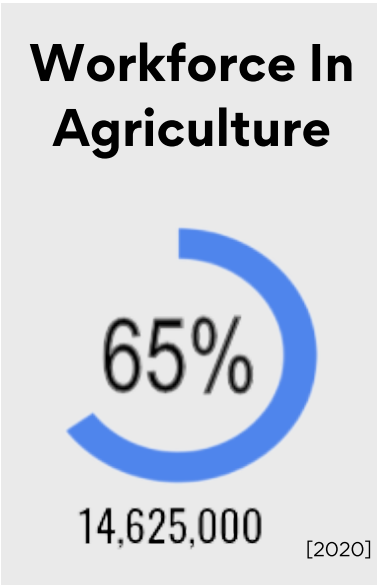
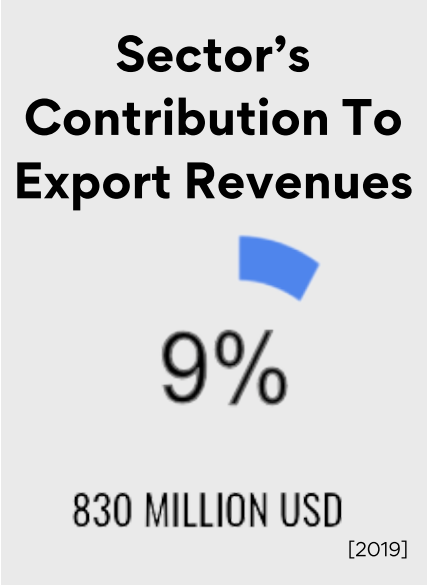
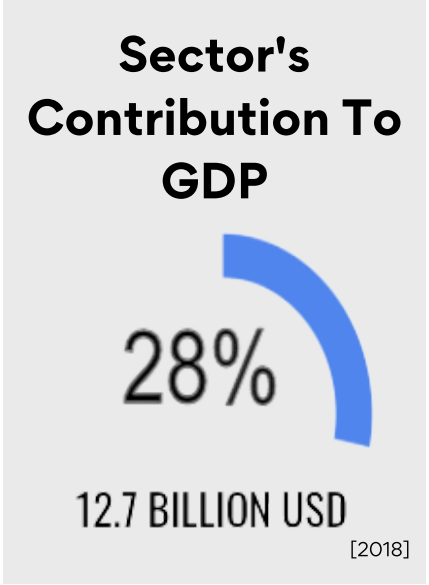
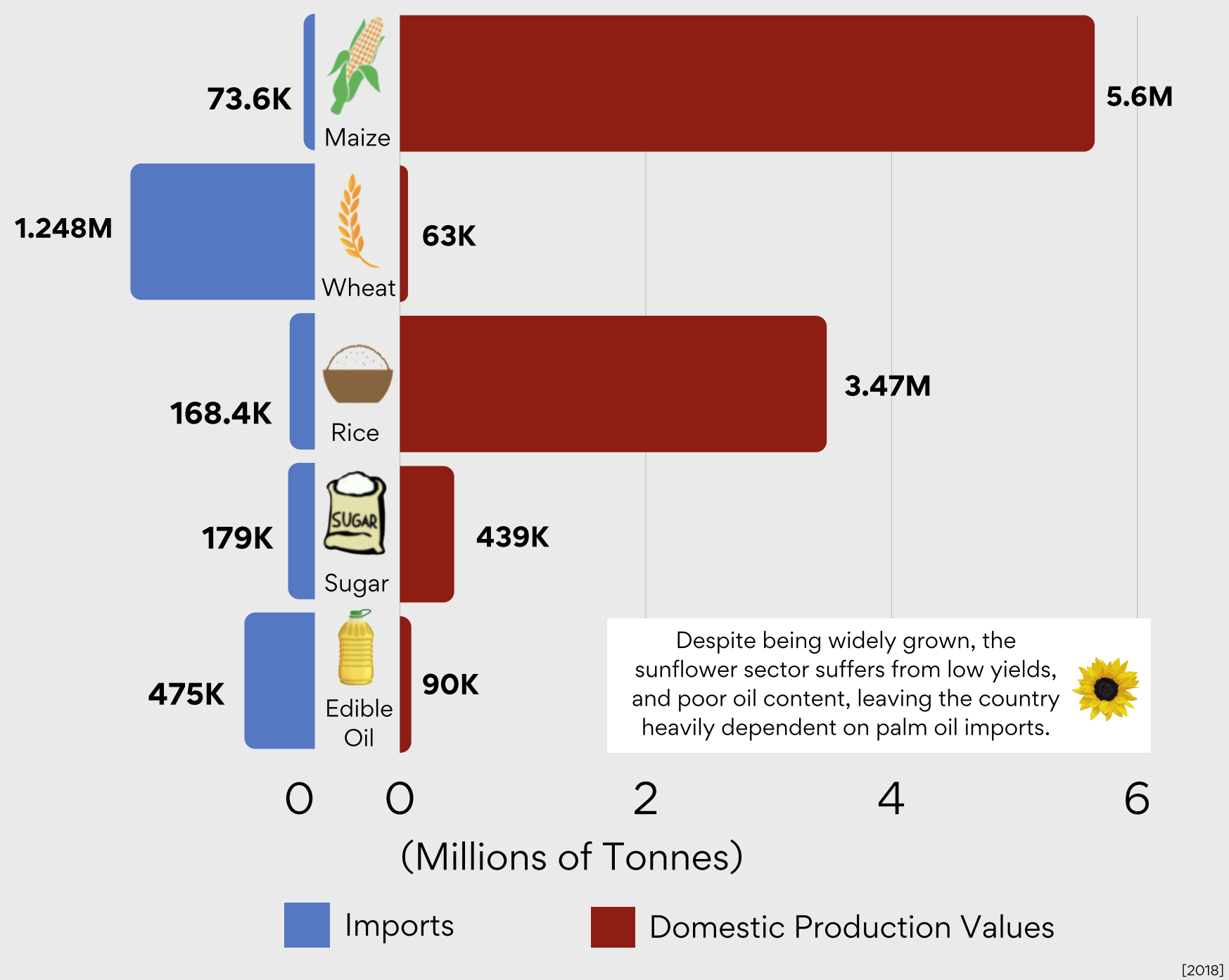




AIA SNAPSHOT: TANZANIA'S AGRICULTURAL SECTOR



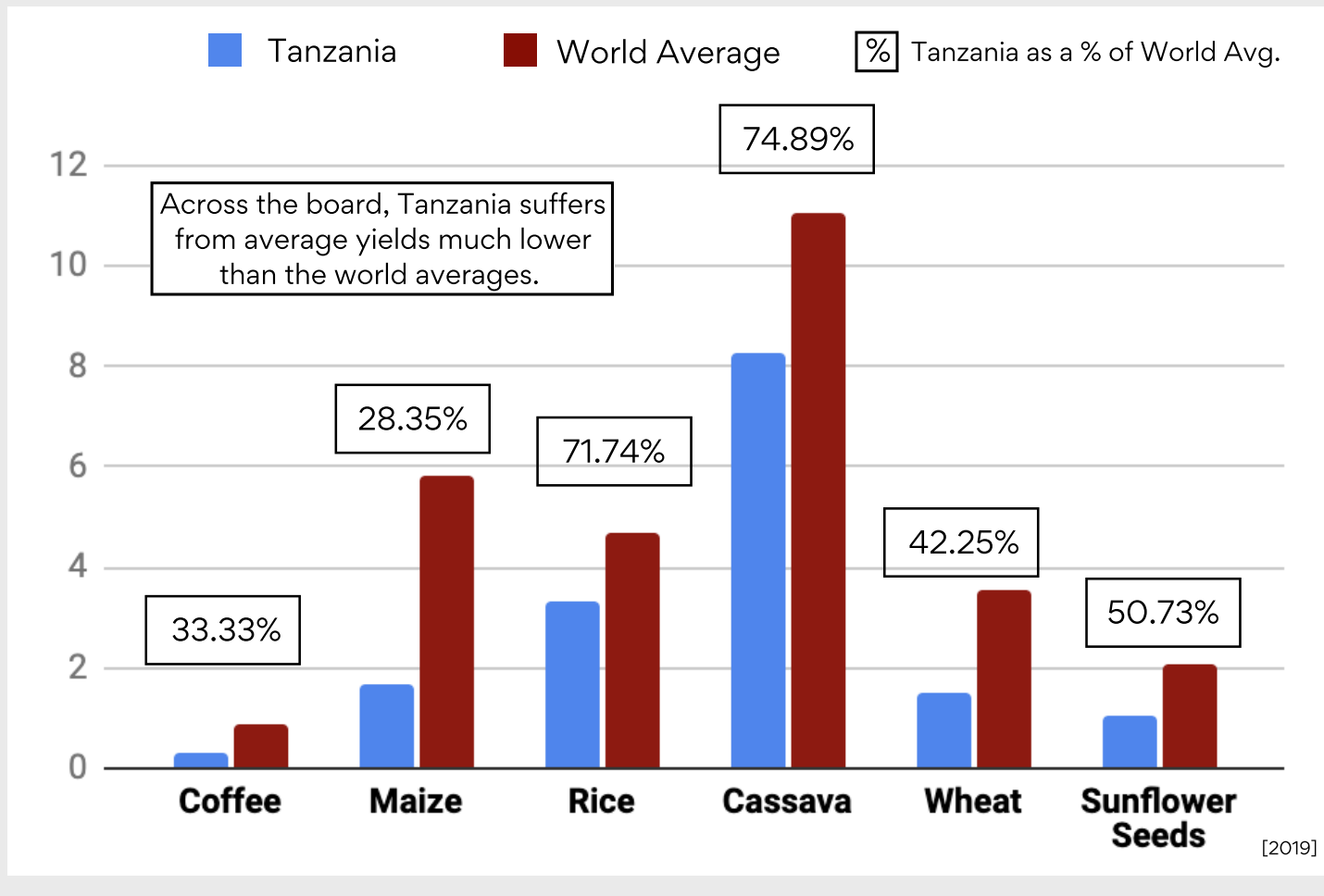
KEY CROP IMPORT VS DOMESTIC PRODUCTION VALUES



KEY CHALLENGES

- Inadequate access to key inputs
- Lack of knowledge on good agricultural practices
- Challenges with transportation logistics, including access to roads
- Limited access to sustainable rural finance
- Limited use of improved seeds and fertilizers
 - **Tanzania: 15.9 kg** of fertilizer per hectare of arable land
 - **World: 199.6 kg** per hectare of arable land [2018]

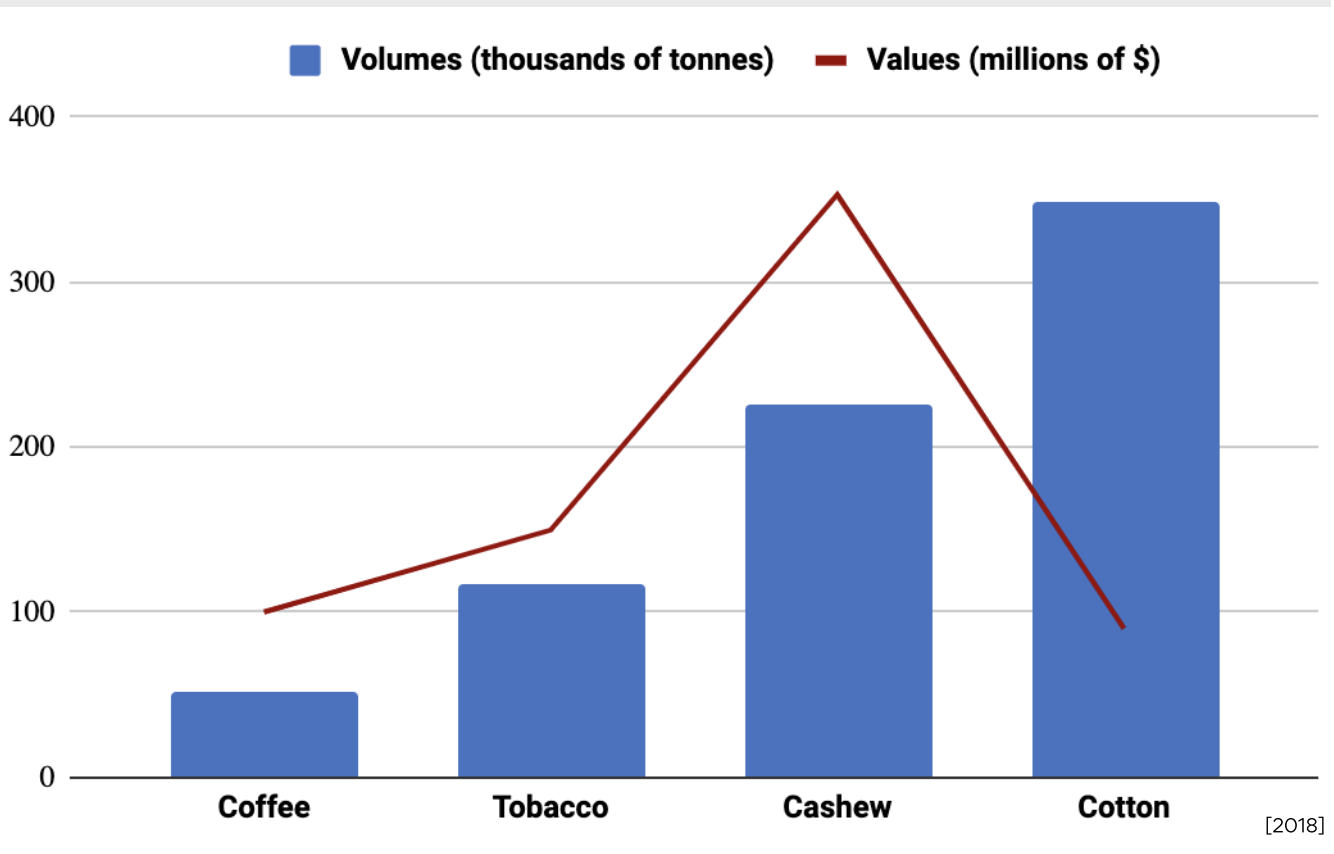
AVERAGE YIELD (TONNES/HECTARE)



KEY OPPORTUNITIES

- Input providers can drive usage of better seeds, fertilizer, post harvest storage products, and other products to increase yields and quality.
- There are **25M** cattle in Tanzania, the **3rd** highest on the continent; however, the beef and leather industries are still nascent and predominantly informal.
- Despite a variety of cash crops, very **little value addition** is done in country. There is tremendous potential for companies to move from being commodity brokers to processing crops into more higher value products or branded goods.

TOP CASH CROPS EXPORT VOLUMES & VALUES



TOP EXPORT DESTINATIONS

- India: 23.5%
- South Africa: 16.7%
- Vietnam: 7.5%
- Kenya: 7%
- Switzerland: 6.3%

In the last **2 years**, AIA has raised **\$25M** from foreign investors looking to capitalize on Tanzanian agriculture opportunities. These investments were into an input provider, meat processor, and fruit and vegetable distributor.

- **45%** of Tanzania's land is arable (**44 million hectares**), and only about **10 million (23%)** are in use.
- In Tanzania, **post harvest loss** is a critical problem that affects multiple value chains and is a threat to overall food security.
 - Tanzanian smallholder farmers lose up to **40%** of their harvests due to poor handling and storage methods.



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