

Embassy of Denmark, Tanzania

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DANIDA BUSINESS PARTNERSHIPS PROGRAMME
BUSINESS DEVELOPMENT PROFILE OF TANZANIA

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Foreword

Tanzania as part of the East African community is fast becoming a regional strategic foreign investment destination as a result of the expanded market. The Common Market Protocol provides for free movement of goods and services, enhancing trade among the member states with a total market potential of almost 130 million people.

The protocol provides for free movement of labour and capital and will thus enhance the region's competitive edge making it a good investment opportunity for both foreign and domestic investors.

To tap into this growing market potential the Danish Embassy in Tanzania is committed to assisting the currently evolving investment and trade relationship in Tanzania. This is in pursuit of Denmark's long term development cooperation objectives of contributing to the twin development goals of economic growth and employment in Tanzania.

Through its Danida Business Partnerships Programme the Danish Embassy in Tanzania has committed itself to increase the quality and quantity of long term partnerships between Danish business investors and Tanzanian business partners, supporting the economic and social development of Tanzania.

The Danida Business Partnerships Programme is designed to achieve this objective, by promoting investment and trade opportunities for Danish investors in doing commercial businesses with Tanzanian partners.

This Business Development Profile of Tanzania has been designed to provide Danish investors interested in teaming up with Tanzanian partners with information on the political, economic and social investment climate of Tanzania that can assist them in their decision making.

I hope the information will inspire potential Danish investors and Tanzanian business partners to explore further the business opportunities in Tanzania and in the entire East Africa Region.

Sincerely,

Bjarne H. Sørensen

Ambassador of Denmark

2.0 WHY INVEST IN TANZANIA

There are a number of reasons why the Danish business community should come and seize the opportunity to invest and do business with Tanzanian partners.

2.1 Tanzania has untapped and abundant natural resources

Tanzania has a wide range of arable land, minerals, natural gas and tourist attractions all awaiting potential investors. Tanzania is internationally renowned for its abundance of wildlife attractions and unexploited mineral reserves such as coal and iron ore. The mining and tourism sectors are the leading recipient of foreign direct investment flow and are tipped to become the “growth sectors” of the economy.

2.2 A fast growing economy with fiscal and non fiscal incentives

Tanzania offers a *comprehensive and competitive package of fiscal and non fiscal incentives* to foreign direct investors. Investors are granted an Investment Certificate to promote foreign and local direct investments in Tanzania. Under the certificate the investor is provided with;

- ❖ value added tax and import duty exemptions on capital goods
- ❖ exemption on import duty for inputs used to produce goods for export
- ❖ allowed repatriation of 100% of the profits and dividends after tax and other obligations.

The investor is also provided with work permits for recruiting up to four non residents/non nationals to make up for management and technical expertise that is not available in the Tanzania labour market. Other non fiscal incentives include access to export processing zones established by the Government with fully developed infrastructure and utilities for establishing light industries in food processing, textiles, electronics and spatial development.

2.3 Investments Guarantee against Nationalization and Expropriation.

Tanzania is a signatory of several multilateral and bilateral agreements on protection and promotion of foreign direct investment including a bilateral Investment Protection Agreement with the Government of Denmark. Tanzania is a member of Multilateral Investment Guarantee Agency (MIGA) and International Centre for Settlement of Investment Disputes (ICSID).

2.4 A Stable Political Environment through Peace and Stability

Tanzania is free of ethnic, tribal and religious conflicts. Multi party democracy has not disturbed the peaceful political climate of the country. The political discourse is characterized by parliamentary democracy and public consensus on key social and economic priorities.

2.5 An Abundant Labour Force with Regionally Competitive Flexible Industry Minimum Wages

Tanzania has an abundant labour force with regionally competitive industry minimum wages that are negotiable between industry stakeholders and the government. Although the labour force is

semiskilled, it is trainable and could effectively provide required skills. The government has made a long-term commitment to develop a well educated technologically knowledgeable and advanced society. The government recently increased its education budget significantly towards this goal. The education sector budget is the second largest budget next to infrastructure budget comprising of 17% of the government expenditures for current financial year 2011/12.

2.6 Strategic Geographical location in relation to other land locked sub Regional Countries.

Tanzania's advantageous geographic position, in relation to six land locked countries in the sub region offers great economic advantages. Tanzania is linked to the other sub regional countries through its ports, roads and railway network that offers opportunities for easy accessing of the sub regional markets.

2.7 Access to Large Sub Regional East and Southern Africa Market and Investment Platform

The East African Regional Market from Kenya, Uganda, Burundi, and Rwanda has a population of about *130 million people*. Having signed the East African Common Market Protocol Tanzania has opportunities to tap into this market by exporting products at cost competitive prices without tariff. The custom union allows for free trade of goods and services within the region as well as free movement of labour and capital. The latter provides for the opportunity to improve the efficient allocation of resources that reduce costs and enhance the competitiveness of the region globally.

2.8 Fast developing communication and information technology

Communication services are the fastest growing sector in Tanzania. The sector is currently growing at 20 % per annum. Recently the government has completed interconnection of regional centres to the national fiber optic communication cable. This has improved the efficiency within the country, lowering costs substantially. Furthermore, a private investor Sea Com Company has financed and developed the first broad band fiber optic cable along the East and Southern Africa coast that would improve the interconnectivity between African countries the East and Southern African regions without having to go through Europe as hitherto.

2.9 A Social Cultural Society full of Tanzanian friendly Hospitality and kindness to other Cultures

Since Tanzania's independence, Denmark has had an ongoing bilateral development assistance programme to support the government of Tanzania and its people, addressing the development challenges of eradicating poverty in the country. For many years, Tanzania has been the largest recipient of Danish Development Assistance. As a result of this, the Tanzanian perception of the Danish people and Denmark as a country is very positive

3.0 DANIDA Business Partnerships Programme

DANIDA Business Partnerships programme is a newly launched initiative from DANIDA. The overall purpose is to generate economic growth and reduce poverty. This is achieved through support to long-term, committed partnerships between Tanzanian and Danish companies, having a common, commercially viable business activity.

The new programme has replaced the earlier Business-to-Business (B2B) and Innovative Partnerships for Development (IPD) Programmes. It builds on the experiences from the earlier programmes whilst focusing more on corporate social responsibility and adding value to society. DANIDA has a strict zero tolerance policy on corruption and aims to develop healthy businesses in the countries where they are located.

For more information regarding DANIDA Business Partnerships, you are most welcome to contact the Danish Embassy in Dar es Salaam or check out <http://um.dk/en/danida-en/activities/business/partnerships>

4.0 Examples of Danish Investments in Tanzania

The following are examples of some of the successful projects:-

4.1 Scandinavian Quality Cooling System

In only five years Danish cooling company Unicool has managed to increase its turnover in Tanzania from 100.000 DKK to 10 mn. DKK in 2010, and position itself as one of the top companies in its line of business, known for quality and high-end solutions.



The establishment of Unicool in Tanzania begun in 2004, after Ole Hoffmann Hansen went on a business delegation set up by the Danish Ministry of Foreign Affairs and the Confederation of Danish Industry (DI). On this trip he realised what potential Tanzania holds within the service sector, while at the same time ruling out establishing an industrial production, deeming it “too problematic.”

In Tanzania Mr. Hoffman Hansen saw that most cooling companies were based in Europe or South Africa, having no permanent presence in Tanzania. This left an opening in the market for a local based company that would be able to provide assistance with service and upgrades of the equipment. Thus Unicool found a local partner and was supported by the B2B programme.

“Scandinavian Quality”

Unicool line of business is installation of cooling systems. Something that is in increasingly high demand with the growth Tanzania is experiencing. The company has decided to focus on delivering “Scandinavian quality” to the African market.

“We cannot compete with the local one-man companies when it comes to low-tech solutions. That is not our part of the market. We focus on very technical and high-end solutions, where we are able to provide something that only a few other companies in Tanzania can provide”.

In choosing to compete on quality, technology and reliability and not price, Unicool tries to create solutions that last longer and are less energy demanding. This has so far secured projects at the headquarters of mobile telecommunication corporations, namely Vodacom and Airtel, as well as the new Vice-President’s Office and the 5 star Möevenpick Hotel.

According to Unicool the main benefit of operating in Tanzania is that the market is expanding and so far it is not yet very developed. On the contrary, in a market like Denmark, you compete over the same limited amount of clients. Also expenses on salaries are considerably lower.

The challenges in Tanzania and Africa in General

There are of course a number of challenges that make companies hesitant about expanding into Africa and Tanzania specifically. The primary challenge is finding educated manpower in Tanzania. This has been virtually impossible for Unicool, as the company is working with advanced technology. Instead the company has started from scratch, providing job training to the local technicians on “almost everything”. The technicians who show the greatest potential are sent on a three-month course in Denmark.

“We have a very extensive process of training” Mr. Hoffman Hansen says. “We train people in Denmark to show them the technical side, but also to show them how to work more efficiently. The hope is that they bring it back to Tanzania and that efficiency will be part of our corporate culture here”. Some of the funding for training local technicians has been provided through the former B2B programme.

Besides finding trained manpower other challenges include dealing with corruption and an erratic power supply, but Ole Hoffman Hansen has not seen that as a problem for Unicool: “Of course corruption exists here, but I think the main reason, that we have been spared is that we work with large international companies, where corruption is limited. When we meet their representatives they act very professionally, often coming from corporate headquarters outside Tanzania.

With regards to the daily erratic supply of electricity, it is a much larger problem for companies who want to set up an industrial production here. “We, as a service company, are not as dependant on electricity”.

Partnering Up

Other problems have been overcome with the help of Unicool’s local partner. He handles the customs paperwork, and helps clearing imported materials through the Dar es Salaam port without major delays, something that can be a nuisance.

Having a local partner is something that Unicool recommends for the above reasons, but also because it provides the company with an instant business network. “It would have been very hard to establish a company without a local partner. We utilise his contacts with high-end clients that our partner spend a lot of time maintaining. And with a local partner we do not need to have a permanent presence in Tanzania. “Right now I am only in the country around once a month”, says the Unicool CEO.

Some Good Advice

Ole Hoffman Hansen agrees that setting up an industrial production faces other challenges than those Unicool has encountered, but he still has some advice for businesses considering expansion into East Africa. “I think you should look at the custom system. There are some goods that are very highly taxed when they are imported into East Africa. If you can start up a local production, thereby avoiding the taxes, you will be able to compete with Indian and Chinese products. But of course it requires that you produce something that there is a demand for in the local East African market. We cannot do that, because the market for our products is not big enough”.

The Future

The future of Unicool in East Africa looks bright, with the company now having secured a Tanzanian class one certification, enabling it to take on the largest projects available.

The company has expanded into Kenya and will set up operations also in Uganda. In Tanzania the turnover is expected to rise to 25 mn DKK in 2011 up from 10 mn DKK in 2010.

4.2 World-Class Shipbuilding in Tanzania with European Technology



In Tanzania, knowledge of ship design is limited. Now, a new joint venture between the Danish company, Johs Gram-Hanssen A/S and the Tanzanian shipyard Songoro Marine Transport is bringing state-of-the art technology and ship-building know-how to Tanzania.

The Mwanza-based shipyard’s portfolio includes ferries, fishery inspection vessels, and various patrol boats, as well as world—class vessels for Lake Victoria and neighbouring Uganda and Kenya. Anders Jensen from Johs Gram-Hanssen A/S is proud of what has been achieved;

“Now we are actually building something that has the same quality as imported materials. That is a big step forward for our company and for shipbuilding capabilities in East Africa”.

The partnership has the potential of improving the Tanzanian shipbuilding industry tremendously while creating jobs in Mwanza.

Revolutionizing the Industry

To improve ship design in Tanzania, the partners work with marine institutes in Dar es Salaam in training local naval engineers of tomorrow. This will revolutionize ship-building in Tanzania as high quality ships can be designed locally with materials and resources specific to local conditions. In this way a viable local expertise will be developed with less foreign dependence.

New technology will also make Mwanza the only place in the East African Community-area where high-level quality test of ships can be carried out. Currently such activities are handled by specialists from Dubai and South Africa. Other upcoming projects include marine safety training classes, something that is badly needed in Tanzania due to lack of funds and skilled staff. The training will also include HIV/AIDS seminars for shipyard workers.

The joint venture has been set up with support from the DANIDA Business Partnerships Programme, including support for establishing a naval training centre in Uganda.

4.3 New Company to Deliver Quality Pork to Dar es salaam's Quality-Concerned Customers

The Tanzanian company Kagera Ranching and Agribusiness Development Company Ltd. (KRADL) and the Danish company Noringlund established a joint venture in the summer of 2011. The new company, by the name of Tandan Farms Ltd., wants to produce quality pork in Tanzania and boost the local production in order to compete with imported pork. The Joint Venture is supported by DANIDA under its Business-to-Business Programme (now the DANIDA Business Partnerships Programme).

Despite the fact that pork is not something you find on every street corner, in a country where 50% of the population is Muslim there is definitely a market for the meat. Although hotels, restaurants and supermarkets sell pork, most of it is imported from Kenya. The pig industry in Tanzania is by and large characterized by a lot of small suppliers who are operating under poor conditions. Furthermore, the quality of the pork is often poor because of lack of knowledge on how to breed, feed and slaughter the animals.



Quality Meat at a Low Cost

The new partners plan to change all of that. Quality, access and fast deliveries will be the most important reasons for the big restaurants in Dar es Salaam to buy Tandan Farms' meat. Danish Noringlund will provide the training needed to produce the pork, while Tanzanian KRADL will supply the manpower on the ground. Furthermore Noringlund has stationed an experienced manager from Denmark to oversee the day to day production, feed preparation and hygiene management of the pigs in order for it to live up to the Danish food health and safety standards.

Danish part-owner, Torben Hansen, has great expectations for Tandan Farms. He had originally wanted to start a production in Kenya but chose Tanzania instead because it is "a calm country with a friendly population", he says and states that "the advice, local knowledge and the financial support from DANIDA has been a great help in bringing this project to life".

Quality access and fast deliveries is Tandan Farms' Strategic plan to enter and penetrate the Tanzanian market Tandan Farms Ltd. has been set up with the help of DANIDA's Business Partnerships Programme.

5.0 Key Potential Sectors for Investment

❖ Agricultural and Livestock

The agricultural sector is the backbone of Tanzania's economy. It provides employment to majority of the population of almost eighty percent. However, only twenty percent of Tanzanian land is utilized for agricultural production. Ninety nine percent of this production is done by small subsistence farmers with about an average of 2 hectares per household. Coffee, Tea, Cashew-nuts, Tobacco, Cotton and Cloves from Zanzibar are the main cash crops that thrive well in Tanzania with its diverse sub tropical agro-climatic conditions providing almost 25% of the total exports.

Food crops grown include maize, rice beans, oilseeds, tropical fruits and vegetables. Tanzania, however, is not food self sufficient. Significant proportion of the food requirements are imported. Despite the fact that Tanzania has potential to produce wheat, about 90 % of the domestic demand is imported. There are as well significant imports of rice, sugar, oils and dairy products. The food deficit is characteristic of the sub region as well and provides for untapped market opportunities for cereal grain exports to the sub region.

The livestock sub sector is the least developed. With a national herd of 14 million traditional zebu horned breed cattle, produced through traditional nomadic pastoralist system, the industry has great potential for commercialization and development to meet the growing demand for meat and dairy products for domestic consumption as well as exports.

The Government of Tanzania agricultural policy objective of Kilimo Kwanza, meaning Agricultural First, is to give priority number one to the agricultural sector in terms of public

financing and supportive policy environment that will attract private sector investments into the sector.

❖ Mineral and Other Natural Resources

Tanzania is endowed with abundant natural resources namely mineral resources, natural gas resources, marine resources, forestry resources, and wildlife resources.

Mineral Resources

Tanzania has a great potential particularly in base metals and has been proven to have significant deposits of gold, diamonds, iron ore and a wide variety of gemstones, some of which are unique in the world such as tanzanite. Coal, uranium, and various industrial minerals such as soda, kaolin, tin, gypsum and phosphate are also available.

Commercially exploited mineral include gold, diamonds and gemstones namely tanzanite, that is unique to the country. Other minerals that are yet to be commercially developed include coal, iron ore, nickel, platinum, silver and uranium.

Potential and prospects of opportunities for the service industries servicing the mining sector are significant and are yet to be fully exploited.

Marine Resources

Tanzania has 800 km coastline and several inland lakes rich in marine resources that have not been fully exploited, except by small scale fishermen. The government estimates that the total fish stock available is 700,000 tons per annum while current exploitation stands at 50 % of the available potential. Exploitation of fishery resources is concentrated on Lake Victoria where investment into value adding fish processing plants have been undertaken. Fish is one of the important non-traditional exports to the European Union market.

Forestry Resources

Tanzania is endowed with 30 million hectares of forest and woodland, almost a third of the land area. Sixty percent of the forest land is public land with very weak management by local government and communities.

Ninety nine percent of the rural energy is derived from forestry resources. This sector is dominated by small scale processing industries such as carpentry, wood carving, charcoal production whose small scale production is mostly confined to the local market. Large scale industries that produce paper and paper products are under privatisation process and have attracted investors.

❖ Energy – Natural Gas, Oil and Renewable Sources

Petroleum, hydro power, gas, coal and fuel wood are the main sources of energy for both domestic and industrial consumption. 95 % of the domestic energy consumption is derived from fuel wood through deforestation with disastrous consequences to the environment. Thus government policy is to encourage the development of renewable energy source opportunities for both domestic and industrial use.

Currently Tanzania is dependent on hydropower for industrial use and, to a limited extent, domestic use. The country has in recent years faced critical power supply shortages due to growth in demand far outstripping the supply as well as due to recurring years of drought that affects hydropower plant generation capacity. The supply is below demand due to slow growth in public investment into the sector. Government policy is to allow private sector to invest into the sector as a strategy to raise the finances required possibly through public-private partnership (PPP).

Other potential sources of power source include gas (LNG) and oil sources. There are huge deposits of gas with potential reserves estimated at 7.5 trillion cubic feet that have been identified in the southern shores of the Tanzania coastline.

The government energy policy is the production of efficient affordable and environmentally sound energy for social economic development. It encourages and promotes technology in the use of other renewable sources of energy namely wind and solar power. This is a potential investment opportunity area that is yet to be exploited in Tanzania.

❖ Tourism

Tanzania's tourist industry is one of the major service industries in the country. The sector contributes significantly to the country's foreign exchange earnings valued at US\$ 1.2 billion (2009) constituting about 36 % of annual total foreign exchange earnings.

Currently the country receives around 700,000 tourists per annum and the trend has been growing since the government liberalized the sector. With an abundant and diverse wild life, unpolluted coastal beaches and environment protected in 12 national parks and 15 game reserves covering an area of 340,000 square km equal to 40 % of the total land area, the country has great potential for the growth and development of the industry.

So far tourism development has concentrated in the northern Tanzania tourist circuit with the Sengereti, Ngorongoro, Lake Manyara National Park, Mount Kilimanjaro Park including the Zanzibar Island. The government is currently promoting investment into the southern tourist circuit consisting of the Selous game reserve and Ruaha, Katavi and Gombe National park as a means to ensure balanced growth and sustainable conservation of the national parks. The government's goal was to achieve an increase in the number of tourist to one million by 2010 a target that is yet to be met.

❖ Manufacturing

This sector is currently the second fastest growing sector next to the service sector. The manufacturing sector has been growing at an annual rate of not less than 8 % for the last decade. This is also a result of the privatization of state owned enterprises in the food and beverages industries, textile tobacco, and construction materials industries namely cement and aluminium products. Successful industries are the beverage industries and the cement industries that have grown and expanded production very fast. Currently the three local cement producing companies have a combined output of 1.7 million tons while demand is considered to have surpassed 2 million tons per annum.

Thus, opportunities exist in further privatization of existing state owned enterprises that have yet to be privatized for example, the rubber and tyre industries and cashew nut, livestock and leather processing industries. There are also opportunities to expand production for these products for both the domestic market and for exports into the sub regions because of the potential of the backward linkages between agricultural sector and the agro-processing industries. More than 80 percent of the agriculture products are exported without value addition in Tanzania. Currently manufactured products are exported in the East Africa Sub Region to Burundi, Rwanda and the Democratic Republic of Congo.

6.0 OVERCOMING CHALLENGES

The challenges faced by investors include logistic challenges due to inadequate infrastructure facilities. Infrastructure is one of the areas Tanzania is committed to develop. There is a sustained programme to build a good quality road network, airports and waterway ports. In the current budget the government has committed almost 20 % of the total budget to investments in infrastructure development for roads, railways and ports. The East African Community has similar infrastructural projects that will strengthen the transport network within the region.

There are challenges of inadequate services in the public utility sector for water and energy. The state owned power utility firm has not managed to expand and maintain the supply of power to meet the growing demand. The government has liberalized the energy sector and has encouraged private sector investment into the sector to address this challenge. The government is also committed to expand the power generation capacity of the state owned power utility firm through investments in hydropower.

Tanzania has challenges with availability of skilled labour. Government has expanded capacity for university graduates and technical institutes especially in business management engineering technology and information technology to meet the growing demand for skilled labour. However, the business culture and skills to meet the challenges of modern business technology need to be addressed through training programmes for successful business relationship to take hold.

Investors are also faced with bureaucracy and delays in complying with the legal and regulatory requirements for establishing and running a business in Tanzania in most of the cases. Experience has shown that working with local professionals firms and local companies greatly eases these constraints.

ANNEX 1: Summary of Important Economic Social Statistics

People 43 million with an average annual growth rate of 2.6 percent. 80 percent of the population is rural based.

Official Language Kiswahili and English

Climate Tanzania has a tropical type of climate. Two rainfall regimes exist over Tanzania. One is unimodal (December - April) and the other is bimodal (October -December and March - May). Temperatures range between 10⁰c and 31⁰c.

Land Tanzania covers 945,000 km², almost 22 times more than Denmark. Mainland covers 943,000 km² and Zanzibar covers the remaining 2,000 km².

Forest and Wild Life Forest and woodlands cover 335,000 km² of the land area. Tanzania has 12 National Parks, the Ngorongoro conservation Area, 13 Game reserves, 38 Game Controlled Areas, and 12 National Cultural Heritage Sites

Minerals Tanzania is the home of the precious gemstone Tanzanite diamond. Tanzania also holds various other gemstones, natural gas, iron ore, coal, spring water, phosphates, soda ash, and salt.

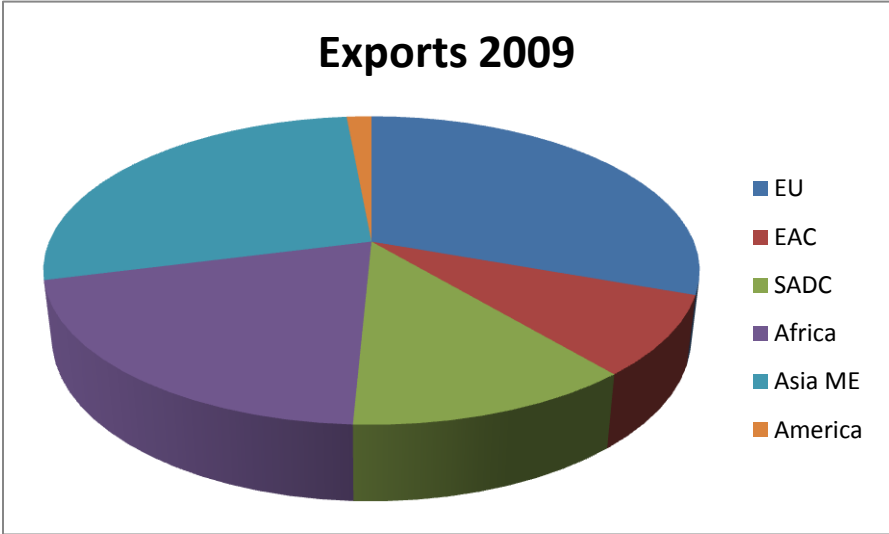
Water Resources Three large lakes: Victoria, Tanganyika and Nyasa/Malawi, the Indian Ocean coastline, rivers and wetlands.

Per Capita Income: US \$ 500, 2009

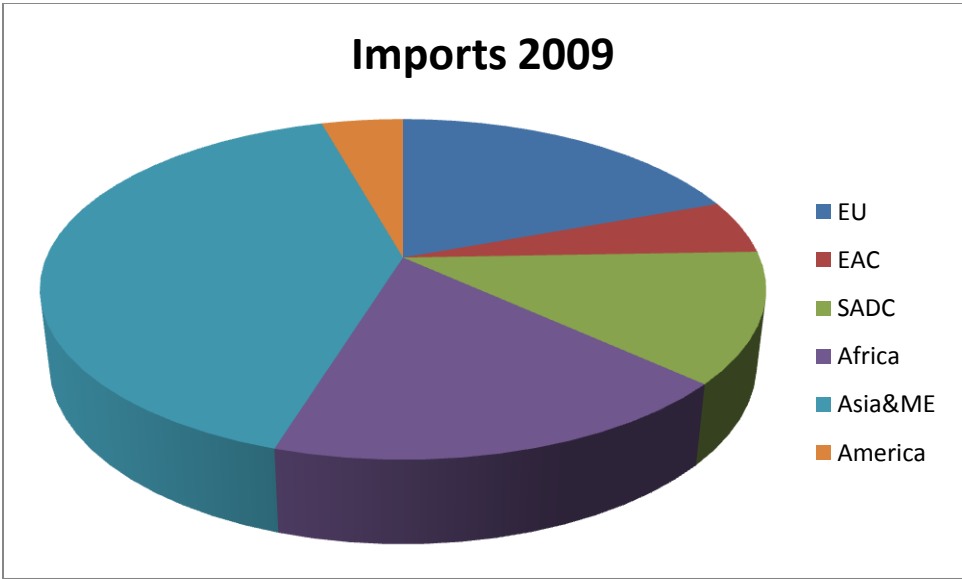
GDP -Real Growth Rate: 6.2 %,

Consumer Price Index 8.1 %, April 2011

Tanzania Exports and Destinations: Continue to expand from \$3.365 billion in 2008 to \$3.809 billion in 2009. The principal commodities are gold, coffee, cashew nuts, cotton, manufactured goods and services in the tourism industry. The European Union is the major trading partner.



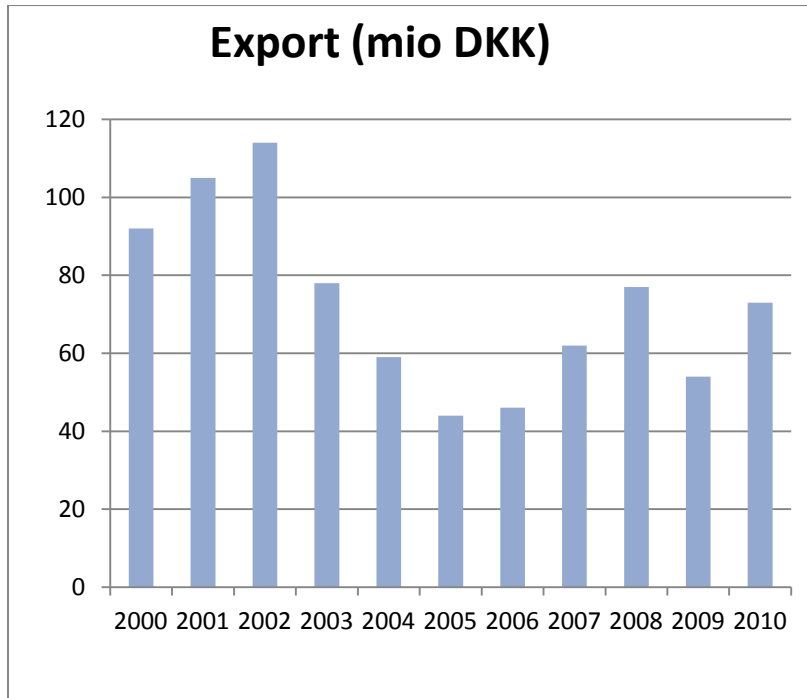
Tanzania Imports and Origins: Continue to increase from \$5.834 billion in 2008 to \$6.334 billion in 2009. The main import commodities are consumer goods, machinery and transportation equipment, industrial raw materials, and crude oil. The main source of imported goods is the European Union.



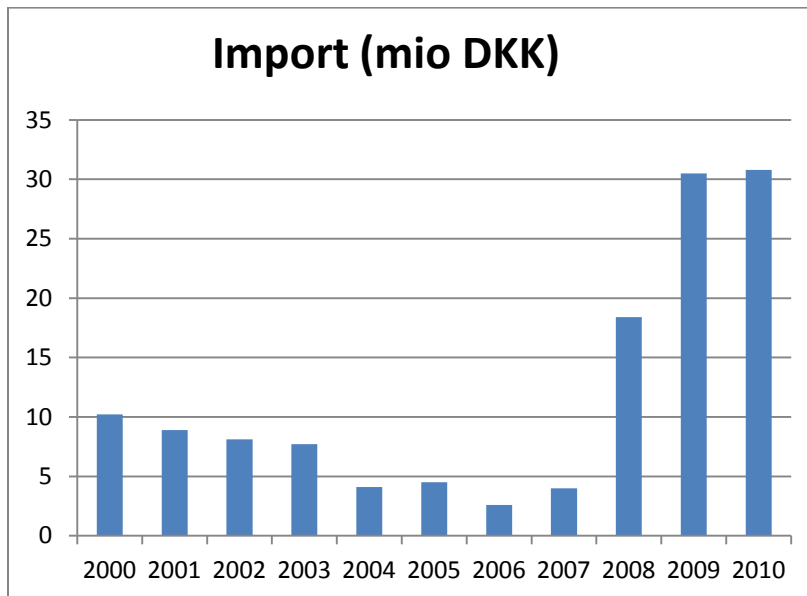
Source: Government of Tanzania Planning Commission Economic Survey 2010.

Danish Trade with Tanzania

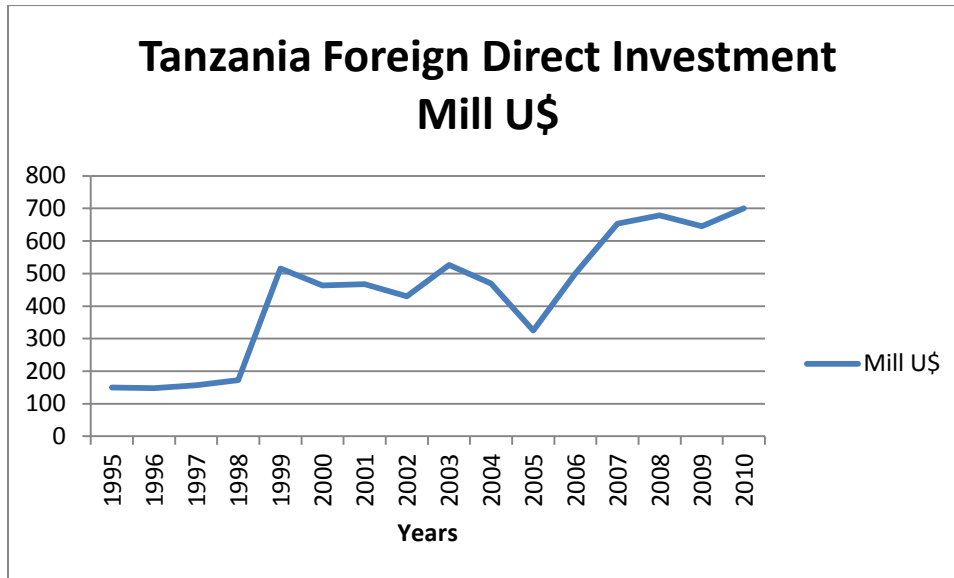
Export from Denmark to Tanzania



Import from Tanzania to Denmark



Foreign Direct Investment Inflows



Source: Tanzania Economic Survey 2009 and World Investment Report 2011

TANZANIA MAP



Useful Contacts

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<http://um.dk/en/danida-en/activities/business/partnerships>

Business Registration and Licensing Agency

Lumumba Street
P.O.Box 9393
Dar-es-salaam
Tel:+255-22-2180141/2180113
www.brela.tz.org

Tanzania Investment Center

Shaaban Robert Street
P.O.Box 938 Dar-es-salaam
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Ministry of Industries Trade and Marketing

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10 Mirambo Street
P.O.Box 2939 Dar-es-salaam
Tel: +255-22-2110976/7/8/9
www.bot-tz.org

Tanzania Trade Development Authority

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Tel: +255-22-2850238
www.tantrade.or.tz

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