Act, the whole land of the United Republic of Tanzania is owned by the public and the President as a Trustee. This means that land in Tanzania is vested to the public, and citizens own land under leasehold tenure.

Section 20 of the Land Act No. 4 of 1999 specifically provides for a procedure to allocate/grant land to non-citizens for investment purpose under the Tanzania investment Act, 1997. Land for investment purpose shall be identified, gazetted and allocated to the Tanzania Investment Centre, which will issue a Derivative Right of Occupancy to a foreign investor. More information on acquisition of land for investment is available on [www.ardhi.go.tz](http://www.ardhi.go.tz)

#### **4.4.2 Land for Investment in Dar es Salaam Region**

Several parcels of land of varying sizes have been earmarked by each district council in Dar es Salaam Region and set aside for specific targeted investment. Such land parcels have been listed in detail under Part Three of this Investment Guide.

#### **4.4.3 Banking and Financial Services**

The banking sector in Tanzania has been booming, growing in assets and in profits. Because of this, new merchant banks, commercial banks, *bureaux de change*, insurance companies, a stock exchange and related financial units have entered the market. There are four categories of banks, oriented towards different markets and *clientèle* operating in Tanzania: local private banks, regional banks, international banks and multinational banks. Overall, the outlook for the banking industry in Tanzania is very positive and there are appealing opportunities for newcomers to the sector as investors and borrowers. Banks are found in all districts of Tanzania.

Tanzania's higher-than-average economic growth rate is fuelling the emergence of an educated middle class that aspires to achieve a more affluent lifestyle in which traditional depository, credit, insurance, and investment products play an important role. The growth of this middle class is expanding national demand for financial services from established providers and could represent a new opportunity for financial services companies looking for growth.

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Currently, there is a positive trend in lending to SMEs that is producing greater confidence in their growth potential among financial institutions and, more generally, in the economy as well, which is generating a positive spiral. In addition, the Government is also introducing new laws that are expected to enhance lending activities.

#### **4.4.4 Labour**

Dar es Salaam Region has surplus labour due to low employment. While some of the labour is unskilled, there are efforts to build a skilled labour force especially through vocational training colleges/centres and investors are invited to build skills development institutions to fill this gap.

### **4.5 Inclusion and Participation of the Private Sector**

The region plans to stimulate its industrial and economic development base through attracting additional private and public-private partnership investments in order to increase its value addition in key sectors like agriculture and manufacturing, to strengthen competitiveness and to raise its GDP. The regional government and district authorities are ready and committed to providing a series of further support services and incentives to drive industrial development and growth in the short, medium and long-term plans.

According to the national policies, it is the role of the public sector to provide basic enablers such as land, utilities, and infrastructure. These are normally supported and constructed using district, regional and national public budgets in addition to other resources or development partners' support. It is the private sector that is mainly supposed to play a major role in investing in the region in the production, transportation, storage, processing, and development of value chains and marketing of products.

However, for the private sector to play its role effectively, Dar es Salaam Region's authorities will create an enabling environment through provision of pre-requisite infrastructure, incentives, formulation/review and enforcement of investment friendly policies, regulations, and procedures. Regional authorities will promote public-private partnerships (PPPs) and public-private-community partnerships (PPCPs), as well as facilitate joint ventures between potential investors and local private investors.

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Such partnerships and joint ventures are critical for the achievement of objectives of capital and technology intensive investments including the build, operate and transfer approach. In addition, the private sector will be assisted in improving delivery, and enabled to thrive and be competitive by facilitating access to affordable input and output factors nationally and internationally.

## PART FIVE

# KEY CONTACTS IN DAR ES SALAAM REGION

This part provides important contacts in the region which will help potential investors in making follow up on opportunities they want to invest in.

## 5.1 Key Websites

Office	Website
Dar es Salaam Regional Secretariat	<a href="http://www.dsm.go.tz">www.dsm.go.tz</a>
Dar es Salaam City Council	<a href="http://www.ilalamc.go.tz">www.ilalamc.go.tz</a> and <a href="http://www.dcc.go.tz">www.dcc.go.tz</a>
Kinondoni Municipal Council	<a href="http://www.kinondonimc.go.tz">www.kinondonimc.go.tz</a>
Temeke Municipal Council	<a href="http://www.temekemc.go.tz">www.temekemc.go.tz</a>
Ubungo Municipal Council	<a href="http://www.ubungomc.go.tz">www.ubungomc.go.tz</a>
Kigamboni Municipal Council	<a href="http://www.kigambonimc.go.tz">www.kigambonimc.go.tz</a>

## 5.2 Key Contacts

### 5.2.1 Regional Commissioner's Office

Office	Post Office Box Number	Telephone/Mobile Phone Number	E-mail Address
Regional Commissioner (RC)	P. O. Box 5429, Dar es Salaam	+255 22 2203158 +255 22 2203156	<a href="mailto:ras@dsm.go.tz">ras@dsm.go.tz</a>
Regional Administrative Secretary (RAS)	P. O. Box 5429, Dar es Salaam	+255 22 2203158 +255 22 2203156	<a href="mailto:ras@dsm.go.tz">ras@dsm.go.tz</a>

## 5.2.2 Dar es Salaam City Council

Office	City Director		E-mail Address
	Post Office Box Number	Telephone/Mobile Phone Number	
Dar es Salaam City Mayor	P. O. Box 20950, Dar es Salaam	+255 22 2128800 +255 754 488802 +255 713 537815	info@imc.go.tz
Dar es Salaam City Director	P. O. Box 20950, Dar es Salaam	+255 22 2128800 +255 754 488802 +255 713 537815	info@imc.go.tz

## 5.2.4 Municipal Councils

LGA	Municipal Director		E-mail Address
	Post Office Box Number	Telephone/Mobile Phone Number	
Kinondoni Municipal Council	P. O. Box 31902, Dar es Salaam	+255 22 2170173	md@kinondonimc.go.tz
Temeke Municipal Council	P. O. Box 46343, Dar es Salaam	+255 22-2928132	temeke@temekemc.go.tz
Ubungu Municipal Council	P. O. Box 55068, Dar es Salaam	+255 22 2926341	md@ubungomc.go.tz
Kigamboni Municipal Council	P. O. Box 36009, Dar es Salaam	+255 713297256	info@kigambonimc.go.tz







**The United Republic of Tanzania**  
**President's Office**  
**Regional Administration and Local Government**  
Dar es Salaam Regional Commissioner's Office  
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[www.dsm.go.tz](http://www.dsm.go.tz)

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