



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

KAGERA REGION INVESTMENT GUIDE





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ABBREVIATIONS AND ACRONYMS

ACGG	African Chicken Genetic Gains
AECF	Africa Enterprise Challenge Fund
AGOA	Africa Growth Opportunity Act
ASDP	Agricultural Sector Development Programme
BMGF	Bill and Melinda Gates Foundation
BRELA	Business Registration and Licensing Agency
CCET	Community Common External Tariff
CEs	Corporate Entities
CoET	College of Engineering and Technology
CSOs	Civil Society Organisations
D-by-D	Decentralisation by Devolution
DC	District Council
DIDF	District Irrigation Development Fund
DPs	Development Partners
DR	Democratic Republic
DRC	Democratic Republic of Congo
EAC	East African Community
EBA	Everything but Arms
EPZ	Export Processing Zone
ESRF	Economic and Social Research Foundation
EU	European Union
FAO	Food and Agriculture Organisation
FBOs	Faith-Based Organisations
FCC	Fair Competition Commission
FDI	Foreign Direct Investment
FETA	Fisheries Education and Training Agency
FYDP II	Five-Year Development Plan 2016-2021
GAFFSP	Global Agriculture and Food Security Programme
GDP	Gross Domestic Product
GoT	Government of Tanzania
ICSID	International Centre for Settlement of Investment Disputes
IFC	International Finance Corporation
IIDS	Integrated Industrial Development Strategy
IITA	International Institute of Tropical Agriculture
IMF	International Monetary Fund

IPI	Institute of Production Innovation
ISO	Industrialisation Support Organisation
ITC	International Trade Centre
JKT	Jeshi la Kujenga Taifa
JV	Joint Ventures
LGAs	Local Government Authorities
LMP	Tanzania Livestock Master Plan
LSIPT	Livestock Sector Investment and Policy Toolkit
M&E	Monitoring and Evaluation
MC	Municipal Council
MIGA	Multilateral Investment Guarantee Agency
MIT	Ministry of Industry and Trade
MLF	Ministry of Livestock and Fisheries
MoA	Ministry of Agriculture
MoW	Ministry of Water
NARCO	National Ranching Company
NBC	National Bank of Commerce
NBS	National Bureau of Statistics
NEEC	National Economic Empowerment Council
NEMC	National Environmental Management Council
NGO	Non-Government Organisation
NIDF	National Irrigation Development Fund
NMB	National Microfinance Bank
OSBP	One-Stop Border Posts
PMO	Prime Minister's Office
PO-RALG	President's Office Regional Administration and Local Government
PPCP	Public-Private Community Partnership
PPP	Public-Private Partnership
PrSW	Private Sector Window
RECs	Regional Economic Communities
RS	Regional Secretariat
SACCOS	Savings and Credit Co-operative Society
SADC	Southern Africa Development Community
SDL	Skills and Development Levy
SEZ	Special Economic Zone
SIDO	Small Industry Development Organisation
SIDP	Sustainable Industrial Development Policy

SOEs	State Owned Enterprises
STAMICO	State Mining Corporation
TAFIRI	Tanzania Fisheries Research Institute
TAFMA	Tanzania Animal Feeds Manufacturers Association
TAHA	Tanzania Horticultural Association
TANESCO	Tanzania Electric Supply Company
TANTRADE	Tanzania Trade Development Authority
TARI	Tanzania Agricultural Research Institute
TBS	Tanzania Bureau of Standards
TBT	Tea Board of Tanzania
TC	Town Council
TCCIA	Tanzania Chamber of Commerce, Industries and Agriculture
TCT	Tourism Confederation of Tanzania
TDU	Textiles Development Unit
TFA	Tanzania Football Federation
THDR	Tanzania Human Development Report
TIA	Tanzania Investment Act
TIC	Tanzania Investment Centre
TIN	Taxpayer Identification Number
TMEA	TradeMark East Africa
TNBC	Tanzania National Business Council
TPA	Tanzania Ports Authority
TPB	Tanzania Postal Bank
TPSF	Tanzania Private Sector Foundation
TRA	Tanzania Revenue Authority
TRIMs	Trade-related Investment Measures
TVETDP	Technical and Vocational Education and Training Development Programme
TZS	Tanzanian Shillings
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNIDO	United Nations Industrial Development Organisation
VAT	Value-Added Tax
VETA	Vocational Education and Training Authority
WB	World Bank
WTO	World Trade Organisation



"My Government is determined to continue improving the business environment and, in so doing, provide a wide range of appropriate incentives and support to unleash creativity of private sector and other stakeholders in harnessing Tanzania's comparative advantages and thereby boosting productivity, enhancing innovation and fostering economic integration and deepening participation in the region and global value chains."

His Excellency, Dr. John Pombe Joseph Magufuli.
The President of the United Republic of Tanzania, Preface to the Tanzania Five Year Development Plan, June, 2016.



"Industrialisation is relevant not only because of economic reasons but more because it enhances shared prosperity necessary to ensure civil harmony. It does this by increasing employment of our youth, reducing poverty and redressing inequality."

Her Excellency, Samia Suluhu Hassan.
The Vice President of the United Republic of Tanzania remarks during the 2nd East African Business and Entrepreneurship Conference and Exhibition held on 14th November 2017, at the Dar es Salaam Serena Hotel.



"The 21st Century is going to identify itself with intensifying competitive business environment in which business to triumph are those with relevant industrial products and services, modern technologies and human resource that is imbued with respective skills, work ethics and innovativeness. Industrialization is the basic requirement and core secret of 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 industrialization as its ultimate goal. The success of this goal calls for the regional administrations to focus on the provision of conducive business environment necessary to facilitate business operations and flow of investments."

Hon. Kassim Majaliwa Majaliwa.
The Prime Minister of the United Republic of Tanzania In his opening remarks at the Business and Investment Forum, Tabora Region, on 21st November, 2018.

FOREWORD



Welcome to Kagera Region. We have embarked on a mission of promoting investments and making the region a new business hub for the northern, eastern and central Africa economic region. This investment guide, made in line with the overall investment policy and development vision of Tanzania, seeks to realise this regional development vision. It outlines and presents available investment opportunities at the regional and council levels to hasten realisation of the regional vision.

The regional investment guide is aligned with a number of national development frameworks, notably Tanzania's National Development Vision 2025 (NDV2025) and the National Five-Year Development Plan 2016-2021 (FYDP II). The guide is meant to accelerate the execution of the regional development pathway elucidated in its regional secretariat vision and mission as well as the local government authorities (LGAs) development strategic plans.

The intent of the regional investment guide is therefore to avail investment information to prospective investors, individuals firms and institutions both local and foreign, with the view of attracting them to exploit rich investment potentials of Kagera Region. In addition, the investment guide intends to entice investors towards areas that will enhance Kagera's trade competitiveness as it positions itself to harness the ever-emerging regional economic and trade opportunities. The primary objective of the guide is to foster growth of productive capabilities to maximally exploit already promising strengths in primary sectors through value addition. This is done to sustainably augment the regional GDP growth by stirring broad, inclusive and resilient economic participation of the local communities into the growth process improved well being of the people of Kagera Region and Tanzania at large.

The Kagera Regional Administration and its eight LGAs, namely Bukoba Municipal Council, Bukoba District Council, Biharamulo District Council, Karagwe District Council, Kyerwa District Council, Missenyi District Council,

Muleba District Council, and Ngara District Council vow to provide investors with a conducive business environment through, among others, the requisite political support, special incentives, supportive social and economic services, and after care services. The region has resolved to prioritise a few strategic initiatives based on existing production capabilities and market opportunities. It has considered the uniqueness of each local Government Authority (LGA), such that some priorities are area specific and therefore flexibility has been built in to consider investors' business acumen and initiatives.

This work has taken some commendable commitment by various stakeholders in terms of finance, time and intellect. To this, I am indebted to many, but would like to single out a few, in particular the United Nations Development Programme (UNDP) for financially supporting the preparation of this investment guide, and the Economic and Social Research Foundation (ESRF) for their time and intellect invested in developing this guide. I would like to specifically acknowledge Prof. Haidari Amani and his team of experts, namely Mrs. Margareth Nzuki, Mr. Mussa M. Martine and Mr. John Shilinde for their commitment and technical support that collectively resulted in the completion of this guide. I am equally grateful for the exemplary support provided by the Kagera Regional Administrative Secretary, Prof. Faustin Kamuzora, who efficiently and effectively coordinated and guided local governments in the region during the consultative processes and validation of the guide. It is not easy to mention everyone, therefore let me extend my deep appreciation to all individuals who contributed in one way or another towards making this investment guide possible.

In conclusion, let me once again take this opportunity to welcome you to invest in Kagera Region while promising to "walk the talk" of our continued support to make your investments productive, profitable and prosperous.



Hon. Brig. Gen. Marco E. Gaguti
Regional Commissioner
Kagera Region, Tanzania

EXECUTIVE SUMMARY

Kagera Region is named after River Kagera, which is the real source of River Nile - the longest river in the world. Kagera Region, with its capital in the Municipal of Bukoba, is one of Tanzania's 31 administrative regions. The region is located in the north-western corner of Tanzania on the western shore of Lake Victoria. Kagera is Tanzania's fifteenth largest region and accounts for approximately 3.3 percent of Tanzania's total land area. Administratively, the region has seven districts, namely Bukoba, Biharamulo, Muleba, Karagwe, Ngara, Kyerwa, and Missenyi. Bukoba District has two councils while the other districts have one council each, making a total of eight LGAs in the region.

Kagera is the only region in Tanzania that borders four countries, namely Uganda, Rwanda, Burundi and Kenya, with whom they share a border in Lake Victoria. It is also very easy to reach South Sudan and Democratic Republic of Congo (DRC) from Kagera. Hence, apart from DRC, Kagera Region shares its border with all member states of the East African Community (EAC). This strategic location makes Kagera Region potential for cross-border trade.

Kagera Region had a population of more than 2.87 million people in 2017. The region also benefits from the population of Tanzania and EAC in general when it comes to market access. The EAC has a population of about 185 million: Tanzania 55 million; Kenya 50 million; Uganda 44 million; Rwanda 12 million; Burundi 11 million; and Southern Sudan 13 million. This strategic location of Kagera and the total EAC population present a huge market for goods and services produced in the region. Within Tanzania, Kagera is one of the six lake zone regions, others being Geita, Mwanza, Shinyanga, Simiyu and Mara. The Lake Zone constitutes twenty-seven percent (27%) of Tanzania's population. All this implies that goods and services produced in Kagera Region have a substantial market not only within Tanzania but also within the EAC region; the markets are readily accessible by current and future investors. Furthermore, there are markets in DRC, which can also be accessed through Uganda, Rwanda and Burundi.

Kagera Region has a mixed economy dominated by the agriculture sector, which employed about seventy-seven percent (77%) of regional population in 2012. Both commercial and peasantry farming are practised. Agriculture

contributes most of the region's cash income mainly from coffee, beans, tobacco, bananas, cotton, tea, fruits, and vanilla production. Trade is the second most important occupation after agriculture, involving 5.3 percent of the population, while domestic service sub-sector comes third engaging 4.3 per cent of the region's population. The fourth most important occupation in the region is fishing, hunting, livestock and other related activities, engaging 2.9 percent, while the fifth occupation, mining and quarrying businesses, engages 1.9 percent of the population. Manufacturing occupation involves 1.5 percent of the region's population, while the construction sector engages 1.4 per cent of the population.

The region's economic infrastructure has been tremendously improved and strategic investments are being made for further improvements. Roads are in good condition and are easily passable in all seasons. Kagera is served by marine transport through Lake Victoria; the region has two bays: one at Bukoba and a smaller one at Kemonondo. There is also an airport at Bukoba, whose runway is 2.5 km, allowing small and medium-size planes to land smoothly. Bukoba Airport is geared to serve an increasing demand of customers not only in Kagera Region but also in neighbouring districts. Kagera Region enjoys internet connectivity, as well as telephone and postal services.

The region receives adequate electricity from both Uganda national grid and Tanzania national grid, and there are three new projects intended to increase the supply of electricity in the region. Kagera Region is rich in natural resources, including agricultural land, forests and minerals such as tin, gold, limestone, etc. The region experiences equatorial climate, which is favourable for crops cultivation and livestock keeping, and temperatures are also moderate, allowing for smooth economic activities. Kagera Region, in collaboration with the Central Government, is committed to continue improving provision of basic enablers of investments such as land, utilities, and infrastructure, which were developed using sector and district budgets.

Investors are welcome to invest in the following suggested priority areas: specialised vocational training centres; animal feeds making industry; industry for packaging materials; dairy industry; building container terminal at Kemonondo; tourism (hotels, campsites, cultural and photographic tourism); commercial ice block plant; development of stadiums and recreation centres; solid wastes recycling plant; modern abattoir; construction of modern markets; construction of bus stands; construction of parking facilities for lorries; fish

farming; development of irrigation farming and related infrastructure; juice factories; banana wine production; cassava processing industry; avocado farming; tea farming; construction of warehouses; mining and value addition of minerals; beans processing plants; beekeeping and honey processing; investing in feedlot; establishment of cattle ranches; construction of industrial parks, supermarkets, and fish processing plants.

DISCLAIMER

This guidebook has been published to assist potential investors in terms of providing access to essential information regarding investments and investing in Kagera Region. The guidebook does not in any way give exhaustive information or detailed practical instructions but 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 districts government officials, private sector, and other agencies. Materials in this guidebook should therefore be used only for the intended purposes and not for defence in a legal dispute or any matter of that nature.



REASONS FOR INVESTING IN KAGERA REGION

1.1 Kagera Region in the Broader Tanzanian Context

As part of Tanzania, Kagera Region benefits from and largely depends on the country's investment policy and climate, including political stability and development frameworks that strategise the overall socio-economic and cultural development in the country.

Peace, security and stability: Tanzania is free of ideological confrontations, ethnic problems and labour disputes, and therefore regarded as an epicentre of economic and political stability in Sub-Saharan Africa. Multi-party democracy adopted in 1992 has not disturbed the peaceful political climate of the country. The political scene is characterised by parliamentary democracy and public consensus on key social and economic priorities.

Transparent investment laws: The pro-investment attitude by Government is clearly demonstrated by the innovative investment legislation, the increasing number of foreign direct investments in the country and economic and structural reforms that have led to substantial progress in establishing a functioning market economy. Institutional support for priority investment projects is readily available at the Tanzania Investment Centre (TIC) and other Government institutions.

This peace-loving nation has abundant natural resources, including agricultural land; water bodies such as lakes, rivers and springs; mineral resources; and tourism 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, landlocked countries. A number of measures have been taken to create 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, and improvements in the business climate through legal and regulatory reform aimed at streamlining procedures and freeing business from unnecessary bureaucracy.

Tanzania has sustained an average rate of 6-7 percent economic growth since the late 1990s due to a relatively stable political environment, reasonable macro-economic policies, structural reforms, a resiliency from external shocks, and debt relief. In 2017, the International Monetary Fund (IMF) reported that Tanzania's macro-economic performance remains strong, economic growth is projected at about seven percent (7%), and inflation is expected to remain close to the Government of Tanzania's (GoT) five percent (5%) target.

Tanzania's development agenda is also guided by the Sustainable Development Goals (SDGs), with particular reference to goals 1 and 2 on investment promotion agenda. The two goals relate to creating sound policy frameworks based on pro-poor and gender-sensitive development strategies to support accelerated investments in poverty eradication actions and increasing investment, including through enhanced international cooperation in rural infrastructure, agricultural research and extension services, technology development, and plant and livestock gene banks to enhance agricultural productive capacity.

The Government recognises the role of the private sector (both local and foreign) and other strategic partners as the engine of growth, poverty reduction and the drivers of economic transformation. This important role of the private sector has been further emphasised in the current FYDP II by recognising that the realisation of the goals and targets of FYDP II hinges on, among others, effective participation of the private sector in developing industries and enterprises that spur economic growth and create jobs.

1.2 Investment Climate and Trade Policy in Tanzania

For the last three decades, the Government of Tanzania has had, generally, a favourable attitude toward foreign direct investment (FDI) and has had considerable success in attracting FDI. There are no laws or regulations that

limit or prohibit foreign investment and firms generally do not restrict foreign participation. The Government also recognises the important role of the local private sector and enterprises in industrialisation. This recognition has been emphasised in many policy documents but more so in FYDP II. In that plan the Government has committed to ensuring that the local investment climate is functional for local enterprises, supporting small and medium-sized enterprises, encouraging new enterprises and attracting inward investment.

The Government uses the World Trade Organisation's (WTO) 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, in particular the agribusiness, textiles and electronics sectors.

Tanzania's Export Processing Zone Authority (EPZA) is the principal Government agency for promoting investments in Tanzania's special economic zones (SEZs). The Authority operates as an autonomous agency under the Ministry of Industry, Trade and Investment of Tanzania. EPZA is mandated to promote, register and facilitate investments in SEZs in Mainland Tanzania. EPZA's functions include the development of EPZ and SEZ infrastructure, provision of business services to EPZ and SEZ investors, and issuing of EPZ and SEZ licences. The Government has encouraged both local and foreign investors to take advantage of the investment opportunities under the Export Processing Zones Authority (EPZA) for their benefits and for the benefit of the country. There are three categories of licence issued by the EPZA; these are:

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

EPZA also oversees incentive packages such as exemptions from corporate tax and withholding taxes 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 be obtained. More information can be found on the website www.epza.go.tz and email address is 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. All the above factors, plus the country's well formulated development-cum-strategic frameworks, have contributed to continuous real GDP growth of about seven percent (7%) 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 of accessing both domestic and regional markets as well as the export markets in the European Union (EU), 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 more than 55 million people, growing at a rate of 2.9 percent per annum, as well as a growing middle class.

Generally, the following are among the reasons why one should invest in any region of Tanzania:

-
- High degree of investment security because of unparalleled political stability that is strife-free without ethnic divisions; democratic rule that respects diversity of opinion and a tradition of strong constitution and rule of law
 - 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
 - Simplified bureaucracy, streamlined through the acclaimed services of Tanzania Investment Centre (TIC), which is a one-stop facilitation agency of Government serving registered investors and businesses
 - Successful economic liberalisation measures commended by both the World Bank (WB) and IMF, with business-supportive legislation continually being improved through genuine dialogue between the Government and the private sector
 - A well balanced package of incentives to investors with additional negotiated benefits to strategic investors
 - Rapidly emerging as the most effective entry point and gateway for trade into Eastern, Southern and Central Africa
 - Lucrative investment opportunities in infrastructure and value-adding facilities
 - Investment guarantees and settlement of disputes: investments in Tanzania are guaranteed against political risks, nationalization and expropriation
 - Any 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, Barclays, Citibank, Stanbic, and Exim Bank have invested in Tanzania.

1.3 Reasons to Invest in Kagera Region

Kagera Region is strategically located, bordering four countries: Kenya, Uganda, Burundi and Rwanda, which make it potential for cross-border trade. Currently, the region has the minimum pre-requisites for establishing industries and successful business based on its geographical location and established infrastructural facilities that are important for enabling industrial development as summarised below:

a) Strategic geographical location

Kagera is the only region in Tanzania that borders four countries, namely Uganda, Rwanda, Burundi and Kenya, with whom they share a border in Lake Victoria. In addition, it is very easy to reach South Sudan and DRC from Kagera. Thus, apart from the DRC, Kagera Region shares its border with all EAC member states, thereby creating opportunity for cross-border trade.

b) Population and markets



Kagera Region had a population of more than 2.87 million people in 2017 increasing at 3.2 per cent per annum. The region also benefits from the population of Tanzania and that of EAC in general when it comes to market access. The EAC has a population of about 185 million: Tanzania 55 million;

Kenya 50 million; Uganda 44 million; Rwanda 12 million; Burundi 11 million and Southern Sudan 13 million. This strategic location of Kagera and the total population in EAC present a huge market for goods and services produced in the region.

Within Tanzania, Kagera is one of the five Lake Zone regions, others being Geita, Mwanza, Shinyanga, Simiyu and Mara. The lake zone constitutes twenty-seven percent (27%) of Tanzania's population. All this implies that goods and services produced in Kagera Region have a substantial market within Tanzania and within the EAC region; the markets are readily accessible by current and future investors. Furthermore, there are markets in DRC and South Sudan, which can also be accessed through Uganda, Rwanda and Burundi.

c) Economic strength of Kagera Region

Kagera Region has a mixed economy that is dominated by the agriculture sector, which employed about seventy-seven percent (77%) of the region's population in 2012. Both commercial and peasantry farming are practised. Agriculture contributes most of the region's cash income mainly from coffee, beans, tobacco, bananas, cotton, tea, fruits and vanilla production.

Trade is the second most important occupation after agriculture, involving 5.3 percent of the population, while domestic service sub-sector comes third, engaging 4.3 percent of the population. The fourth most important occupation in the region constitutes of fishing, hunting, livestock and other related activities and engages 2.9 percent of the population. The fifth occupation involves mining and quarrying businesses, which engages 1.9 percent of the population. Manufacturing occupies 1.5 percent of the population, while the construction sector engages 1.4 percent of the region's population.



d) Infrastructural services in Kagera Region

The region's economic infrastructure has been tremendously improved, and strategic investments are being made for even more improvements.



Roads: Trunk roads (512.1km) accounted for 6.5 percent of the road network in Kagera Region, while regional roads accounted for 13.4 percent (1,053.7 km) and district roads accounted for 35.7 percent (2,814.3 km). Feeder roads covered 44.5 percent (3,505.2 km) of the road network in 2015. Roads are in good condition and are easily passable in all seasons.

Marine transport: Kagera is served by marine transport through Lake Victoria. The region has two bays, one at Bukoba and a smaller one at Kemonondo. The latter bay is under expansion.

Currently, there are cargo vessels ferrying between Bukoba, Kampala and Kisumu. The Government has ordered a new ship



for both passengers and cargo that will operate between Mwanza and Bukoba in Tanzania, Port Bell in Uganda, and Kisumu in Kenya.

Air transport: There is an airport at Bukoba, the capital of the region, whose runway is 2.5km, allowing small and medium-size planes to land smoothly. The airport is about one kilometre from Bukoba Municipal centre. Currently, Bukoba Airport is geared to serve an increasing demand of customers not only in Kagera Region but also in neighbouring districts. There are plans to either expand the current airport or acquire a land located at Omukajunguti which is a few kilometres from Bukoba Municipal centre and construct longer runway.



Telecommunication services: Kagera Region enjoys Internet connectivity, telephone services (both cellular phone and land line telephone services) and postal services.



Electricity: The region receives adequate electricity from both Uganda grid and Tanzania grid. Responding to fast expanding socio-economic activities, there are three new projects intended to increase the supply of electricity in the region; the projects are in Ngara, Missenyi and Kyerwa districts.

Also, there is a plan to design and construct another hydroelectric power plant at Kakono along the Kagera river.

e) Natural resources

Kagera Region is rich in natural resources, including agricultural land, forests, and minerals such as tin, gold, limestone etc.



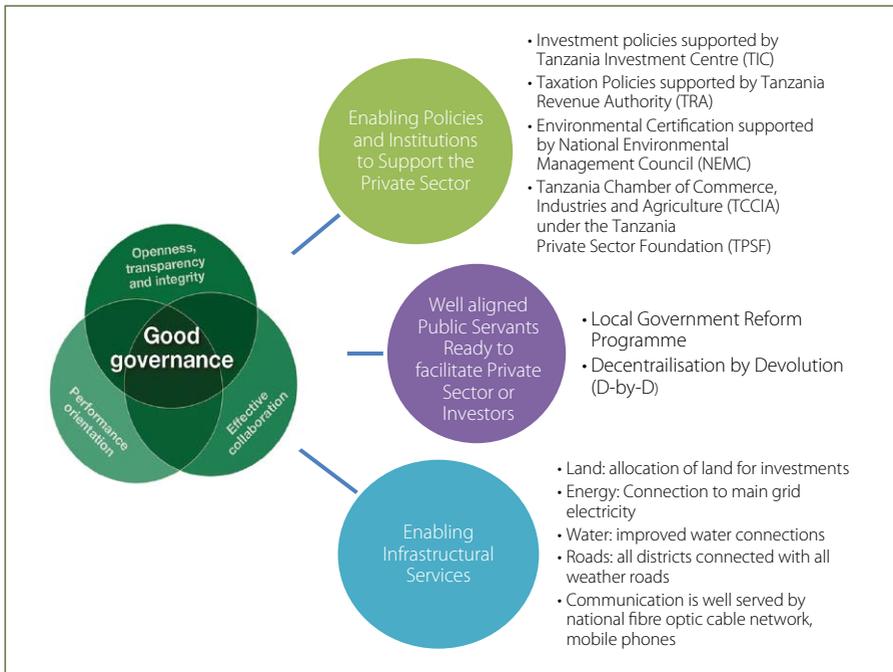
f) Good climatic conditions

The region experiences equatorial climate, which is favourable for crops cultivation and livestock keeping. Temperature is also moderate, allowing for smooth economic activities.

g) Commitments by Kagera Regional Secretariat and Local Government Authorities (LGAs)

The region, in collaboration with the Central Government, will continue to improve provision of basic enablers of investments such as land, utilities, and infrastructure, which were developed using sector and district budgets, as well as financial and technical support from development partners (DPs).

The Government will further support the private sector by enacting some enabling policies and laws so that they do not hesitate nor face hitches while investing in production, transportation, storage, processing and marketing of products, and in the development of various commodity value chains.



1.4 Suggested Priority Investment Opportunities in Kagera Region

Investors are welcome to invest in the following suggested priority areas:

1.4.1 Regional Level Priority Investment Opportunities

- i. Specialised vocational training centres and other educational facilities
- ii. Animal feeds making industry
- iii. Industry for packaging materials
- iv. Dairy industry.

1.4.2 Council Level Priority Investment Opportunities

- i. Building container terminal at Kemondo
- ii. Tourism (hotels, campsites, cultural and photographic tourism)
- iii. Commercial ice block plant
- iv. Development of stadiums and recreation centres
- v. Solid wastes recycling plants
- vi. Modern abattoirs
- vii. Construction of modern markets
- viii. Construction of bus stands
- ix. Construction of lorry parking facilities
- x. Fish farming
- xi. Development of irrigation farming and related infrastructure
- xii. Juice industries
- xiii. Banana wine
- xiv. Cassava processing industry
- xv. Avocado farming
- xvi. Tea farming
- xvii. Construction of warehouses
- xviii. Mining and value addition of minerals
- xix. Beans processing plant
- xx. Beekeeping and honey processing
- xxi. Investing in livestock feedlot
- xxii. Establishment of cattle ranches
- xxiii. Establishing industrial parks
- xxiv. Supermarkets

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- xxv. Fish processing industry
xxvi. Mirror making factory.

1.5 The Guide's Target Groups

The main thrust of this Guide is to provide general information that can assist potential investors and other stakeholders in making informed decisions. It targets national and international prospective investors interested in starting new businesses or acquiring existing ones in various sectors; or those seeking to either expand their current operations or interested in venturing into new businesses; and Government ministries responsible for facilitating business owners. However, directly targeted beneficiaries of this Guide include:

- Investors, business owners and stakeholders, agricultural crop estates and medium-to-large farms and value-adding and marketing entities intending to invest in designated industrial and business areas in Kagera
- Ministry of Industry and Trade
- Prime Minister's Office (Investment)
- Primary stakeholders across value chains, including individual entrepreneurs, importers and exporters of input and output factors and agricultural crops, livestock keepers and fisher folks, industrial organisations/marketing boards or organisations and exporters
- Government ministries and agencies, LGAs, EPZA, and State-Owned Enterprises (SOEs) (e.g. those responsible for agriculture, industries, trade, finance, and international cooperation)
- Academia/researchers in lake zone and in Tanzania as a whole
- Umbrella organisations such as the National Business Council (NBC), 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 management issues, such as Tanzania Bureau of Standards (TBS)
- Organisations providing productive capacities, information and data, monitoring and evaluation and other business support services, 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.;

- Selected civil society organisations (CSOs) and 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), and TradeMark East Africa (TMEA), etc.

SOCIO-ECONOMIC PROFILE OF KAGERA REGION

This part highlights geographical location, surface area, population and demographic pattern, administrative units, topography and land use patterns, agro-ecological zones, climate, socio-economic context and productive sectors of Kagera Region.

2.1 Geographical Location

Kagera is the name of one of the two large rivers after which Kagera Region is named. This is the real source of River Nile, the longest river in the world. Kagera Region is one of Tanzania's 31 administrative regions of Tanzania. The region is located in the north-western corner of Tanzania on the western shore of Lake Victoria. The region lies just south of the equator, between 1°00' and 2°45' south latitudes. Longitudinally, it lies between 30°25' and 32°40' east of Greenwich. The regional capital is the Municipal of Bukoba, which is about 1,400 kilometres from Dar es Salaam by road. Kagera is the only region in Tanzania that borders four countries, namely Uganda, Rwanda, Burundi, and Kenya with whom they share a border in Lake Victoria. In addition, it is very easy to reach South Sudan and Democratic Republic of Congo (DRC) from Kagera. Thus, apart from DRC, Kagera Region shares its border with all EAC member states.

2.2 Land Area

The region has a surface area of about 3,568,600 ha of the land area in Tanzania Mainland (88,598,700 ha). It has reasonably fertile soils. Out of the region's total area of 3,568,600 ha, 10,173 ha are covered by the waters of Lake Victoria, Lake Ikimba, Lake Burigi, and the Ngono and Kagera rivers.

2.3 Population

The region had a population of 2,879,231 in 2017 based on the 2012 census projection. For the period 2002-2012, the region's 3.2 percent average annual

population growth rate was tied for the third highest in the country. In 2012 it was the ninth most densely populated region with 97 people per square kilometre.

The East African Community has a population of about 185 million: Tanzania 55 million; Kenya 50 million; Uganda 44 million; Rwanda 12 million; Burundi 11 million and Southern Sudan 13 million. This strategic location of Kagera and the total population in EAC present a huge market for goods and services produced in the region. Within Tanzania, Kagera is one of the six lake zone regions, others being Geita, Mwanza, Shinyanga, Simiyu and Mara. The lake zone constitutes twenty-seven percent (27%) of Tanzania’s population. All this implies that goods and services produced in Kagera Region have a substantial market not only within Tanzania but also within the EAC region; the markets are readily accessible by current and future investors. Furthermore, there are markets in DRC, which can also be accessed through Uganda, Rwanda and Burundi.

2.4 Districts in Kagera Region

Administratively, Kagera Region has seven districts, namely Bukoba, Biharamulo, Muleba, Karagwe, Ngara, Kyerwa and Missenyi, with a total area of 35,686 square kilometres, as shown in Table 2.1 below; except for Bukoba District, which has two councils, the remaining districts have one council each.

Table 2.1: Population and Area by District

District	Council	Population in 2017	Area (Ha)
Biharamulo	Biharamulo District Council	378,919	562,700
Bukoba	Bukoba Municipal Council	154,887	8,000
	Bukoba District Council	339,340	507,100
Karagwe	Karagwe District Council	388,915	463,000
Kyerwa	Kyerwa District Council	376,037	308,600
Missenyi	Missenyi District Council	237,355	270,900
Muleba	Muleba District Council	632,898	1,073,900
Ngara	Ngara District Council	374,901	374,400
TOTAL		2,883,252	3,568,600

Source: Kagera Regional Commissioner’s Office (2019) and NBS (2018) Sub-Divisional Population Projection for Year 2016 and 2017 Based on 2012 Population and Housing Census

Biharamulo District is bordered to the north by Karagwe District and Muleba District, to the east and south by Geita Region, to the west by Ngara District, and to the southwest by the Kigoma Region. Its administrative seat is Biharamulo Town.

Part of Burigi-Chato National Park is located within the borders of the district. According to projections based on the 2012 Tanzania National Census, the population of Biharamulo District was 378,919 in 2017. Several trunk roads pass through the district: T3 from Morogoro to the Rwanda border, T4 from Mwanza to Bukoba and T9 from Biharamulo to Kigoma.

Bukoba District had a population of 494,227 in 2017 based on the 2012 Tanzania National Census. The district has two councils, i.e. Bukoba Municipal Council and Bukoba District Council. It is bordered to the north by Missenyi District, to the east by Lake Victoria, to the south by Muleba District and to the west by Karagwe District. Paved trunk road T4 from Mwanza to the Ugandan border passes through Bukoba District.

Karagwe District is located 100 kilometres from Bukoba Town. It is bordered to the north by Uganda, to the east by the Bukoba District Council, to the southeast by the Muleba District, to the south by Ngara District and to the west by Rwanda, from which it is divided by River Kagera. The district had a population of 388,915 in year 2017.

Taking public transport (buses) is the most convenient way to reach Karagwe District. Once in the district, one has to use *dalla-dallas* (mini buses) or *piki-piki* (motorbikes) to get around. Satellite lakes such as the Burigi, Kamakala, Kaburi and Rwakajunju provide fishing opportunities for residents of Karagwe District.

Kyerwa District is one of the 20 new districts in Tanzania that were formed since 2010; it was split off from Karagwe District. It is bordered to the north by Uganda, to the east by Missenyi District, to the south by Karagwe District and to the west by Rwanda.

According to the projections based on 2012 Tanzania National Census, the population of Kyerwa District was 376,037 in 2017. Unpaved trunk road T39 from Kayanga in Karagwe District to the Ugandan border passes through Kyerwa District. There are two new national parks, namely, Ibanda – Kyerwa

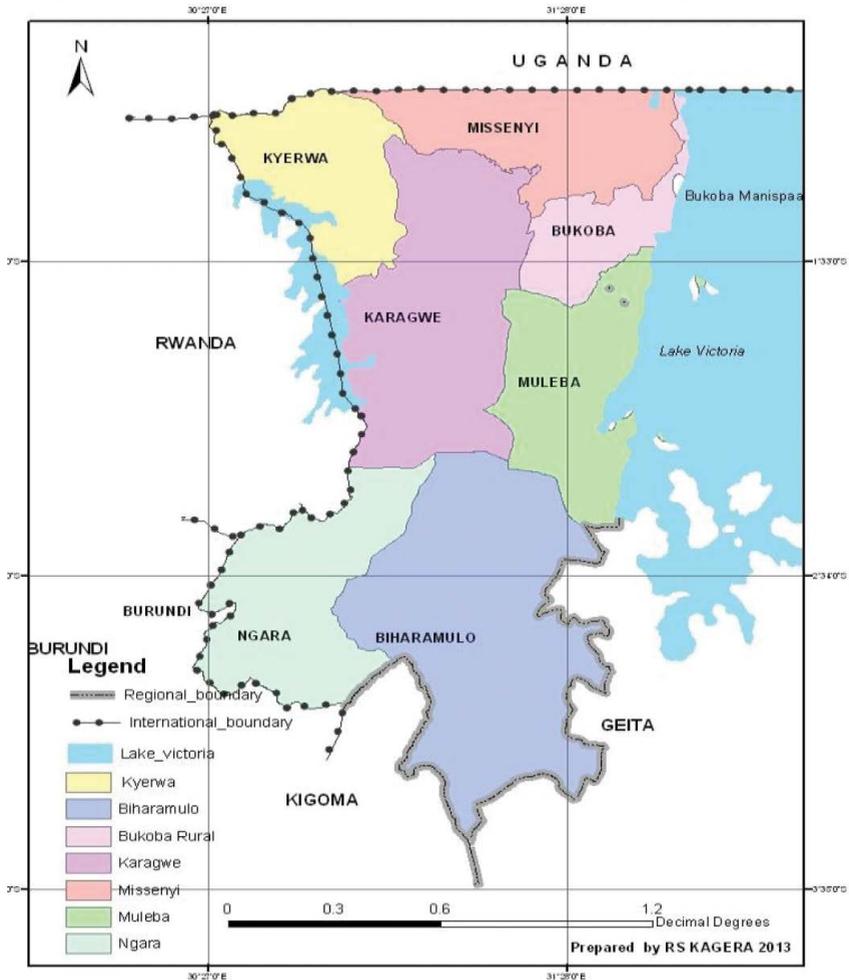
in Kyerwa District and Rumanyika – Karagwe in Karagwe and Kyerwa Districts.

Missenyi District is bordered to the north by Uganda, to the east by Bukoba District Council, to the south by Karagwe District and to the west by Kyerwa District. According to the projections based on the 2012 Tanzania National Census, the population of Missenyi District was 237,355 in 2017. Paved trunk road T4 from Mwanza to the Ugandan border passes through Missenyi District. Unpaved trunk road T38 to Ngara District, through Karagwe District, branches off from T4 in Kyaka Village.

Muleba District is bordered to the north by Bukoba Urban and Bukoba District Council, to the south by Biharamulo District, to the east by Lake Victoria and to the west by the Ngara and Karagwe districts. According to the projections based on the 2002 Tanzania National Census, the population of Muleba District was 632,898 in 2017. The district has about 39 Islands of which 26 are inhabited, and the main activity in these islands is fishing.

Ngara District is a strategic point that borders two countries — Rwanda and Burundi. It is bordered to the North by Karagwe District, to the East by Biharamulo District, to the South by Kigoma Region, to the North-East by Muleba District and to the West by Rwanda and Burundi. According to the projections based on the 2002 Tanzania National Census, the population of the Ngara District was 374,901 in 2017.

Figure 2. 1: Map Showing the Location of Councils in Kagera Region



2.5 Climate, Soils, Topography and Vegetation

2.5.1 Climate

The climate of the Kagera Region is related to its equatorial location, its altitude, the major air currents and the occurrence of a mass of water (Lake Victoria) within a continental land mass. The region experiences two rainy

seasons: the heavy rains fall from March to May and short rains from October to December. The annual rainfall in the Kagera Region ranges from 600 mm to about 2,000 mm (along the Kagera River). Rainfall varies considerably in space and time, and is rather unpredictable. Only the driest period of the year occurs from mid-June to mid August. During the rainy seasons it usually rains only in the morning and ends up being a very nice day afterwards. Daily temperatures fluctuate between 12°C and 34°C, with an average of about 21°C. Seasonal fluctuations in temperature are negligible. Explanations for these low temperatures are frequent cloudiness and a relative high altitude (1,142 – 1,800 metres above sea level).

Altitude, topography and vegetation greatly influence the climate, resulting in micro-climate in specific areas and macro-climate in larger areas. The climate in Kagera Region is influenced by several factors, thereby resulting in the formation of three distinctive climatic zones, namely Bukoba Rural District and Muleba District Zone, Karagwe District Zone and Ngara-Biharamulo Zone. Winds follow a monsoonal pattern being north-easterly during the months of May to November and south-easterly for the rest of the year. From June to October, the winds are usually dry and sometimes dusty.

2.5.2 Soils

Kagera Region is hilly, rolling or undulating and well drained. Bold ridges have developed on hard bands of quartzite. The mountain ridges are in contrast to the low, flat plains surrounding Kagera River and its effluents that have been built up by sediments for long periods from tertiary times to the present day. The mountain ranges of Kagera Region are formed of metamorphosed sedimentary rocks that have undergone rather strong folding. The mountains lie between 1,300 and 1,800 metres above sea level.

In Kagera Region, three major superficial geological deposits are identified: dark brown to reddish brown clay loams and clay sandy loams that have low to medium water holding capacity; greyish brown loamy sands soils, well drained and highly weathered; and the leached very dark grey silts and clay with dark brown sands and loams with low fertility and poor drained. Dark, greyish brown to reddish loamy sands that are characterised by being moderately drained and leached are found in the midlands, while the lowlands are occupied by greyish brown loamy sands.

2.5.3 Topography

Kagera Region lies in the Lake Zone, which rises from 1,000 m to 1,900 m above sea level. The western part of the region is covered by plateaus of Karagwe and Ngara that lie within the western arm of the Rift Valley. To the east of the region there is Lake Victoria; towards the north there are Kagera Plains, lying at 1,400 m above sea level. On the south of the region there are lower plains, which are dissected by Burigi-Chato National Park.

Apart from being a natural boundary between the republics of Tanzania and Rwanda, Kagera River is also an important river in the northern drainage system. The river drains into Lake Victoria and it is constituted by several pinnacle tributaries, such as Mwisu, and rivers including Muyowosi, Ngono, Ruvubu and many small streams that form the major drainage system for the region.

2.5.4 Vegetation

The vegetation consists of woodland, bush land thicket and grasslands. The common vegetation in the arable land comprises planted trees and shrubs. Miombo woodlands cover a greater part of the region including some parts of Bukoba District Council, Karagwe, Ngara and Biharamulo districts. Areas surrounding Muleba Plateau are covered by planted pines and gravellier and a few eucalyptus trees. The Kagera savannah landscape forms a floristic unit and belongs to the 'Lake Victoria Regional Mosaic'. It is a meeting-place of five floristic regions: Guineo-Congolian, Sudanian, Zambezian, Somalia-Masasi and Afromontane. The phyto-geographical mosaic contributes widely to the high areal-richness of Kagera Region.

The main terrestrial vegetation types in Kagera Region are determined by the soil catenae and have been defined according to the classification that is based mainly on physiognomic criteria. For our purpose the covers as well as the average height of the woody plants have been considered for getting a more objective classification.

2.6 Agro-ecological Zones

Climatic conditions as well as geological features have been the base of identifying different agro-ecological zones in Kagera Region. The region is

characterised by highlands, small mountain peaks, moderate hills, gentle plains and plateaus. Basically, the region has three distinctive agro-ecological zones.

2.6.1 Bukoba Rural and Muleba District Zone

The zone is characterised by moderately high rainfall with annual mean precipitation ranging from 1,000 mm to 1,500 mm falling in two seasons, i.e. from September to December or sometimes January (*vuli* or short rains) and also between February and May (*masika* or long rains). The dry and cold season occurs after the *masika* rain season and lasts from June to August. The zone lies almost in the central area of the region and is generally mountainous with plains dissected by many seasonal streams. The soils range in colour from dark brown to reddish brown clay loams and dark, greyish-brown loamy sands, and somewhat darker in colour in the western part of the zone than in the east, with medium fertility, and highly water holding. The zone is conducive for cultivation of permanent cash and food crops like coffee, bananas and tea while in the plains one finds the “*rweya*” grasses suitable for animal feed. Livestock keeping is practised in the tsetse fly-free areas. Because of abundant forests, beekeeping as a minor activity is also practised in addition to crop production.

2.6.2 Karagwe District Zone

This zone has ample rainfall and fertile soils, which allow for the largest areas of banana, coffee, beans and horticultural crops cultivation in the region. Karagwe District is a major breadbasket of the region, although it has no rivers except on its borders. This is a very hilly area whose altitude ranges from 800 to 1,500 m and an annual rainfall of between 1,100 and 1,300 mm. Soils are deep, dark reddish brown to red sandy clay loams, and vegetation is woodlands. Crops grown include coffee, bananas, maize, cassava and beans. Livestock keeping includes cattle, goats, sheep, pigs and poultry. Honey collection is also an important activity.

2.6.3 Ngara and Biharamulo Zone

The Ngara-Biharamulo Zone receives comparatively small amounts of rainfall; crops cultivated in this zone include cotton, tobacco, maize, cassava and sorghum. The zone is predominantly an undulating, flat land, broken by

occasional small hills and has a fair rainfall regime ranging from 600 mm to 1,000 mm annually. It has an altitude of 600 metres to 900 metres above sea level. This zone covers the low and high lying southern parts of the Kagera Region. Temperatures vary between 20°C and 30°C. The lowlands are dominated by greyish brown loamy sands and reddish brown clay loams, which have low fertile and low water holding capacity thus there is considerable soil erosion. Rainfall ranges from 900 mm to 1,200 mm per annum.

The zone is suitable for growing maize, beans, sorghum, cassava, paddy, coffee, bananas, tobacco and cotton. It is moderately infested by tsetse flies; therefore livestock keeping is practised in a large scale. Bee keeping, fishing and lumbering of hard wood are other economic activities practised in this zone.

2.7 Regional Economy



Kagera Region has a mixed economy dominated by the agriculture sector. Both commercial and peasantry farming are practised, with the latter dominating. According to results of the 2012 Population and Housing Census, the agriculture sector in Kagera engages 77.4 percent of the people aged 10 years and above. In rural areas 95.1 percent of the population

was engaged in agriculture while only 4.9 percent of the urban population was engaged in agriculture.

Agriculture contributes most of the region's cash income mainly from coffee, beans, tobacco, bananas, cotton, tea, fruits and vanilla production. Generally, the crop sub-sector's performance has been adequate to ensure food security. Poor performance of this sub-sector in some years has been attributed to the dependence on variable climatic conditions, especially rainfall. Thus the relatively high growth rates of the economy in some years reflect the availability of favourable rainfall in those years.



Trade is the second most important occupation after agriculture, involving 5.3 percent of the population aged 10 years and above in the region, while domestic service sub-sector comes third engaging 4.3 percent of the population. The fourth most important occupation in the region consists of fishing, hunting, livestock

and other related activities engaging 2.9 percent of the region's population. The fifth occupation, consisting of mining and quarrying businesses, engages 1.9 percent of the population aged 10 years and above. The census results also show that manufacturing accounted for 1.5 percent of Kagera Region's population aged 10 years and above, while the construction sector engaged 1.4 percent.

2.8 Economic Infrastructure

The region's economic infrastructure has been tremendously improved, and strategic investments are being made for even more improvements. The region has been integrated into the national road network following the construction of a tarmac road from Kagera to Dar es Salaam via Kahama in Shinyanga Region and Dodoma. The region is equally connected to the neighbouring countries of Uganda, Rwanda and Burundi by tarmac roads. Kenya can be reached via Lake Victoria.

Roads: In 2015, Trunk roads (512.1 km) accounted for 6.5 percent of the road network in Kagera Region, while regional roads (1,053.7 km) accounted for 13.4 percent, district roads (2,814.3 km) accounted for 35.7 percent, and feeder roads (3,505.2 km) covered 44.4 percent of the road network.



Out of the 7,885.3 kilometres of the road network in the region, Muleba District Council had the longest road network (1,498.5 km), followed by

Kyerwa District Council (1,395.7 km) and Karagwe District Council (1,394.7 km). Bukoba Municipal Council, with only 166.0 kilometres, had the shortest road network. Roads are in good condition and are easily passable in all seasons.

Marine transport: Kagera is served by marine transport through Lake Victoria. Marine transport is the cheapest means of transport, especially for goods. The region has two bays, one at Bukoba and a smaller one at Kemondo. The latter bay is due for major expansion, which will be completed by 2025. After its expansion, Kemondo will increase its capacity to serve bigger vessels.

Currently, there are cargo vessels ferrying between Bukoba, Port Bell in Uganda and Kisumu in Kenya. The Government has ordered a new ship for both passengers and cargo that will operate between Mwanza and Bukoba. About eighty percent (80%) of Bukoba residents depend on agriculture for their livelihoods; they grow a variety of crops like banana, beans, cassava and avocado all of which target markets in Mwanza and other lake zone regions. Therefore, the ship that has been ordered by the Government will greatly facilitate transportation of the region's agricultural produce and thus increase the economic livelihoods of the people of Kagera Region.

Air transport: There is an airport at Bukoba Municipality, the capital of the region, whose runway is 2.5 kilometres long, allowing small and medium-size planes to land smoothly. The airport is about one kilometre from Bukoba Municipal centre. There are plans to either expand the current airport or acquire a land located at Omukajunguti which is a few kilometres from Bukoba Municipal centre and construct longer runway. The Bukoba Airport is currently geared to serving an increasing demand of customers not only in Kagera Region but also in neighbouring districts.



As a result, Air Tanzania, which is a state-owned airline, and Precision Air, a private carrier, have regular daily flights to meet the demand of customers in that part of Tanzania. In addition, there are other scheduled flights with light airplanes like Auric Air. In addition to Air Tanzania and Precision Air

domestic flights, private sector companies do operate regularly in Ngara and Biharamulo district councils to serve missionaries, tourists and owners of mines. There are also airdromes operating in Biharamulo, Ngara and Kyerwa District Councils. Air transport has linked Kagera directly with Dar es Salaam and Mwanza and, by extension, with other regions of Tanzania and beyond.

Telecommunication services: Kagera Region enjoys Internet connectivity, telephone services (both cellular phone and land line) and postal services. In 2015 the region had a good coverage network for private mobile phones, including Tigo, Vodacom, Airtel, Zantel, Halotel and TTCL mobile. Postal services were found in all councils



except in Missenyi and Kyerwa councils. Sub-postal services were available in Biharamulo District Councils (6), Ngara District Councils (1) and Missenyi District Council (1). Landline telephones were found in all councils except Karagwe, Bukoba and Kyerwa district councils. Internet centres were found in all councils except in Bukoba, Missenyi and Kyerwa district councils.



Electricity: The region receives adequate electricity from both Uganda national grid and Tanzania national grid. However, as socio-economic activities are expanding fast, there are three new projects intended to increase the supply of electricity in the region; these are in Ngara, Missenyi and Kyerwa districts.

The Rusumo Power Project in Ngara will produce 81 MW, which will be shared equally by Tanzania, Rwanda and Burundi, each country getting 27 mw. Second is the Kikagati Hydro-power Project, which will produce 14 MW, to be shared equally between Uganda and Tanzania. The third is the Kakono Hydro-power Project, which will produce 37 MW; this will solely serve Tanzania. In total, these three energy projects will add 132 mw to the national grid and thus support industrial and other socio-economic activities in the region.

2.9 Productive Sectors

2.9.1 Agriculture

Food crops: Major food crops grown in Kagera Region are maize, banana, cassava and beans, sweet potatoes, groundnuts and paddy, grown mostly by smallholders. During the 2011 – 2015 period, Kagera Region had an average annual land area of 496,519.4 hectares planted with major food crops. Bananas were planted on an average annual land area of 143,233.0 hectares, accounting for 28.8 percent of the regions' average annual land area planted with major food crops. Beans, which accounted for 26.9 percent of the average annual land area planted with major food crops, are normally intercropped with other crops. This was followed by cassava (13.1%), sweet potatoes (4.0%), paddy (1.3%) and groundnuts (0.9%). In 2015, the region cultivated the largest annual land area (541,949 hectares) under food crops. Year 2011 had the smallest annual land area (466,116.0 hectares) planted with food crops in the region.



It is estimated that 64 percent of the region's average annual production of food crops is banana, which makes banana the leading food crops in terms of production with an average annual production of 2.3 million tonnes. This is followed by cassava (21%), maize (7%), beans (6%) and sweet potatoes (2%).

Cash crops: Major cash crops that contribute significantly to the regional economy are coffee, tea, cotton, tobacco, sugar cane, finger millet, millet, vanilla and groundnuts. Coffee is grown in all districts in the region at an



annual average production of 65,000 tonnes of cherry coffee, with Kyerwa and Karagwe districts being the highest producers while Biharamulo is the lowest producer. Tea is grown in Bukoba and Muleba district councils, while cotton is grown in Muleba and Biharamulo district councils. Tobacco is grown in Biharamulo; sugar cane in Missenyi; finger millet and millet in Karagwe; and vanilla in Muleba District Council. There are also emerging cash crops such as chia and cocoa. Karagwe and Kyerwa are currently the main producers of chia, reaching an average of 20 tonnes of chia seeds per season. Cocoa plants have been distributed to farmers in Bukoba and Missenyi districts.

Irrigation: Kagera Region has a potential area for irrigation of 31,547.1 hectares. The largest suitable land for irrigation, 11,140.1 hectares, (35.3%) is in Ngara District Council, followed by Muleba District Council (8,795.0 ha, 27.9%), Missenyi District Council (8,144.0 ha, 25.8%), Biharamulo District Council (2,035.0 ha, 6.5%), Karagwe District Council (723.0 ha, 2.3%), Bukoba District Council (430.0 ha, 1.4%) and Kyerwa District Council (280.0 ha, 0.9%). By 2015 the region utilised only 16,113.0 hectares (51.1% of the irrigable area). The council with the largest unutilised irrigable land was Missenyi with 6,880.0 hectares, followed by Ngara District Council (5,360.1 ha) and Biharamulo District Council (2,035.0 ha). Muleba District Council had utilised 99.1 percent of its land suitable for irrigation.



2.9.2 Livestock

Kagera Region has a significant number of livestock mostly owned by individual households. Livestock keeping is the second most important economic activity after crop production in Kagera Region. The region has good land for livestock rearing at Missenyi, Kikulula, Mabale, Kagoma and Kitengule National Ranching Company (NARCO) farms. There are also 127,000 hectares at Mwisu area for livestock keeping and cattle fattening ready for attracting investments in meat processing plant, and processing of other livestock products such as milk and leather.

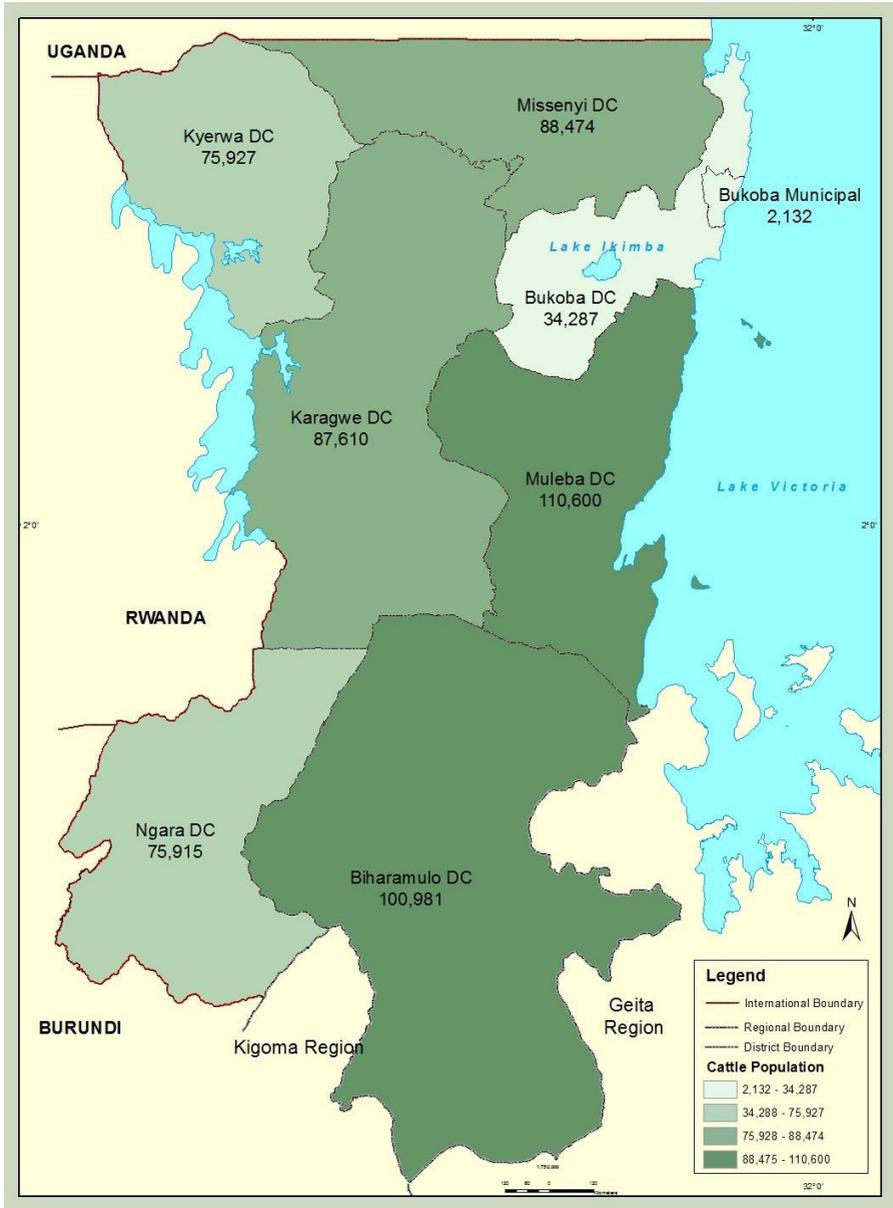
The estimated number of livestock in Kagera Region for year 2015 was 575,926 cattle, 541,156 goats, 56,575 sheep, 108 donkeys, 61,257 pigs, 788,026 indigenous chickens and 26,497 improved chickens (broilers and layers). At council level, Muleba District Council had the largest number of cattle population (110,600; 19.2%), followed by Biharamulo District Council (100,981; 17.5%). In regard to goats, Ngara District Council had the largest number (134,118; 24.8%) and indigenous chicken (217,868; 27.6%).

Muleba District Council had the largest number of sheep (23,702; 41.9%), while pigs were found mostly in Kyerwa District Council (13,924; 22.7%). On the other hand, Bukoba District Council had the largest number of improved chicken - broilers and layers - (12,312; 46.5%) of the region's total (26,497) of improved chicken. The region has set aside about 60,000 hectares for livestock production, which will enhance the building of milk and beef production plants.

Cattle: Indigenous cattle are the dominant type in Kagera Region. In 2015, cattle accounted for 95.7 percent of the region's total cattle population of 575,926. This was followed by dairy cattle (16,999; 3.0%) and beef cattle (7,612; 1.3%). At council level, Muleba District Council led other councils in the number of cattle, accounting for 19.2 percent of the region's total cattle population. Bukoba District Council had the lowest number of cattle (2,132) equivalent to only 0.4 percent of the region's total cattle population. Likewise, Figure below shows population of cattle by council in the region in 2015.



Figure 2. 2: Map Showing Population of Cattle by Council in the region in 2015



Goats: Indigenous goats are the dominant goat type in the region and accounted for 97.9 percent of the region's total goat population of 541,156, while dairy goats accounted for only 2.1 percent of the regional total goat population in 2015. Almost a quarter (24.8%) of goat population in the region



was in Ngara District Council, followed by Muleba District Council (109,289; 18.7%), Karagwe District Council (94,475; 17.55) and Kyerwa District Council (73,168; 13.5%). Bukoba District Council had the smallest number of goats (1,454; 0.3%) of the region's total goat population.

Pigs: In 2015 in Kagera Region, pigs (61,257) were the third largest livestock in number. Kyerwa District Council had the largest pig population (13,924; 22.7%) in the region, followed by Ngara District Council (13,243; 21.6%). Bukoba District Council had the smallest number of pigs (1,069; 1.7%) of the regional total pig population.



Poultry: In 2015 the estimated poultry population in Kagera Region was dominated by indigenous chicken (788,026), which accounted for 96.7 percent of the regional total poultry population of 814,523. Bukoba District Council led other councils in the region in number of improved chicken (12,312; 46.5%) of the total improved chicken in the region. In

terms of percentage distribution of chicken population by council, more than a quarter (27.6%) of the indigenous chicken population in Kagera Region was in Ngara District Council, while Bukoba Municipal Council had 1.7 percent. For improved chicken, nearly half of them (46.5%) were in Bukoba District Council. Muleba and Kyerwa district councils did not have improved chicken.

Grazing area: Grazing land is defined as the land that is available for the grazing needs of livestock. It excludes all areas infested with tsetse fly, wildlife and forest/game reserves and tree plantations, but it includes game

controlled areas. In 2015 the estimated land for grazing in Kagera Region was 355,961 hectares, while the land actually used for grazing was 339,428 hectares (95.4%). As most of the councils had used more than ninety percent (90%) of their grazing land, this implies that there is pressure for grazing land. Land used annually for crop production can also be used for grazing after crop harvests.

Livestock infrastructure: Livestock quality improvement is limited by access to preventive and curative facilities capable of controlling or preventing livestock morbidities and mortalities. Diseases affect animal health and reduce quantity and quality of both meat and milk. Diseases are prevented by availability of livestock infrastructure, including dips and veterinary centres supplied with medicines, while crushes, abattoirs, hides and skin sheds, slaughter slabs, livestock market or auctions and accessibility of water improve the quality of livestock products. The region had 124 dips and 15 veterinary centres in 2015.

The quality of livestock products such as meat, milk, hides and skins and other related products mostly depend on availability, status and quality of infrastructure such as crushes, abattoirs, hide and skin sheds, slaughter slabs, livestock market or auctions and accessibility of water. By 2015, the region had 69 crushes, 11 hides and skin sheds, 4 abattoirs, 40 slaughter slabs, 18 livestock markets/auctions and 28 charcoal dams.

Marketing for livestock and their products: With economic growth, consumption patterns tend to change towards high value and high protein foods, such as those derived from livestock. This implies that, given the economic growth in Tanzania, the market demand for livestock and livestock products is likely to continue in the future. Unfortunately, lack of reliable data on number of livestock and livestock products sold remain a challenge in Kagera Region. Improving data collection system by allocating staff to livestock marketing places to monitor and collect information would be among strategies towards improving availability of information on marketed livestock and livestock products.

2.9.3 Forestry and beekeeping

These activities contribute to the country's GDP and play an important role in the maintenance of climate stability, protection of water sources and soil

fertility, controlling land degradation, and are the source of wood fuel and industrial raw materials. Involvement of the community in these activities is very important in attaining sustainability in the use of the country's natural resources.

Forestry: Burigi-Chato National Park consists of three former game reserves: Burigi, Kimisi, and Biharamulo. Other National Parks are Ibanda - Kyerwa in Kyerwa district and Rumanyika - Karagwe in Karagwe and Kyerwa districts. The new Burigi - Chato National Park covers 4,702 square kilometres making it the second largest in Tanzania after Ruaha National Park. Rumanyika – Karagwe National Park covers 225 square kilometres and Ibanda – Kyerwa covers 248 square kilometres. Minziro Nature Forest Reserve in Missenyi District covers 248 square kilometres. The Minziro Forest is managed by the Tanzania Forest Services (TFS) which manages a total of 2,008 square hectares of forests in Kagera region. However, the majority of the forests in the region are privately owned. A total of 38,481 square hectares of the forests are in private hands making Kagera region one of the greenest region in the country thus contributing into a clement weather suitable for agriculture, livestock keeping and other social investments such as education facilities.



Beekeeping: Beekeeping is particularly well suited to the region, given its extensive forest cover and well-watered land. It is an activity that could provide the peasant farmer with financial gain. However, the potential in this activity has not been fully exploited due to low technical knowhow on modern beekeeping methods. In 2015 Kagera Region had 63,739 traditional beehives and 15,812 modern beehives. In terms of the number of beehives, Karagwe

District Council led other councils in both traditional beehives (26,996; 42.2%) and modern beehives (9,954; 63.0%). Bukoba District Council with a limited number of natural forests had the smallest number of both traditional beehives (149; 0.2%) and modern beehives (293; 1.9%).

2.9.4 Fisheries

The fisheries sector plays an important role in the economic and social development of people, and contributes to food security and employment to fishers, fish dealers and related activities. Kagera Region has a large water body (part of Lake Victoria) covering an area of 10,017 square kilometres on which sizeable fishing activities is carried out. Other fishing areas are on Burigi, Ikimba, Rushwa and Rumanyika lakes.

Fishing activities are also done on Kagera, Ruvuvu and Ngono rivers. Major fishing activities are carried out on Lake Victoria. Some 97.2 percent of the lake area is within Muleba and Bukoba district councils: Muleba District Council accounts for 72.8 percent of the lake water body and Bukoba District Council accounts for 24.4 percent. The remaining 2.8 percent is shared among Karagwe District Council, Biharamulo District Council and Bukoba Municipal Council. Ngara District Council does not have any share in the lake area.

By 2018, Kagera Region had 25,740 fishing licences issued to 23,740 fishermen and 1,787 fish traders. About 6,178 fishing vessels, equal to 84.2 percent of all fishing vessels, were registered; there were also 1,167 unregistered vessels. At council level, Muleba and Bukoba district councils, which had the largest part of Lake Victoria, also had the largest number of fishing licences, fishermen as well as the number of registered fishing vessels.



The fisheries sector in Kagera Region can be divided into inland capture fisheries, fish farming and fish processing. The scale of operations ranges from small-scale subsistence fishing to industrial fish processing. The main fresh water species of commercial interest in Kagera Region are the Nile perch (*Lates niloticus*), Nile tilapia (*Oreochromis niloticus*) and the fresh water sardine or *dagaa* in Kiswahili (*Rastrineobola argentea*).

Capture fisheries are done on Lake Victoria, River Kagera, Ruvuvu River and fifteen (15) satellite lakes, namely Burigi, Rwakajunju, Kamakala, Ikimba, Rushwa, Melule, Katwe, Luko, Karengi, Mitoma, Kaburi, Kitete, Kabindi, Rumanyika and Ngoma. Current investments in fish farming and capture fisheries in Kagera Region are undertaken mainly by residents.

Cage fish farming (offshore farming) is a relatively new technology in Kagera Region. So far there are only 4 cages practised at Kemondo in Bukoba Rural District, which were constructed by *Jeshi la Kujenga Taifa* (JKT). Kagera Region Secretariat is emphasising new investors in cage farming in natural water bodies due to the decline in catches from capture fisheries in Lake Victoria.



The fishing activities are done by using both modern and traditional fishing methods. Fish are mostly caught with plank canoes, dugout canoes and, to a lesser extent, fibreglass boats. The plank canoes are generally 4 to 12 metres in length and dugout canoes average 3.5 metres long. In 2018 the region had having 7,338 fishing vessels, of which about fifty-five percent (55%) were motorised. Currently, Artisanal fishermen use various gears in catching fish, including gill nets, lift-nets, hooks and line gears (hand-lines, fishing rods or tackles), and fish traps.

In recent years fish farming has become popular in Kagera Region as a means of income generation. The distribution of fish ponds in the region is determined by several factors, such as availability of water, suitable land for fish farming, awareness and motivation within the community on the economic potential in fish farming.

Kagera Region has only two large fish processing firms targeting export markets; these are Supreme Perch Ltd and Kagera Fish Industry. Fish processing is also done by small-scale fish processors using traditional drying, smoking and salting technologies. Most processors of *dagaa* are women, who distribute dried *dagaa* in sacks via a network of traders, who in turn

transport it to not only almost every region in Tanzania but also to other countries including Democratic Republic of Congo, Burundi, Zambia, South Sudan, Kenya, Rwanda and Malawi.

2.9.5 Nature and Tourism

As far as tourism is concerned, Kagera Region is located between Gorillas in Uganda and Serengeti in Tanzania on the transit route from Zanzibar, Kilimanjaro, Ngorongoro, and Serengeti to Uganda, Rwanda and the rest of Central Africa. Kagera Region lies on the border with several neighbouring



countries all hosts to individual tourist attractions. These include Uganda and Rwanda Gorilla trekking and Kenya's well-developed tourism.

However, Kagera is one of the regions with unique tourist attractions that have not yet been discovered by many. It is a land of much wonder, holding an unparalleled diversity of fauna, flora and many natural features. The wonders include rocks, scenery and topography that harbour the growth of excellent cultural tourism, game hunting, historical buildings and archaeological ventures as well as wildlife photographic safaris.

The Tanzania Ministry of Natural Resources and Tourism has upgraded the former game reserves in Kagera Region to a national park namely Burigi-Chato National Park. Other National Parks include Rumanyika in Karagwe and Kyerwa, and Ibanda National Park in Kyerwa. The wildlife available in these national parks includes lions, leopards, elephants, hippopotamus, giraffes, buffalos and antelopes, among others. The region also border another national park situated on Rubondo Island in Chato District.

Tourist attractions in Bukoba Municipal Council and Bukoba District Council: These include Rubale exotic forest of only pine trees, situated 7 kilometres from the centre of Bukoba Town; Kyamunene Waterfalls in Rubale Forest; Kyamunene Cave in Rubale Forest; Maruku Bats Cave; beautiful Maruku White Sand Beach; Bunena Stone Beach; Karobela Beach and Bugabo Natural

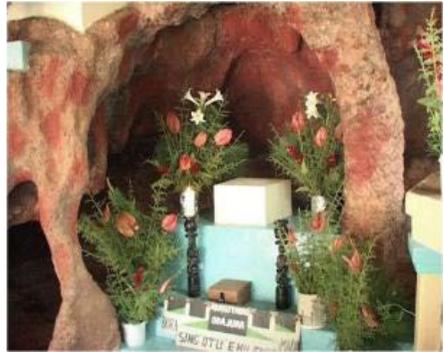


Beach; German underground bank ruins at Gymkhana Grounds; German mass graves of more than 100 years ago in front of Regional Commissioner's office; and Musila Island, a view point on Bukoba Town in a whole.

Other attractions are Nyabesiga Birds Watching and Fishing Island; Roman Catholic Cathedral in Bukoba Town; Kagera Museum; Ntungamo panoramic view point of Lake Victoria; Kabare Palace of King Omukama Lukamba; Ishozi Hiking Hills and panoramic view, and Mugeza view of V- Shaped to Lake Victoria.

Missenyi District Council tourist attractions include:

Nyakijoga Shrine at Mugana Village; Mugana Rock Paintings; Kantare Rain Forest (bird watching, poisonous snakes, colobus monkeys etc.); Ngorongoro Crater at Kanyigo; Kanyigo Caves; Kanyiko Chiefdom Formation History; Slave Market and Distribution in Kyaka Centre; the bombed bridge and church at Kyaka; Minziro Rain Forest (butterflies, bird watching, mammals, medicinal tree); Minziro Pilgrimage Maria Muzeyi; Minziro back cloth industries (*mulumba*); Heroes Monument; Luasina Swamp; Kagera River; Chief's Palace and Home-stay Villages.



Muleba District Council tourist attractions include: Chief Peter Nyarubamba Palace at Kanazi Village; Lake Ikimba – the lake of incredible miracles, needs documentary; Mugasha Foot Prints on Stone at Ikimba Hill; Murorwa Cave; Suleiman Cave; Bugonzi Waterfall and panoramic view in Kamachumu; Kagoma and Muleba Rock Paintings; Stanley Historical Site at Bumbile Island and Home stay in villages.

Biharamulo District has the following tourist attractions: Biharamulo Forest as part of Burigi-Chato National Park is the best for photographic



tourism, canoeing, sport fishing, walking safaris and camping; Burigi best for photographic tourism, canoeing, sport fishing, walking safaris and camping; Bisbo Basota Cave; Byamungu Campsite; German Historical House in Biharamulo Town; and Biharamulo Palace.

Ngara District tourist attractions include: The meeting point of River Kagera from Rwanda and River Ruvuvu from Burundi, to form a huge Kagera River in Tanzania; Rusumo Waterfalls at the border of Rwanda; Rwandan Genocide Ruins; Rwandan Genocide Mass Graves; and Burigi-Chato National Park. Other attractions include Baramba Chieftdom house; *Mafiga Matatu* at Kasange which is the only point that one can stand and view three countries -Tanzania, Burundi and Rwanda; Kirushya Cave connecting three villages - the cave was used for colonial resistance.



Karagwe District tourist attractions include: Ibanda National Park; Rumanyika National Park; Mutagata Hot Water Spring situated near Rumanyika National Park; the oldest King Palace of the famous King Rumanyika of Karagwe; Bweranyange Village, where the famous explorer Stanley stayed over a month recovering from his

illness; King Rumanyika Museum in Kayanga Town; Kitengure Game Reserve; Kagera River Swamps at Murongo; Organic Farms under Kaderes and Home-stay Villages.

Kyerwa District tourist attractions include: wild animals such as hippos, elephants, waterbuck, tohe, tope, bushbuck, roam antelope, olibe, leopard, hyena, and olive baboons, which are found in Ibanda and Rumanyika national parks.

Status of Kagera tourism facilities: Kagera Region has a new Bukoba Airport with the capacity of receiving 6,040 passengers per month and 500,000 passengers in a year. Bukoba Airport has the capacity to host two large planes and two small planes at the same time. The new improved airport should be utilised for tourism, and so should a small airstrip in Ngara that has potential for tourism in the newly developed national parks of Burigi-Chato, Ibanda and Rumanyika. Most of the roads in Kagera Region are accessible throughout the year, and the road to Uganda is well improved. Other potential roads that need improvement include those to Rwanda, from Karagwe to Kyerwa, and from Karagwe to Ngara. Although the absence of ship transportation from Mwanza to Bukoba has contributed to the reduction of tourists to Kagera Region, plans are underway for a new ship for the Mwanza – Bukoba route.

The new ship is under construction, while an old ship, MV Victoria is being rehabilitated. A cargo ship is soon to start ferrying goods from Uganda to Bukoba, Mwanza and Kisumu; expectations are high that the economy will improve once both cargo and passenger ships become operational. Kagera Region is connected with other regions of Tanzania Mainland as well as neighbouring countries of Uganda and Rwanda by tarmac roads. These connections are potential attributors to economic development, including tourism in the region. Other good infrastructures are accommodation facilities, telecommunication services, banking/*bureaux de change* services offered by National Microfinance Bank (NMB), CRDB Bank PLC, Mkombozi Commercial Bank, National Bank of Commerce (NBC), and Tanzania Postal Bank (TPB). Tour operators, including Kiroyela Tours and Bukoba Tours, are available to offer transport facilities and guidance to the region's tourist attractions.

2.9.6 Mining Sector

Kagera Region is resource rich with various minerals including gold, tin and nickel. Kabanga, situated in north western Tanzania, is believed to be one of the most attractive undeveloped nickel sulphide deposits in the world while Tulawaka is a combined underground and open pit gold mine located in Biharamulo District.

The Kabanga Nickel Project is an active mine exploration project situated 130 kilometres south west of Lake Victoria in the Ngara District. The project is a joint venture between Barrick Gold and Xstrata Nickel. At full capacity the mine is estimated to employ over 2,000 people. At present Xstrata has

invested US\$95 million in the pre-feasibility stage of development. Tin minerals are currently mined in Kyerwa District only at small scale. There is an opportunity for investors to venture in large scale mining and processing of tin. Geological survey also revealed that Muleba District has large deposits of nickel sprawling along the undeveloped Kabanga Nickel-Cobalt Project in Ngara District.



2.9.7 Industries

Industries all over Tanzania play a major role in socio-economic development; Kagera Region is not an exception.

- The region is conducive for such investments due to being close to four neighbouring countries - Rwanda, Burundi, Uganda and Kenya - across Lake Victoria for exports of food products and other goods. Farmers should take advantage of investments in the industrial sector as an opportunity to growing various food and cash crops.

Industries in the region, mostly micro, small and medium-scale, contribute significantly to jobs creation. According to international recommendation, which has also been adopted in Tanzania, industries are categorised as follows:

- Micro-scale industry: establishments that employ 1 to 4 staff
- Small-scale industry: establishments that employ 5 to 49 staff
- Medium-scale industry: establishments that employ 50 to 99 staff
- Large-scale industry: establishments that employ 100 and above staff.

Micro and small-scale industries: Based on the given definitions, analysis of industries available in Kagera Region shows that most of them fall into the micro and small-scale category. In 2015 there were a total of 2,245 micro and small-scale industries in the region, most of them (891 industries, 39.7%) involved specifically in maize and paddy grain milling. It was followed by

carpentry (564 industries, 25.1%), welding (221 industries, 9.9%) and lumbering (216 industries, 9.6%). The region has one factory for bottling drinking water and one factory for production of juice, wines and spirits.

Medium-scale industries: According to the report from the Regional Trade and Business Officer, in 2015, there were three medium-scale industries operating in Kagera Region, namely BUKOP Limited dealing with coffee processing, Bunena Development Co. Limited, and NK Bottling Co Limited which produce bottled water. All these industries are in Bukoba Municipal Council.

Large-scale industries: By 2015, Kagera Region had 13 large-scale industries, of which 7 (53.8%) were dealing with coffee processing. Fish processing and drinking water bottling industries took second place, each with two industries accounting for 15.4 percent of large-scale industries. Bukoba Municipal Council had six large-scale industries, representing 46.2 percent of all industries in this category in the region.

Table 2.2: Large-scale Industries in Kagera Region

No.	Name	Products	Location	Installed capacity	Actual Production (Tonnes)	Employment
1	Kagera Sugar Co. Ltd	Sukari	Missenyi	120,000	61,000	4,000
2	Amir Hamza (T) Ltd	Instant coffee	Bukoba	5,000	500	600
				20,000	0	
3	TANICA PLC	Coffee & Bottled water	Bukoba	500	275	200
4	Kagera Fish Co Ltd	Fish Fillet	Bukoba	1,200	440	140
5	Kagera Tea Co Ltd	Tea leaves	Bukoba	2,000	800	248
6	Supreme Perch Ltd	Fish Fillet	Bukoba	10,000	1800	350
7	BUKOP Ltd	Coffee curing	Bukoba	30,000	120	16
8	Bunena Development	Bottled water	Bukoba	120,000m ³	80,000m ³	35
9	OLAM (T) Ltd	Coffee curing	Missenyi	20,000	12,000	250
10	Arab Globe International	Coffee curing & instant coffee	Ngara	25,000	18,000	25

For sustainable development of industries, Kagera Region is:

- i. Creating an enabling environment for sustainable development in agribusiness value chains
- ii. Developing and allocating industrial extension officers to councils in order to support rural industrialisation and organise local enterprises at council and sector levels to create business linkages
- iii. Establishing financial support programmes to improve financial access for small and medium enterprises (SMEs)
- iv. Expanding institutional support to agro-allied industries on human resource development and financing.

Given that Kagera Region has a reliable supply of electricity from Uganda, opportunities for expansion and installation of industrial establishments is viable. Likewise, being the main source of raw materials for industrial establishments, the agriculture sector still has much to offer in the expansion of existing industries as well as establishing new ones.

PRIORITY INVESTMENT OPPORTUNITIES IN KAGERA REGION

The investment opportunities identified by the region can be grouped into eight strategic investment areas and presented at both regional level and council level as follows:

3.1 Strategic Investment Areas

The region has set aside more than 27,800 hectares of land for investing on the following strategic investment areas:

a) Cross-Border Trade

Kagera Region is strategically located, bordering four countries: Kenya, Uganda, Burundi and Rwanda, which make it potential for cross-border trade. The region is also very close to South Sudan and DRC. Also, the region has three one-stop border posts (OSBPs) at Mutukula, Rusumo and Kabanga, which serve to facilitate and enhance cross-border trade between Tanzania and Uganda, Tanzania and Rwanda, as well as between Tanzania and Burundi. Investors can take advantage of the opportunities associated with cross-border trade like building an international agricultural market equipped with ICT at Mutukula in Missenyi District Council at the border with Uganda; building an international agricultural market at Murongo in Kyerwa District Council at the border with Uganda and Rwanda; and a modern market at Rusumo in Ngara District Council. Investors also are welcome to construct warehouses at Mutukula in Missenyi, Rusumo in Ngara and Lusaunga in Biharamulo. About 27 hectares have been set aside for investing in the mentioned opportunities.

b) Commercial Crop Farming

The region experiences equatorial climate, which is favourable for crops cultivation. Investors can invest in production of maize, banana, cassava and beans, sweet potatoes, groundnuts, paddy, coffee, tea, cotton, tobacco, sugar

cane, finger millet, millet, vanilla, chia and cocoa. There are also opportunities for irrigated farming (potential land for irrigation is about 31,547.1 hectares) where investors can build irrigation infrastructure for their own crop production, charging users of the irrigation system and/or entering contract farming for sustainability of the infrastructure.

Several councils in the region have already set aside land for investing in crop farming and building irrigation infrastructure. The idea to invest in agriculture sector in the region is viable due to the following facts:

- Ecology and climate of the region favour production of a wide range of both cash and food crops
- Availability of fertile arable land with more than 17,853 hectares being set aside for potential investors
- Waters from River Kagera and Lake Victoria basin offers an opportunity for development and use of existing irrigation facilities at Kyota, Kyamyorwa, Buyaga, and Buhangaza in Muleba District Council. Also, Mwisa Irrigation Scheme in Karagwe District and Kazingati (Mpanyura), Bigombo in Ngara District is another irrigation potential
- Available workforce as well as training institutions
- Transport links with other regions and proximity to neighbouring countries of Uganda, Kenya, Burundi, Rwanda, South Sudan and Democratic Republic of Congo. These countries, as well as other regions connected with tarmac roads to Kagera Region, are ideal for movements of goods and people.

c) Livestock

Kagera Region is encouraging investment in livestock feedlot for cattle fattening mainly in Biharamulo District Council where 9,500 hectares have been allocated for that purpose. Due to inadequate livestock infrastructure; such as dips, veterinary centres, water points, and abattoirs, construction of livestock infrastructure might be a priority area for investing in the livestock sector. Other areas that highly need investors are dairy farming and meat processing industries.

Furthermore, improvement of the quality of livestock and livestock products could benefit the region's cattle keepers as well as those of neighbouring regions of Mara, Mwanza, Shinyanga, Geita and Simiyu. Moreover, expansion

of dairy cattle keeping in the region would further increase people's incomes, improve their nutrition, and maintain soil fertility. Following an increase in milk production in the region - investments in milk collection centres as well as in milk processing are highly encouraged.

d) Fisheries

Kagera Region covers large part of Lake Victoria (10,017 square kilometres) on which sizeable fishing activities are carried out. Other fishing areas are on Burigi, Ikimba, Rushwa and Rumanyika lakes. Fishing activities are also done on several satellite lakes and on Kagera, Ruvuvu and Ngono rivers. Given high demand for fish within and outside Tanzania, investors are welcome to further invest in cage fishing, aquaculture, fish ponds, dams and aquarium (ornamental) fishing.

e) Industries

Investors are welcome to take advantage of surplus agricultural commodities in the region by establishing agro-processing industries within the region. It will involve establishing dairy industry, animal feeds, packaging materials, commercial ice block plant, solid wastes recycling plant, juice industries, banana wine, cassava processing, beans processing plant, honey processing, fish processing and making mirrors. More than 315 hectares has been set aside for establishing industries in the region.

f) Tourism

The region offers a range of visitor experiences on cultural tourism, heritage tourism, photographic safaris, boating safaris/race, lake cruising, dark tourism (past war sites), agro-tourism, hunting tourism, swimming and diving tourism, and religious tourism. Investment opportunities in tourism include building tourist hotels, campsites, cultural and photographic tourism, gaming, tour companies, and recreational centres. The region has set aside a total of more than 49 hectares for this purpose in its LGAs.

g) Education

This includes investments in the education sector e.g. early learning, primary and secondary education offering alternative quality education

to complement Government facilities; and establishment of specialized vocational training centres. Investors are expected to build modern school facilities and provide competitive education in East Africa and therefore contribute to cross-border trade by enrolling students from nearby countries. The clement weather found in the region provides a conducive learning environment as well reducing some operational costs such as of cooling offices and other living facilities.

h) Mining and other strategic investment opportunities

Kagera Region is rich in various minerals including gold, tin and nickel. Investors can invest in Tin and Gold mining but also adding value to the respective minerals. About 2.33 hectares have been set aside in Kyerwa District Council for investors interested in Tin value addition and 5 hectares in Biharamulo District Council for investors targeting Gold processing.

The region also has set aside more than 51 hectares for other strategic investments in its LGAs. These include establishing industrial parks/sheds, supermarkets, building container terminal at Kemondo, development of stadiums and recreation centres, investing in modern abattoir, construction of bus stands, and construction of lorry parks.

Table 3. 1: Strategic Investment Opportunities

SN	Strategic Investment Areas	Investment Opportunities	Land Allocated and Location
1	Cross Border Trade	Building International Agricultural Markets and Modern Markets	8.9 hectares at Mutukula Border with Uganda in Missenyi District Council
			1.295 hectares at plot number 15 at Murongo Trading Centre bordering Uganda and Rwanda in Kyerwa District Council
			2 hectares at Rusumo Border with Rwanda in Ngara District Council
		Construction of warehouses	3.5 hectares at Mutukula Border with Uganda in Missenyi District Council
			8.2 hectares at Rusumo –(Kahaza) Border with Rwanda in Ngara District Council
			3.24 hectares at Lusahunga Junction in Biharamulo District Council

SN	Strategic Investment Areas	Investment Opportunities	Land Allocated and Location
2	Crops Farming and Forestry	Tea farming	1,576 hectares in Bukoba District Council
		Avocado farming	1,000 hectares have been allocated for this investment in Bukoba District Council
		Cassava production	5000 hectares in Ngara District Council
		Building irrigation infrastructure and/or irrigation farming for paddy, vanilla and other products	90 hectares in Bukoba District Council; 5,463 hectares in Missenyi District Council; 570 hectares in Karagwe District Council; 1,120 hectares in Biharamulo; 1,180 hectares in Muleba; 1,854 in Ngara; and selected areas in Kyerwa District Council
		Beekeeping	Biharamulo District Council
3	Livestock	Investing in livestock feedlot for cattle fattening	9,500 hectares in Biharamulo District Council
4	Fishing	Investing in cage fishing, aquaculture, ponds, and dams	Bukoba, Karagwe, Muleba, and Kyerwa District Councils
5	Industries	Dairy industry	30 hectares at Kihanga Ward in Karagwe District Council
		Animal feeds industry	2.0 hectares at Buhembe Ward in Bukoba Municipal Council
		Industry for Packaging Materials	1.5 hectares at Kemondo Ward in Bukoba District Council
		Commercial Ice Block Plant	1.3 hectares in Bukoba Municipal Council, and 2 hectares in Bukoba District Council
		Solid Wastes Recycling Plant	5.4 hectares in Bukoba Municipal Council
		Juice Industries	Within 21.21 hectares in Bukoba District Council, and 200 hectares in Karagwe District Council
		Banana wine	1.18 hectares in Bukoba Municipal Council, 7.6 in Kyerwa District Council, 1.5 hectares in Karagwe District Council, 0.39 hectare in Muleba District Council, and 5 hectares in Ngara District Council
		Cassava processing industry	5 hectares in Ngara District Council
		Beans processing plant	5 hectares in Karagwe District Council
		Honey processing	Within 20 hectares in Biharamulo District Council
Fish processing industry	6 hectares in Muleba District Council		
Mirror making factory	Bukoba District Council		

SN	Strategic Investment Areas	Investment Opportunities	Land Allocated and Location
6	Tourism	Hotels, campsites, cultural and photographic tourism, gaming, tour companies, and recreational centres	2.5 hectares in Bukoba Municipal Council, 3 hectares in Bukoba District Council, Missenyi District Council, 18.255 hectares in Kyerwa District Council, 12 hectares in Karagwe District Council, 5 hectares in Biharamulo District Council, 3 hectares in Muleba District Council, and 11 hectares in Ngara District Council
7	Education	Specialised Vocational Training Centre	3.5 hectares have been allocated at Nyakato Ward in Bukoba District Council
8	Mining and other Strategic Investments	Mining and value addition of minerals	2.3304 hectares in Kyerwa District Council (for Tin value addition), and 5 hectares in Biharamulo District Council (for Gold processing)
		Establishing industrial parks/sheds	2.8 hectares in Muleba District Council
		Supermarkets	0.8 hectares in Muleba District Council, and 4 hectares in Biharamulo District Council
		Building Container Terminal	10 hectares at Rwagati area in Kemono in Bukoba District Council
		Development of Stadiums and Recreation Centres	Bukoba Municipal Council, 3.2 hectares in Missenyi District Council, and Muleba District Council
		Modern slaughter house (abattoir)	3.32 hectares in Bukoba Municipal Council
		Construction of Bus Stands	8.3 hectares in Bukoba Municipal Council, and 1.2 hectares in Biharamulo District Council
		Construction of Lorry Parks	3.5 hectares in Missenyi District Council, 8 hectares, and 2 hectares in Biharamulo District Council

3.2 Regional Level Priority Investment Opportunities

Based on the availability of raw materials and the required infrastructure for some of the investment opportunities, the region has identified four key investment opportunities to be recognised and implemented at the region level. These opportunities are specialised vocational training centre; animal feeds making industry; manufacturing of packaging materials; and dairy production. The regional level investment opportunities have two main

attributes: first, it is their scale and scope, which transcends beyond those of individual LGAs; and the opportunities are large enough to serve all LGAs. Specific details for each opportunity are given below:

1. Specialised Vocational Training Centre and other Learning Facilities

Overview of the Opportunity	
<p>Key features</p> 	<ul style="list-style-type: none"> ▪ 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 addition for agricultural crops, milk, fish, leather industries and leather-related value addition, construction technicians, production and marketing entrepreneurship, sorting, grading, packaging and branding of products, and hospitality industry among others ▪ Investors are welcome to build a vocational education and training institute for developing skills mentioned above ▪ The institute will, among other things, provide skills on primary processing of leather, avocado, honey and banana. Kagera Region has quality animal skins and hides with more than 700,000 per year of which twenty percent (20%) are slaughtered ▪ Three and a half hectares (3.5 ha) have been allocated at Nyakato Ward in Bukoba District Council for building a Vocational Education and Training Authority (VETA) centre.
<p>Key investment rationale</p>	<ul style="list-style-type: none"> ▪ The Second Five-Year Development Plan (FYDP II) 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 Kagera Region and its sub-national level governments call for 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 2014 ▪ The demand for skills development has been identified in all councils as critical for promoting

	value addition to agricultural commodities and other non-agricultural small-scale manufacturing industries.
Available support	<ul style="list-style-type: none"> ▪ Technical and Vocational Education and Training Development Programme (TVETDP) ▪ Supportive institutions include a College of Engineering and Technology (CoET) founded in 2001 through the transformation and integration of the Institute of Production Innovation (IPI) and the existing Faculty of Engineering (FoE) at the College (CoET) ▪ The Small Industry Development Organisation (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).

2. Animal Feeds Industry

Overview of the Opportunity	
<p>Key features</p> 	<ul style="list-style-type: none"> ▪ An investor is welcome to establish animal feeds making industry targeting cattle, chicken, fish etc. ▪ Two hectares (2.0 ha) have been allocated at Buhembe Ward in Bukoba Municipal Council for establishing this industry. The Regional Secretariat selected this location in consideration of the existence of sources of raw materials and of availability of infrastructure for bringing in raw materials as well as for marketing of animal feeds.
<p>Key investment rationale</p> 	<ul style="list-style-type: none"> ▪ The industry is still undeveloped; and there is high demand for animal feeds, mainly for cattle and chicken ▪ It will promote incomes for all people involved in the value chain ▪ Given the current pressure on natural resources, there is need to focus on increasing the use of crop residues, by-products from the agro-industrial processes and other locally-available non-conventional feed resources to produce animal feeds mainly for fish, poultry and dairy cattle.

Overview of the Opportunity



- Kagera Region has a rich supply of essential raw materials required in the manufacture of animal feed; these include feed grains (millet and maize), cassava chips, groundnuts, oilseed mill products, meat and fish formulas and special ingredients like dried coffee residues as well as nutritionally-enhanced meals
- African Chicken Genetic Gains (ACGG), which aims at providing the beneficiaries with new high-breed chicken as a way of increasing their income¹.

Available support

- Tanzania Livestock Modernisation Initiative of 2015 and Tanzania Livestock Master Plan, both support establishment of animal feed processing industry
- Existence of Tanzania Animal Feeds Manufacturers Association (TAFMA), which provides a common forum for all animal feed manufacturers in Tanzania.

3. Industry for Packaging Materials

Overview of the Opportunity

Key features



- Investing in the production of packaging materials
- Almost all districts recognised that lack of packaging materials has constrained not only industrialists but also agricultural producers, particularly those who are in horticultural subsector. In view of this, the Kagera Regional Secretariat will champion this kind of investment and determine its location in one of the councils to serve the whole region
- A piece of land (1.5 ha) has been set aside for this industry at Kemondo Ward in Bukoba District Council.

Key investment rationale



- A substantial percentage of Kagera's food loss and waste is due simply to poor packaging and care. Thus, investing in the production of packaging material is more than an economically viable opportunity, as well as an imperative one, for food security and poverty alleviation
- The industry 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

¹ Depicted from IPP Media - 17 July 2018

Overview of the Opportunity

the use of plastic packaging materials will easily be abided to

- The Government, through the Tanzania Bureau of Standards, has been calling for the private sector to invest in the production of packaging materials
- Packaging materials currently in use do not meet quality standards required by different products
- Proper packaging materials will reduce post-harvest losses and elongate shelf life of some delicate produces, especially horticultural crops
- Appropriate packaging materials provide basic functions, i.e. simplified and easy-to-handle transportation; protection against external wear and tear; provides the necessary legal information on packaged content and its use; facilitation of the consumer's use and preservation of the environment
- 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.

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
- Political support at national, regional and local government levels
- Land is available for the building packaging materials industry
- Good infrastructure, which includes roads networks, waterways, communication, electricity and markets
- Seventy-five percent (75%) import duty relief on deemed capital goods including equipment, utility vehicles and some building materials through TIC.

4. Dairy Industry

Overview of the Opportunity

Key features

- Investors are welcome to establish a dairy industry that will serve the whole region. This will include building collection centres

	<ul style="list-style-type: none"> ▪ Average annual milk marketed in the region is 51 million litres ▪ The Regional Secretariat will determine the location of building such an industry considering the availability of raw materials and needed infrastructure ▪ Thirty hectares (30 ha) have been allocated for this industry at Kihanga Ward in Karagwe District Council.
<p>Key investment rationale</p> 	<ul style="list-style-type: none"> ▪ Most studies suggest that demand for milk is growing significantly driven by population growth, urbanisation and the recent economic growth experienced in Tanzania ▪ Producers get high prices and are ensured of the market ▪ It creates employment and value chains ▪ It will ensure quality and supply of milk to feed the industry ▪ It also promotes better handling, hygiene, safety, shelf life and packaging of milk ▪ It is also easy to keep records of milk supplied and processed.
<p>Available support</p>	<ul style="list-style-type: none"> ▪ It is supported by FYDP II, which promotes value addition at primary and secondary levels ▪ Supported by National Livestock Policy 2006 ▪ Policy of food safety and standards supports establishment of milk collection centres ▪ <i>VAT special relief on project capital goods:</i> VAT exemption on heat insulated and milk cooling tanks and aluminium jerry cans used for storage and collection of milk in dairy industry ▪ Seventy-five percent (75%) import duty relief on deemed capital goods including equipment, utility vehicles and some building materials through TIC.

3.3 Council Level Priority Investment Opportunities

At council level, Investors are welcome to invest in building a container terminal at Kemondo, tourism (hotels, campsites, cultural and photographic tourism), commercial ice block plant, development of stadiums and recreation centres, construction of solid wastes recycling plant, modern abattoir, modern markets, bus stand, lorry parking facility, establishment of fish farming and fish processing industry, development of irrigation farming and related infrastructure,

construction of factories for production of fruit juice and banana wine; cassava processing; avocado farming, tea farming, construction of warehouse, mining and value addition of minerals, beans processing plant, beekeeping and honey processing, investing in feedlot, establishment of cattle ranches, industrial park, supermarkets, and mirror making factory. Detailed information about district level investment opportunities is given below:

1. Building Container Terminal at Kemondo

Overview of the Opportunity	
<p>Key features</p> 	<p>Bukoba District Council</p> <ul style="list-style-type: none"> ▪ Kemondo is due for a major expansion and therefore demand for container terminal will be quite high ▪ In that regard the council has a set aside about ten hectares (10 ha) at Rwagati area in Kemondo which can be used to establish Kemondo EPZ area and container terminal.
<p>Key investment rationale</p>	<ul style="list-style-type: none"> ▪ It will further facilitate and improve performance of the expanded Kemondo ▪ It will create more jobs.
<p>Available support</p>	<ul style="list-style-type: none"> ▪ Tanzania Ports Authority (TPA) regulates and licenses port and marine services and facilities. It also manages vessel traffic in the port while ensuring safety and security. TPA website contains information, guidelines and procedures on matters relating to the port and its operations ▪ Tanzania's National Transport Policy 2011-2025.

2. Tourism (hotels, campsites, cultural and photographic tourism)

Overview of the Opportunity	
<p>Key features</p> 	<p>Bukoba Municipal Council</p> <ul style="list-style-type: none"> ▪ Investing in tourism-related opportunities such as hotels, campsites, cultural and photographic tourism ▪ Bukoba District Council has many tourist attractions, including beaches along Lake Victoria, which are good for camp sites and other investments ▪ An investor may also invest in tour operations ▪ Two-and-a-half hectares (2.5 ha) have been allocated for building hotels at Nyanga.



Bukoba District Council

- Tourism-related opportunities, including building hotels along Lake Victoria beaches
- Three hectares (3.0 ha) have been allocated for building hotels at Kemondo.

Missenyi District Council

- Investing in photographic tourism: Minziro Forest is rich in butterflies, cultural tourism, and historical sites such as pilgrimage sites at bombed Catholic Church etc.



Kyerwa District Council

- Building tourist hotels through joint ventures
- Land owned by individual (2.458 ha)
- Piece of land, 1.265 ha at Murungo, and 14.532 ha at Rubwera has been allocated for building hotels
- Mutagata Village forest reserve has 112.2 ha and blessed with hot water spring.

Karagwe District Council

- Investing in campsites, cultural tourism, gaming, tour companies, and building tourist hotels
- Twelve hectares (12 ha) have been allocated for building hotels at Kayanga.



Biharamulo District Council

- Investing in campsites, tourist hotels, and developing historical sites such as caves
- About five hectares (5 ha) have been set aside at Biharamulo Township for building hotels.

Muleba District Council

- Investing in eco-tourism along islands and historical sites
- Building tourist hotels and recreational centres
- About three hectares (3 ha) at Muleba have been allocated for building hotels and recreational centres.

Ngara District Council

- Investing in campsites, cultural tourism, gaming, tour companies, building tourist hotels and recreational centres
- Building Tourism Centre at Benako where 1 hectare has been set aside for this investment. This area is very close to Burundi and Rwanda.

Key investment rationale	<ul style="list-style-type: none"> Some councils with tourist attractions lack good tourism facilities, i.e. hotels and campsites, thus forcing tourists to travel fairly long distances from the attractions.
Available support	<ul style="list-style-type: none"> The industry is supported by an Integrated Tourism Master Plan, which outlines strategies and programmes for the sector Existence of Tourism Confederation of Tanzania (TCT) - a private sector body which represents interests of the tourism private sector The 1999 National tourism Policy emphasizes the need to improve, among others, communication and accommodation facilities as a means of attracting tourists.

3. Commercial Ice Block Plant

Overview of the Opportunity	
<p>Key features</p> 	<p>Bukoba Municipal Council</p> <ul style="list-style-type: none"> Investing in ice-making plant About 1.3 hectares have been set aside for such a plant at Kifungwa area but compensation has not yet been paid. <p>Bukoba District Council</p> <ul style="list-style-type: none"> Investing in ice-making plant About 2 hectares have been set aside at Kemondo for construction of such plant.
Key investment rationale	<ul style="list-style-type: none"> Huge waste of fresh fish due to poor transport and storage facilities To supply ice for adding value to fish products and therefore enabling small fisher folks to earn more income by reducing post-harvest losses It will also create a linkage to cold chain transportation of fish.
Available support	<ul style="list-style-type: none"> In the past, cold chain facility in Tanzania was either rudimentary or non-existent, but it is beginning to develop due to improved supply of electricity and the increasing demand for the service, at least for refrigerated reefers² It is supported by FYDP II, which promotes value addition at primary and secondary levels.

² A refrigerated container or reefer is an intermodal container (shipping container) used in intermodal freight transport that is refrigerated for the transportation of temperature-sensitive cargo.

4. Development of Stadiums and Recreation Centres

Overview of the Opportunity

Key features



Bukoba Municipal Council

- Upgrading/development of Kaitaba Sports Centre at the existing stadium
- Public-Private community Partnership (PPP) model of investment is expected.

Missenyi District Council

- Construction of stadium and sports centre
- About 3.2 hectares at Bunazi have been set aside for this purpose
- A PPP model is expected to be used in arranging for such investments

Muleba District Council

- Rehabilitation of David Zimbihile Stadium, and also increasing the number of recreational centres
- Cultural tourism, sports, eco-tourism, and development of tourism facilities.

Key investment rationale



- Sports is an area of human interaction where respect for rules, teamwork and fair play are the norm. Teamwork, cooperation, abiding by the rules, respect for opponents and similar concepts all feature in the principles of the Charter of the United Nations
- District's headquarters needs modern stadiums and recreation centres for residents and regional competition
- Sporting activities have a wide range of benefits - from improved personal health, job creation and income-generation to the promotion of cultural values and national identity.

Available support

- Tanzania Sports Council (*Baraza la Michezo la Taifa*) and Tanzania Football Federation (TFA) in preparing sport competitions and training of referees
- Sports and recreation centres for people is an important aspect of human development, and is supported by the Second Five-Year Plan as an important attribute towards human development.

5. Solid Wastes Recycling Plant

Overview of the Opportunity

Key features



Bukoba Municipal Council

- Solid waste management – building a solid waste recycling plant
- Land is available for that purpose - 5.4 hectares have been allocated at Nyanga
- Bukoba Municipal Council generates an average of 15,000 tonnes of solid waste per day
- Community-based urban waste management to involve neighbourhood communities, households, community-based organisations and small, informal enterprises engaged in collection and disposal, re-use and recycling of waste materials.

Key investment rationale



- Bukoba District Council's economic activities are expanding and so is the production of solid waste
- The Municipal Council is already generating a lot of solid waste, so much so that the existing dumps are unable to absorb them
- Community participation in waste management 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.

Available support

- The National Environment Management Council (NEMC) provides some guidance on how to handle solid waste management
- Policy supports collection, compression and recycling of solid waste
- Seventy-five percent (75%) import duty relief on project deemed capital goods including equipment, utility vehicles and some building materials through TIC.

6. Modern Abattoir

Overview of the Opportunity	
<p>Key features</p> 	<p>Bukoba Municipal Council</p> <ul style="list-style-type: none"> Investors are invited to establish a modern slaughter house (abattoir) About 3.32 hectares have been set aside for this purpose at Rwamishenye area A PPP investment arrangement is envisaged.
<p>Key investment rationale</p>	<ul style="list-style-type: none"> Slaughtering and meat handling in Bukoba District Council is sub-standard and causes enormous food safety risks and health hazards to the majority of the population A well-designed and managed abattoir would improve the supply chain and promote commercial livestock production. Building partnerships with the supply chains, developing emerging farmers and linking with communal farmers would form a strong basis for development of livestock farming in the region 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 There is need to commercialise the livestock industry and stimulate its development in support of the livelihoods of livestock farmers through increased incomes and self-sufficiency in food of animal origin.
<p>Available support</p>	<ul style="list-style-type: none"> Good infrastructure, including road networks and communication services; electricity supply; and available markets The Livestock Sector Modernisation Initiative of 2015 has components to support various value chains in the sector.

7. Construction of Modern Markets

Overview of the Opportunity

Key features



Bukoba Municipal Council

- Building modern markets (shopping centres)
- The Municipal Council lacks such facilities and its fast growth is an opportunity for one to invest in
- About 1.14 hectares have been set aside for this investment at the centre of Bukoba Municipal Council.

Missenyi District Council

- Building an international agricultural market at Mutukula – equipped with ICT
- About 8.9 hectares owned by Missenyi District Council have been set aside for the construction of the strategic border market at Kabakesa Village in Mutukula, which is 3 kilometres from the border with Uganda
- A PPP investment arrangement between the Council and a private entrepreneur is envisaged
- It is the best way to link farmers with markets and agro processors with source of raw materials
- The location of the market at the border with Uganda will facilitate cross-border trade. It will be an avenue for promoting production of quality goods that meet required standards: in the case of agricultural produce (crops, fishers, and livestock keepers) farmers will most likely add value and earn higher returns
- The existence of the market will promote and increase agricultural production.

Kyerwa District Council

- Building an international agricultural market at Murongo at the border with Uganda and Rwanda
- Land allocated (1.295 ha) is plot number 15 at Murongo Trading Centre
- The strategic international market is to be built at Murongo, which is located at the border between Tanzania, Uganda and Rwanda. The project beneficiaries are communities from Kyerwa District and other nearby districts in Tanzania in

doing internal business, especially agribusiness commodities

- Partnership with individual land owner is expected.

Ngara District Council

- Building a modern market at Rusumo that will facilitate selling of agricultural products and other products from the region and buying products from other regions like Kigoma, Singida etc.
- About 2 hectares have been allocated for this purpose

Muleba District Council

- Building a modern market for agricultural and industrial goods
- About 1.5 hectares have been allocated for this purpose at Muleba Town.

Key investment rationale



- There is a lot of illegal trade taking place at the borders - more than 80 percent of total agro produce has been traded illegally along the River Kagera border using inefficient boats, posing high risks.
- The market for crops produced and other related products will improve livelihood in the area
- The proposed investment will allow for intensification of land use as well as crop diversification and productivity, thereby enhancing food security, income and employment opportunities for the local population
- Farmers need access to markets to earn their fair share of the profits. Good markets, in turn, provide food security for the population and facilitate agricultural self-sufficiency. Markets are at the centre of an agricultural ecosystem that forms the basis of sector development
- Making markets work is a supply-chain infrastructure and information issue
- Additionally, markets at the borders with neighbouring countries like Uganda, Rwanda and Burundi would enhance cross-border trade and facilitate the enablers that remove trade barriers and inefficiencies between countries and free up the traffic of agricultural produce

	<ul style="list-style-type: none"> Available infrastructure includes communication, good road network and electricity supply The Agricultural Policies and Agricultural Sector Development Programme Two (ASDP II) has prioritised marketing development for agriculture, including promotion of agricultural value chains.
Available support	<ul style="list-style-type: none"> Land for construction of these markets is available Kyerwa District Council has conducted community training/sensitisation sessions on how to do international marketing.

8. Construction of Bus Stands

Overview of the opportunity	
<p>Key features</p> 	<p>Bukoba Municipal Council</p> <ul style="list-style-type: none"> Construction of a bus stand at Nyanga About 8.3 hectares of land have been set aside for this investment PPP investment arrangement is proposed. <p>Biharamulo District Council</p> <ul style="list-style-type: none"> Construction of a bus stand at Nyakanazi About 1.2 hectares of land have been set aside for this investment.
<p>Key investment rationale</p>  	<ul style="list-style-type: none"> The existing bus station in Bukoba MC is not only small but lacks standards as well: it is inadequate to meet the growing demand for efficient transport system to cater for both inflows and outflows of commuters and goods Buses in Biharamulo are temporary parked along the road to Kigoma in the South and West of Lusahunga-Ngara road - there is no permanent lot for bus stand A modern bus station with good management and environment will spur further economic activities in and around the bus station Bus station is aligned with FYDP II, which promotes transportation, an important ingredient for industrialisation and trade.

Overview of the opportunity

Available support

- Supported by FYDP II
- The Council has allocated land for the construction of the bus stand
- Seventy-five percent (75%) import duty relief on project deemed capital goods including equipment, utility vehicles and some building materials through TIC.

9. Construction of Lorry Parks

Overview of the Opportunity

Key features



Missenyi District Council

- Construction of a lorry parking facility near the border with Uganda to ease cross-border trade
- The Council has allocated 3.5 hectares for the construction of the facility at Mutukula.

Ngara District Council

- Construction of a lorry parking facility near the border with Rwanda to ease cross-border trade
- Construction of a lorry parking facility near the border with Burundi to ease cross-border trade
- The Council has allocated 8 hectares for the construction of the facility at Benako.

Biharamulo District Council

- Construction of a lorry parking at Nyakanazi through PPP to facilitate more business trade along the great lakes countries
- The Council has allocated 2 hectares for the construction of the facility at Nyakanazi

Key investment rationale

- Lorry parking is aligned with FYDP II, which promotes transportation as an important ingredient for industrialisation and trade.

Available support

- Supported by FYDP II
- Seventy-five percent (75%) import duty relief on project deemed capital goods including equipment, utility vehicles and some building materials through TIC.

10. Fish Farming

Overview of the Opportunity

Key features



Bukoba District Council

- Investing in cage fishing, aquaculture, and aquarium (ornamental) fish farming
- The main reason being that the volume of fish for processing and other value addition has been declining since most small fisher folks cannot undertake deep lake fishing. Therefore, in order to increase stock of fish for processing and for home consumption, there is need to promote fish farming around the lake and at households. This will only be possible if an investor establishes fish hatcheries to supply households wish to start fish farming.

Karagwe District Council

- Investing in fish farming using cage, ponds, and dams
- It is also possible to invest in aquarium (ornamental) fish farming.

Muleba District Council

- Investing in cage fish farming
- Seventy-five percent (72%) of Lake Victoria area that is in Kagera Region is in Muleba District.

Kyerwa District Council

- The district has 7 satellite (natural) lakes and 53 man-made ponds/small dams, all of which are suitable for fish farming.

Key investment rationale



- Clearly, Bukoba District Council has considerable potential for increasing the contribution of aquaculture, given the extensive lake and river water resources, ideal temperatures and availability of raw materials for producing fish feed
- About 28 percent of Lake Victoria, covering an area of 10,655 square kilometres is in Kagera Region. On this area sizeable fishing activities are carried out. Some 97.2 percent of the lake area in Kagera is within Muleba District Council and Bukoba District Council

	<ul style="list-style-type: none"> ▪ Aquaculture plays a vital role as an alternative source of income for fishery communities, as it contributes in reducing the pressure on marine natural resources and has recently been considered an important sector for supporting rural economic development ▪ It will also increase the supply of fish for fish processing industries along with increasing employment ▪ Tanzania would earn more foreign exchange from exports of processed fish.
<p>Available support</p>	<ul style="list-style-type: none"> ▪ Tanzania Fisheries Research Institute (TAFIRI) ▪ Government has strongly supported investment in aquaculture training, with degree programmes at Sokoine University of Agriculture and the University of Dar es Salaam, and skills training at Mbegani Fisheries Development Centre as well as at Fisheries Education and Training Agency (FETA) ▪ Tanzania will be one of the beneficiaries (along with Uganda and Kenya) of a major EU-funded project (up to EUR 10 million) launched in 2017: Support to Promoting Aquaculture in the East Africa Community.

11. Development of Irrigation Farming and Related Infrastructure

Overview of the Opportunity

Key features



1. Investing in irrigation for paddy

- There are several irrigation projects that have been established by the Government but private investment is welcome through PPP and/or PPCP arrangements

2. Investing in irrigation for Vanilla

- Vanilla irrigation farming through contract farming
- Areas potential for vanilla farming include Bukoba District Council, Bukoba Municipal Council, Missenyi District Council, and Muleba District Council
- The current production of vanilla in the region is about 50 tonnes per annum.

3. Land allocated for irrigation

- Councils have allocated land for irrigation as follows:

Overview of the Opportunity



Bukoba District Council

- Area set for irrigation is 90 hectares at Kyabalamba
- Building irrigation infrastructure for paddy along River Ngono
- A feasibility study on 121.4 hectares has already been done.



Missenyi District Council

- Areas allocated for irrigation include Nkenge (1300 ha); Byeju (500 ha); Kajunguti (1000 ha); Buchurago (2000 ha); Kabingo (500 ha); and Kyakakera (163 ha).

Karagwe District Council

- Areas allocated for irrigation include Kagenzi (90 ha); Nyakashozi (80 ha); Karazi (100 ha); and Mwisa (300 ha).

Biharamulo District Council

- Areas allocated for irrigation include Migango (1,000 ha); and Mwiluzi (120 ha).

Muleba District Council

- Land allocated for irrigation includes Burigi (400 ha); Kyamyorwa (500 ha); Buyaga (80 ha); Buyaga (80 ha); and Kyota (120 ha).

Ngara District Council

- Land allocated for irrigation includes Ngono (1300 ha); Mpanyula (110 ha); Rwinyana (40 ha); Mubuhenge (86 ha); Mugozi (120 ha); Magamba (88 ha); and Bigombo (110 ha).

Kyerwa District Council

- Areas allocated for irrigation include Lake Rushwa, Kibanda, Kagera and Kihinda basin, currently owned by village councils.
- Paddy is an important subsistence and commercial crop in Tanzania, and consumption of rice has been increasing in recent years
- Government support for reducing policy barriers in the rice sub-sector is evident through promotion of investments under the BRN initiative, and

Overview of the Opportunity

Key investment rationale



Available support

- strengthening the Tanzania Rice Partnership to represent private sector stakeholders
- According to a Bill and Melinda Gates Foundation (BMGF) 2012 commissioned study on rice markets, Tanzanian consumers are willing to pay a 21% premium for Tanzanian rice, over cheaper imported rice, because of their inherent preference for its flavour, aroma and freshness; cross-border trade for rice is also growing fast
- The size and continued growth of the sub-sector should open it up for investment opportunities that could be considered by Global Agriculture and Food Security Programme (GAFSP), Private Sector Window (PrSW) and International Finance Corporation (IFC)
- Irrigation can improve incomes and food security if farmers can access markets for inputs and produce, food pricing systems reflect real costs of production, and farmers diversify beyond staple cereals
- Crop management practices emphasise yield increase, but more attention is required to adapt irrigation to both climatic variability and climate change through optimising water use efficiency. Drip irrigation technology, which uses very little water to irrigate several hectares, is available
- Unreliable rainfall pattern limits agricultural production of various commodities
- To increase the number of farming seasons in order to increase supply of agricultural produces for both direct consumption and for processing
- Water harvest technologies are available, making it easier to collect and distribute water for irrigation purposes.
- The revised National Irrigation Master Plan of 2017 seeks to expand land under agriculture and improve agricultural productivity and profitability for food security and poverty alleviation through irrigation
- Government has set up a District Irrigation Development Fund (DIDF) and a National Irrigation

Overview of the Opportunity

Development Fund (NIDF) through which irrigation financing of needed services is done

- Good infrastructure, including roads and communication networks; electricity supply, and markets.

12. Juice Industries

Overview of the Opportunity

Key features



Bukoba District Council

- Building a horticultural processing plant
- Depending on the scale of the proposed processing plant, an investor may establish it on either a 1.25-hectare land at Kemondo, a 7.16-hectare land at Rushaka and/or on a 12.8-hectare at Kyakaitoke.

Karagwe District Council

- Constructing a juice-making plant
- About 200 hectares at Kihanga Village have been allocated for this plant
- Availability of raw materials, which include avocado, banana and pineapples.

Key investment rationale

- This is an investment in the value chain of avocado and banana that have appropriate growing conditions in Karagwe District Council and Bukoba District Council. The fruits have local markets as well as a small niche in the neighbouring regions of Mwanza and Geita
- Fruits are highly perishable (spoil very quickly) and many farmers have little access to good storage facilities
- Creates employment and other social benefits to many residents of Kagera Region.

Support available

- Government of Tanzania, through the Ministry of Agriculture (MoA), Tanzania Revenue Authority (TRA), Prime Minister's Office (PMO), Ministry of Industry and Trade [MIT], Tanzania Bureau of Standards (TBS), EPZA, SIDO, etc. is addressing various business enabling environment issues, innovative technologies in value addition and trade facilitation

- Tanzania Horticultural Association (TAHA) is supportive of horticultural farming, processing and export business.

13. Banana Wine

Overview of the Opportunity	
<p>Key features</p>   	<p>Bukoba Municipal Council</p> <ul style="list-style-type: none"> ▪ Constructing a banana processing plant ▪ Bukoba District Council produces close to 9,000 tonnes of bananas annually ▪ About 1.18 hectares have been allocated for this industry at Buhembe but compensation has not yet been paid. <p>Kyerwa District Council</p> <ul style="list-style-type: none"> ▪ Constructing a banana wine processing plant ▪ About 7.6 hectares have been set aside for this industry at Nkwenda, Kaisho and Kamuli ▪ Kyerwa produces more than 400,000 tonnes of bananas annually. <p>Karagwe District Council</p> <ul style="list-style-type: none"> ▪ Constructing a mixed fruit juice-making plant; 1.5 hectares have been allocated for this industry at Rwabigaga Village in Kamuli Ward ▪ Raw materials include avocado, banana and other fruits. <p>Muleba District Council</p> <ul style="list-style-type: none"> ▪ Establishing banana wine industry ▪ About 0.3912 hectares have been allocated for this industry at the centre of Muleba Town. <p>Ngara District Council</p> <ul style="list-style-type: none"> ▪ Establishing banana wine industry in the council ▪ About 5 hectares have been allocated for this industry at Rumasi.
<p>Key investment rationale</p>	<ul style="list-style-type: none"> ▪ Creates employment and other social benefits to many Tanzanians ▪ Provides market for banana producers



- The market for banana wine is locally available and the wine can fetch markets in the neighbouring regions.

Support available

- Government of Tanzania (MoA, TRA, PMO, TBS, MIT, EPZA, SIDO, etc.) is addressing various business enabling environment issues, innovative technologies in value addition and trade facilitation
- TAHA is supportive of horticultural farming, processing and export business.

14. Cassava Processing Industry

Overview of the Opportunity

Key features



Although cassava is not traditionally consumed in flour form, it presents a viable alternative to wheat or maize flour.



Ngara District Council

- Cassava is one of the cash crops grown in Ngara District Council ranking first in terms of planted area with major cash crops
- Between 2011 and 2015 cassava was the leading cash crop with an average annual production of 100,000 – 150,000 tonnes, equivalent to 55.1 percent of the total cash crop production. The regional annual average production was 800,000 – 1,200,000 tonnes
- About 5,000 hectares have been allocated for cassava production, out of which 5 hectares have been allocated for cassava processing factory.

Key investment rationale



- Cassava is the second most produced food crop after maize, supporting the livelihoods of 37 percent of farmers in rural areas
- Cassava flour is most commonly consumed as *ugali* through a blend with maize flour for a desirable texture. Cassava flour could play a significant role in food security, given the periodic shortage of maize and the reliance on wheat imports.

<p>Available support</p>	<ul style="list-style-type: none"> ▪ Tanzania Agricultural Research Institute (TARI) stationed at Mlingano work closely with TARI Kibaha to introduce new high yielding cassava varieties (e.g. <i>Mkuranga and Kiroba</i> breeds) ▪ International Institute of Tropical Agriculture (IITA) is supportive of cassava farming.
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15. Avocado Farming

<p>Overview of the Opportunity</p>	
<p>Key features</p> 	<p>Bukoba District Council</p> <ul style="list-style-type: none"> ▪ Investing in avocado farming ▪ Investing in increased production and productivity for most crops (avocado, beans, herbs etc.) in new farms or in strategic collaboration with existing entrepreneurs owning land ▪ One thousand hectares (1,000 ha) have been allocated for this investment at Katoro (80 ha); Kaibanja – Nyakigando (320 ha); and Rukoma – Nsheshe (600 ha).
<p>Key investment rationale</p>	<ul style="list-style-type: none"> ▪ Driven by dynamics in a global surge in prices and demand for ‘green gold’, the cultivation and trading of avocado is rapidly gaining traction among the farmers in Kagera Region. Commercial avocado farming provides an avenue to successfully diversify the region’s portfolio of horticultural crops, thereby enhancing the value of the horticultural industry.
<p>Available support</p>	<ul style="list-style-type: none"> ▪ Like all horticultural crops, avocado is regarded as an enterprise of agriculture. It falls under agricultural sector policies that include the National Agricultural Policy of 2013, which seeks to revolutionise agriculture through modernisation and productivity enhancement; and the National Horticultural Strategy 2010-2020, which seeks to double agricultural exports by year 2020 ▪ Post-Harvest Management Strategy 2017 –2026 ▪ Tanzania Horticulture Association ▪ Financial institutions (Vision Fund, TADB, NMB etc.) facilitating access to finance for horticultural farmers.

16. Tea Farming

Overview of the Opportunity	
Key features 	Bukoba District Council <ul style="list-style-type: none">Two thousand hectares (2000 ha) are suitable for tea production, but only 424 hectares are under production. There is a tea-processing factory with the capacity of processing 40,000 tonnes per annum. However, tea production has declined and the factory cannot get enough raw tea leaves to processTea farming through promoting out-growers scheme/contract farming is envisaged.
Key investment rationale	<ul style="list-style-type: none">The existing tea processing factory does not get enough raw tea leaves for processing as its processing capacity is underutilised.
Available support	<ul style="list-style-type: none">There are some established international players in the sector (such as Unilever), who could be potential partners for investment; there is limited need for investment in increased processing capacity until raw material supply constraints are addressed. In 2015, the Africa Enterprise Challenge Fund (AECF) - Tanzania Window had made a couple of small investments, including provision of US\$450,000 to Kagera Tea Company Limited to support scaling up of technology used by farmers and improvements in the transport system, with a view to increasing quality and production of green leaf tea sold to the company for processingKey donor-supported interventions include the Chai Project launched by the Gatsby Foundation and Wood Foundation Africa, with a view to transforming the sector through providing matching grants with private factories (to address specific local constraints); and to strengthening a farmers' associationThe Tea Board of Tanzania (TBT) is to introduce a new market-based pricing mechanism for all 30,000 smallholders and, with the Tanzania Smallholder Tea Development Agency, to pilot a land titling projectThere is also Tea Research Institute that supports improvement of tea production through a technology transfer programme.

17. Construction of Warehouses

Overview of the Opportunity	
Key features	<p>Missenyi District Council</p> <ul style="list-style-type: none">Construction of a warehouse at Mutukula BorderConstruction of a warehouse for agricultural produce, and establishment of a warehouse receipts system (WRS) whose mission is to regulate and promote a system that ensures fair and sustainable accessibility to formal credit and commodity marketing systemsAbout 3.5 hectares have been allocated for this investment at Mutukula Border. <p>Ngara District Council</p> <ul style="list-style-type: none">Construction of a warehouse at Rusumo BorderConstruction of a warehouse for agricultural produce, and establishment of a Warehouse Receipts System (WRS) whose mission is to regulate and promote a system that ensures fair and sustainable accessibility to formal credit and commodity marketing systemsAbout 8.20 hectares have been allocated for this investment at Rusumo -(Kahaza) Border. <p>Biharamulo District Council</p> <ul style="list-style-type: none">Construction of a warehouse at Lusahunga Junction for agricultural produce, and establishment of a Warehouse Receipts System (WRS) whose mission is to regulate and promote a system that ensures fair and sustainable accessibility to formal credit and commodity marketing systemsAbout 3.24 hectares have been allocated for this investment at Lusahunga Junction for private investment or PPPThe plot has been surveyed and currently owned by the Biharamulo District CouncilLusahunga Junction is strategic area for investment due to reliable transport, communication and it is near to east African countries like Rwanda, Burundi and Uganda.
Key investment rationale	<ul style="list-style-type: none">Improving the transportation infrastructure (roads, ports, railways and airport) calls for construction of warehouses, all of which are critical for the country/ region to improve internal and external trade and commercial activities.



Overview of the Opportunity

Available support

- This is supported by Warehouse Receipts Regulatory Board
- Seventy-five percent (75%) import duty relief on project deemed capital goods including equipment, utility vehicles and some building materials through TIC.

18. Mining and Value Addition of Minerals

Overview of the Opportunity

Key features



Kyerwa District Council

- Investors are welcome to extract tin minerals in Kyerwa and do initial processing before the minerals are put into the smelter
- The Kyerwa Tin Fields are approximately 8 kilometres wide and 48 kilometres long within the Karagwe-Ankolean, *phyllite-sericite schist-quartzite*, meta-sediments belt. The main areas with tin ore are Kyerwa Syndicate, Kigarama, Kagenyi, Rwenkorongo, Kibingo, Rukuraijo and Kitwechenkura
- Smelter for processing tin minerals into ingots has been constructed at the State Mining Corporation (STAMICO) area in Kyerwa.
- The district has 3,965,519.42 tonnes of ore tin out of which 35.55 percent is tin (equivalent to 1,409,742.15 tonnes of tin), and production will last for about 50 years
- Land allocated for this investment include Buberwa area: plot 195 (0.4853 ha); plot 197 (0.5496 ha); plot 198 (0.7771 ha); and plot 199 (0.5184 ha).

Biharamulo District Council

- Building small industries for processing Gold at Nyakahura
- 5.0 hectares have been allocated for this investment.

Key investment rationale

- The Government has banned the export of concentrates and ores of all metallic minerals. The ban is intended to ensure that “value addition activities,” such as smelting and refining, are undertaken within Tanzania, and to encourage

Overview of the Opportunity



- domestic mineral “beneficiation”– the processing of mined output into a product of higher value
- Most of these identified minerals are yet to be added value
 - Almost all of them are located in accessible areas, hence low cost of transporting them from processing centres
 - The number of mines and miners is increasing
 - Such investment will generate employment in addition to providing markets for small-scale miners in the district.

Available support

- Good infrastructure, which includes roads and communication networks, electricity supply, and markets
- Supported by Tanzania’s FYDP II, which calls for value addition and beneficiation in metal and mineral industries.

19. Beans Processing Plant

Overview of the Opportunity

Key features



Karagwe District Council

- Establishing beans processing plant
- Beans are the staple food in Karagwe District Council. It is possible to cultivate beans in all 23 wards of the council
- About 5 hectares have been allocated for this industry
- On average the district produces between 30,000 and 40,000 tonnes of beans per annum.

Key investment rationale



- Karagwe is the main producer of beans in Kagera Region and also one of the main producers in Tanzania
- The region has an average annual production of 120,000 – 180,000 tonnes of beans
- Supply of beans for the processing plant will be obtained from other districts of Kagera Region.

Available support

- It is a major food and cash crop that is supported by the National Agricultural Policy, the second Agricultural Sector Development Programme, and FYDP II, which promotes bean production and value addition.

20. Beekeeping and Honey Processing

Overview of the Opportunity	
<p>Key features</p>  	<p>Biharamulo District Council</p> <ul style="list-style-type: none"> Investing in modern beehives, beekeeping and honey processing Investment in modern beehives both for investor's own honey production as well as for selling the beehives to individuals in the community Increased production of honey will eventually create an opportunity for honey processing industry About 20 hectares have been allocated for this industry.
<p>Key investment rationale</p> 	<ul style="list-style-type: none"> Biharamulo has proved to be very conducive for honey production Current producers use traditional beehives, whose production is still low but adequate enough for small-scale honey processing Additional honey supplies can easily be obtained from neighbouring districts Such investment is in line with FDYP II, which has identified value addition of forestry products as strategic investment.
<p>Available support</p>	<ul style="list-style-type: none"> The region will promote establishment of a vocational training institute focusing on value addition of honey, among others Kagera Region is also attracting investment for producing packaging materials that will meet the specific requirements of honey and related products.

21. Investing in Livestock Feedlot

Overview of the Opportunity	
<p>Key features</p> 	<p>Biharamulo District Council</p> <ul style="list-style-type: none"> Investing in livestock feedlot for cattle fattening at Nyabugombe, Mihongora, and Nyambale About 9,500 hectares have been allocated for ranching and livestock feedlot investment for partnership with livestock keepers in their respective areas

	<ul style="list-style-type: none"> ▪ Feedlot emerges as a valuable input in the livestock production systems and caters primarily for quality meat supply to domestic niche markets and export markets ▪ It is envisaged to have a vibrant commercially oriented production of quality beef, which meets standards for the domestic and external markets ▪ Feedlot finishing is associated with lower requirements for land, improved overall production efficiency, and reduced age of animals at slaughter as well as promotion of more efficient utilisation of feed resources.
<p>Key investment</p> 	<ul style="list-style-type: none"> ▪ Traditional farming systems respond slowly to increasing demand for livestock products than modern technologies do ▪ There is a general gradual trend of livestock production towards intensification to meet the increasing demand for livestock products. Concentrates in the form of grains and supplementation in the form of fodder will substitute dependence on open rangelands for livestock feed resources ▪ The supply chain is characterised by low value addition among pastoralist and high value addition among beef cattle fatteners. Opportunities identified included: high market access and prices for fattened cattle compared to animals that are not fattened ▪ Hence there is great emphasis in the country to commercialise beef cattle production for the sector to contribute more effectively to household food security, and income as well as to the nation's economy.
<p>Available support</p>	<ul style="list-style-type: none"> ▪ Livestock development programme ▪ Livestock Sector Investment and Policy Toolkit (LSIPT) ▪ Tanzania Livestock Master Plan (LMP) for 2017–2022. LMP is a series of five-year value chain development investment plans that have prioritised beef production, particularly from on-farm fattening and commercial feedlots, as a way of reducing the red meat deficit.

22. Establishing Industrial Parks

Overview of the Opportunity

Key features



Muleba District Council

- Establishing an industrial park
- The industrial park to comprise of the following investment opportunities in the form of clusters, industries, and service centres
- About 2.8 hectares have been allocated for this industry.

Manufacturing cluster:

- Furniture.

Commercial, business and trade services centre:

- Business centre, financial and insurance centre; trade centre with an agro-commodity exchange; and supply chain services centre.

Social services cluster:

- Passenger transportation stations; well-being centres; learning centres.

Assembling cluster:

- Assembly, repackaging, machinery, equipment, and other industrial goods for value addition, such as farm machinery and implements, abattoirs equipment, etc.

Hospitality industry:

- Hotels, restaurants, recreation centres, and tourism.

Key investment rationale

- Industrial parks can help scale up industrialisation efforts by attracting domestic and foreign investments. Just like in Ethiopia, other African countries will benefit from a concrete industrial development policy that brings in investments in productive sectors such as agro-industry and manufacturing, thus helping create new jobs
- Well thought, designed and participatory planned sustainable development of the district as opposed to haphazard development

	<ul style="list-style-type: none"> Need of public and private investments in Muleba urban planning and urban infrastructure development so as to have a well-planned town in line with laws and regulations.
Available support	<ul style="list-style-type: none"> Strong support by the Integrated Industrial Development Strategy (IIDS) 2025 and FYDP II.

23. Supermarkets

Overview of the Opportunity	
<p>Key features</p> 	<p>Muleba District Council</p> <ul style="list-style-type: none"> Building a supermarket at Muleba town centre About 0.8 hectares have been allocated for the construction of the supermarket. <p>Biharamulo District Council</p> <ul style="list-style-type: none"> Building a supermarket and 165 stalls, restaurants and commercial buildings at Nyakanazi trading centre About 4 hectares have been allocated for the construction of the commercial centre.
Key investment rationale	<ul style="list-style-type: none"> A supermarket will generate employment to the people of the district Value added agro-products from investments on horticultural, food and cash crops and fish will be supplied to the supermarket, which in turn will create further opportunities for value addition.
Available support	<ul style="list-style-type: none"> Demand for supermarket goods is growing in Muleba Town Good infrastructure, which includes roads and communication networks, electricity supply, and markets.

24. Fish Processing Industry

Overview of the Opportunity	
Key features	<p>Muleba District Council</p> <ul style="list-style-type: none"> Establishing a small fish-processing plant to support further fishing and investment in cage fishing

Overview of the Opportunity



- The incentive to fish farmers to produce is when consumers are linked to the needs of fish farmers, processors, traders, and transporters. This is likely to happen when the policy environment enables the PPP model to operate in the fish-farming sub-sector.
- Fish processing is mostly done by small-scale fish processors using traditional drying, smoking and salting technologies
- Six hectares (6 ha) have been allocated for this industry at Katembe – Magarini.

Key investment rationale



- Muleba District Council accounts for 72.8 percent of Lake Victoria water body within Kagera. The Council has the largest number of fishing licences, fishermen and of registered fishing vessels. The Council is also inviting investors in cage fish farming, which will further increase fish catch for the industry
- Cage fish farming (offshore farming) is a relatively new technology in Kagera Region. So far there are only 4 cages practised at Kemondo in Bukoba Rural District, constructed by JKT. Kagera Region Secretariat is emphasising new investors in cage farming in natural water bodies due to the decline in catches from capture fisheries in Lake Victoria.

Available support

- One of the prioritised investments in FYDP II.

25. Mirror Making Factory

Overview of the Opportunity

Key features



Bukoba District Council

- An investor is welcome to invest in sand processing for the aim making mirrors.

Key investment rationale



- The council has large sands deposit suitable for making mirrors.

Overview of the Opportunity

Available support

- Strong support by the Integrated Industrial Development Strategy (IIDS) 2025 and FYDP II
- The council will facilitate land acquisition for establishing the proposed factory.

FACILITATION, PROCESSES, REQUIREMENTS AND INCENTIVES

This part provides a summary related to facilitation, processes, requirements, and incentives for investment in Tanzania in general and in Kagera Region in particular.

4.1 Supportive Policies and Legal Environment

The 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 Kagera Region's relevant areas are: National Investment Promotion Policy (1996); National Agricultural 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 (2017); The Mineral Policy of Tanzania (2009); Tanzania Mining Industry Investor's Guide (2015); and Kagera Region Authority Development Plans as well as the political will of the region to attract investors.

B. Key laws

The major laws and regulations that guide investment promotion and activities in Kagera 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); and other Sectoral Acts and relevant Kagera Region by-laws.

4.1.2 Strategies, Plans, and Programmes

The key strategies, plans and programmes are: Annual Regional Plans and Annual Reports; PO-RALG Reports; District Development Plans; FYDP II; Agricultural Sector Development Strategy and Programme 2017-2022 (ASDP II); Livestock Sector Development Programme (2011); Ministry of Industry, Trade and Investment's Reports; and IIDS 2025. Others are the National Rice Development Strategy; Tanzania Agriculture and Food Security Investment Plan; and Agricultural Growth Corridor in Tanzania.

With the above policies, regulatory frameworks, strategies and plans, the investment climate in Kagera Region is supported by sound frameworks that offer an appropriate environment which, in turn, 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 Kagera Region is determined to doing just that so as to ensure speedy implementation of prioritised investment opportunities and put in place a conducive investment climate in the region.

4.1.3 Investment Options: Private, PPP, PPCP, Joint Ventures

Investment options available in Tanzania include individual private sector investments, PPP, PPCP and Joint Ventures (JV).

A. Public-Private Partnerships

The Government recognises the role of private sector in bringing about socio-economic development through investments. PPP frameworks provide an important instrument for attracting investments. Indeed, 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 PPP, 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. PPP is a way to amalgamate public and private capital and expertise for public projects in which the private sector has interest in sharing ownership. PPP Act (2010) and PPP Regulations (2011) give areas of collaboration, which comprise of investment capital, managerial skills and technology.

Additionally, PPPs can enable the Government to fulfil its responsibilities in efficient delivery of socio-economic goods and services by ensuring efficiency, effectiveness, accountability, quality and service outreach.

The concept of PPP entails an arrangement between the 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 specified outputs. The private entity assumes the 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 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, which both the public sector (particularly local government authorities) and private sector are interested to invest in.

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 National Development Corporation, Tanzania Petroleum Development Corporation, and the National Housing Corporation, in energy, bio-fuels, and real estate ventures.

4.2 Facilitation: Processes and Requirements

Kagera Region and Central Government have set and are striving to improve investment climate to entice 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 so as 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

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 right up to project start up.

The minimum investment capital threshold for an enterprise to qualify for registration under the Centre is not less than US\$ 500,000 if foreign or joint venture owned, and US\$ 100,000 for domestic investors. Under the one-stop facilitation Centre, TIC assists all investors to obtain permits, licences, approvals, and authorisation etc., required by other laws to set up and operate investment in Tanzania.

The TIC contacts are:

Head Quarters-Executive Director, Tanzania Investment Centre, Plot no; 9A&B, Shaaban Robert Street, P.O Box 938, Dar-es-Salaam, Tanzania, Tel: 255 22 2113365/116328-32 Fax: 255 22 2118253, Email: information@tic.go.tz

TIC Lake Zone Branch Contacts are:

Zone Office, P.O. Box 638, Kenyatta Road, Mwanza, Tel: +255 (28) 2540871/2, Fax: +255 (28) 2540884, lakezone@tic.co.tz

4.2.2 Main Institutions Dealing with Investment in Tanzania and Kagera Region

The main institutions dealing with investment issues in Kagera Region in particular and Tanzania at large are: Tanzania Investment Centre (Email: information@tic.co.tz), BRELA, TRA, Tanzania Electric Supply Company (TANESCO), Tanzania Bureau of Standards (TBS), Ministry of Industry and Trade (MIT), Prime Minister's Office (Investment), water supply companies in respective regions, municipal authorities in respective districts (on land issues), Ministry of Water (MoW), MoA, and Ministry of Livestock and Fisheries (MLF).

4.2.3 Registration

Registration of an investment can be undertaken at the local BRELA and district, regional or national branches of Tanzania Investment Centre 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).

4.2.4 Central Government Taxes

The taxes involved in investment projects in Kagera Region are various and include:

A. Corporate Tax

Corporate tax is charged at the rate of 30 percent for both resident and non-residents. In case of a 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. Furthermore, corporate entities (CEs) with perpetual unrelieved losses for three consecutive years (excluding CEs conducting agricultural business, provision of health care or education services), corporate tax is 0.3 percent of annual turnover for resident CEs.

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 Taxes

Residents are subjected to personal income tax where total income exceeds TZS 2,040,000 per year. 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 employs four or more persons; the rate is 4.5 percent of the gross wage. Exempted employers from SDL include diplomatic missions, registered educational institutions, charitable organisations, farm employment, and foreign institutions dealing with technical assistance and United Nation and its organisations/agencies.

C. Withholding Taxes

Withholding tax rate on dividends from corporations listed with Dar es Salaam Stock Exchange is 5 percent for both resident and non-resident persons. Dividend rate from other corporations is 10 percent. The rate withheld on interest is 10 percent and on royalties is 15 percent for resident and non-resident persons. Furthermore, 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 of persons dealing with professional services, as they are required to register 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 manufactures and processors of vegetable oils, textiles, pharmaceuticals, and skins and leather manufactured in Tanzania Mainland.

VAT returns are supposed to be filed on the 20th day of the month after a tax period. However, where the 20th day falls on Saturday, Sunday or public holiday, VAT return shall be lodged on the first working day following 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.

4.3 General Investment Incentives

Investors registered by Tanzania Investment Centre pursuant to the 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 import duty exemption on deemed capital goods (in regard to deemed capital goods, investor shall pay 25 percent of import duty due). Deemed capital goods that are eligible for exemption are specified depending to 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 quota granted to the 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 (ICSID) 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 investment climate in the country. Please contact Tanzania Revenue Authority (www.tra.go.tz) and Tanzania Investment Centre (www.tic.go.tz) for current updates.*

4.4 Access to Resources

4.4.1 Land for Investment in Tanzania

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

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 TIC, which will in turn issue a Derivative Right of Occupancy to an investor. More information on acquisition of land for investment is available on www.ardhi.go.tz.

4.4.2 Land for Investment in Kagera Region

Various parcels of land of different sizes have been earmarked by each council in Kagera Region and set aside for specific targeted investment. Such land parcels have been listed in details under Part Three of this Investment Guide.

4.4.3 Banking and Financial Services

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 clientele 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 development 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. Currently, there is a positive trend in lending to SMEs; this trend produces greater confidence in SMEs' 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

Kagera Region has surplus labour due to low employment. While some of the labour is unskilled, there are efforts to build skilled labour force, especially through vocational colleges. The region has nine vocational training college(s)

of which eight of them are publicly owned and one is privately owned, therefore investors are welcome to build skills development institutes in every council.

4.5 Inclusion and Participation of the Private Sector

The region plans to stimulate its industrial and economic development base through attracting additional PPP investments in order to increase its value addition in key sectors, such as 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 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, region 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, Kagera Region authorities will create an enabling environment through provision of prerequisite infrastructure, incentives, formulation/review and enforcement of investment friendly policies, regulations, and procedures. Regional authorities will also promote PPP, PPCP and facilitate joint ventures between potential investors and local private investors. These investment frameworks/arrangements, including the build, operate and transfer approach, are critical for achieving the objectives of implementation of capital and technology intensive investments. In addition, the private sector will be facilitated to improve delivery, and enabled to thrive and be competitive by ease access to affordable input and output factors nationally and internationally.

PART FIVE

KEY CONTACTS IN KAGERA REGION

This part provides important contacts in Kagera Region, which will help potential investors in making follow up for the opportunities they want to invest in.

5.1 Key Websites

Office	Website
Kagera Regional Secretariat	www.kagera.go.tz
Bukoba Municipal Council	www.bukobamc.go.tz
Bukoba District Council	www.bukobadc.go.tz
Biharamulo District Council	www.biharamulodc.go.tz
Karagwe District Council	www.karagwedc.go.tz
Kyerwa District Council	www.kyerwadc.go.tz
Missenyi District Council	www.missenyidc.go.tz
Muleba District Council	www.mulebadc.go.tz
Ngara District Council	www.ngaradc.go.tz

5.2 Key Contacts

5.2.1 Regional Commissioner's Office

Office	Post Office Box	Telephone/ Mobile Phone	E-mail
Regional Commissioner (RC)	299 Bukoba	+255 28 2220215 +255 28 2220218	ras.kagera@tamisemi.go.tz
Regional Administrative Secretary (RAS)	299 Bukoba	+255 28 2220215 +255 28 2220218	ras.kagera@tamisemi.go.tz

5.2.2 Bukoba Municipal Council

LGA	Municipal Director		E-mail
	Post Office Box	Telephone/Mobile Phone	
Bukoba Municipal Council	284 Bukoba	+255 28 2220226	md@bukobamc.go.tz

5.2.4 District Councils

LGA	District Executive Director		E-mail
	Post Office Box	Telephone/Mobile Phone	
Bukoba District Council	491 Bukoba KAGERA	+25528 2220287	ded@bukobadc.go.tz
Biharamulo District Council	70 Biharamulo KAGERA	+25528 2223403	ded@biharamulodc.go.tz
Karagwe District Council	20 Karagwe KAGERA	+25528 2227148	ded@karagwedc.go.tz ded.karagwedc@kagera.go.tz
Kyerwa District Council	72 Kyerwa KAGERA	+255 686 397972 +255 754 422746	ded@kyerwadc.go.tz
Missenyi District Council	38 Kyaka Missenyi KAGERA	+255732 983531	ded@missenyidc.go.tz
Muleba District Council	131 Muleba KAGERA	+255282 224013 +255756 350183	ded@mulebadc.go.tz
Ngara District Council	30 Ngara KAGERA	+255282 226016	ded@ngaradc.go.tz



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