



# United Republic of Tanzania

## DIAGNOSTIC TRADE INTEGRATION STUDY (DTIS) COUNTRY & TRADE OVERVIEW

**Population (2015)** 53,470,420  
**GDP per capita (2015):** \$878.98  
**GDP growth rate:** 6.4%  
 since 2003:

**Gross value added by economic activity**  
 (2015, % OF GDP)  
**AGRICULTURE: 31.05%**  
**INDUSTRY: 27.20%**  
 (INCL. MINING & EXTRACTIVES)  
**SERVICES: 41.75%**  
 (INCL. TOURISM)



**Doing Business ranking**  
 2017: 139 (+5 since 2016)  
 Time to import (\*16): 27 DAYS  
 Time to export (\*16): 8 DAYS  
**Services-to-goods export ratio**  
 2012/13: 54%  
 2005/06: 76%

### AGRICULTURE

AT LEAST  
**500,000**  
 TONS OF MAIZE  
 Was exported informally in 2014

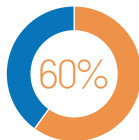
Up to **80%**  
 of Tanzania's  
 small-scale  
 (agricultural)  
 cross-border  
 traders are  
**women.**  
**70-80%**

= **80%**

AROUND **80%** OF TANZANIAN HOUSEHOLDS  
 DEPEND ON AGRICULTURE  
 FOR THEIR LIVELIHOOD

### TOURISM

Accounts for  
 60% trade in  
 services receipts



Contributes  
 nearly 12 %  
 of GDP

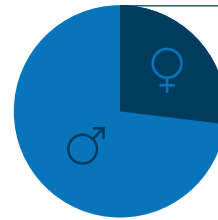
Tanzania's elephant population decline,  
 2009-2014: **60%**

In 2015 tourism generated  
 services receipt worth  
**\$2.2 billion**  
 + 467,000 direct &  
 1.3 million indirect **JOBS**

### EXTRACTIVE INDUSTRIES

In 2015, minerals  
 accounted for **24%** of total Tanzanian  
 exports, but only **4%** of GDP

Jobs in  
 Tanzanian  
 mining,  
 (2012 data)



**680,000**  
**Artisanal & small  
 scale mining**  
 (27% women)  
**Large-scale mining**  
**7,300**

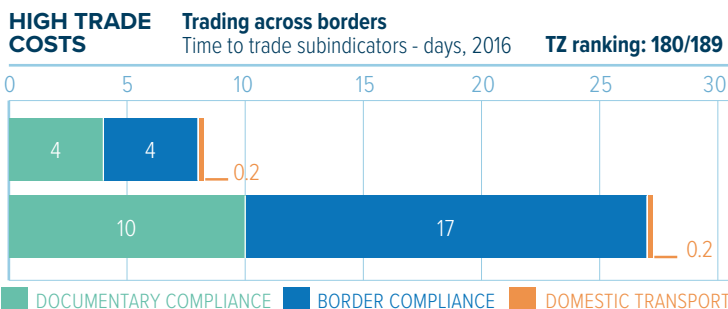
### ZANZIBAR

To start a  
 business  
 in Zanzibar : **10 procedures**  
**28 days**

tourism  
 supports  
 over **10%**  
 of all jobs in Zanzibar.

CLOVES ACCOUNT FOR ABOUT  
**50%**  
 OF ZANZIBAR'S **TOTAL EXPORTS**  
 AND PROVIDE A LIVELIHOOD TO  
**8,000+ FARMERS**

### BUREAUCRACY



### AGRICULTURAL EXPORT LICENSES

only issued in Dar es Salaam.  
 Smallholder farmers may have  
 to travel **over 1,000 km**  
 to obtain one (2010 data)

FULL DTIS: [mit.go.tz/dtis/](http://mit.go.tz/dtis/)

MORE ON TANZANIA: [enhancedif.org/en/country-profile/tanzania](http://enhancedif.org/en/country-profile/tanzania)





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DIAGNOSTIC TRADE INTEGRATION STUDY (DTIS)

## RECOMMENDATIONS 2017 UPDATE

### AGRICULTURE & AGRI-BUSINESS

#### CONSTRAINTS

Multiple & overlapping requirements



Introduce modern approaches, unify requirements & procedures across similar agencies



Centralized permit system



Decentralize system, & eliminate unnecessary permits

Closed markets for key crops



Eliminate official monopolies & single marketing channels – allow private sector engagement with small farmers

#### ACTIONS

### TOURISM

#### CONSTRAINTS

Lack of qualified professionals (including female) in many tourism-related fields



Support National Tourism College to access to technical training, including for women (Ministry of Finance funding)



Multiple permit requirements makes doing business more difficult



Establish one-stop shop for tourism registration, licensing & payments

Elephant poaching & illegal ivory trade



Community outreach & training for conservation & tourism in/around park areas

#### ACTIONS



### TRADE POLICY & TRADE FACILITATION

#### CONSTRAINTS

Difficult record keeping requirements, procedures & regulations

#### ACTIONS

Expand systems across regulatory agencies & provide training to agents

High trade costs, which are harder on small-scale traders & women.



Implement EAC STR & Charter for Cross-Border Trade



Many export restrictions



Phase out export taxes & bans

### EXTRACTIVE INDUSTRIES

#### CONSTRAINTS



Conflicting roles of State Owned Companies



Review responsibilities & create clear financial rules for state-owned companies

Poor skills & infrastructure, low access to finance & inconsistent trade & local content regulations



Expand vocational training & SME support programs with consistent regulations, duties & tariffs

Policy does not distinguish between different scales of mining operation & enforcement of existing rules lacking



Establish legal distinction, conduct awareness campaigns, empower Zonal Mining Offices, & introduce gender quotas for PMLs & ASM funding schemes

### ZANZIBAR

#### CONSTRAINTS



Difficult trade policy & tax environment, duplication & overlaps with mainland



Simplify tax procedures & systems between the island & mainland

Lack of competition on key crops (e.g. cloves); lack of diversification strategy



Open new market outlets – Diversify away from traditional sub-sectors

Lack of Zanzibar Tourism Strategy & Poor data collection capacity within Ministry of Tourism



Establish delivery unit within Ministry, to develop & implement tourism strategy. Train staff in & strengthen data collection systems



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WORLD BANK GROUP



Enhanced Integrated Framework  
Trade for LDC development

USE MORE OFTEN



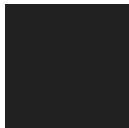
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USE LESS OFTEN



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