



# INVESTMENT CASES A SUMMARY FOR TANZANIA



With support from  
**Hand-in-Hand**  
Initiative

Hand in Hand Initiative in Tanzania  
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## INTRODUCTION

Under the Hand in Hand Initiative, the Ministry of Agriculture of the Government of the United Republic of Tanzania, prioritized Soybean, Sunflower and Wheat value chains based on existing national priorities in the agriculture sector. These value chain investments are designed to attract agricultural investment to fill the market gap in terms of quality seeds, modern storage facilities, state-of-the-art agricultural extension services and the increasing number of processing facilities needed in these agricultural value chains.

Blessed with arable land that is yet to be utilized to its full potential, Tanzania is already investing heavily in road infrastructure, communication facilities, energy and water to ensure a conducive environment for both internal and external agricultural investors in the agriculture sector.

Surrounded by eight countries, three big lakes with some of the neighbouring countries and three ports facing the Indian Ocean, Tanzania is strategically located to increase access to both regional and international markets. This is in addition to the growing internal market.

Tanzania welcomes you to invest in these value chains and others with the potential of increasing income and improving the livelihoods of subsistence farmers who are ready to transition into commercial farming.

Below is the summary of the three prioritized value chain investments targeting the Ruvuma region in the Southern part of the country for the Soybean value chain and the Manyara region in the North for the Wheat and Sunflower value chains.

## 1. WHEAT VALUE CHAIN

Tanzania's agricultural sector is diverse, with a range of primary food and cash crops. Despite producing around 70,000 MT of wheat annually, the country heavily depends on imports, which add up to nearly 1 million MT every year. Over 90% of the domestic production is concentrated in the Northern and Southern Highlands, particularly in regions such as Kilimanjaro, Arusha, and Manyara.

Wheat ranks fourth in cereal consumption in Tanzania, trailing maize, cassava, and rice. However, there is an observed surge in wheat consumption, particularly in urbanized regions, accounting for 80% of the total intake. By 2023/24, wheat consumption is projected to rise to 1.175 million MT due to increasing demands in urban and semi-urban centres like Dar es Salaam. Globally, developing nations are set to witness a 60% growth in wheat demand by 2050. With Africa's consumption expected to hit 76.5 million MT by 2025, Tanzania, which has immense untapped potential, can lead in wheat production, especially given global geopolitical situations like the Russia-Ukraine conflict.

Investing in Tanzania's wheat production offers multiple benefits, such as reducing import reliance, strengthening economic stability, enhancing food security, and providing employment. However, the sector faces challenges such as insufficient processing facilities, and low adoption rates of advanced technology, discouraging smallholder farmers. Investments in seed multiplication and processing can attract more farmers and boost production profitability.

Ultimately, prioritizing investments and addressing these challenges can strengthen Tanzania's agricultural economy, aligning with national development goals and addressing rising wheat demand both domestically and regionally.

## Why Invest in the Wheat Value Chain in Tanzania?

- **Increasing Demand for Wheat Products:** Tanzania's growing population, urbanization, and changing dietary habits have led to a rising demand for wheat-based products like bread, pasta, and pastries.
- **Reduced Dependence on Imports:** Tanzania currently imports a significant portion of its wheat to meet domestic demand. Investing in the local wheat value chain can help reduce this dependency and enhance food security.
- **Favourable Agro-climatic Conditions:** There are regions in Tanzania with very suitable agro-climatic conditions for wheat cultivation. Properly managed, these areas give assurance to good and quality wheat yields.
- **Diversification of Agricultural Activities:** Investing in the wheat value chain contributes to diversifying the agricultural sector, which helps to stabilize incomes and reduce vulnerability to fluctuations in other commodities.
- **Job Creation and Poverty Alleviation:** Wheat farming and related activities provide employment opportunities to women and youth, especially in rural areas. This has a positive impact on the improvement of livelihoods and poverty reduction.
- **Potential for Value Addition:** Beyond wheat farming, there are opportunities for value addition through processing, milling, and bakery businesses. This can lead to higher profitability compared to raw commodity production.
- **Access to Export Markets:** If the wheat production reaches surplus levels, Tanzania is ideally positioned to take advantage of export opportunities in neighbouring countries or even further afield.
- **Government Support and Policies:** The Tanzanian government provides incentives, subsidies, and policies that support wheat farming. This includes favourable tax policies such as 100% capital allowance on expenditure incurred on plant and machinery, subsidies on inputs, and access to credit.
- **Environmental Sustainability:** Properly managed wheat farming practices have the potential to be part of a sustainable agricultural system. Conservation agriculture techniques, like minimum tillage and crop rotation, can help maintain soil health and reduce environmental impacts in the country and the global arena.

### Prioritized Investments Summary: Wheat Value Chain

#### A. Investments in Wheat Seeds Multiplication

An investment is proposed to set up a wheat seed multiplication centre in Manyara to tackle the issue of insufficient quality seeds, crucial for boosting wheat productivity. Quality seeds play a key role in sustainably elevating wheat yields. The primary objective of this initiative is to make high quality wheat seeds more accessible and affordable for farmers, reduce seed expenses, and enhance yields.

Located in Manyara, the seed multiplication centre will not only be beneficial for local farmers around the Manyara region but is also strategically positioned to cater to seed demand from other wheat producing regions and neighbouring countries like Kenya and Uganda.

The Ministry of Agriculture estimates an annual wheat seed requirement of 48,000 MT, and therefore the government is targeting annual seed production of 55,000 MT which will be able to service the current needs.

## B. Investments in Modern Storage Facilities

The proposed investment involves constructing storage facilities for short and long-term storage of wheat to benefit farmers in the Manyara region. These facilities will enable producers to store their produce and release it to the market when prices are favourable, reducing the current need to sell immediately after harvest.

By encouraging farmers to store their wheat and providing access to banking services and individual or collective storage options, the investments aims to prevent losses and enable farmers to secure better prices. With an estimated annual wheat grain harvest of 36,568 MT, the need for additional storage facilities is evident, as currently there are no storage facilities dedicated to wheat.

Storage facilities will be strategically located near the main wheat-producing districts in Manyara, to facilitate aggregation, grading, drying, packing, and transportation of wheat, ensuring proper preservation and improved market opportunities.

## C. Investments in Wheat Processing Facilities

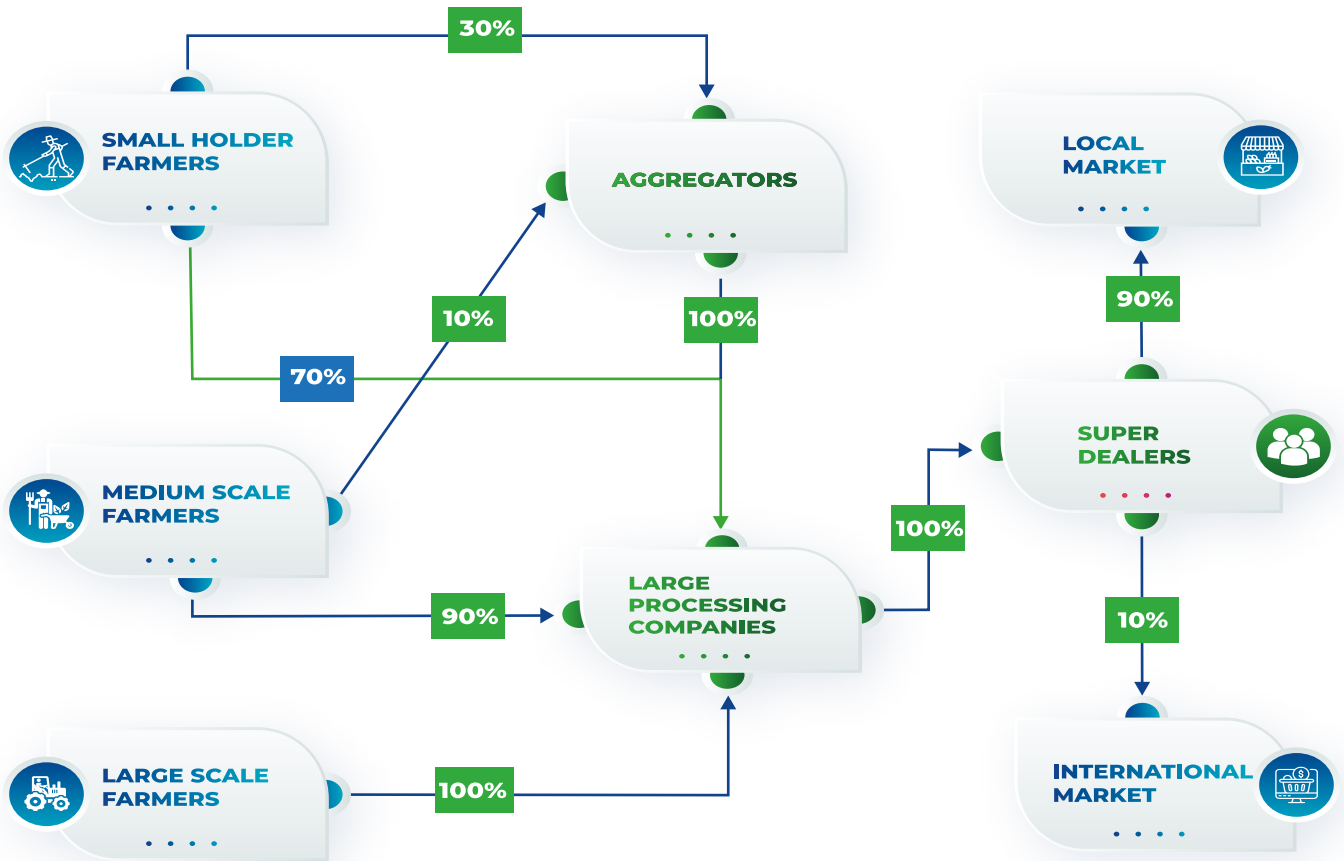
This investment opportunity involves the establishment of a wheatflour processing factory close to wheat producing areas with many smallholders and large-scale farmers. The facility will eliminate the need to transport wheat to far locations for processing, creating a competitive market and giving farmers more price flexibility.

The processing plant will focus on producing high-quality wheat flour and generate valuable by-products like pollard and chaff. The plant's daily processing capacity is aimed to be about 60 MT, including other stages such as cleaning, conditioning, milling, and sieving of Wheat grains to ensure quality and better price of the final products. The resulting flour is in high demand, has wider food applications, while by-products will be utilized as raw materials in animal feed formulations or other applications, enhancing value extraction and profitability.

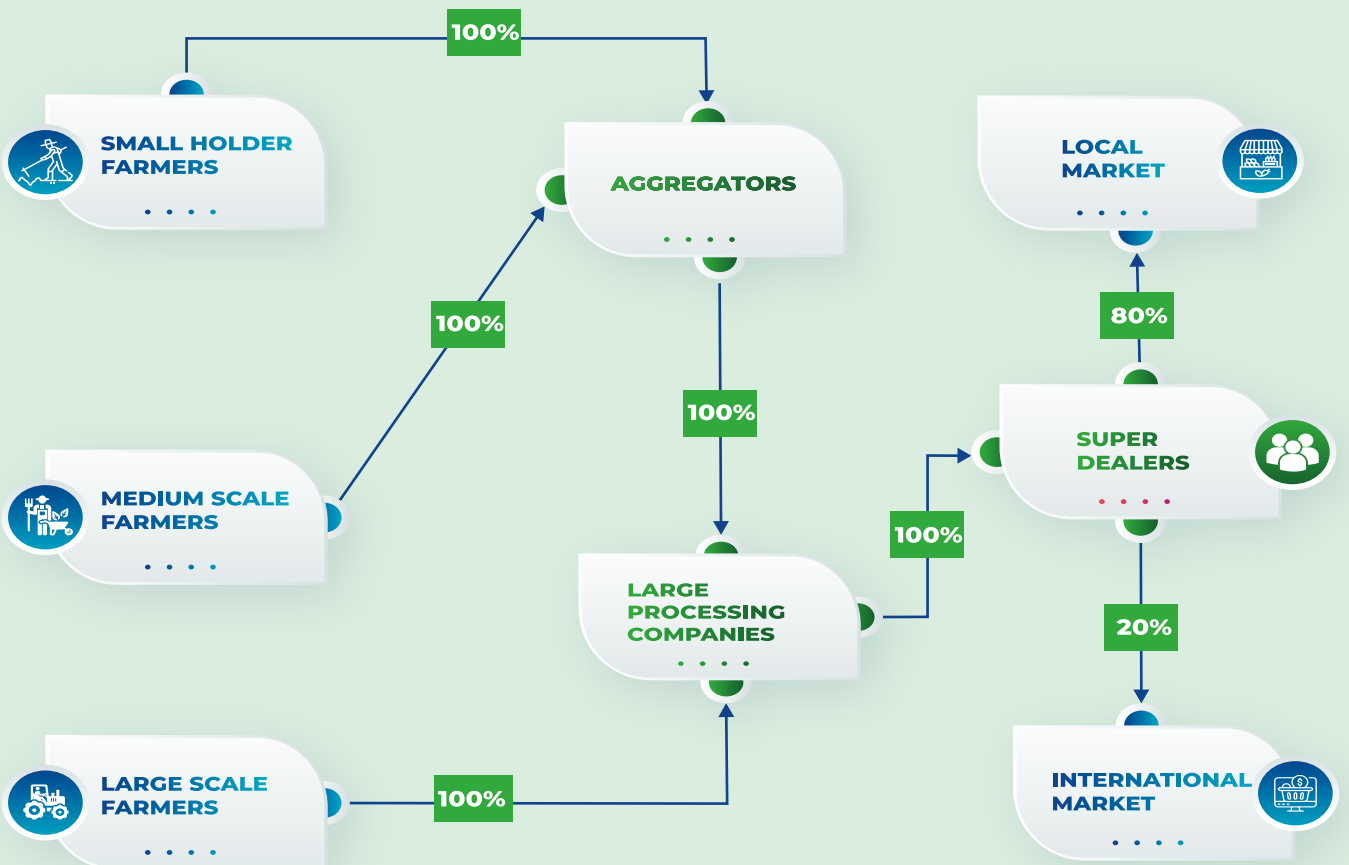
This model not only ensures a sustainable source of high-quality wheat flour in the region and the country but also supports the overall growth and development of the wheat subsector by creating a robust market for Wheat farmers.

Profitability Indicators: Prioritized Wheat Value Chain Investments				
Investment Pillars	Investment (USD)	NPV (USD)	IRR	PBP (Years)
Seed Multiplication (6)	3,776,666.65	269,964.81	9.75%	4.23
Storage Facilities (12)	1,555,230.80	125,785.23	10.11%	3.03
Processing Facilities (6)	10,271,743.61	863,386.46	10.20%	3.13
<b>Total</b>	<b>15,603,641.06</b>	<b>1,259,109.50</b>		
Socio- Economic Impact				
Production and Productivity	Increased at average rate of 4%			
Profitability	Increased at average rate of 14.5%			
Employment Generation	Increased at 16%			
Environmental Impact				
GHG Emissions	Reduced per hectare by : 0.59 tCO2-eq.			
Food Losses	Declined overall by 11%			

## Current Wheat Value Chain Commodity Flow



## Planned Wheat Value Chain Commodity Flow



## 2. SUNFLOWER VALUE CHAIN

The global sunflower oil market is witnessing a significant increase in demand due to its health benefits, and versatility. Suited to a range of agrifood uses, Sunflower oil consumption has been increasing steadily in Tanzania, driven by factors such as increased awareness of healthy diets and the need for low saturated fat edible oil alternatives.

According to Tanzania's Food and Agriculture Delivery, Dakar 2 Compact; the production of edible oil in the country is approximately 290,000 tons compared to the demand of more than 650,000 tons per year, which leads to an import bill of more than 450 billion shillings equivalent to US\$180,000 a year. It is based on this the government has set a production target of 3 million tons of Sunflower by 2025, from which 1 million tons can be processed and sold locally and in export markets. Currently, locally produced Sunflower oil stands at USD 2.4 per litre while imported stands at USD 3.2 per litre.

The Ukraine war presents an opportunity for Tanzania to tap into regional markets for the exportation of sunflower products to East African countries, especially Kenya and Ethiopia, which heavily depend on sunflower oil imported from Ukraine. From 2017 to 2021, Kenya and Ethiopia imported sunflower oil worth USD \$26 million and USD \$56 million respectively, of which 76% and 84% respectively were supplied by Ukraine.<sup>29</sup> Tanzania has refocused on increasing sunflower seed production by 100,000 MTs in the next five years to meet the growing demand in the local and regional markets.<sup>30</sup> The government and processors can take this advantage to invest more incentives that spur increased production. This is according to Tanzania sunflower market assessment of 2022 by Farm Africa.

Tanzania stands out as a country with huge potential for cultivating Sunflower oil seeds, particularly in the Central Corridor and Manyara region. Sunflower cultivation in Tanzania benefits both small and medium-scale farmers and large-scale farmers involved in seed multiplication. The sector has the potential to meet the country's demand towards attaining an affordable and healthier cooking oil for all. However, challenges such as labour intensive farming methods, limited access to quality seeds, and inadequate refining facilities are impeding the full potential of the Sunflower sector to be realized.

It is because of this, an investing in the Sunflower value chain in Tanzania offers a promising return on investment. In addition to an assured return on investment, an investment in the Sunflower value chain also provides increased access to affordable and nutritious cooking oil, increased availability of raw materials for livestock feed production, improved livelihood, and income in the face of weather variation and climate change, and an employment opportunity to women and youth.

The strategic location of Tanzania which is surrounded by eight neighbouring, big lakes of Africa and the Indian Ocean, increases access to regional and global markets for Sunflower oil, by-products and other value added products.

### Why Invest in Sunflower Value Chain in Tanzania?

- **Abundant Natural Resources:** Tanzania has favourable agro-climatic conditions for sunflower cultivation. The country's diverse geography and climate zones make it suitable for sunflower production, which is a critical component of the value chain.
- **Growing Demand for Edible Oils:** With an increasing population and changing dietary habits, there is a rising demand for edible oils in Tanzania. Sunflower oil is a popular choice due to its health benefits and versatility in cooking.
- **Economic Diversification:** Investing in the sunflower value chain contributes to economic diversification. It supports the development of the agricultural sector, reducing dependency on a single crop or industry.

## Why Invest in Sunflower Value Chain in Tanzania?

- **Job Creation:** Sunflower farming and processing activities create employment opportunities, especially in rural areas. This can have a positive impact on poverty reduction and local economic development.
- **Potential for Value Addition:** Beyond sunflower cultivation, there are opportunities for value addition through processing, refining, and packaging. This can lead to higher profit margins compared to raw commodity production.
- **Export Potential:** Tanzania has access to regional and international markets through organizations like the East African Community (EAC) and the African Continental Free Trade Area (AfCFTA). This provides avenues for exporting sunflower products to neighbouring countries and beyond.
- **Government Support:** The Tanzanian government offers incentives, subsidies, and policies that support agricultural activities, including sunflower farming. This includes favourable tax policies such as 100% capital allowance on expenditure incurred on plant and machinery, subsidies on inputs, and access to credit.
- **Sustainability and Environmental Benefits:** Sunflower farming can be part of a sustainable agricultural system. Proper farming practices, such as crop rotation and agroforestry, can help maintain soil health and reduce environmental impacts.
- **Local Community Development:** Investing in the sunflower value chain will lead to social development in the surrounding communities. This can be attained through improved infrastructure, access to education, and healthcare facilities as part of corporate social responsibilities.

## Prioritized Investments Summary: Sunflower Value Chain

### A. Investment in Sunflower Seeds Multiplication

The proposed investment aims to establish seed multiplication units to address the issue of inadequate quality seeds in the sunflower industry. By developing a robust seed sector, the model seeks to enhance sunflower yield and promote sustainable productivity growth. In the Manyara region, with a potential cultivation area of 260,059 hectares, the current national annual seed demand stands at 12,000 MT, which accounts for the deficit of 10,660 MT. Currently, the country's production capacity of Sunflower seeds is only 1,340 MT annually.

Investment in Sunflower seed multiplication aims to fill the market gap in Sunflower seed availability and accessibility to Sunflower producers in the country. This will contribute to increasing income and profitability across the value chain and to primary producers who are mainly small-scale farmers. This is also projected to boost the increase in Sunflower production and increase the availability of Sunflower oil for a healthy life.

Based on this, there is a need for increased investment in Sunflower seed multiplication units within the country and Manyara region to cater for the rising needs, guarantee the supply of high-quality seeds, and foster the growth of the Sunflower value chain in the country.

### B. Investment in the State-of-the-Art Grain Storage Facilities

The proposed model aims to support an increased investment in state-of-the-art storage facilities for all year-round Sunflower oil production in the country. An increased investment in seed multiplication, will contribute to increased accessibility of quality and affordable seeds to farmers and thus a need for increased storage facilities.

Increased investment in the state-of-the-art storage facility is much needed to address the challenge of seasonal availability of Sunflower seed grains to feed processing industries in the country. It is based on this, and the anticipated increase in production following investment in seed multiplication storage facilities is needed in the seven districts of the Manyara region to support improved livelihoods through investments in the Sunflower value chains.



These facilities would serve not only as storage but also as aggregation, grading, packing, and transportation centres, aiming at reducing pre-refinery losses and enabling farmers to obtain better prices for their sunflower crops.

Approximately 235,071.6 MT of Sunflower Grain is anticipated to be harvested annually to feed processing facilities for Sunflower edible oil in the country. To ensure that the harvest is appropriately utilized and used not only during the harvest season but throughout the year, increased investment in state-of-the-art storage facilities and small to medium scale processing industries for small-scale farmers is unavoidable.

Therefore, increased investment in storage facilities within the Manyara region and other areas with untapped agricultural potential is essential for increased income and improved livelihood of the communities in Tanzania.

### C. Investment in Sunflower Oil Refineries

Investment in Sunflower oil refineries aims to address the challenge of inadequate Sunflower oil refineries within the Manyara region and other areas with a high number of Sunflower producers in the country. The lack of a sunflower double refinery in the Manyara region presents an opportunity for value-added Sunflower products with increased market value not only within the region but also in other regions such as the Tanzania capital city of Dodoma.

Focusing on the Manyara region in Northern Tanzania, most refineries are at a small-scale level with inadequate capacity to attain high-value Sunflower oil as needed by the larger market. A large refinery facility in the nearby region is also inadequate to accommodate all the Sunflower that is being produced at the end of each harvest season. It is a result of this that most farmers are obliged to sell some of their harvest at a giveaway price to avoid total loss.

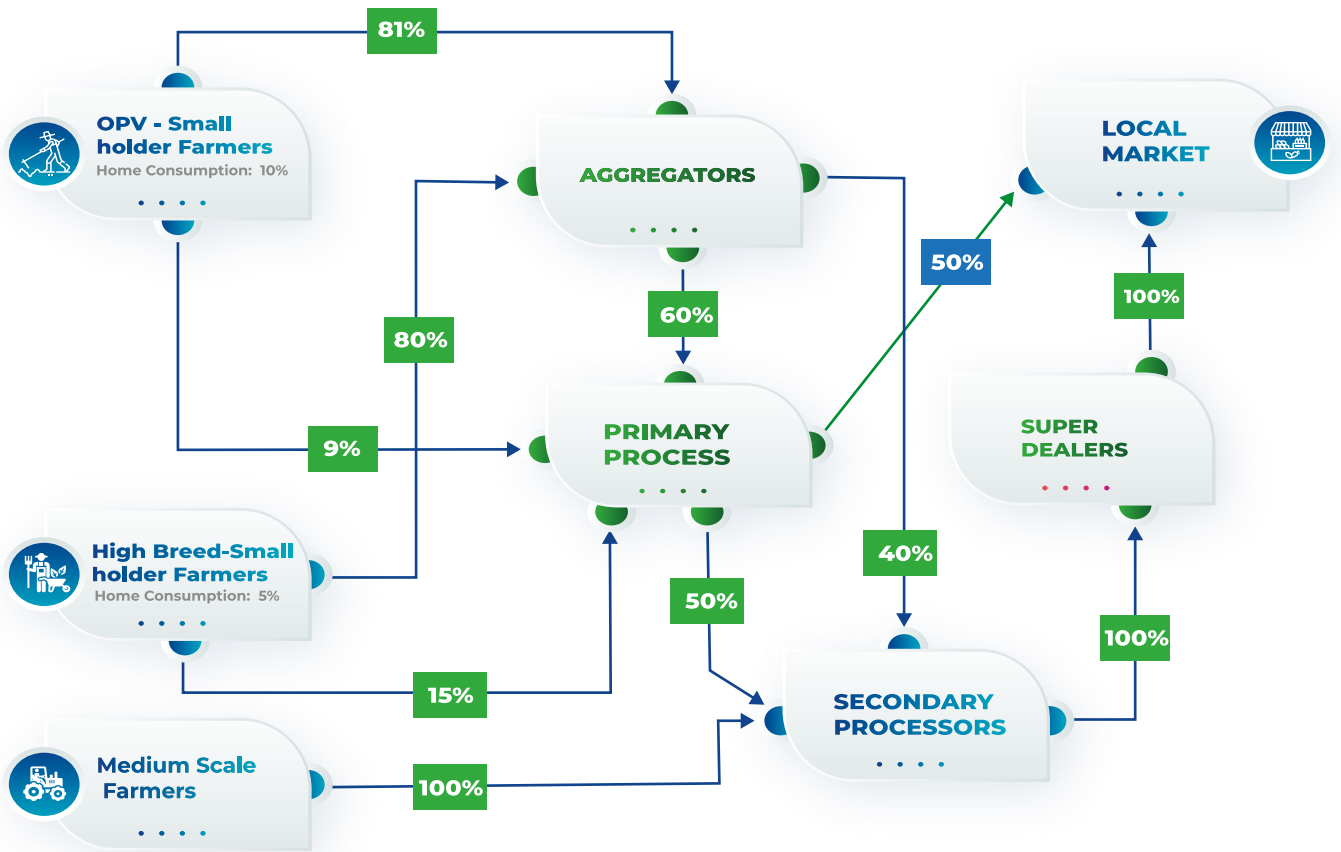
Increased investment in the Sunflower oil refinery has therefore emerged as an important investment area among the Sunflower agricultural value chain stakeholders to ensure the continued sustainability of the sector and adequate contribution to the improved livelihoods of the value chain actors in Tanzania. This would meet the growing demand for refined Sunflower oil, create jobs, stimulate economic growth, and reduce dependence on imported oils.

The proposed investment involves setting up processing plants to perform essential refining processes such as degumming, alkali refining, decolonization, deodorization, and dewaxing. These processes are meant to result in a refined sunflower product with a lighter colour, high nutritional value, and a pleasant taste for enhanced value and quality of the produced Sunflower oil.

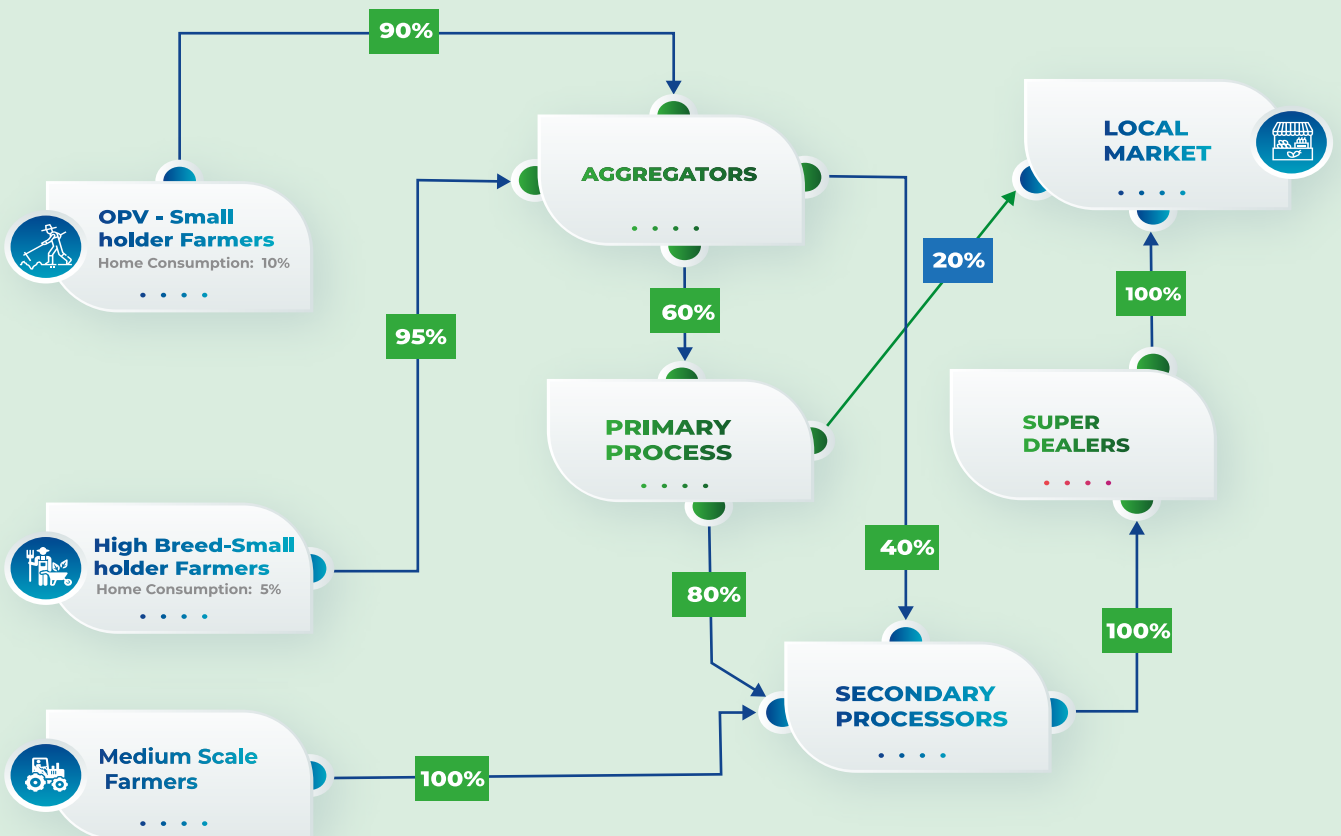
Profitability Indicators: Prioritized Sunflower Investments				
Investment Pillars	Investment (USD)	NPV (USD)	IRR	PBP (Years)
Seed Multiplication (6)	1,083,618.49	56,185.92	9.27%	3.83
Storage Facilities (42)	5,443,307.69	440,248.30	10.11%	3.03
Refinery Facilities (42)	45,553,388.63	3,605,977.54	10.08%	3.25
<b>Total</b>	<b>52,080,314.81</b>	<b>4,102,411.76</b>		
Socio- Economic Impact				
Production and Productivity	Increased at average rate of 79%			
Profitability	Increased at average rate of 48%			
Employment Generation	Increased at 81%			
Environmental Impact				
GHG Emissions	Reduced per hectare by 0.076 tCO <sub>2</sub> -eq.			
Food Losses	Decreased by 7.8%			

<sup>1</sup> Double refinery – for the production of double refined oil. Sunflower seeds go through a double refining process to ensure purity and superior taste. This oil has a light texture and a high smoking point, making it suited for deep frying and high-temperature cooking.

## Current Sunflower Value Chain Commodity Flow



## Planned Sunflower Value Chain Commodity Flow



### 3. SOYBEAN VALUE CHAIN

Soybean production in Tanzania has experienced significant growth in recent years due to increased awareness of healthy diets for human consumption and as an ingredient for livestock feed formulation. Over the past decade, soybean production in Tanzania has steadily risen from 8,100 metric MT in 2012 to 25,900 metric MT in 2022. A study released by ReportLinker, a Research and Development Organization, estimates an increase of Soybean production in Tanzania to reach 32,310 MT by 2026. This is a growth of an average rate of 4.5% each year.

The nutritional value and versatile applications of Soybean make it an important agrifood value chain for investing in Tanzania. An increasing demand for Soybean-based products for both human and livestock feed is still challenged by inadequate investment in Soybean processing facilities in the country.

The Ruvuma region, despite being known for its high production of Soybean in the country, still relies on exporting most of its produced harvest for processing to other regions or export markets. Considering the health benefits of Soya as a readily available plant-based high protein food protein for both human and livestock feed, more local value addition and investment along the Soybean value chain are needed.

Inadequate access to good and quality seeds, inadequate use of good agricultural practices, limited access to agricultural technologies and inputs such as inoculants and few Soybean processing facilities are key challenges facing agricultural stakeholders along the Soybean value chain in Tanzania.

Increased investment in Soybean seed multiplication, state-of-the-art agricultural extension services tailored to sustainable Soybean production and the establishment of more Soybean processing facilities are key prerequisites for increased productivity and income. Increased investment in the targeted areas is being promoted to potential investors and development partners for increased income and livelihood of Soybean farmers in Tanzania.

#### Why Invest in the Soybean Value Chain in Tanzania?

- **Growing Demand for Protein:** As the population grows and dietary habits change, there is an increasing demand for protein-rich foods. Soybeans play a significant role in meeting this demand, both for human consumption and as animal feed.
- **High Nutritional Value and Versatility:** Soybeans are rich in protein, making them a valuable food source. They are used in a wide range of products including animal feed, cooking oil, tofu, and various processed foods.
- **Export Potential:** Tanzania has access to regional and international markets through organizations like the East African Community (EAC) and the African Continental Free Trade Area (AfCFTA). This provides avenues for exporting soybean products.
- **Government Support:** The Tanzanian government offers incentives, subsidies, and policies that support agricultural activities, including soybean farming. This includes favourable tax policies such as 100% capital allowance on expenditure incurred on plant and machinery, subsidies on inputs, and access to credit.
- **Diverse Market Opportunities:** Soybeans can be processed into various products, including soybean oil, soy milk, tofu, and soy-based meat substitutes. This diversity in end products provides multiple market channels and revenue streams.
- **Economic Diversification:** Investing in the soybean value chain contributes to diversifying the agricultural sector. This helps reduce the country's dependency on a single crop or industry, making the economy more resilient to market fluctuations.

<sup>2</sup> <https://www.reportlinker.com/report-summary/search/726255?keywords=Soybean>

- » **Employment Opportunities:** Soybean farming and processing activities create employment opportunities, especially in rural areas targeting women and youth. This contributes to the overall goal of the country on poverty reduction and local economic development.
- » **Environmental Sustainability:** Soybean farming, when practised sustainably, can be part of a balanced agricultural system. Proper practices, like crop rotation and conservation agriculture, can maintain soil health and reduce environmental impacts.
- » **Potential for Value Addition:** Beyond soybean farming, there are opportunities for value addition through processing, oil extraction, and the production of soy-based products. This can lead to higher profit margins compared to raw commodity production.

## Prioritized Investments Summary: Soybean Value Chain

### A. Investment in Soybean Seeds Multiplication

Investment in soybean seed multiplication is essential to improve access to quality Soybean seeds for Soybean farmers in the country. Limited or no access to quality seeds based on different agro-climate conditions in the country is limiting the capacity of most farmers to attain optimal productivity. Access to high-quality seeds is crucial for optimizing yields and achieving sustainable growth in the soybean industry. By increasing investments in Soybean seed multiplication, Soybean farmers can achieve optimal productivity for increased income and profitability.

Increased investment in Soybean seed multiplication will not only meet the seed demand but also promote the expansion of soybean farming in other regions of the country with the potential for Soybean cultivation.

This will lead to increased production, improved returns and food security, and more economic opportunities for farmers. By prioritizing the availability of quality seeds, the model aims to support farmers in maximizing their yields and driving the growth of the soybean industry in the Ruvuma region.

### B. Investment in the State-of-the-Art Soybean Extension Services

Investment in state-of-the-art agricultural extension services is needed to support farmers transitioning from subsistence to commercial agricultural production. Investment in agricultural extension services is not only required in the Soybean value chain but also in other agricultural value chains for increased productivity and income.

There is currently an inadequate number of agricultural extension officers to provide services for the number of farmers in need. A market opportunity therefore exists for an innovative state-of-the-art agricultural extension service for increased productivity and income.

In the Soybean value chain, especially in the Ruvuma Region of Southern Tanzania, most farmers are still relying on the use of traditional seeds and limited use of agricultural inputs and machinery for their production. Despite this, the region is still renowned for the high production of Soybeans in the country.

Focusing on the opportunity, an investment in agricultural extension services aims to offer a combination of traditional, mobile and internet based establishment agricultural extension services that are market oriented for increased productivity and income. These services are meant to support farmers with specialized technical advice, access to agriculture inputs and machinery, value addition and market linkages. These services are vital in improving agricultural productivity by offering guidance on soybean cultivation techniques, sharing new research findings, and addressing water management, weed control, pest management, and disease prevention.

By helping farmers increase their yields, the extension service provider will be compensated based on a commission structure tied to farmers' revenues. This arrangement ensures that the provider is fairly rewarded for their contribution to enhancing farmers' productivity and overall yields. This model is also in line with the Government's Building Better Tomorrow (BBT)-Youth Initiative in Agribusiness practised through block farming.

Through the BBT, youth trained on the state of the Agri-Soybean value chain extension services would be providing the required agricultural extension service to farmers and contributing to their income. This way an investment in agricultural extension services investment will also be contributing to addressing unemployment challenges faced by many youth and women in Tanzania.

## C. Investment in Soybean Processing Facilities

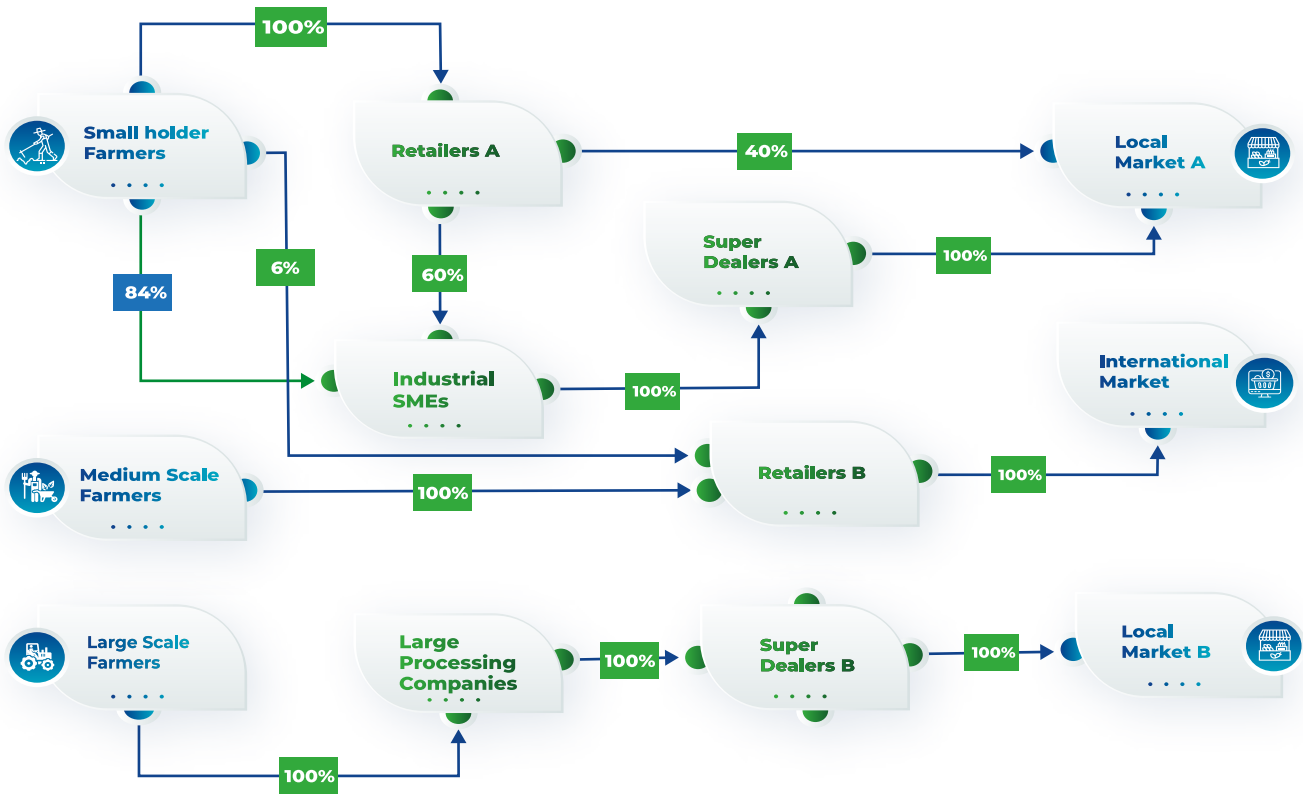
Investment in Soybean processing facilities aims to add value to Soybean that is being produced but not widely consumed as food by most Tanzanians. The key challenge is limited access to technologies for breaking elements in the Soybean to make it more edible and a limited number of Soybean process facilities in the country especially for human consumption.

Instead of focusing solely on logistics and services, the goal is to convert produced Soybeans into processed products or by-products with longer shelf lives with higher market value for income and improved livelihood of the value chain actors. This model also takes into account an increased need for Soybeans as a source of raw materials for animal feeds. Currently, most of the Soybean cake used in animal feed is imported into the country.

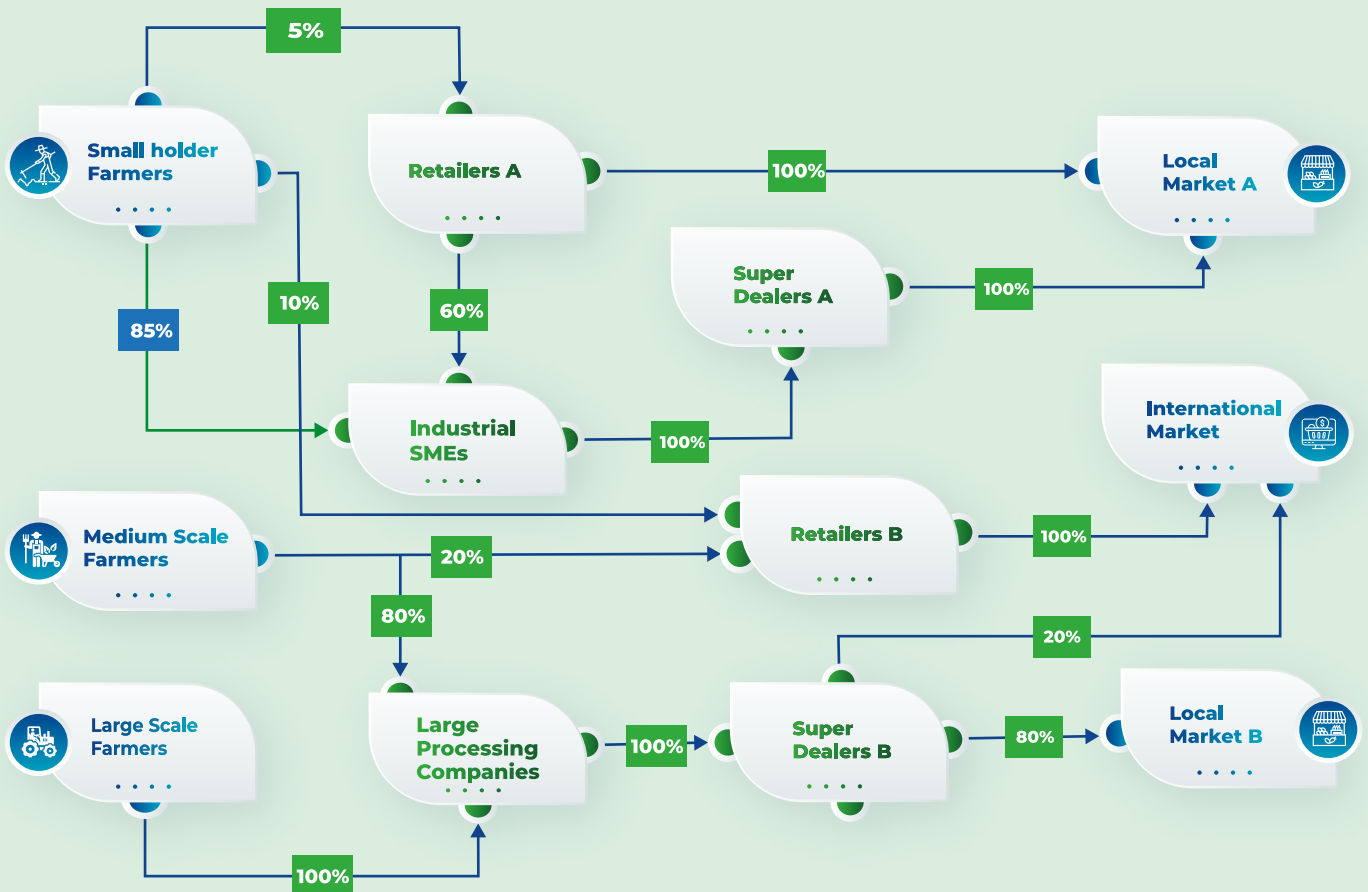
To complement prioritized investment in Soybean seed multiplication and state-of-the-art extension services, increased investment in Soybean processing facilities is an important investment for a sustainable Soybean value chain in Tanzania. A decentralized approach to establishing processing facilities is being proposed to ensure market accessibility, and affordable market prices and foster local economic development based on the anticipated high productivity of up to 3 MT per hectare.

Profitability Indicators: Prioritized Soybean Investments				
Investment Pillars	Investment (USD)	NPV (USD)	IRR	PBP (Years)
Seed Multiplication (6)	2,677,208.23	64,321.3	8.57%	3.45
Extension services (6)	848,974.37	61,016.32	9.93%	3.82
Extension services (6)	848,974.37	61,016.32	9.93%	3.82
Processing Facilities (6)	3,846,615.37	116,544.42	10.39%	3.20
<b>Total</b>	<b>7,372,797.96</b>	<b>241,882.05</b>		
Socio- Economic Impact				
Production and Productivity	Increased at average rate of 87%			
Profitability	Increased at average rate of 144%			
Employment Generation	Increased at 43%			
Environmental Impact				
GHG Emissions	Reduced per hectare at 0.26 tCO2-eq.			
Food Losses	Decreased by 18%			

## Current Soybean Value Chain Commodity Flow



## Planned Soybean Value Chain Commodity Flow





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