



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

MARA REGION INVESTMENT GUIDE



2020



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LIST OF ABBREVIATIONS

AEZ	Agro Ecological Zones
AGOA	African Growth and Opportunity Act
AI	Artificial Insemination
ASDP	Agriculture Sector Development Strategy and Programme
ASDP II	Agriculture Sector Development Strategy and Programme 2017-2022
AVCs	Agriculture Value Chains
BRELA	Business Registration and Licensing Agency
COSOTA	Copyright Society of Tanzania
CSOs	Civil Society Organisations
DC	District Council
DOC	Day-Old Chick
DPs	Development Partners
EAC	East African Community
EBA	Everything But Arms
EIA	Environmental Impact Assessment
EPZ	Export Processing Zone
EPZA	Export Processing Zones Authority
ESRF	Economic and Social Research Foundation
EU	European Union
FAO	Food and Agriculture Organisation
FCC	Fair Competition Commission
FETA	Fisheries Education and Training Agency
FYDP II	Second Five-Year Development Plan 2016-2021
GDP	Gross Domestic Product
GoT	Government of Tanzania
HDI	Human Development Index
HPC	Population and Housing Census
ICTs	Information and Communication Technologies
IDPs	Integrated Development Plans
IIDS	Integrated Industrial Development Strategy
ISOs	Industry Support Organisations
IT	Information Technology

ITC	International Trade Centre
JKT	Jeshi la Kujenga Taifa
LED	Local Economic Development
LGAs	Local Government Authorities
MA	Ministry of Agriculture
MC	Municipal Council
MIT	Ministry of Trade and Industry
MLF	Ministry of Livestock and Fisheries
MSMEs	Micro, Small, and Medium Enterprises
MWI	Ministry of Water and Irrigation
NBC	National Bank of Commerce
NDC	National Development Corporation
NEEC	National Economic Empowerment Council
NGOs	Non-Government Organisations
NBI	Nile Basin Initiative
OUT	Open University of Tanzania
PO-PRALG	President's Office-Regional Administration and Local Government
PPCP	Public-Private Community Partnership
PPP	Public-Private Partnership
RAS	Regional Administrative Secretary
RECs	Regional Economic Communities
RSs	Regional Secretariats
SACCOS	Savings and Credit Co-operative Society
SADC	Southern African Development Community
SEZ	Special Economic Zone
SIDO	Small Industry Development Organisation
SIDP	Sustainable Industrial Development Policy
SMEs	Small and Medium Enterprises
SNP	Serengeti National Park
TANESCO	Tanzania Electric Supply Company Limited
TANTRADE	Tanzania Trade Development Authority
TBC	Tanzania Broadcasting Corporation
TBS	Tanzania Bureau of Standards
TC	Town Council
TCCIA	Tanzania Chamber of Commerce, Industry and Agriculture

TDU	Textiles Development Unit
TDV	Tanzania Development Vision
THDR	Tanzania Human Development Report
TIC	Tanzania Investment Centre
TIN	Taxpayer's Identification Number
TIRDO	Tanzania Industrial Research and Development Organisation
TMDA	Tanzania Medicines and Medical Devices Authority
TMEA	Trade Mark East Africa
TNBC	Tanzania National Business Council
TRA	Tanzania Revenue Authority
TRIMs	Trade-Related Investment Measures
TSHZ	Tanzania Short-Horn Zebu
TVET	Technical and Vocational Education and Training
TVETDP	Technical and Vocational Education and Training Development Programme
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNIDO	United Nations Industrial Development Organisations
WB	World Bank
WMA	Weights and Measures Agency
WTO	World Trade Organisation

COMMITMENT FROM THE HIGHEST LEVEL OF GOVERNMENT



"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 regional administrations to focus on 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 Mara Region, home to the Serengeti which covers 70 percent of the entire area of the Serengeti that connects to the Lake Victoria (Speak gulf). Mara Region hosts the most valuable part of Lake Victoria which is the third largest lake in the world. The lake and its islands offer great socio-economic potentials, including fishing, irrigation and tourism – connecting to the Serengeti Western Corridor. It is endowed with large deposits of Gold that make Mara region one of the richest regions in gold deposits in East Africa with several eye-catching tourist destinations.

Gold is the most dominant resource among the available minerals in the mining sector. Mara Region is rich with abundant and productive natural resources suitable for investment in agriculture (crops, livestock & fishery), mining, energy and tourism. The region is endowed with both renewable and non-renewable natural resources. The richness in natural resources constitutes a major opportunity within the region and it is fundamental for socio-economic transformation. The region is also located strategically along the Lake Victoria with easy cross-border trade connections to Kenya, Uganda and other East African Countries.

Mara region has prepared this investment guide with a view to ensure that investors are better informed about the investments opportunities the region provides. This is done in line with the overall investment policy in Tanzania. The guide provides reasons as to why one should invest in Mara region, spells out investment opportunities available in the region, gives an economic overview of the region, identifies key locations for investments, and how the regional leadership has set itself to provide the necessary support to investors. Important contacts are, therefore, provided to facilitate follow ups as and when they are needed.

This is in line with the Regional Secretariat's mission, i.e., to provide advisory and coordination services to LGAs and other stakeholders through effective and efficient use of resources, capacity building and good governance. It

is intended that the information needed to prospective local and foreign investors is easily accessed and thus invite them to invest in Mara and generate sound financial, social and environmental returns to their investments. Other objectives of the guide are to foster productive capacities in key priority areas (infrastructure, products and services) especially the industrial sector – processing and value addition activities. The guide is also intended to promote investments that nurture inclusive and resilient economic transformation needed to accelerate societal development and well-being of the people of Mara Region and of Tanzania at large.

The guide is in line with the regional vision, namely “A region with quality life” that is aligned with National Development Vision 2025 and the Second Five-Year Development Plan (FYDP II) 2016–2021. The guide is meant, therefore, to execute the regional development pathway as clearly manifested in the Mara Regional Vision and Mission that are implemented through the regional and local government authorities (LGAs) development strategic plans.

The regional leadership wishes to provide assurance to prospective investors that the environment is conducive in terms of policies, laws, by laws and regulatory framework; with an ever improving business environment. The leadership of the region is well organised to facilitate and provide further details on specific, selected strategic and viable opportunities to interested investors.

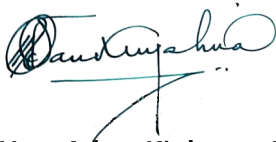
The regional leadership has prioritised investment opportunities in transforming crop farming and irrigation infrastructure development; agro-processing industries; livestock improvement practices and range management; production of animal feeds; production of appropriate packaging materials; fishing and fish farming; mineral processing industries; construction of education infrastructures and provision of related services; construction of affordable and quality tourist hotels, recreational centres, conferences and shopping malls, real estate infrastructures and regional sports arena; forestry and beekeeping; construction of health care facilities and provision of related services; and production of electric power and gas from waste.

The preparation of this guide was participatory involving key stakeholders from the government and private sector in the region. The ESRF team that assisted in preparing this guide received full cooperation from the regional

team under the Regional Administrative Secretary (RAS), Ms Karolina Albert Mthapula. I am grateful for the teams' commitment to the task. I am indebted to express my sincere gratitude to the United Nations Development Programme (UNDP) for the financial and technical support and the Economic and Social Research Foundation (ESRF) for providing technical assistance in developing this guide.

I would like to specifically acknowledge the Foundation's team of experts, namely Christine Msisi UNDP Country Representative, Amon Mnyama UNDP Project Coordinator, Prof. Haidari Amani, Prof. Samuel Wangwe, Prof. Innocent Zilihona from IRDP, Mr, BonMax Mbaso from IRDP, Mrs Margareth Nzuki, Mr Mussa M. Martine, Mr John Shilinde and Joseph Nyampepela Ngonyani, Joshua Murumbe Consultant EX DC Bunda for their commitment and technical support that collectively resulted in the completion of this guide. It is difficult to mention everyone. I, therefore, thank all other individuals from Mara Region who contributed in one way or another towards the preparation of this investment guide, which can also be accessed on www.mara.go.tz.

I humbly take this opportunity to welcome you to invest in Mara Region and assure you of our continued support to make your investments productive, profitable and progressive for our mutual benefit.



Hon. Adam Kighoma Ali Malima
Regional Commissioner
Mara Region, Tanzania

DISCLAIMER

This booklet was published to guide investors on how best to access essential information regarding investment opportunities available in Mara Region as well as what processes that investors should follow in order to invest in the region. In no way does this investment guide give exhaustive information to an investor.

Most of or all information contained in this booklet was derived from consultations among regional and districts government officials, private sector, private consultants, Agencies and Academic institutions. Depending on the nature of investment, investors will be facilitated and enabled to conduct feasibility studies, develop business plans and conduct environmental impact assessment for their investment ideas.

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.

The guide is presented in good faith and in cognisance of the 2018 Amendment to the Statistics Act (2015). Where a datum point used in this guide unknowingly contradicts an official statistic, it should be deemed an error and the official statistic should be assumed to be correct.

MARA REGION AT A GLANCE

The key attributes of Mara Region, including key economic indicators, are summarized in Table 1. The region has about 2.4 million people, deriving their livelihoods from land and lake resources. Per capita income is about TZS 2.2 million, which portrays a reasonable purchasing power, not diverging much from the national average of TZS 2.6 million.

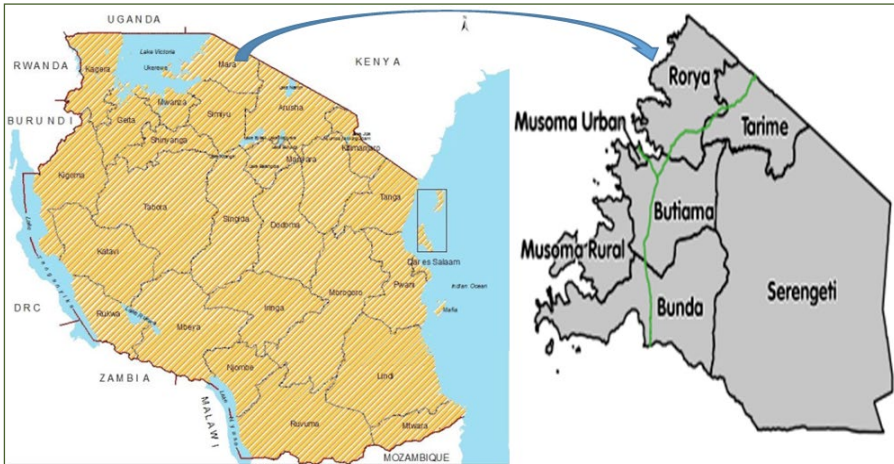
Table 1: Mara at a Glance

Name	Mara Region
Location	Lies between latitudes 01° 01' and 02° 31' south of the Equator and between longitudes 33° 10' and 35° 15' east of Greenwich. It is 297 km to Kisumu and 494 km to Nairobi in Kenya, 527 km to Jinja, 638 to Entebbe and 603 to Portbell in Uganda. The region is also 220 km to Mwanza 158 km to Bariadi in Simiyu. 520 km to Arusha passing through Serengeti National Park.
Area	30,150 km ² Water bodies cover 10,854 km ² National Park of Serengeti and Game reserve 11,045 km ² Area for social Economic Activities 8,251
Population	2,391,845 (2020 projections)
Population Growth Rate	2.5% in 2012 PHC
Population density	110 Persons per km ²
People and culture	Main languages spoken are Kiswahili, English and vernacular languages
Neighbouring Countries	Kenya and Uganda
Administrative set up	Six districts namely: Bunda, Butiama, Musoma, Rorya, Serengeti and Tarime
GDP	TZS 5,107,169,000 in 2019
Per capita	TZS 2,222,134 in 2019
Human Development Index (HDI)	0.612 in 2015 (based on THDR 2017)

Name	Mara Region
Major economic activities	<ul style="list-style-type: none"> ▪ Crop farming ▪ Livestock keeping ▪ Fishing ▪ Mining ▪ Tourism ▪ Cross border Trading
Agro Ecological Zones	<p>Sub-divided into three main agro-ecological zones (AEZ) namely: Highlands Zone, Central Zone and Lowland Zone.</p> <ul style="list-style-type: none"> ▪ The Highlands Zone is mainly found in Tarime District and some parts of Rorya and Serengeti Districts. This zone receives an average annual rainfall of 1,250 – 2,000 mm ▪ The Central Zone covers Musoma, Butiama and eastern part of Serengeti District. The average annual rainfall in this zone ranges between 900 and 1300 mm ▪ The Lowland Zone mainly found in Bunda District and some parts of Rorya, Musoma, Butiama and Serengeti Districts. Its altitude is about 1,120-1,300 mm above sea level. The zone receives an average annual rainfall of about 700 to 900 mm.
Climatic condition	<ul style="list-style-type: none"> ▪ Rainfall: Bimodal pattern ▪ Temperature: Ranges between 18°C to 29°C ▪ Precipitation: 73.5mm ▪ Humidity: 76% ▪ Wind: 11km/h ▪ Pressure: 1016 mbar ▪ Visibility: 25km
Major crops	<p>Maize, sorghum, finger-millet, bulrush millet, cassava, sweet potatoes, Irish potatoes, Orange, fleshed sweet potatoes, beans, Bambara-nuts, ground nuts, green gram, chickpeas, cotton, coffee, tea, sunflower, sesame, sugarcane, banana, onions, tomatoes, watermelon, oranges, avocados, pawpaw, pineapples, pumpkins and lemon</p>
Strategic crops	<p>Cotton, coffee, tea, horticultural, cassava and banana</p>

Name	Mara Region
Livestock	Cattle, poultry, shoats, donkeys, dogs, etc.
Fisheries	Nile perch, sardines, tilapia, catfish
Mining	Gold, kaolin, limestone, gypsum and gemstones
Tourism	Photographic, sighting, water sports, cultural tourism beach tourism etc.

Note: PHC is Population and Housing Census, and THDR is Tanzania Human Development Report



WHY INVEST IN MARA REGION

2.1 Reasons to Invest in Mara Region

Mara region has unique variety of attractive investment opportunities and incomparable social and economic services for investors. Below is just a brief as to why Mara Region is the best destination for investors.

a) Strategic Location

Mara region borders four other regions namely Arusha Region to the east, Simiyu Region in the south, Mwanza Region in the south west and Kagera Region in the west over the waters of Lake Victoria. This is a favourable geographical location which offers enormous trading opportunities amongst businesses and households in these areas.

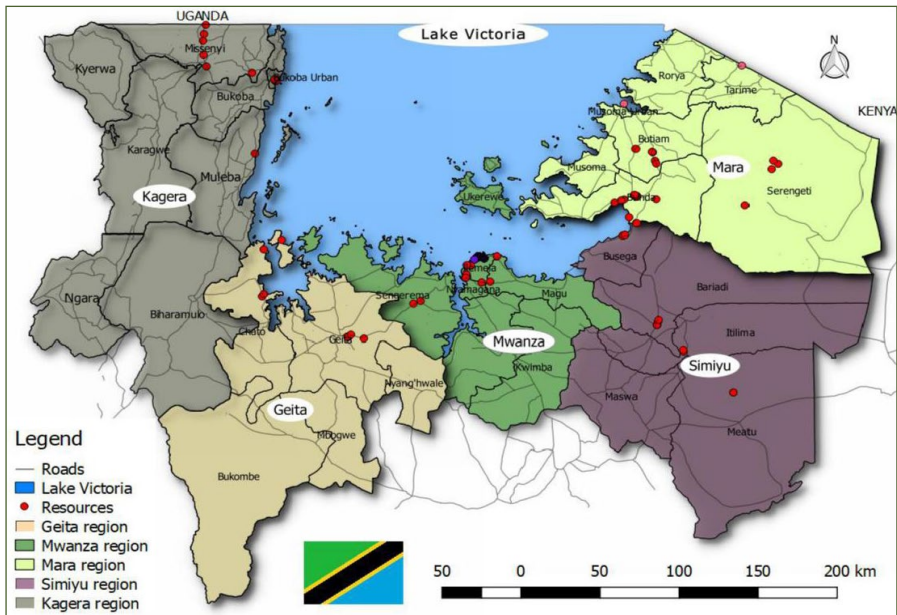


Figure 1: Location of Mara Region in the Lake Zone of Tanzania

The region is also strategically bordering the East Africa Countries of Kenya and Uganda, which ensures proximity to a wider market, making it attractive for **cross-border** investment and trade. Presence of tarmac road networks and water ways make connectivity with Kenya and Uganda much easy and cheap.



Figure 2: Map of East Africa showing location of Mara Region

b) Market

The potentials in the region are complemented by a huge market with a population of about 2,391,845 inhabitants (2020 projections), high population growth, abundant skilful workforce, plus the neighbouring population which is also dynamic and contributes to the potentials in the region. The region, also benefits from the country's 58 million people, and is located closer to all partner states in the East African Community (EAC) with a total population of over 185 million people.

c) Infrastructure

Connectivity is critical in facilitating investments. The region is well served by tarmac roads from the South (Mwanza and Simiyu) and from the North (from Kenya); also has access to Mwanza and Musoma airports. All these options make connectivity between Mara and neighbouring regions and countries of Kenya and Uganda much safe, easier and cheaper.

d) Serengeti National Park for Wildlife and Tourism

Mara is home to the International tourism brand, the Serengeti National Park. Serengeti National Park is the World natural heritage site. Ecosystem found in Mara is unique and famous for its year-long migration of over 1.5 million wildebeest and 250,000 zebra. The Serengeti hosts the second largest terrestrial mammal migration in the world. This places it as one of the ten-natural wonders of the world, and was voted and clinched Africa's leading national park award in 2019; the second recognition in a row after it won the best African Safari Park award in 2018. Investment potentials within the Serengeti national park include Campsite, Hotels and Lodges accessed at competitive prices.

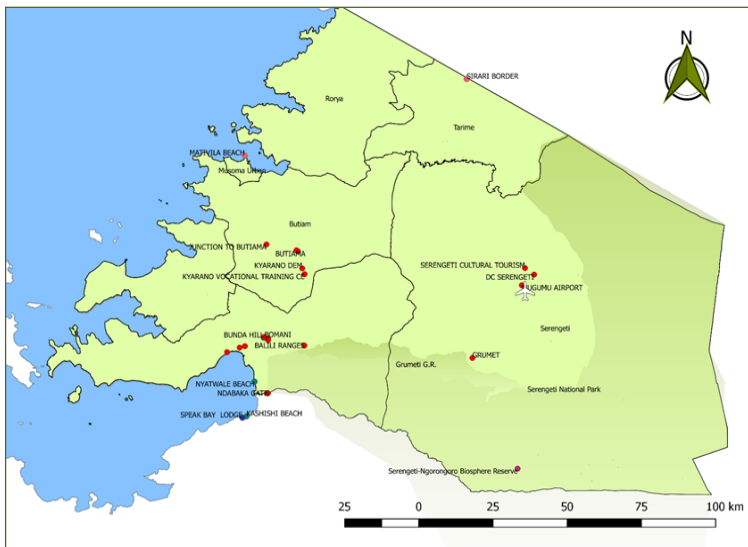


Figure 3: Mara regional map showing the locations of the potential's tourist attractions

e) Grumet/Ikorongo Game Reserve and Ikona Wildlife Management Area

Ikorongo and Grumet game reserves in Bunda and Serengeti districts were established in 1993 covering an area of 993.4 km². They have high concentration of wildlife species. There are six rivers that are frequented by wildebeest through the annual migration they make from Serengeti. Among

the wild animals found in the area include Elephants, Rhino, Giraffe, Buffalo, Greater and Lesser Kudu, Hyena, baboon, Zebra, Wild dogs, Grant's and Thomson's gazelle, Topi, Warthog and Duiker. In addition to the Reserves is the presence of Ikona Wildlife Management Area (IWMA) which has an area coverage of 242.3 km². Ikona WMA like other WMAs in Tanzania support sustainable utilization of Wildlife resources for improved local community's livelihoods.

Several tourist activities take place within the Reserves and IWMA, including walking safaris, photograph tourism and hunting, which provide investment opportunities for low-cost tourist hotels that meet the needs of tourists. Investors are, therefore, invited to invest in hotels, tour operation and in delivery of services such as food, vegetables and distribution of drinks.

f) Lake Victoria and Islands

Mara region has 10,854 square kilometres covered with water which is 15% of the Lake Victoria's water body. The Lake is the second largest in the world and provides another good site for tourists. Apart from being rich in freshwater fishing, it is viable to develop beaches where tourists interested in sport fishing, boat racing, swimming, diving, and breezing can utilize the opportunity. There are lodges and camps in Musoma Municipality to meet tourists' accommodation needs. Areas of investment include Accommodation (camps, houseboats and resorts), Sport fishing utilities, Retail services support, e.g., shop and production (art/craft/souvenir), Food and beverage facilities and visitor services.



Plate 1: Aerial view of Lake Victoria (at Musoma Peninsula)

Investments can as well be done in several islands in the Lake that are suitable for attracting tourists. These include Bulamba, Nafuba, Sozia, Sata, Namguma, Machwele, Ilela, Igali, Chalika, Nyakalango, Bugulani, Nachenyele, and Guyanza in Bunda District Council; Ryamgasire in Musoma Municipal Council; Rukuba and Iriga in Musoma District Council; Towa, Kinesi, and Bugwambwa in Rorya District Council.



Plate 2. Lukuba Island is one of the Mara regional island's potential for fishing and tourism activities in the Lake Victoria

g) Export Promotion Zones (EPZ):

Mara region has established key locations for investment by setting aside 3,173.6 Acres of land (as Land Bank) in Bunda District for Export Processing Zones (EPZs), industrial parks, real estate, and tourist hotels. Potential investors are therefore invited to invest in these earmarked areas. The area is very strategically located, bordering Lake Victoria, served with a network of Tarmac roads to Mwanza and Kenya via Sirari Border and an electric power station that provides uninterrupted supply of electricity.

h) Economic Strengths

Mara Region has a unique attractive economy dominated by mining, fishing, tourism, livestock keeping, crop farming and cross-border activities. Given its strategic location, its natural resources, entrepreneurship and diligence of its people,



the region is ideal investment destination and has high economic growth potential. Mara Region has good transport links with other regions in Tanzania and proximity to neighbouring countries of Kenya and Uganda, thus facilitating trade and mobility of resources including human resource for production.

Roads: Mara Region is well served with tarmac road network linking other regions (such as Mwanza, Simiyu and Arusha) and neighbouring country of Kenya.

Water transport: Mara is served by water transport logistics through Lake Victoria to neighbouring countries of Kenya (Kisumu) and Uganda (Port Bell & Jinja) and other regions such as Mwanza, Geita, Simiyu and Kagera.

Air transport system: Mara Region is served with air transport through Musoma Airport, Seronera and Fort Ikoma airstrips in Serengeti National Park and Magena Airstrip in Tarime. There is an on-going upgrading of Musoma Airport to meet the increasing demand for air transport.

Telecommunication services: Mara Region is well served with Internet, telephone services (both cellular phone and landline telephone), radio and postal services.

Electricity: All the nine (9) local government authorities are well served with electricity, thus investors are assured of adequate, affordable and reliable supply of electric power. Available Electric power is controlled from the national grid to main grid in Musoma and other substations around the Region to ensure adequate supply for both industrial and Domestic use.

i) Natural Resources and Good Climatic Conditions

Mara Region is rich in natural resources, including arable agricultural land, forests and minerals such as gold, iron ore and gemstones thus serving as a source of raw materials for industrial activities. Also, the region has excellent climate. Temperature ranges between 18°C and 29°C; rainfall ranges between 700mm and 2000mm while precipitation is 73.5mm and humidity is 76%. Mara region has an average wind speed of 11km/h and visibility of 25km. The climatic condition is favourable for agriculture (specifically crop cultivation), animal husbandry and fishing.

j) Health Services

Mara Region has 13 hospitals, 43 health care centres and 264 dispensaries. The region is also constructing an international referral hospital (Mwalimu Nyerere Memorial Medical Centre), which is expected to be completed by September 2020, thus assuring investors of state-of-the-art health care services.

k) Peace and Security

Tanzania ranks high among the peaceful countries in Africa. Like the other regions in the country, Mara Region enjoys peace and political stability, with low crime rates, which offer a safe environment for investment. Efforts will be made to enable investors to understand the culture of the people surrounding the investment areas and ensure that there is sustained warm and friendly relationship between the investors and the communities.

l) Leadership Commitments

The Regional Secretariat and Local Government Authorities in collaboration with private sector associations are committed to assist and facilitate investments and businesses in the region. Facilitation desks and officers are positioned at the Regional Secretariat and local government authorities and are all required to provide correct information and support to potential investors. In addition, the region, in collaboration with the Central Government, is committed to continue improving provision of basic enablers of investments such as land, utilities, and infrastructure development using sector and council budgets, as well as financial and technical support from development partners.

2.2 Investment Opportunities in Mara region

In developing and implementing the investment opportunities in Mara region, a transformative, doing things differently and an innovative business model will be required so as to attract more partnerships, investments and capital from both public and private sector, from within and outside the country. Through the transformative approach, the region will be able to scale up and infuse technology use, moving beyond market access to market creation, and creating engagement platforms through digitalization, forming strong productions and processors associations and enforcing contractual agreements.

The use of business models for different ways of financing including blended financing cannot be avoided. In general, the region has the following investment opportunities:

- i). Mineral (gold, iron ore, gemstone and limestone) processing – three quarters ($\frac{3}{4}$) of land is believed to contain varieties of minerals – value addition through transformation of small miners is critical.
- ii). Crop farming requires better agro practices to increase productivity of various crops (coffee, cotton, horticulture) and irrigation infrastructure development, which is adaptive to climate change – climate smart agriculture. The region has a total of 48,611.30 ha potential for irrigation as only 3,364.10ha are currently utilized.
- iii). Agro-processing including food processing facilities for maize, millet, paddy, cassava, sweet & orange fleshed potatoes, pumpkins, etc. Also, oil seed processing industries for sunflower, cotton and sesame.
- iv). Livestock improvement practices and range management, i.e., transformation of livestock through improving practices moving from free range grazing to ranching and zero grazing by improving livestock feed, awareness and education through extension services and transferring livestock technologies and make them available to developmental farmers.
- v). Production of animal feeds will require a re-thinking of the types of crops produced in the region (to ensure availability of raw materials) and introduce processing technologies plus improved breeds of livestock. Feeds will enable the transformation of dairy, meat (beef) and Skin and hide processing industries,

-
- vi). Production of appropriate packaging materials – this can be done in collaboration with other regions that have already embarked on these activities of producing various packaging materials – on scale.
 - vii). Fishing and fish farming will be transformed by creating a new generation of fish farmers who will invest in fish cage, fish - ponds and other technologies like fish tanks, fish processing industries, Ice making plants installation, improving beach management and fish collection centres, etc.
 - viii). Skills development is critical. This will require improvement of the existing education institutions and vocational training centres such as VETA Musoma, FDC Musoma. FDC kisangwa Bunda, FDC kyarano Butiama and Buhemba Anglican. FDC Tarime. Mogabiri Tarime, Roman Catholic Chipuka Serengeti which are focusing on promoting livestock feed, extension services, field farmers schools, demo plots, Milk processing, beef processing, fish farming related technologies, tourism, and agro processing.
 - ix). Construction and rehabilitation of existing infrastructures (Musoma Hotels) for tourism industry by making affordable and quality tourist hotels, tented camps, beach resort. recreational centres, curio shops, conferences and shopping malls, real estate infrastructures and regional sports arena and improve tourist activities under Eco Tourism.
 - x). Establishment of Regional forestry Management programme (Agro – forest and beekeeping) which will evolve for both public and private sector to invest and use various landscapes found in the region. These will improve rural and urban livelihoods and reduce poverty.
 - xi). Construction of health care facilities and provision of related services, this has been going on, and the region will promote further investment in sophisticated facilities for human and livestock health.
 - xii). To revive industries which are not working such as Cotton industries. Fish industries, dairy industries and collection points of milk processing
 - xiii). Establishment of strategic regional market centre at Kiabakari - Butiama District (banana, Potatoes, maize, paddy, onions and horticultural products)
 - xiv). Transforming wastes into energy (production of electric power and gas from waste materials).
 - xv). Establishing Agro processing industries, Fish processing industries, Livestock industries, packaging Material processing Industries, Gas and Energy Plants, Tourism industries.

PART THREE

PRIORITISED INVESTMENT OPPORTUNITIES IN MARA REGION

Mara Region has prioritised investment opportunities as follows; Agriculture (Food Crops, Horticulture Crops and Cash crops), Livestock Development, Fish Development, Tourism Development, Manufacturing and Processing Development and Mining Development. Below is an outline of investment opportunities along the value chains:

3.1 Agriculture

Agriculture contributes about sixty per cent (60%) of the region's GDP, with about eighty per cent (80%) people employed in the sector. Crops grown in the region include cassava, paddy, maize, sorghum, finger-millet, bulrush millet, sweet potatoes, Irish potatoes, beans, Bambara nuts, ground nuts, green gram, chickpeas, banana, cotton, coffee, sunflower, sesame, onions, tomatoes, water-melon, oranges, avocados, pawpaw, pineapples and lemons. However, strategic crops of the region are cotton, horticulture, coffee, cassava and banana

The region's total arable land is estimated to be 2,500,000 hectares but only 500,000 hectares, which is approximately twenty per cent (20%) of the arable land, are normally utilised for crop production. In this regard, the region's potential for agriculture development investments is still enormous and many opportunities for investing in agriculture as the primary sector, employing majority of residents, are available to both firms and individuals. Stakeholders are welcome to invest either jointly with the Government or privately in the following:

- i). Crop farming
- ii). Strengthening extension services
- iii). Supplying agro inputs
- iv). Improving irrigation infrastructure (e.g. irrigation schemes)
- v). Constructing storage facilities and transport facilities (warehouses, cold rooms, refrigerated trucks etc.) for agriculture produce

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- vi). Quality seed production and multiplication of the strategic crops
 - vii). Establishment of agro-processing industries as well as strengthening agriculture marketing information system
 - viii). Establishing business operations for modern food crops, vegetables, fruits, flowers, spices and horticulture crops for domestic, regional and international markets.

The community will participate in this strategic area of investment by expanding crop production, especially the strategic crops. The community can also trade their labour to large-scale farmers expected to establish irrigation schemes. Over time, the community is expected to learn new technologies and practices in crop farming and, as a result, community members will be in a good position to run their own farms as out-growers. The agro-processing industries will create markets for the crops produced by the community and other actors.

3.1.1 Cotton

Mara Region is among eleven regions of the cotton producers in Western Cotton Growing Area (WCGA) and it is a leading region in cotton productivity per acreage by average of 220 kilograms per acre as per Tanzania compared to other regions. Due to the history of being the founder of





Cotton Contract Farming Model. However, there are few cases for individual farmers who are using good farming practices and producing 600 to 1200 kilograms per acre. Cotton is mainly grown in four districts, namely Bunda, Serengeti, Musoma, Butiama and. Also the Region proposed to extend Cotton production in the low land area in Rorya and Tarime District.

Cotton production in the region by 2018 was 23,870 metric tonnes lower than the region's industrial requirement, therefore the Regional plan is to increase productivity per acreage from 220 kg to 550kg per acre by 2025. The regional target is to increase production up to 130,000 kg. thus, creating a need for investment in cotton production and productivity.

In order to increase production and productivity there is a need to invest in extension services, input supply, breeding and research. There is also a need to invest in cotton value chain by going beyond ginneries to textile industries.

1. Investment in Cotton and Textile Industry

Overview of the Opportunity in Textile Industry	
Key features	<p>Musoma and Bunda Districts.</p> <ul style="list-style-type: none"> Improvement of the old Musoma Textile to be Modern textile. Improvement of Mugango and Badugu Ginery.
Potential targeted area	<ul style="list-style-type: none"> Mugango area in Musoma Rural and Musoma Municipal Kibara S&C, OLAM and Ushashi ginneries in Bunda district and Bunda Town Council
Current state	<ul style="list-style-type: none"> There are three ginneries which are operating (SC, OLAM) and Mara Lint) and two ginneries not operating in Bunda are Kibara and Ushashi ginneries.
State of infrastructure	<ul style="list-style-type: none"> The area is accessible with a reliable road network, has all necessary utilities and social services including water, electricity, a hospital and schools, to mention just a few.
Market situation	<ul style="list-style-type: none"> There is a high demand of products to be produced by the facility.
Future expectation	<ul style="list-style-type: none"> To develop a modern textile industry that will cater for the demand of local and international markets
Key investment rationale 	<ul style="list-style-type: none"> Aimed at meeting the goals of increasing income growth, increased productivity, improved quality and enhanced value addition to improve social and economic wellbeing.
Available support 	<ul style="list-style-type: none"> Policy and political support at national, regional and local government levels Recognition of textile industry given in the Second Five-Year Development Plan (FYDP) 2016/17-2020/25 Supported by the Government's "Cotton-to-Clothing Strategy 2016-2021"
Risk/mitigation	<ul style="list-style-type: none"> The Government will put strategies and interventions to increase production of cotton in the region. through involvement of public and private.

3.1.2 Coffee

The region grows Arabica Coffee, estimated at 3,065 hectares out of potential area of 22,632 hectares suitable for the crop. Coffee is grown in four districts in Mara region. These are Tarime, Serengeti, Rorya and Butiama districts. Production is mainly done by small-scale farmers, with average plot size of 1 acre and average productivity of 800 kilogram per acre.

Coffee production in 2018 was about 2,998 metric tonnes harvested from 1,499 hectares. The target is to reach 10,000 tonnes by year 2022. This will be achieved by investing in coffee seedling nurseries, farm horizontal expansion, and extension services, input supply, breeding and research. There is an opportunity to establish coffee processing units (CPU) for value addition and branding.

Given the soil suitability for growing more coffee, the region will re-position itself to processing and producing special premium Mara Coffee brand to take advantage of its top-ranking good taste among African coffees. Mara Coffee is currently being bought for blending with other types of coffee. Direct coffee marketing channels will be created to reach special customers in the global market.

1. Coffee Processing

Overview of the Opportunity in Coffee Processing	
Key features	Tarime , Rorya, Butiama and Serengeti Districts <ul style="list-style-type: none">Improvement of coffee processing industry
Potential targeted area	<ul style="list-style-type: none">Tarime, Serengeti, Rory and Butiama Districts land have been allocated.
Current state	<ul style="list-style-type: none">Production is 2,998 metric tonnes of coffee on average per year.
State of infrastructure	<ul style="list-style-type: none">infrastructures need to be improved. All areas are accessible with a reliable road networks and all necessary utilities and social services including water, electricity, hospital and schools to mention just a few.
Market situation	<ul style="list-style-type: none">There is a high demand of coffee due to its peculiar quality to the extent that a direct coffee market (Mara Premium Coffee) need to be created.

Overview of the Opportunity in Coffee Processing

Future expectation	<ul style="list-style-type: none">▪ The region is expecting to produce 15,000 tonnes of coffee to sustain future established blending industries.
Key investment rationale	<ul style="list-style-type: none">▪ Absence of processing industry discourages farmers from increasing output and hence lowers their incomes▪ It is seen as a major avenue for reducing post-harvest losses along with provision of employment to residents, mainly the youths in the districts.
Available support	<ul style="list-style-type: none">▪ All four Districts and Regional Authorities have shown commitment to provide conducive environment for investment, including allocation of land needed for constructing a coffee processing factory.
Risk/mitigation	<ul style="list-style-type: none">▪ Production will be increased to meet capacity of the expected processing factory.

3.1.3 Sunflower

Sunflower represents one of the crucial cash crops in Mara Region for production of high value oil seed crops. Tarime district has the largest planted area of sunflower in Mara Region followed by Musoma, Bunda, Serengeti and Butiama districts.

Smallholder farmers are involved in the production of sunflower at an average area of one (1) acre with an average productivity of 400 kilograms per acre and sell the sunflower seeds to processors and refiners.

The annual average sunflower production in Mara Region is too low to sustain large-scale industrial requirements. There is a need of strengthening research and extension services as well as facilitate the formation of farmers' cooperative associations, use of appropriate technology and creation of reliable market in order to assist small-holder farmers to increase production and benefit from the existing linkages of sub-sector players.

These initiatives will increase production of sunflower and thus create opportunity for processing industries.

1. Commercial Sunflower Farming and Oilseed Processing

Overview of the Opportunity in Sunflower Farming

Key features	<ul style="list-style-type: none">▪ Establishment of commercial production of sunflower▪ Establishing of sunflower oil processing industries.
Potential targeted area	<ul style="list-style-type: none">▪ Tarime District (also leading in planted area of sunflower)▪ Musoma, Bunda, Serengeti and Butiama district councils.
Current state	<ul style="list-style-type: none">▪ Mostly produced by small-holder farmers attaining low levels of yields at 400 kilograms per acre▪ Existing oilseed milling machines lack adequate supply of raw materials.
State of infrastructure	<ul style="list-style-type: none">▪ Land for commercial farming is available▪ Access roads to the districts are adequately maintained
Market situation	<ul style="list-style-type: none">▪ There is a market potential for sunflower seeds due to low productivity attained by small-holder farmers.
Future expectation	<ul style="list-style-type: none">▪ To establish large-scale commercial farms that can produce enough sunflower seeds for the local market.
Key investment rationale	<ul style="list-style-type: none">▪ The nation imports more than a half of its national demand for edible vegetable oils
Available support	<ul style="list-style-type: none">▪ Authorities in Tarime district have shown commitment to provide conducive environment for investment, including allocation of land needed for crop expansion▪ Rwamkoma JKT has been piloting a large-scale cultivation of sunflower and has been successful in raising yields per acre▪ Policy and political support at national, regional and local levels.

3.1.4 Cassava

Cassava is grown in Mara Region mainly as a staple food crop and it is preferred by farmers as a drought resistant crop, which can be harvested at any time during the year and can stay in a farm as food reserve for a long time.



Cassava production is done mostly by small-scale farmers for subsistence purposes on an average farm land size of one (1) acre with an average productivity of 1,500 kilograms per acre. The Government has put efforts towards production of resistant varieties of cassava in order to sustain food production. Investments in

breeding and supplying resistant cultivars by private entities are highly encouraged in the region.

Investment opportunities on cassava in Mara Region include disease-resistant seedling multiplication, extension services, supply of agro inputs, value addition and cassava processing facilities.

3.1.5 Irrigation

Mara Region has enormous water resources potential. Water for irrigation can be obtained from Lake Victoria, rivers, and underground sources. Potential irrigable farmland in the region is approximately 48,611.30 hectares, out of the potential area only 3,634.10 hectares (7.5% of the potential area) are under irrigation farming at present. Although, Mara is one of the smallest regions of the mainland it boost of having sizable water resource which is important for irrigation development as follow.



- i). The largest share of Lake Victoria water area compared to the other lake zone regions.
- ii). Has two perennial rivers namely Mara and Mori rivers flowing from highlands and discharging the water into lake Victoria making up vast plain lands and valley ideal for irrigation.
- iii). A number of seasonal rivers which includes Suguti, Kyarano, Mirale and Nyaburongo to mention a few. These rivers are ideal for water harvesting technology.

This sector offers various investment opportunities, such as supplying modern irrigation machineries and appropriate irrigation technologies to enhance climate smart irrigation practices

Interested parties can invest in large scale irrigation schemes along Mara River Valley, nyakthorogo plains, Mori river valley, Bugwema valley, Chumwi valley and Suguti-Kyarano valley. Detailed large and small scale irrigation investment opportunities are summarise below.

1. Investment in Building climate proof irrigation infrastructure and Contract Farming

Overview of the Opportunity in Building climate proof Irrigation Infrastructure

Key features

The most preferred irrigated crops are paddy, maize and vegetables. Main sources of water include Lake Victoria, Mara River, Mori River and rain water harvesting.

Bunda Town Council

- Building paddy irrigation scheme infrastructure at Nyatwali with a total area of about 1,070 acres
- This may be run by charging users of infrastructure or through contract farming. More than 300 families will directly benefit from this investment.



Bunda District Council

- Building irrigation infrastructure for paddy cultivation in Mariwanda, where 220 acres have been set aside for that purpose. Other areas include Namhula, Suguti, and Nansimo.

Rorya District Council

- Building irrigation infrastructure and charge user fees at Chereche. Other areas suitable for irrigation schemes include Nyathorogo, Singida Andaki, Irienyi, Ochuna, Rabuor, Ryangubo, Rwang'enyi and Baraki farm.

Overview of the Opportunity in Building climate proof Irrigation Infrastructure



Butiama District Council

- Construction of irrigation infrastructure at Kyarano Dam, currently serving gravity irrigation on 15 acres; also at Kitaramanka and Ikongo Valley.
- About 12,500 hectares have been set aside along Ikongo Valley in Butiama District for sugarcane cultivation.

Serengeti District Council

- Irrigation farming at Mesaga Valley along Mara River, especially paddy irrigation – feasibility study has been done and the project will benefit 10 villages
- Sugarcane cultivation along Mara River: about 17,600 hectares have been set aside for sugarcane cultivation in Serengeti District.

Musoma District Council

- Irrigation infrastructure at Bugwema, especially for cultivation of paddy, maize, sunflower, and cotton. About 2,500 hectares have been set aside. The total area is 5,000 hectares that can be divided so that a certain part is given to an investor and the remaining part for out-growers.

Current state

- Potential irrigable farmland in the region is approximately 48,611.30 hectares, out of which only 3,634.10 hectares are under irrigation farming.

State of infrastructure

- Most of the developed schemes require some rehabilitation
- New land is available for establishment of new schemes.

Market situation

- There is a ready domestic and export market for products from the schemes.

Future expectation

- To have double cropping from available schemes after installation of water storage dams for cultivating crops off-season.

Overview of the Opportunity in Building climate proof Irrigation Infrastructure

Key investment rationale



- 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 emphasizes yield increase, but more attention is required to adapt irrigation to both climatic variability and climate change through optimising water use efficiency and use of climate proof irrigation infrastructure
- To increase the number of farming seasons in order to increase supply of agriculture produce for both direct consumption and processing
- Water harvesting technologies, including drip irrigation, are available, thus making it easier to collect and distribute water for irrigation purposes.

Available support

- Through irrigation policy of 2009, the Government recognises that irrigation development in Tanzania is critically important in ensuring that the nation attains a reliable and sustainable crop production and productivity as a move towards food security and poverty reduction
- Land is available for irrigation schemes
- Good infrastructure, which includes roads and communication networks, electricity supply and markets.

Risk/mitigation

- Irrigation schemes management is affected by problems that relate to lack of a sense of collective responsibility that is increased by formalisation
- Community-based irrigation schemes have difficulties in both ensuring equitable access to land and water, and in resolving conflicts among farmers
- Strengthening Water Users Associations is a key mitigation measure to enforce regularity of irrigation practice.

3.1.6 Tea

Tea is mainly grown in Tarime District mostly by small-holder farmers with land plots ranging from 0.2 acre to 2 acres, and productivity of 600 kilograms per acre per month. Other areas within the region with some potentials to grow tea include Rorya and Serengeti districts.


Tarime tea possesses special features due to the district's special climatic and soil characteristics. Mara Region is planning to establish a direct marketing scheme with special customers interested in the premium brand known as "Tarime Finest Tea".



Investments in tea seedling multiplication is encouraged in order to increase production and sustain the processing industry that is located in Rebu in Tarime Urban District. The Government will capitalise on provision of extension services and agro inputs.

1. Tea Production and Processing Industry

Overview of the Opportunity in Tea Production and Processing

Key features 	<ul style="list-style-type: none"> Expansion of tea acreage by farmers in Tarime, Rorya and Serengeti districts Establishment of a tea-blending factory in Tarime
Potential targeted area	<ul style="list-style-type: none"> Ganyange Ward, whereby a minimum of 150 hectares are allocated for investors and a minimum of 0.5 acre per household from 10,000 households are expected to sustain the blending industry to be constructed in the area.
Current state	<ul style="list-style-type: none"> There is a small value-adding tea facility at Rebu in Tarime Township.
State of infrastructure	<ul style="list-style-type: none"> The area is availed with utilities and social services like water, electricity, telephone, a hospital and schools, to mention just a few.
Market situation	<ul style="list-style-type: none"> There is a market potential for the tea grown due to the comparative advantage it carries; and Mara Region is planning to establish a direct market due to the high quality tea produced.
Future expectation	<ul style="list-style-type: none"> To establish a modernised tea-blending facility for the export market

Overview of the Opportunity in Tea Production and Processing

Key investment rationale	<ul style="list-style-type: none">▪ Low capacity of current processing factory discourages farmers from expanding crop cultivation or increasing output, and therefore investment in tea processing will trigger more tea production and increase income to farmers▪ It is seen as a major avenue for reducing post-harvest losses along with providing employment to Tarime District residents, mainly the youths.
Available support	<ul style="list-style-type: none">▪ Authorities in Tarime District have shown commitment to provide conducive environment for investment, including allocation of land needed for crop expansion and constructing of industry▪ Policy and political support at national, regional and local levels.

3.1.7 Horticulture crops

The horticulture sub-sector in Mara Region is one of the potential areas employing a number of people and providing raw materials to some factories. However, fruit and vegetable production is undertaken by households in small quantities with the aim of increasing income and for household consumption.




The region has many sources of water for irrigation and therefore interested parties are welcome to invest in horticulture smart farming (including greenhouses), value addition, storage and transport facilities. For instance, banana as one of the horticultural crops grown in the region need a processing plant which will process about 12,953 metric tonnes produced per year on average.

Some councils, such as Tarime and Butiama, are specifically welcoming investors in processing banana and sweet potatoes. Pumpkins production and processing is another potential horticultural crop for investment.

1. Investing on Horticulture Farming

Overview of the Opportunity in Horticulture Farming	
Key features	<ul style="list-style-type: none">▪ Establishment of greenhouses for drip irrigation of various types of horticulture crops▪ Commercial farms for production of banana▪ Commercial production of sweet potatoes, Orange fleshed sweet potatoes and pumpkins▪ Establishment of horticultural crop storage and processing facilities.
Potential targeted area	<ul style="list-style-type: none">▪ Tarime District▪ Butiama District▪ Bunda District
Current state	<ul style="list-style-type: none">▪ Banana production by smallholders is about 12,953 metric tonnes per year▪ Sweet potato production is ongoing by small-holder farmers to the tune of 5,600 metric tonnes per year▪ Orange fleshed sweet potatoes and pumpkins are produced at small scale
State of infrastructure	<ul style="list-style-type: none">▪ Land for farming is available▪ Well established road network and availability of important social services.
Market situation	<ul style="list-style-type: none">▪ Businessmen from neighbouring countries and lake zone regions buy from peasants at farm-gate price.
Future expectation	<ul style="list-style-type: none">▪ Expand climate smart horticultural crop production with adequate storage and processing facilities▪ To establish a pumpkin processing industry in Bunda district for value addition
Key investment rationale	<ul style="list-style-type: none">▪ More production per unit area due to adoption of drip irrigation▪ To provide raw materials to factories to be established parallel to the expanded production of banana, sweet potatoes, Orange fleshed sweet potatoes, pumpkins etc.
Available support	<ul style="list-style-type: none">▪ It is supported by FYDP II, which promotes expanded production of non-traditional crops.

2. Investing in Confectionary (e.g. biscuits-making)

Overview of the Opportunity in Confectionary	
<p>Key features</p>	<p>Butiama District Council:</p> <ul style="list-style-type: none"> Biscuit-making factory at Mkoma using sweet potatoes  <p>Tarime Town Council:</p> <ul style="list-style-type: none"> Biscuit-making factory using bananas and potatoes as raw materials <p>Bunda District:</p> <ul style="list-style-type: none"> Pumpkins and Orange fleshed sweet potatoes flour ad biscuit making industries
<p>Current state</p>	<ul style="list-style-type: none"> Sweet potato production is ongoing by small-holder farmers to the tune of 5,600 metric tonnes per year Orange fleshed sweet potatoes and pumpkins are produced at small scale
<p>State of infrastructure</p>	<ul style="list-style-type: none"> Well established road network and availability of important social services
<p>Market situation</p>	<ul style="list-style-type: none"> Businessmen from neighbouring countries and Lake Zone regions buy from peasants at farm-gate prices.
<p>Future expectation</p>	<ul style="list-style-type: none"> To establish a modern biscuit-making and flours factories that will serve as a market for poor resource farmers To establish a formal marketing system to encourage fair trading of the commodities
<p>Key investment rationale</p>	<ul style="list-style-type: none"> Investors (farmers and processors) will earn higher income and the country will benefit by adding value locally rather than the current situation where sweet potatoes are exported to Kenya as raw and added value there Raw materials are available It will further promote production of sweet potatoes, orange fleshed sweet potatoes and pumpkins.
<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.

3.2 Livestock Development

Livestock sector plays a significant role in the economy of Mara Region. Livestock generates a considerable amount of households income.



It is estimated that more than ninety-nine per cent (99.7 %) of cattle population is indigenous cattle breed (Tanzania Short-Horn Zebu (TSHZ)).

The rest (0.3 %) are improved breeds mainly for dairy production (crosses of Friesian or Ayrshire with TSHZ). Due to the Government's efforts to improve beef cattle, there has been an increase in the number of cross-bred cattle for beef (TSHZ with Boran or Simmental).

Table 1 below depicts livestock distribution and the number of various types of livestock kept in Mara Region.

Table 2: Livestock population in Mara Region by June 2019

Council	Cattle	Goats	Sheep	Chicken	Ducks	Pigs	Donkeys	Dogs
Bunda DC	352,301	107,696	93,463	253,645	6,424	148	1,797	7,584
Bunda TC	98,468	35,504	40,036	93,441	7,239	537	473	7,753
Butiama DC	331,831	152,311	72,083	102,902	23,919	460	1,536	6,490
Serengeti DC	580,823	248,298	294,855	221,319	432	977	4,019	41,978
Musoma MC	4,748	6,834	516	117,165	11,125	933	0	5,012
Musoma DC	162,334	82,670	47,218	294,606	25,464	426	973	8,516
Rorya DC	293,476	112,390	74,045	215,305	13,350	1,515	1,725	41,233
Tarime DC	195,680	103,953	64,558	191,750	20,431	504	1,197	26,715
Tarime TC	29,414	3,665	613	34,520	3,369	302	37	3245
Total	2,049,075	853,321	687,387	1,524,653	111,753	5,802	11,757	148,526

Source: Regional Commissioner's Office, 2019

Mara Region has favourable conditions to support livestock keeping: good climatic condition; vast land that may accommodate various activities for livestock keeping, including ranching, and pasture establishment; presence of local cattle breeds mainly TSHZ that are highly resistant to diseases and can be improved to increase productivity; and the presence of Lake Victoria and rivers that offer water for livestock and raw materials for animal feeds ingredients.

The prevailing investment opportunities in the livestock sector include dairy production and processing, meat processing, forage production and animal feed processing, skins and hides processing, leather goods manufacturing industries, hatchery units and breeding programmes through artificial insemination, bull mating and embryo transfer.

Changing of community mind set on livestock keeping practices from free range livestock keeping to ranching and zero grazing and adoption of livestock technologies are critical for the livestock sector.

More details of the investment opportunities are given hereunder:

3.2.1 Dairy Production and Processing

Dairy sub-sector in the region is still underutilized, thus calling for strategic investments. Average milk production in the region per day is 200,894 litres, out of which 96.5 percent is produced by Tanzania Short-Horn Zebu (TSHZ). The number of commercial dairy cattle (mainly crosses of Friesian or Ayrshire with TSHZ) is about 5,972, which contribute about 3.5 percent of the total milk from which an average milk production per cattle is 1.5 litter. Small milk processing factories present in the region have the ability to process only 3.3 per cent of the total milk while the rest of milk is consumed raw.

Interested parties are welcome to invest in genetic improvement of local breeds to produce dairy heifers through artificial insemination/high quality bull mating, embryo transfer; and construction of milk-processing plants in line with strengthening milk collection centres. Specific investment opportunities are explained hereunder:

1 Construction of Milk Collection Centres

Overview of the Opportunity in Construction of Milk Collection Centres

Key features



All Districts

- Construction and rehabilitation of milk collection centres in all districts to ensure collection of quality milk and easy transportation of milk to the processing plants

Overview of the Opportunity in Construction of Milk Collection Centres

Potential targeted areas	<ul style="list-style-type: none"> Musoma District Council, Tarime District Council, Tarime Town Council, Rorya District Council, Serengeti District Council, Bunda District Council, and Bunda Town Council.
Current state	<ul style="list-style-type: none"> Most of the existing milk collection centres are not operational and therefore require investors to revive them or set up new ones
State of infrastructure	<ul style="list-style-type: none"> The Government and private sector has ongoing plans to rehabilitate some of the rural roads and is expanding rural electricity network
Market situation	<ul style="list-style-type: none"> Small-holder livestock keepers sell their products at farm-gate price to itinerant traders for domestic consumption and some to small milk processing plants.
Future expectation	<ul style="list-style-type: none"> To revive the existing Dairy industry and construct of modern large milk-processing plant which will serve as a hub for all milk collection centres in the region. Establishment and improving pasture management and technology (water, vaccination, deep tanks and crush.) Improvement of Cattle bleed technology.
Key investment rationale	<ul style="list-style-type: none"> Aimed at meeting the goals of increasing income growth, increased productivity, improved quality and enhanced value addition to improve social and economic wellbeing.
Available support	<ul style="list-style-type: none"> Policy of food safety and standards support establishment of milk collection centres Supported by National Livestock Policy 2006
Risk/mitigation	<ul style="list-style-type: none"> This investment should be carried out hand-in-hand with the establishment of milk processing plants.

2 Milk Processing Industry


Overview of the Opportunity in Milk Processing

Key features



- Invest in milk processing plant to all Districts
- invest, expansion and rehabilitation of Musoma Dairy Milk processing industry.
- Supply of milk will come from all districts with milk collection centre.

Overview of the Opportunity in Milk Processing

Potential targeted area	<ul style="list-style-type: none"> All districts in Mara region,
Current state	<ul style="list-style-type: none"> The milk produced in the region is 200,894 litres per day and to the large extent (96.7%) are consumed raw as the existing milk processing industries have the ability to process only 3.3% of the total milk produced in the region.
State of infrastructure	<ul style="list-style-type: none"> The areas are accessible and equipped with necessary social services.
Market situation	<ul style="list-style-type: none"> Small-holder livestock keepers are currently selling their products at farm-gate price to itinerant traders for domestic consumption and some to small milk-processing factories.
Future expectation	<ul style="list-style-type: none"> To export UHT and other related milk products. Formation of livestock keeper cooperative.
Key investment rationale 	<ul style="list-style-type: none"> The region produces more than 200,894 litres of milk per day, and has land allocated for building a milk-processing plant It will ensure quality and supply of milk to feed the processing plant It also promotes better handling, hygiene, safety, shelf life and packaging of milk Producers get high prices and are ensured of the market It creates employment and value chains It is also easy to keep records of milk supplied and processed.
Available support	<ul style="list-style-type: none"> Policy of food safety and standards support establishment of milk collection centres Supported by the National Livestock policy 2006 Support by the Second Five-Year Development Plan (FYDP II), which focuses on industrialisation, including agro-processing.

3.2.2 Meat Processing

Meat production in Mara Region is constrained by low productivity due to large domination of indigenous cattle. However, indigenous cattle can perform best when raised in feed lots. It is essential that meat processing go hand-in-hand with improving local breeds in order to ensure supply of quality cattle for meat processing.

The Government and private sector has put emphasis on improving local cattle by cross breeding with quality beef cattle, whereby Boran bulls are distributed to farmers for cross breeding. This programme has proven success in Bunda and Serengeti districts.


Construction of modern abattoir and meat processing plants in the region will ensure reliable market for meat animals (cattle, goats and sheep) and discourage export of live animals abroad. Investment opportunities include:

- Feedlot operations for local cattle, goats and sheep to ensure quality animals are slaughtered for quality meat to meet export standards
- Setting up slaughterhouses/abattoirs as well as meat or beef processing plants to produce beef products such as fresh beef, sausage and corned beef. Such value addition will improve profitability to livestock farmers and thereby boost regional and national economy.
- Introduce cattle fattening to produce quality meat and high price

It should be noted that the Meat Industry Act No. 10 of 2006 promotes the restructuring of the meat industry through establishment of proper organisation and coordination of meat industry stakeholders for the development of the industry. It also regulates the production of the meat and meat products within the meat value chain to ensure quality and standards of meat.

Bunda Town Council and Butiama District Council are specifically inviting investors in establishing modern slaughterhouse and meat processing plants:

1. Modern Animals Slaughter House/Abattoirs

Overview of the Opportunity in Construction of Modern Slaughter Houses/Abattoirs	
<p>Key features</p> 	<ul style="list-style-type: none"> ▪ Construction of a modern slaughter house in Bunda, Butiama and Musoma Municipal Council (PPP is expected)
<p>Potential targeted area</p>	<ul style="list-style-type: none"> ▪ Bunda stoo in Bunda Town Council.

Overview of the Opportunity in Construction of Modern Slaughter Houses/Abattoirs

Current state	<ul style="list-style-type: none"> The slaughter shed in Bunda has been constructed but it is not yet operational; and an area of about 10 acres has been set aside for that purpose
State of infrastructure	<ul style="list-style-type: none"> High accessibility with most of infrastructures available.
Market situation	<ul style="list-style-type: none"> Meat is currently poorly prepared on slaughter slabs. Most of cattle of poor health quality are sold raw to neighbouring countries
Future expectation	<ul style="list-style-type: none"> To be number one exporter of quality beef in the country.
Key investment rationale	<ul style="list-style-type: none"> The existing abattoirs are not only small but also inefficient, particularly with respect to meeting supply requirements for meat processing and tanneries Easy linkages with leather industries/tanneries Such value addition will improve profitability to livestock farmers, thus boosting regional and national economy.
Available support	<ul style="list-style-type: none"> Supported by the Meat Industry Act No. 10 of 2006 as explained above Good infrastructure: roads and communication networks, electricity supply and markets
Risk/mitigation	<ul style="list-style-type: none"> Investment in demonstration area that will ensure reliable supply of quality cattle for the abattoir and the market.


2. Meat Processing Industry

Overview of the Opportunity in Meat Processing

Key features	<ul style="list-style-type: none"> Establishment of a meat processing plant. Establish cattle fattening centres in all districts
Potential targeted area	<ul style="list-style-type: none"> A total of 789 acres have been allocated at Nyankanga Ward in Butiama District for industrial activities, including meat processing. About 3000 acres for the EPZ Zone in Bunda district have been set aside for investment purposes and the government has already compensated



Overview of the Opportunity in Meat Processing

Current state	<ul style="list-style-type: none"> ▪ The region has more than 2 million cattle, mainly for beef production purposes
State of infrastructure	<ul style="list-style-type: none"> ▪ High accessibility with most of infrastructures available.
Market situation	<ul style="list-style-type: none"> ▪ Meat is currently poorly prepared on slaughter slabs; most of cattle of poor health quality are sold raw to neighbouring countries ▪ Cattle fattening is currently practiced at very small scale level
Future expectation	<ul style="list-style-type: none"> ▪ To be number one exporter of quality beef in the country.
Key investment rationale 	<ul style="list-style-type: none"> ▪ The meat processing industry will be in line with the modern slaughterhouses that will be built ▪ High demand for quality meat in the region by both domestic consumers and tourists ▪ Meat industries, like all other industries, will generate employment to the people of the region ▪ It will help to maintain meat quality.
Available support	<ul style="list-style-type: none"> ▪ It is supported by FYDP II, which promotes value addition at primary and secondary levels ▪ Supported by the Meat Industry Act No. 10 of 2006 as explained above ▪ Good infrastructure: roads and communication networks, electricity supply and markets.
Risk/mitigation	<ul style="list-style-type: none"> ▪ The Government will have to ensure that the existing cattle ranches are well developed.

3.2.3 Animal Feeds Processing Industry

High quality animal feeds (forages and concentrates) are important for improved productivity and transformation of the livestock sector. There are currently no animal feeds processing facilities in the Mara

Region. Despite the abundant fertile land and favourable climate for growing forages, there is unutilised investment potential in pasture production and




processing. This is a potential area for investment. Pasture production and processing will ensure availability of forages and concentrates to feed the animals.


The Buhemba Holding Ground of about 5000 acres at Butiama and Bunda District is suitable for commercial forage production and processing. The existing industrial areas set aside by every council are good for construction of animal feeds processing factories. Investment opportunities include:

- Pasture production and forage processing
- Concentrate feed production
- Construction of animal feeds processing plants.

1. Animal Feeds Processing

Overview of the Opportunity in Animal Feeds Processing	
Key features 	Musoma Municipal Council: <ul style="list-style-type: none"> ▪ Establishment of animal feeds processing industries demo plots
Potential targeted area	<ul style="list-style-type: none"> ▪ Baruti and Kwangwa in Musoma Municipal Council; about 10,000 m² of land have been allocated for construction of the factory
Current state	<ul style="list-style-type: none"> ▪ There is no animal feeds processing factory; therefore, animal feeds are processed outside Mara Region.
State of infrastructure	<ul style="list-style-type: none"> ▪ The areas are highly accessible with roads and have electricity as well as water supply
Market situation	<ul style="list-style-type: none"> ▪ There is high demand of animal feeds due to increased awareness on commercial livestock keeping among Mara Region famers.
Future expectation	<ul style="list-style-type: none"> ▪ To increase animal productivity to cater for the high demand of animal products in the region, Lake Zone and East Africa

Overview of the Opportunity in Animal Feeds Processing

<p>Key investment rationale</p> 	<ul style="list-style-type: none"> ▪ There is a high demand for a shift towards dairy cattle keeping but the main constraint is inadequate feed for dairy farming in the district and the region at large ▪ There is also demand for animal feeds to cater for local chicken, as many small households have started to raise such chicken ▪ The region produces some, if not most, of the raw materials for feeds industries including maize bran, which is the product of maize milling ▪ Establishment of animal feeds processing industry is expected to promote further production of maize and related products ▪ Increased supply of animal feeds will increase the productivity of dairy livestock and, therefore, increase supply of milk to dairy plants (creation of a value chain) and beef industries ▪ Animal feeds processing industry, like all other industries will generate employment to the people of the region.
<p>Available support</p>	<ul style="list-style-type: none"> ▪ Policy and political support at national, regional and local government levels for animal feeds.
<p>Risk/mitigation</p>	<ul style="list-style-type: none"> ▪ Livestock keepers have to be educated on modern livestock keeping and the importance of processed animal feeds.

3.2.4 Artificial Insemination

Livestock keepers in Mara Region rely mainly on bull mating for their cows. It is crucial to boost their cattle production by artificial insemination (AI) and embryo transfers. Private actors do artificial insemination but the cost of insemination per cow is high due to difficulties in availability of AI materials like semen and liquid nitrogen, among others. Establishment of an AI centre will facilitate the availability of requirements at an affordable price.

In addition, skills development on embryo transfers will facilitate improvement of animal genetic makeup and hence improve productivity. The local breeds of cattle in the region produce an average of 1 litre of milk per day, while the improved breeds (F₂) can produce 8-12 litres per day. Establishment of centres for livestock genetic improvement through IA and embryo transfers is necessary for improving animal breeds.

1. Artificial Insemination for Cattle Industry

Overview of the Opportunity in Provision of Artificial Insemination (AI) Services


<p>Key features</p> 	<ul style="list-style-type: none"> Artificial insemination delivery for cows and dairy farming in Butiama District, where 100 acres have been set aside for this investment. It is envisaged that a PPP model between council and potential investors will be used.
<p>Current state</p>	<ul style="list-style-type: none"> There are only small-scale AI centres owned by a freelance veterinary officer
<p>State of infrastructure</p>	<ul style="list-style-type: none"> The areas are highly accessible with roads and have electricity as well as water supply
<p>Market situation</p>	<ul style="list-style-type: none"> There is high demand for AI services
<p>Future expectation</p>	<ul style="list-style-type: none"> Modernised herds of cattle for milk and beef production in the region
<p>Key investment rationale</p>	<ul style="list-style-type: none"> It is one of the interventions for improving cattle breeds and thus increase cattle productivity It is a better breeding practice plus better genetic approach of cross breeding High productivity in terms of milk and beef and, therefore, potential for establishing a milk and meat processing industries.
<p>Available support</p>	<ul style="list-style-type: none"> Livestock policy and development programmers support expansion of dairy farming.
<p>Risk/mitigation</p>	<ul style="list-style-type: none"> A need for awareness creation to the community on the importance of AI.

3.2.5 Leather and Leather Goods Making Industry

An average of 39,059 herds of cattle, 24,931 goats and 28,760 sheep are slaughtered per year in Mara Region. These produce large number of raw hides and skins, therefore investing in hides and skins processing will make use of the available raw materials.

There is also potential for construction of a leather goods manufacturing factory.


1. Grain Leather and Tanneries

Overview of the Opportunity in Leather Processing	
Key features 	<p>Musoma Municipal Council:</p> <ul style="list-style-type: none"> Building a leather processing factory that will convert raw leather into grain leather and other leather products <p>Bunda Town Council:</p> <ul style="list-style-type: none"> Leather processing factory to produce grain leather
Potential targeted area	<ul style="list-style-type: none"> Baruti and Kwangwa in Musoma Municipality and EPZ area in Bunda Town Council.
Current state	<ul style="list-style-type: none"> Some skins and hides produced are mainly sold raw while most of them are being disposed off.
State of infrastructure	<ul style="list-style-type: none"> The areas are accessible by roads and have electricity and water supply
Market situation	<ul style="list-style-type: none"> There is high demand for leather products in both local and external markets.
Future expectation	<ul style="list-style-type: none"> To have a big tannery facility that will enable the region earn foreign currency through exports of finished (value-added) leather goods.
Key investment rationale	<ul style="list-style-type: none"> Leather from slaughtered cattle and goats is left unprocessed and often sold as raw materials outside of the region Modernisation of existing slaughterhouses is expected to increase with the supply of well-prepared hides and skins.
Available support	<ul style="list-style-type: none"> Political support from national, regional and local government levels Good infrastructure: roads and communication networks, electricity supply and markets The Government intends to exempt value-added tax (VAT) on capital goods used in the production of edible oil, textiles, leather, and pharmaceuticals (including veterinary) products.
Risk/mitigation	<ul style="list-style-type: none"> Need for awareness creation on livestock keeping best practices to ensure quality skins.

3.2.6 Veterinary Services

There are 21 veterinary centres in the region, which are not optimally functioning due to various reasons. The Livestock Policy 2006 allows private sector to run veterinary centres. Construction of veterinary centres and diagnostic laboratories as well as provision of veterinary and diagnostic services is an opportunity for the private sector to invest in so as to complement government's efforts to control and prevent animal diseases.




Overview of the Opportunity in Establishing Veterinary Centres	
Key features 	<ul style="list-style-type: none"> Establishment of veterinary centres with full or semi-fledged facilities Establishment of laboratory diagnostic facilities to serve veterinary centres and livestock keepers.
Current state	<ul style="list-style-type: none"> All 21 veterinary centres in the region are not optimally functioning
State of infrastructure	<ul style="list-style-type: none"> The areas are accessible by roads and have electricity and water supply
Market situation	<ul style="list-style-type: none"> There is high demand for veterinary centres in the region
Future expectation	<ul style="list-style-type: none"> To have modern veterinary centres that will enable the livestock keepers to commercially keep their livestock.
Key investment rationale	<ul style="list-style-type: none"> There is a shortage of animal health care facilities such as veterinary centres and laboratories
Available support	<ul style="list-style-type: none"> Livestock policy and development programmes support expansion of livestock keeping for both dairy and meat processing.
Risk/mitigation	<ul style="list-style-type: none"> Livestock keepers find it difficult to spend money on diagnosis and tend to buy drugs and dispense them without advice from experts. There is need for awareness creation to community to change their mind set to the extent that seeking of extension services be their practice.

3.2.7 Poultry Hatchery Units

Poultry production, mainly chicken, has been increasing in the region because of increased demand and awareness created among farmers. Supply of day-old chick (DOC) is from other parts of Tanzania mainland. The presence of a hatchery unit in the region will ensure availability of these chicks to farmers and thus reduce the cost of purchasing them from other areas. Therefore, producing day-old chicks within the region is an opportunity for investment.

Overview of the Opportunity in Establishment of Hatchery Units

Key features 	<ul style="list-style-type: none">▪ Establishment of poultry eggs hatcheries▪ The investments should include vans for distributing the chicks to customers in areas where there is lack of regular transport system
Key investment rationale	<ul style="list-style-type: none">▪ There is a high demand for one-day-old chicks, as most residents in the region and neighbouring regions increasingly opt for chicken/poultry farming
Available support	<ul style="list-style-type: none">▪ Livestock policy and development programmes support expansion of modern poultry farming.
Risk/mitigation	<ul style="list-style-type: none">▪ A need for awareness creation to community on the vaccination routines to prevent disease outbreaks.


3.3 Forestry and Beekeeping

3.3.1 Forestry

Mara Region is estimated to have an area of 9,541.2 hectares with legally protected forests. Out of these, 2,927 hectares are under Central Government, 3,593.3 hectares are under district councils, 2,980.5 hectares are under village governments and 40.4 hectares are under private sector.

Given the relatively small area of natural forests, investors are invited to establish forest plantations and tree seedling nurseries. There is also a room for supplying new and efficient technology for renewable energy. There is also need for skills development to the community living along hills, rivers

and streams on appropriate conservation and management of these areas. It is required to reserve a 30-metre distance along streams and hills for conservation purposes and 60 metres along the rivers.


Overview of the Opportunity in Establishment of Forest Lots	
Key features 	<ul style="list-style-type: none"> ▪ Establishment of Forest Plantations ▪ Establishment of Tree Nursery/Gardens for selling seedlings to customers ▪ Scaling renewable energy technologies
Current state	9,541.2 hectares with legally protected forests. Out of these, 2,927 hectares are under Central Government, 3,593.3 hectares are under district councils, 2,980.5 hectares are under village governments and 40.4 hectares are under private sector. There is limited use of appropriate renewable energy technologies
Key investment rationale	<ul style="list-style-type: none"> ▪ There is a high demand for forest products and conservation of the environment
Available support	<ul style="list-style-type: none"> ▪ Forest and Environmental Policies and development programmes support expansion of planted forests and environmental conservation
Risk/mitigation	<ul style="list-style-type: none"> ▪ A need for awareness creation to community on the vaccination routines to prevent disease outbreaks.

3.3.2 Beekeeping

Beekeeping in Mara Region is practised mostly by small-scale beekeepers, of whom 1,667 are individual beekeepers and 169 operate in groups with 7,075 beehives that produce an average of 23,718 kilograms of honey and 699.5 kilograms of bee wax per year. However, this falls far below the demand for honey in the region and beyond. The current demand in Mara Region alone is over one million kilograms a year, thus assuring investors of a reliable market.

The region has sufficient land area for beekeeping and conducive weather condition, which create room for further investment in the sub-sector, mainly production of inputs for beekeepers (modern beehives, gloves etc.), and construction of plants for honey and wax processing and related products.

Overview of the Opportunity in Establishment of Honey Processing Plants

<p>Key features</p> 	<ul style="list-style-type: none"> ▪ Establishment of honey processing plants ▪ Establishment of modern beehives for sale to bee keepers
<p>Current state</p>	<p>The current demand for honey in Mara Region alone is over one million kilograms a year, thus assuring investors of a huge market.</p>
<p>Key investment rationale</p>	<ul style="list-style-type: none"> ▪ There is a high demand for honey and bee wax in the region and Lake Zone and East Africa
<p>Available support</p>	<ul style="list-style-type: none"> ▪ Forest policy and development programmes support expansion of planted forests
<p>Risk/mitigation</p>	<ul style="list-style-type: none"> ▪ Government should reduce cost of gas and electricity so that communities can use alternative source of energy instead of using charcoal and fire wood as source of energy. ▪ Plant tree in all hills to regain the vegetation cover that has been cleared by community for charcoal and firewood. ▪ Develop resource forest for firewood and charcoal.

3.4 Natural Resources and Tourism

Mara Region has a unique wildlife ecosystem that comprises Serengeti National Park, Ikorongo, Grumeti game reserves and Ikona Wildlife Management Area (WMA) with at least 35 species of large wild animals and other small animals such as wildebeest, elephant, giraffe, buffalo, zebra, Thomson Gazelle etc. There are more than 500 bird species in the Serengeti Ecosystem. There is also Lake Victoria, which offers water sports, fishing and sight-seeing tourism. The region is also rich in historical sites that can offer attractions to domestic and international tourists. Below is a summary of the attractions offered by Serengeti National Park, Lake Victoria and cultural/historical sites.

3.4.1 Serengeti National Park

The internationally renowned and award-winning Serengeti National Park (SNP) hosts the second largest terrestrial mammal migration in the world, which helps secure it as one the ten natural wonders of the world. Serengeti

National Park is also the only terrestrial park in the world which is connected to in land lake i.e. Lake Victoria through a Speke Gulf in Bunda district. Mara Region has seventy per cent (70%) share of the park (i.e. 9,842 out of 14,763 square kilometres). The park has attracted an average of 403,949 tourists per year from 2016 to 2019. It has clinched the African Safari Park in 2018 and 2019. The park is also renowned for its large lion population and is one of the best places to observe prides in their natural environment. Ikorongo and Grummet game reserves and Ikona Wildlife Management Area, as part of Serengeti Ecosystem, were set aside for hunting and photographic tourism.



The Great Wildebeest Migration in Serengeti National Park

Along Serengeti National Park there is a range of recreational services to tourists, which include modern lodges such as Four-season hotel. Melia. Lobo, Seronera, Serena, Sopa lodge etc. In addition, there are several affordable lodges, guest houses, hotels and camp sites outside the park for tourists found at Ikona WMA, Mugumu Town, Robanda, Natta, Musoma and Bunda Town. However, most of them do not meet requirements and standards of the tourists.

Government initiatives to foster tourism and attract more tourism investment in Mara include establishment of Tanzania National Park Western Zone headquarter office in Bunda District to foster tourism development in the region; and improvement of Musoma Airport and upgrading of Mwanza

Airport to international standard to facilitate direct landing of tourists. This initiative will open the Western Corridor of Serengeti National Park through which tourists will have the option of utilising the Ndabaka Gateway in Bunda and the Musoma–Natta to Ikoma Gate route. This will stimulate economic activities and trade in the region as the number of tourists landing in Mara Region is expected to increase from 7,000 to 70,000 per year.

The increase in tourists will create tourism-related investments such as facilitating annual tourism exhibition festivals and sector exhibitions; encouraging the establishment of tourism training centres; tourists visiting the colonial Fort Ikoma, which is located close to the north-western border of Serengeti National Park. The Fort was established by Germans as both a garrison and an administrative centre; and building the capacity of residents to produce quality goods instead of importing supplies from other regions, and also to provide excellent services.

Gulf sites in Bunda, and the islands of Ryamakabe and Bugambwa in Rorya are suitable for camp sites; while hotels can be established at Magena, Nkende and Tagota in Tarime District and Makoko and Bweri in Musoma Municipal Council. There are also several beach sites along Lake Victoria that are ideal for tourist facilities such as hotels and airstrips.

Private entities are encouraged to utilise investment opportunities in the following areas:

- Accommodation facilities, mainly construction of affordable hotels, motels, serviced apartments, camping grounds, farm stays and guest houses outside the protected areas. These should meet tourist standards and requirements
- Other accommodation facilities such as B&B (beds & breakfast), backpackers, caravan parks, cabins, houseboats and resorts, hotels, parks, cultural festivals
- Tourism training centres
- Travel agents, inbound agents, tour wholesaler and packaging agents
- Retail support services, such as shops and production of art and crafts and souvenirs
- Food and beverage facilities and visitor services.

3.4.2 Lake Victoria



Mara Region has 10,584 square kilometres covered with water, which is fifteen per cent (15%) of Lake Victoria. The lake is the second largest in the world and provides another good site for tourists as well. Apart from being

rich in freshwater fishing, it has nice beaches such as Makoko and Rukuba, where tourists interested in sport fishing; boat racing, swimming, diving, and breezing can utilise the opportunity. There are privately-owned tourist accommodation facilities like Tembo Beach, Peninsula Beach Complex, and Matvilla Beach Complex, among many others.

There are also some lodges and camps in Musoma Municipal Council to cater for accommodation needs. There are several islands in Lake Victoria that are suitable for investing in tourism. These include Bulamba, Nafuba, Sozia, Sata, Namguma, Machwele, Ilea, Igali, Chalika, Nyakalango, Bugulani, Nachenyele, and Guyanza in Bunda District Council; Ryamgasire in Musoma Municipal Council; Rukuba and Iriga in Musoma District Council; Towa, Kinesi, and Bugwambwa in Rorya District Council.

3.4.3 Mwalimu Nyerere Museum

Another tourist attraction in Mara Region is the Mwalimu Nyerere Museum in which historical information pertaining to the independence of the nation is stored. The Museum is located in Butiama Village where the founding father of the nation, Mwalimu Julius Kambarage Nyerere, is laid to rest. While in Butiama, visitors can enjoy cultural tourism including traditional dances by *Wazanaki* (Mwalimu Nyerere's tribe), village tour and recreational services provided by the lodge situated in the village. There is potential for investing in cultural tourism.



Stakeholders are welcome to Mara Region and invest in the following areas:

1. Tourist Hotels, Camp Sites, Airstrips, and Other Similar Investments

Overview of the Opportunity

Key features



Bunda Town Council

- Construction of tourist hotels: land for construction has been set aside at EPZA.
- Construction of air strip in Serengeti national park western corridor.
- Camping sites at Speke Gulf

Butiama District Council

- Cultural tourism: village tours, cultural centres, camping sites, wild animal sanctuary and zoo, snakes park, and recreational centres. PPP is envisaged

Tarime District Council

- Building tourist hotels in Tarime with sites available in Magena, Nkende, and Tagota
- Improvement and rehabilitation of Magena Air Strip at the Northern gate of Serengeti National Park
- Investors can lease land from the Council or acquire it from private individuals

Serengeti District Council

- Building airstrip at Burunga: the council has set aside an area measuring 4 kilometres long and 800 metres wide
- Building camping sites and permanent camps along Serengeti National Park
- Building tourist hotels: 20 acres of land has been set aside near Serengeti National Park for this purpose

Rorya District Council

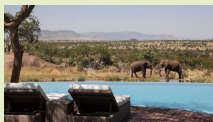
- Camping sites on Ryamakabe and Bugambwa islands.

Musoma District Council

- Establishing a tourist centre at Busekera, investing in tourist cruising, fishing sport, construction of hotels and other investment to make Busekera a tourism hub
- Makoko and Bweri are also ideal for constructing hotels.

Overview of the Opportunity

Key investment rationale



- Mara Region has many tourist attractions, which include Serengeti National Park and Lake Victoria shores which are connected through Speke Gulf in Bunda district
- Government has embarked on plans to link Mara Region as part of East African tourism circuit and to connect the Northern Tanzania tourism circuit to Lake Victoria water sports tourism

Available support

- The 1999 National Tourism Policy emphasises the need to improve, among others, communication and accommodation facilities as a means of attracting tourists, including hotels and camp sites
- Land will be made available for construction of hotels, camping sites and airstrips; in some of these investments, PPP arrangements with local government authorities (LGAs) and Central Government are envisaged
- Some of the investments will be through joint ventures between private citizens and potential investors but to be facilitated by district councils
- LGAs are allowed by law to undertake some investments in their areas with or without PPP
- Good infrastructure: roads networks, and communication, electricity and markets.

Risk/mitigation

- The Government will have to provide needed infrastructure.

3.5 Fisheries

Fishing in Mara Region is done mainly on Lake Victoria of which 49 per cent of the total area of the lake is on Tanzanian side. Fishing is ranked as one of priorities of the main economic activities of the region and is undertaken along Lake Victoria and Mara River and its streams. Fishing, as an income-generating undertaking, employs about 379,707 people, who constitute forty per cent (40%) of the region's labour force.

Furthermore, fisheries sector contributes to nutrition and employment opportunities thereby generating substantial local and foreign exchange earnings. The main fish species available in the lake and river includes Nile perch (*L. niloticus*), tilapia (*O. niloticus*) and sardines (*R. argentea*).



3.5.1 Sardines (*Dagaa*)



Sardines are the leading in total catch in the region and can be processed by sun drying, frying and in rare cases smoking. Sardines (*dagaa*) from Mara Region, particularly Kibuyi in Rorya District, are the tastiest and with much weight per gallon or per bucket compared to sardines from other places. The total average

catch marketed in and outside Mara Region is estimated to be 3,452.25 metric tonnes per month. Interested parties are welcome to invest in value addition of sardines.

1. Value Addition (Primary Processing: Sorting, Grading, and Packaging) of Fish, Mainly Sardines

Overview of the Opportunity in Sardines Value Addition	
<p>Key features</p> 	<p>Bunda, Rorya and Musoma District Councils</p> <ul style="list-style-type: none"> Establishment of sardines processing industries
<p>Current state</p> 	<ul style="list-style-type: none"> Sardines continue to be largely sun dried on the ground (i.e. on sand and grass), thus resulting in high post-harvest losses. During the rainy season, processors can become overwhelmed, and are seriously challenged to dry the catches before the fish spoils. As a result, many sun-dried sardines are of low quality more suited to animal feed than human consumption. Smoking operations in artisanal processing facilities are fuel inefficient, with poor hygiene conditions and subject to variations in quality.
<p>State of infrastructure</p>	<ul style="list-style-type: none"> There is enough supply of electricity. BMU centres and good roads to support value addition
<p>Market situation</p>	<ul style="list-style-type: none"> There is high demand for processed sardines
<p>Key investment rationale</p>	<ul style="list-style-type: none"> Value addition of fish at village level reduces post-harvest losses, increases prices to fisher folks and provides secondary processors with quality raw materials and at the same time provides consumers with healthy consumer goods

Overview of the Opportunity in Sardines Value Addition

Available support

- Districts will promote the establishment of vocational training institutes focusing on skills development for value addition with the intention of imparting such skills to farmers
- Districts have commitments to attract investments in production of packaging materials that will meet the specific requirements of various horticulture products
- Policy and political support at national, regional and local levels

3.5.2 Nile Perch

Nile perch is a source of income and food nutrition for households, and raw material for fish processing plants. Large amounts of catch landed in the districts of Bunda, Musoma and Rorya. Fish from Rukuba. Makoko. Nyakarango. Namguma, Machwera, Sozia, Nafuba. Ryamakabe, Toa, Ngonche, Msasani and Bugambwa beaches are processed within the region by Musoma



Fish Processors. About 72 per cent, equivalent to 13,373.07 metric tonnes of the Nile perch landed are processed outside the region, mostly in Mwanza. This opens room for investing in fish processing plants, as they are assured of the availability of raw materials.

Likewise, fish maws extracted from Nile perch are not processed in the region due to absence of special factory to process them. There is room for establishing fish maws processing plants to produce useful products for domestic and export markets. For the time being fish maws are sent to Mwanza Region for processing.

3.5.3 Lake Victoria Tilapia.

Lake Victoria Tilapia is source of high protein and nutrition it is in high demand across the region and its sustainability has been a subject of interest lately Investment in tilapia fishing will increase production and productivity through

fish farming in ponds and cage farming along Lake Victoria to meet demand requirements and environmental factors. Various studies have shown that fish resource in Lake Victoria is at risk of being depleted due to overfishing. This opens opportunities in two areas: first, the Government will continue to strengthen management



and protection of fish resources through patrols on breeding areas to combat illegal fishing on Lake Victoria as well as ensuring enforcement of law. Second, investment in fish farming (cage and pond) is highly encouraged.

3.5.4 Summary Investment Opportunities in Fishery

The following investment opportunities in the fishery sector have been specifically prioritised in Mara Region:

- i). Value addition on fish and fishery products intended for animal feeds and human consumption, i.e. processing (smoking), canning and packing fish products for local and export markets. The investment in this aspect will increase or maximise profit to processors of the products such as smoked fish, wet/dry salted fish, fried fish etc.
- ii). Production of quality fingerlings and fish feed for fish farming
- iii). Construction of fish maws processing plant to enable export of fish maws directly from Mara Region
- iv). Manufacturing of inputs like fish crafts and gear, supply of modern fishing equipment to fishermen, construction of fish cages, provision of technical advice to fishermen etc.
- v). Construction of cold storage and ice plants for storing and preserving fish and fish products. Post-harvest loss of fish by fishermen and processors can be reduced by installing ice plants to preserve fish after harvesting and by constructing cold room facilities for storing and preserving fish
- vi). To invite investor to invest modern fish processing industries in EPZ as catalyst of regional development

- vii). Practising pond fishing, especially in Tarime. Butiama and Serengeti districts, where there are water source and cage fishing alongside Bunda District (Bulamba 822 KJ, karukekere. Sikilo, Sunsi, and Egundu), Musoma District (Bugwema, Suguti and Mugango and tembo beach 27k) and Rorya District (Mori and Bukoro).

3.5.5 Specific Investment Opportunities in Fishery

1. Fishing, Fish Farming/Aquaculture and Fish Hatcheries¹

Overview of the Opportunity in Fish Farming and Fish Hatcheries

Key features



- Modern fish farming using fish cages and large ponds in and along Lake Victoria and other water bodies like Mara River
- Establishment of fish hatcheries for better fingerlings to supply ventures engaged in fish farming
- Establish fishponds, especially in Tarime and Serengeti districts, where water is available
- Establish cage culture alongside Lake Victoria in Bunda District (Bulamba, Sikilo, Sunsi and Egundu), Musoma District (Bugwema, Suguti and Mugango) and Rorya District (Mori and Bukoro)

Key investment rationale



- It will increase the supply of fish for fish processing industries and create new employment opportunities
- Clearly, Mara Region has considerable potential for increasing the contribution of aquaculture in the economy, given the extensive lake and river water resources, ideal temperatures and availability of raw materials for feed
- 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 as an important sector for supporting rural economic development
- Tanzania would earn more foreign exchange from exports of processed fish.

¹ We treat hatcheries as industry

Overview of the Opportunity in Fish Farming and Fish Hatcheries

Available support	<ul style="list-style-type: none">Some institutions, like JKT Bulamba through ESRF training initiatives, have already begun to promote fish farming at household levelNational Fish Policy, 2015Government 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 through Fisheries Education and Training Agency (FETA).
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2. Fish Processing and Fish Feed Making

Overview of the Opportunity in Fish Processing

Key features	<ul style="list-style-type: none">Establishment of fish processing industries for value addition on fish and fish products for local and export marketEstablishment of fish feed processing industry for fish farmingConstruction of fish maws processing plant to enable export of fish maws direct from Mara Region
Key investment rationale	<ul style="list-style-type: none">Investment in this aspect will increase or maximise profit to the processors of the products such as smoked fish, wet/dry salted fish, fried fish etc.It will contribute to increased supply of fish for fish processing plants, as well as increase employmentTanzania would earn more foreign exchange from exports of processed fish.
Available support	<ul style="list-style-type: none">National Fish Policy, 2015Government 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 through FETA.

3. Manufacturing of Fishing Gear and Equipment

Overview of the Opportunity in Manufacturing Fishing Gear and Equipment



Key features	<ul style="list-style-type: none">Manufacturing of inputs like fish crafts and gearSupply of modern fishing equipment to fishermenConstruction of fish cagesSkills development to fishermen
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Overview of the Opportunity in Manufacturing Fishing Gear and Equipment

Key investment rationale	<ul style="list-style-type: none"> Modern fishing gear will contribute to an increase in the supply of fish for fish processing industries and will also increase employment opportunities Tanzania would earn more foreign exchange from exports of processed fish
Available support	<ul style="list-style-type: none"> National Fish Policy, 2015 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 through FETA

4. Industrial Ice Making Plant

Overview of the Opportunity in Industrial Ice Making Plant

Key features	 <p>Bunda, Rorya and Musoma District Council</p> <ul style="list-style-type: none"> Establishment of ice block making plant
Potential targeted area	<ul style="list-style-type: none"> Bunda EPZ, Kibara in Bunda District and Suguti area in Musoma District.
Current state	<ul style="list-style-type: none"> Two ice-making plants in Rorya District Plants installed in Musoma Fish Processor. Post-harvest loss and supply of poor-quality fish which affect fish market
State of infrastructure	<ul style="list-style-type: none"> Area set aside is accessible by road and has electricity supply
Market situation	<ul style="list-style-type: none"> High demand for ice blocks needed by fishermen to preserve fish and related products
Future expectation	<ul style="list-style-type: none"> Improvement of fish preservation along the fish value chain by establishing sufficient Ice block making facilities
Key investment rationale	 <ul style="list-style-type: none"> Huge wastage of fresh fish due to poor transport and storage facilities To supply ice blocks 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.

Overview of the Opportunity in Industrial Ice Making Plant

Available support

- Improved supply of electricity and the increasing demand for the service, at least for refrigerated reefers².
- FYDP II, which promotes value addition at primary and secondary levels

3.6 Mining Sector

Mining is one of the key economic activities of Mara Region Notwithstanding its large deposits of Gold, Mara Region's mining sector is primarily constructed by small scale mining with exception of North Mara Gold Mine located in Nyamongo, Tarime Province and the presence of medium gold investments mines in Butiama and Musoma Districts, most of Mara Region massive deposits are under small mining licences and prospecting licences directives are focused on promoting joint ventures partnerships and other forms of investments collaborations between Tanzanian Nationals with mining licences and foreign and domestic investors with financial and technological capacity to extract such gold with the acquired efficiencies and environmentally sustainable technologies.



The investors, are invited to invest in Financial services and Technology, they will be supposed to conduct intensive Geological survey/feasibility study through (GST) that will ensure proper allocation of capital and investment.

There are about three medium mining industries in the region; CATA Mine in Butiama, SEKA Mine in Musoma District, ZEM in Butiama and Buhemba Gold mine under STAMICO and other small scale mine. Also, technological innovation of Elution plants installation for purifying Mineral concentrate (remnants of Gold sand) increases the potential of investment in Gold industries.

Mining activities are gold, ochre, iron ore, gemstone and building materials are practised in all districts. the region has 1196 small-scale mine. Thus, investments are needed in providing mining machinery for hire, mineral

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.

processing plants and supply of mining services such as drilling, laboratory services, or smelting/refining and exploration of new areas with minerals, for example airborne geophysical surveys.


Table 3: Mineral distribution chart in Mara Region

District	Type of minerals available
Musoma	Gold and building material
Bunda	Iron ore, limestone, slate, ochre, copper, gold and building material
Butiama	Ochre, gold, building material, iron ore and kaolin
Serengeti	Slate, soapstone, gold, copper, building material, gemstone and limestone.
Tarime	Gold, building material and soapstone
Rorya	Gold, building material and gemstone.

3.6.1 Investment Opportunities in the Mining Sector

- Value addition through transformation of small miners
- Establishing gemstone cutting and processing industries for mineral value addition. Gemstones are currently sold raw
- Establishing mining curriculum college and training machine operators
- Development and establishment of iron and steel processing plants
- Constructing cement making factories
- Opening a modern and extensive mining laboratory
- Opening markets for supplying mining chemicals and required solutions.

1. Cement and Lime Stones Industry

Overview of the Opportunity in Cement and Limestone Industry	
Key features 	<p>Bunda District</p> <ul style="list-style-type: none"> ▪ Construction of limestone making factories. <p>Serengeti District</p> <ul style="list-style-type: none"> ▪ Construction of cement making factory.
Potential targeted area	<ul style="list-style-type: none"> ▪ Guta in Bunda District ▪ Serengeti
Current state	<ul style="list-style-type: none"> ▪ Mara Region does not have limestone and cement making factories though there is abundant related raw materials and other required resources

Overview of the Opportunity in Cement and Limestone Industry

State of infrastructure	<ul style="list-style-type: none"> The area is not developed yet, but it is accessible by an improved road network and related social infrastructures
Market situation	<ul style="list-style-type: none"> There is a high market demand for cement and limestone related products, both locally and externally
Future expectation	<ul style="list-style-type: none"> To be the main limestone and cement producer and exporter in the country and East Africa
Key investment rationale	<ul style="list-style-type: none"> Construction industry will benefit from getting such building materials from within the region and therefore lowering their cost of raw materials Raw materials required for cement and limestone industry are available Cement and limestone industries, like all other industries, will generate employment to the people of the region Cement and limestone production will reduce consumer prices and promote construction of modern houses
Available support	<ul style="list-style-type: none"> Land for construction of a factory is available and raw materials are available at Bulamba and Buzimbwe in Bunda District Council There is national, regional and local government support for this type of industry Good infrastructure: roads and communication networks, electricity supply and markets There is demand for lime products in the district and the region as well.

3.7 Industrial Development

Mara Region has all essential factors for industrial establishment. These factors range from sufficient supply of raw materials, electric power supply, good infrastructure network, and availability of abundant labour.

The Government focus on industrial sector development is vested in

- investing in export processing zones (EPZs) in order to promote export, as the region is in strategic position bordering Kenya and Uganda.



- (b) establishing industries that will utilise mainly raw materials produced within Mara Region and neighbouring regions;
- (c) establishing industries that can produce items/products for mass consumption; and
- (d) establishing industries that will create both direct and indirect employment as far as the value chain is concerned.

3.7.1 Investments Opportunities in Industrial Sector

Investment opportunities in industrial sector in Mara Region include:

- (a) modern textile industries and cotton ginneries
- (b) steel and iron processing
- (c) fish fillets and fish maws processing
- (d) tanneries and leather goods production
- (e) tea processing
- (f) coffee processing
- (g) mineral value addition
- (h) dairy processing
- (i) beverage and soft drink manufacturing
- (j) oil seed processing, packaging and blending
- (k) manufacturing of packaging materials
- (l) production of construction materials
- (m) pharmaceuticals.

The region, through all its local government authorities, has set aside land for industrial development for medium and small business activities as shown in Table 4.

Table 4: Land set aside for Investment under Local Government Authorities (LGAs)

S/NO	DISTRICT	AREA	PLANNED USE
1.	Tarime District Council	72.9 Acres 159.3 Acres	Industrial park Business
2.	Tarime Town Council	28 Acres	Industrial park
3.	Bunda District Council	90 Acres	Industrial park
4.	Bunda Town Council	369 Acres	Business
		3173.3 Acres EPZ	Industrial park
5.	Serengeti District Council	250 Acres	Industrial park

S/NO	DISTRICT	AREA	PLANNED USE
6.	Musoma Municipal Council	88 Acres	Industrial park
		12.73 Acres	Business
7.	Butiama District Council	35.8 Acres	Business
		03 Acres	Industrial park
8.	Rorya District Council	78.9 Acres	Industrial park

3.7.2 Specific Investment Opportunities in Industrial Sector

Some of the specific investment opportunities in the industrial sector are elaborated in the tables below

1. Establishment of integrated industrial parks in Bunda, Butiama, Musoma, Rorya, Tarime and Serengeti districts

Overview of the Opportunity in Establishing Integrated Industrial Parks

Key features



Generally, an industrial park comprises of the following investment opportunities in the form of clusters, industries, and services centres:

1. Manufacturing cluster:

- Value addition (primary processing: sorting, grading, and packaging) of horticulture products and fish drying
- Value addition and processing of cassava
- Processing milk into various dairy products
- Meat processing
- Tanneries
- Grain-milling, mainly maize, millet and paddy
- Factory for producing packaging materials for both primary and secondary processing industries as well as for cold chain trucks
- Solid waste management, including recycling facilities
- Mining
- Chicken hatchery
- Animal feeds processing

2. Commercial business and trade services centre:

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

Overview of the Opportunity in Establishing Integrated Industrial Parks



3. **Social services cluster:** passenger transportation stations; well-being centres; learning centres; and shopping malls
4. **Assembling cluster:** assembling and re-packaging, machinery, equipment, and other industrial goods for value addition; for example, farm machinery and implements, abattoirs equipment, etc.
5. **Hospitality industry:** hotels, restaurants, recreation centres, tourism
6. **High technology clusters** (in the longer term)
7. **Packaging and supply chain management facilities.**

Key investment rationale

- Well thought, designed and participatory planned sustainable development of Mara Region as opposed to haphazard development
- Need for public and private investments in urban planning and urban infrastructure development so as to have well-planned towns in line with and laws and regulations
- Mara Region is strategically positioned for development of viable industrial parks, as it has direct access to the EAC and SADC trading blocs through land, waterways and air ways
- Good links to neighbouring regions of Mwanza, Arusha, Simiyu, Shinyanga and Kagera; good road infrastructure to Musoma Airport, to Mwanza City and to the major port in Dar es Salaam, which provides guarantee for sea freight.

Available support

- The Second Five-Year Development Plan (FYDP II) 2016/17-2020/21

2. Establishment of Export Processing Zone (EPZ)

Overview of the Opportunity in Establishing EPZ

Key features



- Creating an EPZ (financial support, buildings, facilities, warehouses, roads etc.) for investments that would process various commodities for exports. Given the size and scope of such an infrastructure, it should be built in a district with adequate land for this purpose
- In that regard, the EPZ should be built in Bunda Town Council, where 3,173.3 acres have been set aside and the government has already compensated

Overview of the Opportunity in Establishing EPZ

Key investment rationale

- EPZ is the best way through which to capture foreign markets: promoting the use of domestic raw materials to target foreign markets
- EPZ is also the best way to receive new technology and create jobs
- EPZ serves as a catalyst for industrial cluster development and stimulates the incubation of advanced technologies and skill development in the region
- Manufacturing externalities present challenges and demand attention; it is easier to attend to such challenges in an industrial estate
- Attract foreign and local investment projects which:
 - create jobs
 - are export led
 - are sustainable
 - make arrangements for and mobilise financial, human and other resources for the development of EPZ
- Promote, foster and mentor micro, small and medium enterprises (MSMEs) business opportunities in and around the zone.

Available support

- The Export Processing Zones Act 2002 (as amended by the Export Processing Zones (Amendments) Act, 2006 and the Economic Zones Laws (Miscellaneous Amendments) Act, 2011) (the **EPZ Act**)
- **Infrastructure development:** Using the SEZ developer/operator, investors can establish SEZ industrial and commercial parks. Such projects entail construction of roads, utility systems, fencing and supporting administrative and service blocks.
- **Manufacturing:** Investors can establish manufacturing operations in the special economic zones using either the SEZ User Licence or SEZ Export User Licence and enjoy the lucrative incentives provided by the scheme. Among existing investment sectors in Tanzania are agro-processing, textile and garments, lapidary, leather processing, fish processing, forest and forestry products, ICTs industries and assembly

Overview of the Opportunity in Establishing EPZ

- **Trade and services:** Investors are welcome to establish trading and service operations in the Free Trade and Freeport Zones using the SEZ User License.
- **Tourism:** Investors can establish/develop tourism infrastructure in the special economic zones using the SEZ User Licence. Such projects can be hotels, museums, amusement parks and golf clubs.
- The Government trade and globalisation policy promotes diversification of exports

3. Packaging Materials for both Primary and Secondary Processing Industries

Overview of the Opportunity in Production of Packaging Materials

Key features



- Establish packaging materials production facilities

Current state

- There are no facilities for producing packaging materials in the region

State of infrastructure

- There are good roads and adequate electricity supply to support establishment of a facility to produce packaging materials

Market situation

- There is high demand for appropriate packaging materials not only in Mara region but also in the Lake Zone and the country as well as East Africa

Key investment rationale



- This will also meet demand for packaging materials emanating from expected investments in primary and secondary processing as well as establishment of modern markets and shopping malls. Production of appropriate and approved packaging materials will facilitate public observance of Government prohibition on the use of plastics
- There are no appropriate facilities for production of packaging materials

Overview of the Opportunity in Production of Packaging Materials

Available support

- This investment is in line with Government 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 constructing a factory for producing packaging materials
- Good infrastructure: roads and communication networks, electricity supply and markets.

6. Sugar Industry

Overview of the Opportunity in Sugar Industry

Key features



Tarime District Council

- Establish and expand sugarcane production
- Establish sugar processing industry

Serengeti District Council

- Establish and expand sugarcane production
- Establish sugar processing industry
- Constructing a sugar-producing factory:

Current state

- There is no sugar-making facility in the region.
- Sugarcane cultivation is suitable in Nyansurumunti, Gantamome, Busawe, Iseresere, Nyamakobiti, Majimoto, Hekwe and Magatini villages. There are a total of 44,236.7475 acres for sugar cane production

State of infrastructure

- There are good roads and supply of electricity to support establishment of a sugar-producing facility

Market situation

- There is high demand of sugar in the country.

Key investment rationale



- One of the advantages of sugar is that it provides a superb multiplier of economic growth. Not only is sugar consumed by a large number of other industries (e.g. fertiliser, fuel, spare parts, chemicals of various kinds), but it also provides business opportunities with regards to transportation of both cane and sugar, merchandising and distribution opportunities, stevedoring opportunities, and even catering services
- It will also promote out-grower sugar cane production schemes

Overview of the Opportunity in Sugar Industry

	<ul style="list-style-type: none">▪ Sugar cane farming is highly labour intensive³, therefore it will provide employment to people in the neighbourhood.
Available support	<ul style="list-style-type: none">▪ Government policy on sugar industry▪ Recognition in the second Five-Year Development Plan FYDP II) 2016/17-2020/21, which focuses on industrialisation.

3.8 Construction Sector

Construction sector is booming, thus making Tanzania the second largest market for construction in East Africa. In Mara Region, the emphasis is on:


- Transport infrastructure (roads, water and air transport): Improving the nation's roads, rural roads, ports and airports infrastructure is critical for Mara Region to improve internal and cross border trade and commercial activities. Moreover, the sector's further development goes hand-in-glove with improvements in energy sector, as Tanzania strives to become a middle-income country
- Real estate, One stop border Post at Kirongwe and Kogaja area in Rorya.
- Regional strategic Makert at Kiabakari in Butiama.
- Other civil works

3.8.1 Real Estate

Mara Region strives to take several strategic initiatives by encouraging interested parties to invest in real estate. This is because demand is emanating from industrial development, increasing number of businesses, growth of tourism, increasing production of crops, increasing fishing activities that will be attributed by the expansion of Musoma Airport to international standard, opening of Western Serengeti Wildlife Corridor, construction of Mwalimu Nyerere Memorial Medical Centre, construction of roads and other establishments will lead to rapid population growth and per capita income will lead to an increase in demand for real estates (rental spaces for accommodation, offices, warehouses, etc.). Mara Region, and specifically, Rorya and Butiama districts, warmly welcomes interested parties to invest in real estate.

³ On a typical sugar estate one hectare of sugar cane land will, on average, employ three people.


1. Investing on Real Estate

Overview of the Opportunity in Real Estate Development	
Key features 	Rorya and Butiama District Councils <ul style="list-style-type: none"> Building houses for staff: there are 21 acres at Saro in Rorya District Council for this purpose. There is high demand for rental houses in Butiama. Foreign investors can establish joint real estate collaborate with local investors.
Key investment rationale	<ul style="list-style-type: none"> Real estate, especially houses for renting to district and local government employees, most of who live outside the district because of shortage of housing in the “new” district
Available support	<ul style="list-style-type: none"> They are employees and therefore can either buy the houses on loan or rent them.

3.8.2 Infrastructure

Local government authorities in Mara Region are welcoming investors to venture in construction of various structures through PPP or private investment.

1. Modern Markets and Shopping Malls

Overview of the Opportunity in Constructing Modern Markets and Malls	
Key features 	Musoma Municipal Council <ul style="list-style-type: none"> Building shopping mall in Musoma Municipality Building modern vegetable and fruit market structures.
Potential targeted area	<ul style="list-style-type: none"> Nyasho and <i>Soko Kuu</i> (main market) in Musoma Municipality and Tarime Township (PPP is expected)
Current state	<ul style="list-style-type: none"> Vegetables and fruits are currently sold raw locally and there are no cold chain facilities
State of infrastructure	<ul style="list-style-type: none"> Absence of market sheds with no cold rooms for preserving perishable produce
Market situation	<ul style="list-style-type: none"> High demand of fruits and vegetables in and outside the region

Overview of the Opportunity in Constructing Modern Markets and Malls

Future expectation	<ul style="list-style-type: none"> Constructing modern market structures to fit marketing of horticulture and cereals, including millet and maize with cold chain facilities in order to export.
Key investment rationale	<ul style="list-style-type: none"> Shopping malls and modern market will directly and indirectly generate employment to the region's population Value addition, especially for horticulture produce, will be promoted
Available support	<ul style="list-style-type: none"> Policy and political support at national, regional and local levels Land is available for construction of shopping mall and market structures Good infrastructure: roads and communication networks, electricity supply and markets.

2. Building International Market

Overview of the Opportunity in Building an International Market Structure

Key features	 <p>Tarime Town Council</p> <ul style="list-style-type: none"> Construction of international market structure that will involve agricultural and industrial products from Mara and other regions such as Mwanza and Simiyu.
Potential targeted area	<ul style="list-style-type: none"> The market structure will be constructed in Remagwe Village within Sirari town, which borders with Kenya
Current state	<ul style="list-style-type: none"> Construction is in progress
State of infrastructure	<ul style="list-style-type: none"> The construction of the facility is in progress and is accessible with an improved road network and has utilities (electricity and water supply) as well as services (hospital).
Market situation	<ul style="list-style-type: none"> Most of the products sold from the Tanzanian side are raw materials while those from Kenya are industrial ones.
Future expectation	<ul style="list-style-type: none"> To attract investors into processing industries in order to sell manufactured goods.

Overview of the Opportunity in Building an International Market Structure

Key investment rationale	<ul style="list-style-type: none">▪ It is the best way to promote Mara Region's/other regions' agricultural and industrial production to target exports▪ It will also be an avenue for promoting production of quality goods that meet international standards: in the case of agriculture, crop farmers, fishers, and livestock keepers will most likely add value to their produce and earn higher returns▪ Over time, this process will tend to diversify production as a reflection of the changing demand to be signalled from this market
Available support	<ul style="list-style-type: none">▪ Tanzania's current focus on industrialisation supports and encourages such investments▪ Good infrastructure: roads and communication networks, electricity supply and markets▪ The EAC Common Market Protocol is meant to promote inter-regional trade.

3.9 Transportation Sector

There has been continued efforts by the Tanzanian Government to create essential transport infrastructure and services to improve overall accessibility in the country and attract foreign direct investments. The demand for roads construction is very high, as good trunk roads are needed not only to connect regions but also to connecting district headquarters.³


Water transport: Musoma port is being reconstructed undergoing modernization to be able to receive trans lake cargo to Port bay, Kisumu, Kemono, Mwanza and other key ports of Lake Victoria. In that regard government initiatives has completed rehabilitation of MV New Victoria, Mv Butiama and MV Ukerewe. Such investments will not only improve transportation in the Great Lakes region, but also promote trade among the partner states. Other investment areas include provision and operation of cargo and passenger vessels; provision of water transport services; and supply and operation of fast, luxury marine ferries, among others.

⁴ TIC investment profile 2013-14

Road transport: Mara Region’s main road networks include tarmac roads (213.63 km), gravel roads (1,220.66 km) and earth roads (2864.06 km). The region has also a rural roads network that includes tarmac roads (21.37 km), gravel roads (1,008.88 km) and earth roads (3,210.91 km).

The potential for tourism provides an opportunity to develop transport network to link with Serengeti National Park. There is need to develop an all-year-round road network and associated infrastructure, such as trunk roads, linking Serengeti National Park: Musoma – Bunda – Ndabaka Gate; Musoma – Butiama – Nata – Ikoma Gate; and Musoma – Butiama – Nata - Mugumu – Tabora B Gate. There is also need to construct central bus terminals in the region to ensure transportation of goods and services within and outside the region. Road rehabilitation and construction in rural areas are required, and upgrading of district and feeder roads to open up key areas with agricultural potential is strategic. Through public-private partnership model, a central bus terminal needs to be developed at Chamoto and Kemange areas in Mugumu and Tarime town councils respectively. Serengeti District Council has set aside 2 hectares and Tarime Town Council has allocated 3.6 hectares of land with title deeds ready for construction of bus terminals.

1. Constructing Bus Stations

Overview of the Opportunity in Constructing Bus Stations	
<p>Key features</p> 	<p>Musoma Municipal Council</p> <ul style="list-style-type: none"> Construction of a modern bus station (PPP model is envisaged). <p>Tarime Town Council</p> <ul style="list-style-type: none"> Constructing a bus station at Kimange: some 28,000 square metres of land have been set aside for this purpose (PPP model is envisaged) <p>Serengeti District Council</p> <ul style="list-style-type: none"> Construction of bus terminal at Chamoto in Mugumu town
<p>Key investment rationale</p>	<ul style="list-style-type: none"> Musoma Municipality is growing and is most likely to becoming a city in the future. The existing bus station is not only small but also lacks international standards – it already is inadequate to meeting the growing demand for efficient transport system to cater for both inflows and outflows of commuters and their goods

Overview of the Opportunity in Constructing Bus Stations

	<ul style="list-style-type: none">▪ A modern bus station with good management and environment will spur further economic activities in and around the bus station▪ Tarime is the strategic area, as it borders Kenya, an EAC partner state.▪ Mugumu is also a strategic town for the Serengeti National park
Available support	<ul style="list-style-type: none">▪ Political support from national, regional and local levels▪ The Municipal Council has allocated land for the construction of an international terminal bus station.

Air transport: Despite the fact that Mara Region is the hub for international tourists visiting Serengeti National Park, its air transport is not well developed. However, there is significant effort by the Government to improve Musoma Airport by upgrading it from gravel to tarmac. Other supportive air transport investments are required at Magena Airstrip in Tarime.

3.10 Energy Sector

The Government has taken steps to improve delivery of quality energy supplies in rural areas. This is seen as key factor in promoting industrial investment in rural economy.

The Region has 458 villages, out of which 334 villages are enjoying access to electricity and 80 villages are expected to be connected soon with electricity through REA phase III round one. The availability of electricity will enable investors to establish industries in Mara Region.

3.11 Service Sector

3.11.1 Education Facilities

Quality education at pre-primary, primary and secondary school levels is a potential investment area. There are opportunities in investing in privately-owned schools even at international level. The region needs to construct pre-primary and primary schools in Bukima, Murangi and Mugango in Musoma, where land has been earmarked for this purpose. There is also room for

establishing a training institute for developing skills targeted to adding value to agricultural commodities and non-agricultural small-scale manufacturing industries.

1. Vocational Training on Skills Development

Overview of the Opportunity in Establishing Vocational Training Facilities	
<p>Key features</p> 	<ul style="list-style-type: none"> Establishment of a training institute for developing skills targeted to adding value to agricultural commodities and non-agricultural small-scale manufacturing industries It can be established in any of the local government authorities that do not have such facilities.
<p>Current State</p>	<p>Mara Region has:</p> <ul style="list-style-type: none"> Two (2) vocational training centres Two (2) teacher-training colleges Two universities i.e. Open University of Tanzania (OUT) and Mwalimu Julius K. Nyerere University of Agriculture and Technology (MJNUAT) One Community Development Training Institute
<p>Key investment rationale</p>	<ul style="list-style-type: none"> The demand for skills development has been identified in almost all districts as critical for promoting value addition to agricultural commodities and non-agricultural small-scale manufacturing industries The whole idea of promoting value addition at primary level of production is to remove middlemen who take advantage of primary producers' lack of knowledge for value addition: additional earnings that tend to accrue to middlemen would eventually be earned by those who add value to their products
<p>Available support</p>	<ul style="list-style-type: none"> FYDP II categorically states the Government's intention and commitment to promote mass training in skills development for value addition Education and Training policy of 2014 Education Sector Development Plan (ESDP 2016/17-2021/22)

3.11.2 Health Care Facilities

The region has 13 Hospitals, 43 health centres and 264 dispensaries. These health facilities are owned by Government, faith-based organisations and the private sector. The Government owns 5 hospitals while 5 are owned by faith-

based organisations and the private sector has 3 hospitals. The Government owns 31 health centres, 7 are owned by faith-based organisations and private organisations and individuals own 5.

Among the 264 dispensaries, 221 are owned by Government, 17 by faith-based organisations and 26 are owned by the private sector. The Government has opened the door for private sector investment in delivery of health care services, so it has created suitable environment for privatisation of the health sector.

Since health care services require continuous improvement to cope with increasing demand, investors are highly encouraged to venture into the provision of health care services in the region.

Regional referral hospital: In order to improve health care services, the region is finalising the construction of an international referral hospital, which is expected to be completed by September, 2020. The hospital is located at Kwangwa area in Kwangwa ward, 5 kilometres south west of Musoma Town. The hospital will be providing the following services, among others:

- i). Outpatient and specialised services: supporting services will include a modern medical laboratory, a blood bank and an imaging department
- ii). Research and teaching in health care field
- iii). Highly specialised health care services (dialysis and renal transplant): this will reduce the number of Tanzanians who are referred outside the region and out of the country for such services.

1. Specialised Medical/Health Care Facilities/Centres

Overview of the Opportunity in Establishing Specialised Medical/Health Care Facilities



Specific areas of investment in health care services are:

- Construction of health facilities (hospitals, health centres and dispensaries)
- Construction of factories to manufacture and supply drugs and medical equipment
- Provision of health care insurance services.

Overview of the Opportunity in Establishing Specialised Medical/ Health Care Facilities

Current State	<ul style="list-style-type: none">▪ Mara Region has only one referral hospital located at Musoma Municipality and some four health training institutions▪ Only one privately owned hospital and 6 privately owned health care centres▪ More medical facilities are needed due to the large population
Key investment rationale	<ul style="list-style-type: none">▪ Increasing population and high ratio of patients to medical facilities
Available support	<ul style="list-style-type: none">▪ FYDP II categorically states the Government's intention and commitment to improve its citizens' health by providing health care facilities to all.

3.11.3 Water and Sanitation

Water is one of the country's most important natural resources. Mara Region is gifted with Lake Victoria and covered with a myriad of rivers and basins. Many of the country's sectors rely on water as a major input for production.

Provision of safe water and good quality sanitation facilities is of primary importance to ensure the well-being of the people of the region. At present, the share of population with access to safe drinking water stands at 51.5 per cent in rural areas and 62.4 per cent in urban areas. There is an opportunity to raise these levels.

Serengeti District is keen on developing a comprehensive solid waste management in Mugumu Town at Ngarawani area, where 11 hectares of land have been set aside for that purpose. The National Water Policy, 2002 promotes private sector participation.

Overview of the Opportunity in Solid Waste Management

<p>Key features</p> 	<p>Serengeti District Council</p> <ul style="list-style-type: none"> Construction of solid wastes recycling plant <p>Musoma Municipal Council</p> <ul style="list-style-type: none"> Establishment of facility for “wastes-to-energy” (production of electric power and gas from waste)
<p>Current state</p>	<ul style="list-style-type: none"> There is no solid wastes recycling plant in the region
<p>State of infrastructure</p>	<ul style="list-style-type: none"> Good roads and supply of electricity to support establishment of solid wastes recycling plant
<p>Key investment rationale</p>	<ul style="list-style-type: none"> Musoma Municipal Council and Serengeti District Council are growing, economic activities are expanding and so is the production of solid wastes Already, as of now, the councils are generating a lot of solid wastes, so that the existing dumps are unable to absorb them
<p>Available support</p>	<ul style="list-style-type: none"> Policy and political support at national, regional and local government levels Policy supports collection, compressing and recycling of solid wastes.

STRATEGIC ISSUES FOR IMPLEMENTATION OF THE GUIDE

4.1 Introduction

Among the critical areas as far as attracting investors is concerned is preparation articulation of an in-depth implementation plan or strategy, including detailed financing strategy. To accomplish this requires that regional staff identify and link up with international investors, businesses, and investment promoters, as well as creating awareness of and getting access to international investment opportunities. The necessary capacities to develop and present bankable project proposals for investment must be built.

Thus, moving forward, the region will make efforts to seek support from partners and local financial institutions to mobilize resources that will be used to: (i) develop capacity of local government staff, (ii) engage and support capacity development for private sector associations including business councils, (iii) facilitate organization of local, national and international investment forums, (iv) enable development of bankable projects / business cases and (v) facilitate and promote cross-border trade.

In line with the identified investment opportunities, among other things, the region will give priority to improving the collection and quality of data in all key social-economic sub-sectors. This is extremely important for supporting investors in undertaking their feasibility studies and development of business plans.

The region recognises the challenges of implementing the guide and to attract the much-needed investments. Therefore, the region resolves to establish an investment unit to guide and facilitate investors. Also, the investment guide will be used to market the investment opportunities that are available in the region. To operationalise the guide the region will select some opportunities and collaborate with lenders and investors to conduct feasibility studies and develop business plans for bankable projects.

4.1.1 Financing

a) Financing

Access to finance is the most pronounced challenge given the changing global financing architecture and onset of COVID-19 pandemic that has forced governments, the private sector and other key economic players to revisit their expenditure priorities. Innovative ways have to be identified and decisions of where to invest require strategic thinking.

The region will have to seek support from experts for advice on how to structure financing for promising viable bankable projects. Such expertise is readily available at UNCDF, UNIDO, UNDP, AfDB, UN-HABITAT, private consultancy firms and Universities.

Some of the potential financing approaches include:

- Increasing private sector participation, singularly or in partnership with the LGAs, at the same time ensuring that the private resources (e.g. local banks, etc) is well leveraged.
- Undertake measures that help to scaling up domestic revenue mobilisation for LGAs, which can be an incentive for ploughing back resources into further investment.
- Ensuring priority investments secure smooth and full funding, e.g. through innovative financing – blended finance, municipal bonds, etc.
- Leveraging public sector resources into key infrastructure to entice private sector participation in financing priority development projects.
- Working closely with experts that can assist in developing business ideas and collaborating with local banks and other lenders or grant making institutions.
- Encouraging and working with institutional investors like pension funds, cooperative unions, state owned enterprise, etc.
- Work with and encourage foundations or corporates to properly be responsible social investors / environmental investors.
- Utilize investment facilitation fund by approaching development banks such as TADB and TIB and others.

b) Human Resources Development

Investment in human resources development is one of the agenda given priority in Sustainable Industrial Development Policy (SIDP). Human capital consists of the stock of knowledge, set of skills and abilities inherent in individuals which increases productivity. We now live in the Knowledge Economy and we need, as a matter of necessity, to build human capital that will enable Mara region to productively and effectively engage in the country, region and globally. It is important to structure training programs that are linked to what the market requires. This involves technical training of workforce required by individual industries, development of business management, and development of industrial capability to plan and implement business strategies. Scarcity of middle-level management and skilled labour is one of the most serious constraints, which the region will focus on to improve.

Other key elements of capacity development are leadership and promotion of the guide, communication and marketing the investment opportunities, ability to engage and negotiate deals for a win-win results, accurate interpretation of the national and local investment policies, laws and regulations. Also, partnership creation in various circumstance and forms so that a vibrant Special Purpose Vehicle (SPV) can be established e.g. PPP or PPPC, Region (A) + Region (B); two districts or more forming partnership; LGA with state owned enterprise; LGA + SOE, Private; LGA + Private + SOEs + International Private.

It is imperative to invest in digitalization of the investment guide, data and link to economic diplomacy. Digitalization and economic diplomacy will help to share with both foreign embassies located in Tanzania and Tanzanian embassies abroad.

Focusing on Measures to Address Weaknesses that would Hinder Investments

- i). Priority investment in physical (hard) infrastructure to support SMEs such as in SIDO spaces, as well as in designated spaces for clusters and in soft infrastructure including human resource development, institutional support and regulatory issues
- ii). The region will work with SIDO in the provision of business support services to SMEs for the purpose of building their capacity to grow (this can be done through SIDO and clusters)

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- iii). Identifying mechanisms to address financing needs of SMEs through public finance, from private financial institutions and from development partners
 - iv). Creating regional institutional support for growth through accelerating public sector development for coordinated public support by:
 - (a) Establishing financial support programmes for promotion of local investment in identified sub-sectors.
 - (b) Creating an investment matching fund to promote private sector investment in regional strategic projects.
 - (c) Creating and deploying industrial extension officers to support industries in all LGAs.
 - (d) Establishing investment facilitation units or teams for easy access by investors.
 - v). Mobilizing zonal or regional technical support institutions, (industrial support organisations, business support organisations and agencies) at regional and district levels because national support institutions like NDC, BRELA, NBC, TIRDO, EPZA, TANTRADE, TBS, COSOTA etc., may not be able to undertake their functions effectively in each region.

4.2 Translating the National Five-Year Development Plan 2016/17 – 2020/21 (FYDP II) to Local Context

The investment guide is aligned to the Second Five-Year Development Plan (FYDP II) 2016/17 – 2020/21, which is dedicated to nurturing Tanzania’s industrialisation for human development and economic transformation through industrial sector growth based on inter-sector value addition, competitive agro-processing industries, developed medium-technology industries, natural gas-based/fuelled industries, iron and steel and chemical industries as well as an increase in mineral beneficiation.

4.2.1 FYDP II Core Objectives

FYDP II has several core objectives, which centre on three pillars of transformation, namely:

- i). Industrialisation (semi-industrialised nation by 2025; develop sustainable productive and export capacities; regional production, trade and logistics hub; promote industrial skills)

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- ii). Interventions for human development and social transformation focus on education and skills development; health delivery systems; water supply and sanitation; urban planning, housing and human settlements; food security and nutrition; social protection; and good governance. Human development (broad-based and inclusive economic growth; improved quality of life and human well-being)
 - iii). Implementation effectiveness (prioritisation, sequencing, integration and alignment of interventions; stronger role of local actors in planning and implementation; global and regional agreements mainstreamed into national development planning and implementation frameworks).

4.2.2 Role of Mara Region as per FYDP II Focus

FYDP II acknowledges that, at the local level, the envisaged economic transformation will have sizeable and sustainable impact on the reduction of poverty and improvement in quality of life (through inclusive growth) if MSMEs are supported and well linked to large-scale enterprises in manufacturing, construction, tourism, and other priority areas of FYDP II through the local economic development (LED) approach. The LED approach, which tailors' local plans to respective local contexts and comparative advantages, provides an effective way to organise small-scale farmers and MSMEs for the purpose of supporting industrial transformation.

As per FYDP II, Mara Region Investment Guide mapped economic and investment opportunities and is focusing on strengthening and promoting industrialisation and SMEs in agriculture value chains, knowledge transfer and capacity building.

The key to socio-economic transformation is the LED approach, it is critical to ensure that allocation of land for investment and development of SME clusters is happening.

4.2.3 The Investment Guide and Local Economic Development (LED) Approach

The core aim of LED in FYDPII is to ensure that practical approaches are used by regional secretariats, LGAs, and communities in designing and implementing locally customised investment interventions. The LGAs pursue

the promotion of local investment through the LED approach - **Focusing on Small and Medium Enterprises (SMEs).**

In recognition of the role that SMEs play in job creation, to align with the FYDP II, the Mara investment guide focuses on the following, among others:

- (a). commercialisation of primary production activities that will provide inputs to the manufacturing and processing enterprises – agriculture, livestock, forestry, marine products harvest (from lakes and oceans) and mineral extractive industries
- (b). Industrial parks development as physical platforms for locating manufacturing and processing enterprises with reliable and affordable supply of industrial infrastructure and related services – power, gas, industrial water, telecommunications and industrial waste management.
- (c). Human skills and enterprise development that will create a labour pool and the requisite business infrastructure.
- (d). Technology transfer to ensure that the development of new industries will be profitable and environmentally friendly. To acquire and adapt various technologies for the long-term development requirements of the region.

INVESTMENT CLIMATE AND FACILITATION

5.1 Investment Climate and Trade Policy in Tanzania

The Government of Tanzania has reviewed its policies and regulations in order to attract local and foreign private investment. This is evidenced by the recent development and implementation of the Blueprint for Regulatory Reforms to Improve the Business Environment, including merging some functions of regulatory institutions, abolishing nuisance taxes and fees, and improving dialogue between Government and private sector etc.

The country has adopted the World Trade Organisation's (WTO's) Trade-related Investment Measures (TRIMs) to encourage investments in line with national priorities, and to attract and regulate foreign investment. Trade development instruments that Tanzania has adopted include establishment of export processing zones (EPZs), Investment Code and Rules, export development/promotion and export facilitation. More information on EPZA can be found on the website www.epza.go.tz and/or through email: info@epza.go.tz.

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 through the Africa Growth Opportunity Act (AGOA); Europe through 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), namely the Southern African Development Community (SADC) and the East African Community (EAC). With the upcoming of the SADC-EAC-COMESA Tripartite, Tanzania is impliedly linked to COMESA as well to export markets.

5.2 Supportive Policies and Legal Environment

National policies, regulatory frameworks, strategies and plans support the investment climate in Mara Region. The policies include: National Investment Promotion Policy (1996); National Agriculture Policy (2013); National Livestock Policy (2006); Sustainable Industrial Development Policy (SIDP) (1996-2020); National Trade Policy for Competitive Economy and Export-led Growth (2003); National Microfinance Policy(2000); National Forest Policy (1998); Bee Keeping Policy (1998); Small and Medium Enterprises Development Policy (2003); National Land Policy (1995); National Environmental Policy (1997); The Mineral Policy of Tanzania (2009); Tanzania Mining Industry Investor's Guide (2015); and Mara Region Authority Development Plans as well as the political will of the region to attract investors.

Major laws and regulations that guide investment promotion and activities include: 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); Environmental Impact Assessment (EIA) and Audit Regulations (Amendment), 2018; PPP Act (2010) and PPP Regulations (2011); and other sector Acts and relevant Mara Region by-laws.

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

5.3 Mode of Investment

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

The public-private partnerships (PPP) approach is a way to amalgamate public and private capital and expertise for public projects in which the private sector has interest in sharing ownership. The Public Private Partnership (Amendment) Act (2018) and PPP Regulations (2020) give areas of collaboration, which comprise of investment capital, managerial skills and technology.

Public-private community partnership (PPCP): This is a variant of PPP in that it includes communities/villages where the nature of a project requires that community resources (such as land) become part of a project, in which both the public (particularly local government authorities) and the private sectors are interested in investing.

Joint ventures: The Tanzanian Government encourages joint ventures between domestic firms or individuals and foreign investors. Many foreign firms have recently collaborated with the National Development Corporation (energy), Tanzania Petroleum Development Corporation (biofuels), and the National Housing Corporation (real estate ventures).

5.4 Facilitation: Processes and Requirements

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

Tanzania Investment Centre (TIC) is a one-stop agency of the Government of Tanzania established under the Tanzania Investment Act No. 26 of 1997 to promote, co-ordinate and facilitate investment in Tanzania. The Centre is a focal point for all investors and performs all liaison work for the investor from enquires right up to project start up. In order to avoid bureaucracy, the Government will establish a one-stop centre to facilitate tourism and other investments in Mara Region. 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 agency, TIC assists all investors to obtain permits, licences, approvals, and authorisation etc., required by other laws to set up and operate investment ventures in Tanzania. TIC contacts are: Executive Director, Tanzania Investment Centre, Plot no; 9A&B, Shaaban Robert Street, P O Box 938, Dar-es-Salaam, Tanzania, Telephone: 255 22 2113365/116328-32 Fax: 255 22 2118253, Email: information@tic.go.tz

Other institutions dealing with investment in Tanzania and Mara Region include Business Registration and Licensing Agency (BRELA), Tanzania Revenue Authority (TRA), Tanzania Electric Supply Company (TANESCO), Tanzania Bureau of Standards (TBS), Ministry of Industry and Trade (MIT), Tanzania Medicines and Medical Devices Authority (TMDA), Prime Minister's Office (Investment), water supply companies/authorities in respective regions, local government authorities in respective districts (on land issues), Ministry of Water (MW), Ministry of Agriculture (MA) and Ministry of Livestock and Fisheries (MLF).

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

5.5 Incentives

5.5.1 General Investment Incentives

Investors registered by Tanzania Investment Centre pursuant to Tanzania Investment Act, 1997 (TIA, 1997) are accorded various investment fiscal and non-fiscal incentives as stipulated in various applicable tax and other laws. Fiscal incentives under TIC include 100 percent import duty exemption on capital goods and 75 percent on deemed capital goods (regarding deemed capital goods, investor shall pay 25 percent of import duty due). These includes but not limited to;

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- Access to various services related to permits, licenses and approvals in the TIC One Stop Facilitation Centre.
 - The recognition of private property and protection against any non-commercial risks. Tanzania is an active member of the World Bank Foreign Investment Insurance wing, MIGA (Multilateral Investment Guarantees Agency). Likewise, Tanzania is a member of The International Centre for Settlement of Investment Disputes (ICSID) also a body affiliated to the World Bank.
 - Zero percent (0%) Import Duty on Project Capital Goods, Computers and Computer Accessories, Raw Materials and Replacement Parts for Agriculture, Animal Husbandry and Fishing, Human and Livestock Pharmaceuticals and Medicaments, Motor Vehicle in Completely Knocked down (CKD) form and inputs for Manufacturing Pharmaceutical Products.
 - Ten percent (10%) - Import Duty for Semi-processed/semi-finished goods).
 - Introduction of pay and refund scheme for excise duty paid on fuel purchased by eligible companies.
 - 100% capital expenditure to Mining & Agricultural sectors.
 - The Income Tax Laws allows 50% Capital allowances in the first year of use for Plant and Machinery used in manufacturing processes and fixed in a factory, fish farming; or providing services to tourists and in a hotel Thereafter, wear and tear rates apply to the remainder as below:
 - VAT Deferment granted on project capital Goods such as Plant & Machinery. However, the persons has to carry on an economic activity, keeps proper VAT records and file returns, has no Tax outstanding and VAT payable in respect of each unit of the Capital goods is twenty million Shillings or above.
 - Deemed capital goods that are eligible for exemption are specified depending on the project sector. Additional fiscal incentives may be granted to investments that meet strategic investor status provided for under Section 20 of TIA, 1997.

EPZA also provides incentive packages according to the Export Processing Zones Act No. 11 of 2002.

Revenue offices are available in every region to facilitate tax clearances and investors can register their businesses in Mara Region using TRA's online facility.

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 updates.

5.5.2 Investment Incentives in Mara Region

Local government authorities in Mara Region offer their own additional incentives. These include, among others, earmarking various parcels of land of various sizes for specific targeted investments. For example, land banks for investments in Bunda (5,622 ha) and Butiama (13,650 ha); Musoma Municipality has earmarked an export processing zone, a special economic zone and dedicated industrial zones.

Tarime Town Council has set aside land for industrial, commercial, agricultural and institutional development. All the councils offer support to investors to lease land, and to have access to infrastructure, labour and conducive environment for legal processes.

5.6 Access to Resources

Land for investment: 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. More information on acquisition of land for investment is available on www.ardhi.go.tz

Banking and financial services: The banking sector in Tanzania has been booming, growing in assets and in profits. There are four categories of banks oriented towards different markets and *clientèle* operating in Tanzania: local

private banks, regional banks, international banks and multinational banks. Overall, the outlook for the banking industry in Tanzania is very positive and there are appealing opportunities for newcomers to the sector as investors and borrowers. Banks are found in all districts of Tanzania.

Labour: Mara Region has surplus labour due to low employment. While some of the labour is unskilled, there are efforts to build a skilled labour force especially through vocational colleges. Investors are welcome to build skills development institutions in the region.

5.7 Inclusion and Participation of the Private Sector

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

Mara Region authorities will create an enabling environment through provision of pre-requisite infrastructure, incentives, formulation/review and enforcement of investment friendly policies, regulations, and procedures. Regional authorities will promote public-private partnerships (PPPs) and public-private-community partnerships (PPCPs), as well as facilitate joint ventures between potential investors and local private investors.

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

The Government will conduct various capacity building programmes to the community on how to utilise resources and how to participate in the identified strategic investments.

5.8 The Guide's Target Groups

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

The following are the specific beneficiaries of the guide:

- Investors, business owners and stakeholders, agriculture crop estates and medium-to-large farms as well as value adding and marketing entities intending to invest in Mara designated industry and business areas
- Ministry of Industry and Trade (MIT)
- Prime Minister's Office (Investment)
- Primary stakeholders across value chains, including individual entrepreneurs, importers and exporters of input and output factors, and agriculture crops and livestock keepers and fisher folks
- Government ministries, agencies, LGAs, EPZA, and state-owned enterprises (SOEs) (e.g. those responsible for agriculture, industries, trade, finance, and international cooperation)
- Academia/researchers in the Lake Zone and in Tanzania
- Umbrella organisations such as the Tanzania National Business Council (TNBC), Tanzania Chamber of Commerce, Industry and Agriculture (TCCIA), pension and provident funds investing in agriculture and industries, and other support institutions
- Institutions overseeing the management of quality and safety management issues, such as Tanzania Bureau of Standards (TBS) and Tanzania Medicines and Medical Devices Authority (TMDA)
- 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 Organization (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.

PART SIX

KEY CONTACTS IN MARA REGION

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

6.1 Key Websites

Office	Website
Mara Regional Secretariat	http://www.mara.go.tz
Musoma Municipal Council	http://www.musomamc.go.tz
Musoma District Council	http://www.musomadac.go.tz
Bunda Town Council	http://www.bundatc.go.tz
Bunda District Council	http://www.bundadac.go.tz
Tarime Town Council	http://www.tarimetc.go.tz
Tarime District Council	http://www.tarimedc.go.tz
Butiama District Council	http://www.butiamadc.go.tz
Serengeti District Council	http://www.serengetidc.go.tz
Rorya District Council	http://www.roryadc.go.tz

6.2 Key Contacts

6.2.1 Regional Commissioner's Office

Office	Post Office Box	Telephone/ Mobile Phone	E-mail
Regional Commissioner (RC)	299, Musoma	+255 28 2622305	ras@mara.go.tz
Regional Administrative Secretary (RAS)	299, Musoma	+255 28 2622305	ras@mara.go.tz

6.2.2 Musoma Municipal Council

Office	Municipal Director		E-mail
	Post Office Box	Telephone/ Mobile Phone	
Mayor	194, Musoma		info@musomamc.go.tz
Municipal Director	194, Musoma		info@musomamc.go.tz

6.2.3 Town Councils

LGA	Town Director		E-mail
	Post Office Box	Telephone/ Mobile Phone	
Bunda Town Council	219, Bunda	+255 28 2621773	info@bundatc.go.tz
Tarime Town Council	45, Tarime	+255 28 2690218	td@tarimetc.go.tz

6.2.4 District Councils

LGA	District Executive Director		E-mail
	Post Office Box	Telephone/ Mobile Phone	
Musoma District Council	344, Musoma	+255 28 2622163	ded@musomadc.go.tz
Bunda District Council	126, Bunda		ded@bundadc.go.tz
Rorya District Council	250, Tarime		mawasiliano@roryadc.go.tz
Serengeti District Council	176, Serengeti	+255 732 985408	ded@serengetidc.go.tz
Tarime District Council	16, Tarime	+255 28 2690518	ded@tarimedc.go.tz
Butiama District Council	1207, Butiama		ded@butiamadc.go.tz







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