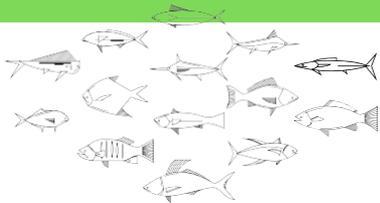


THE 6TH ANNUAL AGRICULTURAL POLICY CONFERENCE (AAPC)



DODOMA, TANZANIA

FEBRUARY 12-14, 2020



Partners



BACKGROUND

Tanzania has made great strides in economic growth in the last two decades registering an average annual Gross Domestic Product (GDP) growth exceeding 5%, including 7% in the last three years (NBS,2019). Tanzania joined the group of Lower Middle Income (MIC) countries in 2017 by attaining a per capita annual income of \$1,090 (MoF,2019). Despite rapid economic growth, poverty has declined only slowly, at a rate of 0.5 percentage point per year between 2000/01 and 2017/18 (National Bureau of Statistics/ Household Budget Survey 2001 and 2019). Poverty reduction slower than economic growth implies that economic growth has not been sufficiently inclusive. This pattern is explained in part by the fact that agriculture, agro-processing and manufacturing have grown at a slower pace than the overall economy. For example, agricultural GDP has been growing at a rate of 3-4 % in the last decade, only slightly above population growth of 2.8% (NBS, 2019). Recent rates of poverty reduction mean that it will take another 52 years to completely eliminate poverty in Tanzania unless there is a drastic improvement in agricultural sector performance or a slow-down in population growth. The rate of stunting among children under-five years of age has declined much faster (0.9% per annum) from 48.2% in 1999 to 34.4% in 2015/16 (Demographic and Health Survey, 1999 and 2016).

Economic Growth and Poverty Reduction: Poverty reduction requires economic growth and it is virtually impossible for a poor country to reduce poverty without growth (USAID 2015a). Evidence shows income of the poorest 20% increases as fast or faster than economic growth rates. The importance of agriculture in economic growth and poverty reduction cannot be overemphasized. A cross-country study by the World Bank (2007) which focuses on Sub-Saharan Africa reveals that agriculture does deliver more poverty reduction than other sectors, especially in the lower-income countries, because it has strong links with other sectors and because poor people participate more in growth from agriculture than in growth from other sectors.

Economic Growth and Productivity: Based on the literature, it is indisputable that economic growth is brought about by increased productivity. There is also ample literature on factors contributing to increased productivity such as: specialization and trade; quality of labor; technology (machine, knowledge and network); and cost reduction (management). There is no single path to development. However, a cross-country analysis by the Growth Commission Report (2007) reveals that countries that experienced rapid economic growth had the following points of resemblance:

- Their economics were open
- Their macro-economies were stable
- They saved and invested
- They let markets allocate resources
- Their governments were competent and committed to growth

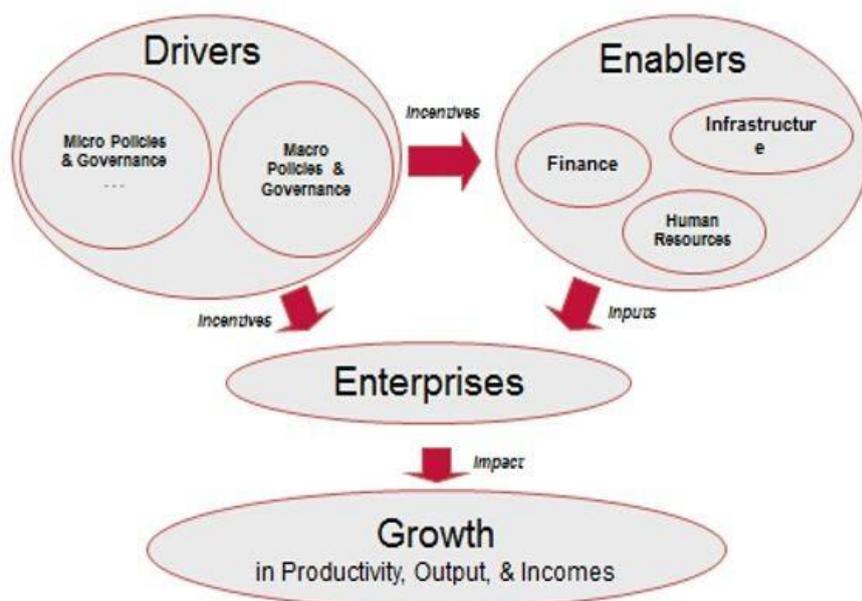


Radelet (2010) provides a framework for economic growth based on two factors:

- i) Drivers of growth which include macroeconomic and microeconomic policies
- ii) Enablers of growth which include finance, infrastructure and human resource

The two factors are incentives for entrepreneurs (including farms and agribusiness) to invest and thrive.

Figure 1: Growth Producing Factors



Source: USAID EG Course, 2015b2015b

The Government of Tanzania (GoT), during the last two decades has embarked on a number of initiatives to improve business environment such as BEST (Business Environment Strengthening in Tanzania). Development partners such as USAID, through projects such as ASPIRES (Agriculture Sector Policy and Institutional Reforms Strengthening project) has supported GoT's effort to improve the policy environment in agriculture, food security and nutrition. Such support has helped accelerate policy and regulatory reform Overall, many reforms have been done on fiscal policy but challenges remain, especially in the regulatory framework.

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The food security and nutrition policy in Tanzania is guided by two policies: The 1993 Agriculture Policy and the 1992 Food and Nutrition Policy (FNP). Both are under review and expected to be approved during the 2020/21 fiscal year.

The implementing strategies for Agriculture Policy and FSNP are specified by the 2017-26 Agricultural Sector Development Program, phase-two (ASDP II) and the 2016-21 National Multi-Sectoral Nutrition Action Plan (NMNAP). Under ASDP-2, Component 4 focuses on Sector Enablers (policy, regulatory framework) and Coordination. In addition to agriculture sector policies, food security and nutrition is affected by policies from other sectors. Although Tanzania has made some progress in policy reforms, many challenges remain to be addressed in order to create a favorable policy environment to accelerate agriculture transformation, food security and nutrition, and poverty reduction.

Based on experience from the Policy Analysis Group (PAG), this section highlights the strengths, weaknesses, opportunities and threats in implementation of activities to improve enabling policy environment. The analysis provides a justification for further investment to improve enabling policy environment in agriculture.

2020 Thematic Focus

Renowned as an instrumental policy dialogue structure, the 6th Annual Agricultural Policy Conference (AAPC) will take stock of the Tanzania's agricultural sector performance and address a key question: "Is Agriculture the Driver or Follower of Economic Transformation?"

The 6th AAPC will therefore respond to this theme. The discussion will revolve around drivers of growth which include macro and micro economic policies and enablers of sector growth, particularly supporting infrastructure, finance and human resource. The theme captures very well the fifth phase Government agenda for economic transformation and industrialization in which agriculture provides multiple linkages including raw materials and labour. Therefore, the 6th AAPC is organized around seven policy thematic areas as namely:

- i) Agricultural sector policies (macro and micro economic policies)
- ii) Trade policy
- iii) Private sector enabling environment
- iv) Land, natural resource and environment
- v) Access to farm input and technology
- vi) Access to finance
- vii) Food security, nutrition and resilience





KEY POLICY QUESTIONS FOR DISCUSSION

Based on the theme and sub-theme for the 6th AAPC, the following are some of the key questions to be tackled during paper presentations and discussions:

- 1) What is the performance of the agricultural sector in the context of the economic transformation and industrialization agenda? Is agriculture the driver or follower of economic transformation?
- 2) Despite increased pace of policy reforms why have concerns on business environment have persisted?
- 3) Is there a need for prioritization of reforms? What further incentives could be provided to enhance both public and private sector investment in the sector?



5th AAPC Highlight: Hon. Angellah Kairuk, Minister of State in Prime Minister's Office (Investment) (right) listening on to discussions during the 5th AAPC before officiating the opening of the 5th AAPC. On her left is the Deputy Minister of Agriculture, Omary Tebweta (MP).

ABOUT PAG AND AAPC:

The Annual Agricultural Policy Conference (AAPC) is organized by the Policy Analysis Group (PAG) in collaboration with the Ministry of Agriculture and other Agricultural Sector Lead Ministries. PAG is an informal (community of practice) and voluntary group with members working on agricultural policy projects and initiatives, academia, local and international policy think tanks. Established in 2013, the group has about 20 members and provides a platform for sharing information on policy research findings so as to enhance coordination, collaboration and synergy. PAG also aims at ensuring consistency in policy messaging. The AAPC brings together over 150 participants from academia, research institutions, policy-makers, advocacy groups and development practitioners from Tanzania, in the region and beyond.

The Conference will provide an opportunity to assess progress in implementation of policy reforms under the CAADP framework of the New Alliance on Food Security and Nutrition. In addition, the conference will discuss successes, lessons learned and identify remaining gaps and emerging issues that require attention.

POLICY ANALYSIS GROUP (PAG) MEMBERS

- Agricultural Markets and Development Trust (AMDT)
- Agricultural Non-State Actors Forum (ANSAF)
- Agricultural Sector Policy and Institutional Reforms Strengthening (ASPIRES)
- Alliance for a Green Revolution in Africa (AGRA)
- Dalberg
- Eastern Africa Grain Council (EAGC)
- Economic and Social Research Foundation (ESRF)
- Enabling Growth through Investment and Enterprise Program (ENGINE)
- Financial Sector Deepening Trust (FSDT)
- International Food Policy Research Institute (IFPRI)
- International Livestock Research Institute (ILRI)
- Monitoring and Analysing Food and Agriculture Policies (FAO-MAFAP)
- Platform for Agricultural Policy Analysis and Coordination- PAPAC, representing the Ministry of Agriculture Livestock and Fisheries
- REPOA
- Regional Strategic Analysis and Knowledge Support System (ReSAKSS)
- Southern Agricultural Growth Corridor of Tanzania (SAGCOT)
- Tanzania Horticulture Association (TAHA)
- Trademark East Africa (TMEA)
- Tanzania Private Sector Foundation (TPSF)
- Agri-connect (EU)
- USAID



A SNAPSHOT OF POLICY SESSIONS BY THEMATIC AREAS

The 6th AAPC is organized around seven policy thematic areas which collectively aim to address strategies for tackling sector drivers and enablers in Tanzania's agricultural sector.

Key Note Session: Is Agriculture the Driver or Follower of Economic Transformation?

THEMATIC AREA 1: AGRICULTURE SECTOR POLICY

A stable macro-economy is essential for the sustainability of the agricultural sector. Agricultural sector has been growing at an annual rate of 3-4 % during the last 15 years. The sector growth is considered to be modest as it is below the broader economy (5-7%) and CAADP target of 6% but faster than annual population growth (2.8%) (NBS, 2019). Inflation rate has been low (3% in 2018) and the exchange rate modestly stable (NBS 2019). The share of agriculture in the national budget of 4% is below the CAADP target of 10% (MoA, 2019). The National Agricultural Policy (NAP) is being revised so as to be aligned with the sector program (ASDP-2). Fiscal reforms are being implemented in order to reduce the cost of production and enhance country's competitiveness in agriculture trade. Exemptions for VAT have been provided for farm inputs, farm machinery, equipment and various technologies to improve agriculture productivity. In 2017/18 production of food crops was approximately 15.9 million tons of which 9.4 million tons were cereals (maize and rice) while 6.5 million tons were non-cereals (potatoes, cassava, banana and pulses) (MoA 2019). Households below the national food poverty line have declined to single digit 9% (HBS 2019) and malnutrition (stunting) has continued to fall to 34% (NNS, 2018) though still high according to international standards. In summary, the key policy issues that will form part of the discussion include:

- Is agriculture the driver or follower of economic growth and transformation?
- What lessons and experiences do we draw from other countries with a strong agriculture economy?
- How could public sector investment be made to attract private investment?
- Despite being self-sufficient, Tanzania has one of the highest incidences of malnutrition. How could Tanzania achieve agriculture-sensitive nutrition?
- Will the role of staples diminish during agriculture transformation and dietary change?

THEMATIC AREA 2: TRADE AND INVESTMENT:

Agricultural exports contribute about 40% of Tanzania's export earnings. For the first time Tanzania achieved a benchmark of \$1.1 billion in agricultural exports in 2018 (BoT, 2018). The major agricultural exports include cashew-nut, tobacco, coffee, cotton, sisal, tea, and pyrethrum. The export portfolio of traditional crops has not changed much over years for the seven crops. During the last 10 years, the average production of cotton, sugar and cashew-nut has been increasing while production of tobacco and coffee has been dwindling. Over 90% of crops are exported in raw form and hence missing an opportunity to create jobs through agro-processing. Horticulture is the leader in non-traditional exports. Annual export for horticulture is estimated to stand at USD 545 million per annum, creating employment for over 2.5 million Tanzanian especially youth and women (Match Maker, 2017). The annual food import bill in Tanzania is estimated to be US\$700 million. Major food imports are edible oil (US\$270 million), wheat (US\$225 million), and sugar (US\$133 million).

Rice imports in recent years have exceeded US\$75 million (USDA, 2018). Although most of imported products are locally produced, the demand exceeds supply and hence the need to import in order to close the supply gap. Tanzania is almost self-sufficient in some of the imported products such as sugar (75%) and edible oil (40%). However, the domestic production has not increased fast enough to close the supply gap resulting in continued dependency on imports. The challenge has been on how to manage imports in a way that meets the short-term supply gap without undermining long-term domestic production. The GoT is promoting the industrialization agenda which could help to reduce the country's dependency on imports to create employment opportunity for Tanzanians particularly the youth, while also creating a market for farmers. Recent reforms in trade policy have focused on protection of the domestic industry. Import tariffs have been raised on some imported agricultural products such as edible oil, milk, juice, wine, poultry, meat and others. The following are policy issues on agricultural trade:

- How could indicative pricing be implemented without causing market distortion?
- How effective are export levies in promoting domestic processing of crops such as cashew nut before export? What lessons do we learn from India and Vietnam in their cashew nut industry?
- How could agricultural boards be reformed to increase efficiency and effectiveness of service delivery to farmers and other stakeholders in the value chain?
- How could ASDP-2 strike a balance between export diversification and prioritization of value chains?
- Is tariff increase necessary and sufficient to incentivize import substitution industry?
- What factors hamper operationalization of the commodity exchange?

THEMATIC AREA 3: ENABLING PRIVATE SECTOR:

The plurality of regulatory authorities, excessive power (over regulation), high transaction costs (multiplicity of regulatory fees and charges), and bureaucratic process, have been issues of concern by the businesses in Tanzania. In December 2017 the GoT endorsed "*The Blueprint on Regulatory Reforms to Improve the Business Environment*", hence ushering its implementation. The 486-page document reflects a conclusion of two years of broad-based stakeholders' consultative process on what needs to be done to improve the business environment in Tanzania. The document popularly known as the "Blueprint" has been praised by the private sector and raised expectations for a new chapter in business environment in Tanzania. The Blueprint elaborates challenging areas in policies, laws, regulations, and implementing institutions that require reforms aimed at reducing the cost of doing business in the country. Specifically, the Blueprint discusses issues faced during business registration (such as permits, licenses and inspection) and issues faced during business operations (such as taxes, levies and registering products and inspections). The analysis covers six economic sectors, namely: agriculture, natural resources and tourism, construction, health, energy and minerals and transportation. The selected sectors reflect prioritized public investment areas in Tanzania's Five-Year Development Plan (2016-2020). During the last five years, the GoT has waived over 120 nuisance fees and charges in agriculture and livestock, particularly those charged by regulatory authorities such as Agriculture Boards.

Illustrative discussion questions on enabling private sector are:

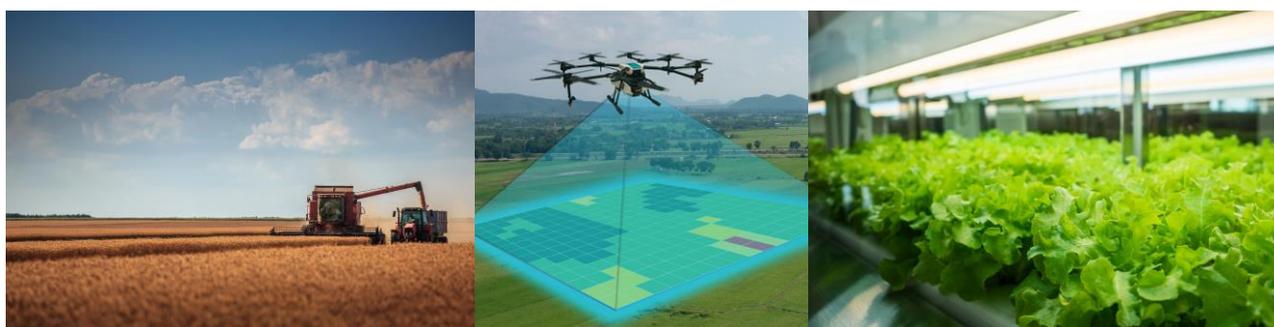
- With 50 regulatory agencies in agriculture, how could the regulatory framework be streamlined to for increased efficiency?
- What could be alternative sources of revenue for regulatory agencies to avoid excessive fees and charges?
- How could the delay and costly registration of pesticides, seed and fertilizer be addressed?

THEMATIC AREA 4: ACCESS TO FARM INPUT AND TECHNOLOGY

For maximum productivity, there are three factors that need to be taken into account: the genetic make-up (seed), nutrition (feed/fertilizer) and management (animal husbandry and agronomic practices). The lack of use of farm technologies has resulted in low productivity. The Tanzania Country Economic Update (World Bank, 2019) provides a synopsis of access and use of farm input and technologies in Tanzania. While in the last decade Tanzania has substantially increased the number of farmers using improved seed, there is potential to further increase utilization. The average fertilizer application in Tanzania is 8-10 kg /ha, far below the 50 kg/ha target set by African

governments at the 2006 Abuja Declaration on Fertilizer; and only 16.5 % of Tanzanian rural households applied inorganic fertilizer to any crop. Tanzania imports more than 90% of its inorganic fertilizer (Urea, DAP and NPK). Fertilizer Import Bill is about USD 155.1 mil in the year ending October 2018 (BoT, 2018). About 60% of all the all fertilizer is used in the Southern Highlands regions (TFRA, 2018). According to the World Bank report, only 44%of households use improved seed. Farmers are increasingly likely to use mechanization—by 2014, 7% were using a tractor to prepare land, 40% were using improved seed, and 28% had bought the improved seed (World Bank, 2019). Policy issues for discussion include:

- What are alternative policies to input subsidy in promoting use of fertilizer and improved seed varieties?
- As national soil mapping is progressing, how could such information be used to package fertilizer use recommendations?
- Are the roles of public and private sector clearly defined in farm input value chains?
- How could farm mechanization be promoted without being a threat to rural employment?
- Inadequate public investment in irrigation infrastructure leaves a room for squatter irrigation to develop which might be more detrimental to environment. How could a regulatory framework held to mitigate the environmental hazard of squatter irrigation?
- How could public and private extension services complement each other?
- The role of cooperatives and farmer organizations to enhance farmers' access to agricultural services
- Policy and regulatory framework to promote public-private-partnership in providing agricultural services e.g. private versus public extension service
- Impact of public investment (rural roads, rural electrification, water projects, extension) in productivity and the competitiveness



THEMATIC AREA 5: ACCESS TO FINANCE AND SUPPORT SERVICES

African economies have grown faster than any others in the world with an average growth of 4.3% in 2019 and over 6% for countries like Tanzania, Senegal and Ethiopia. For many African economies including Tanzania growth has occurred outside of agriculture. Less than 3% of total bank lending in Africa goes to a sector that accounts for about 70% of all employment and over 40% of the GDP (AfDB). Low investment in agriculture has led to Africa's economic expansion to exclude the majority of the population. Research has shown inclusive growth in Africa can only be achieved when there is increased public and private investments in agriculture. According to FSDT (2017) only 65% of the population in Tanzania has access to formal financial services. Domestic lending to agriculture has declined from 12% to 7% of the total lending between 2010-2018 (BoT, 2018). Private lending to agriculture seems to decline with decrease in public investment in agriculture. Despite receiving the lowest share of credit, agriculture contributed the largest share (29%) of Non-Performing Loans in 2017. e.g. Kiliflora, Kilombero Plantation Ltd. Only 5% of TIC projects were focus on agriculture (1996-2013), in 2018 the share increased to 8% but declined to 7% in 2019. Tanzania's private equity uptake has been relatively slow compared to other countries in East Africa. Since 2017, Tanzania has been the destination of five (5) private equity (PE) deals, out of a total of a regional total of 102 (Asokolnsight, 2019). Tanzania's share of the regional PE pie shrunk from 4% and 2% between 2017 and 2018. In the year through August 2019 deal making picked up both across East Africa and within Tanzania; the region attracted 25 deals, of which three were in Tanzania, representing 12% of the total (Asokolnsight, 2019).

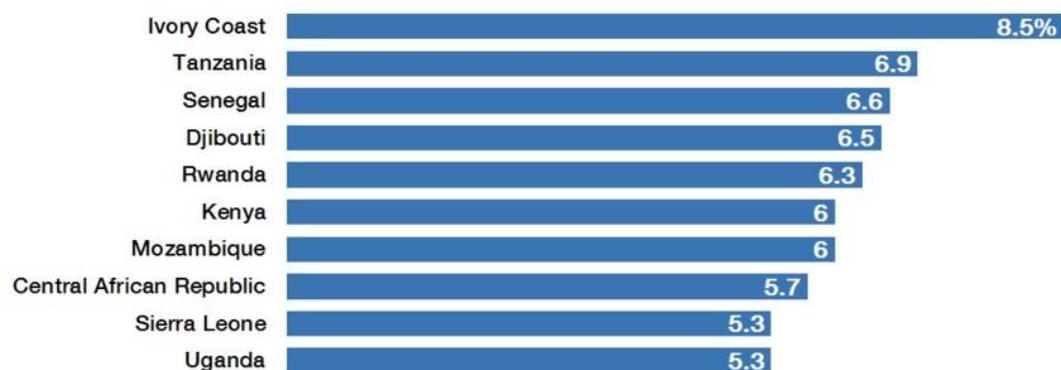
Policy issues for discussion include:

- Savings and investment are interwoven. What policies could incentivize saving?
- What policies need to be in place to minimize crowding out of private lending by public sector borrowing?
- What policies could mitigate the perceived risk by banks in lending to agriculture?



These are Africa's fastest growing economies

Projected percentage real GDP growth, 2016



Source: IMF World Economic Outlook April 2016

THEMATIC AREA 6: LAND, NATURAL RESOURCES AND ENVIRONMENT

Forests economically and ecologically support the livelihoods especially of the poor, ensure biodiversity, mitigate greenhouse gas emission and sustain water cycles and soil conditions. About 40% (39.9 mil. ha) of Tanzania's land is covered by forest of which 90% is woodland (The REDD Desk Tanzania 2012). 18 mil. ha under Forest Reserve and 3.67 million ha under Participatory Forest Management. 50% of forest land is under Village and hence vulnerable to deforestation as the management regime is unclear (The REDD Desk Tanzania 2012). Forest products – firewood and charcoal, contribute 90% of national energy and 75% of construction materials. Forest goods and services contribute 20.1% of GDP and about 10-15% of export earnings in the past decade (The REDD Desk Tanzania 2012). Tanzania is losing an estimated 465,000 hectares of forest per year. If not mitigated, the current trend could lead to total loss of forest in 50-80 years. The water-food-energy nexus is central to sustainable development. Demand for all three is increasing, driven by a rising global population, rapid urbanization, changing diets and economic growth. Agriculture is the largest consumer of the world's freshwater resources, and more than one-quarter of the energy used globally is expended on food production and supply. Water is a finite resource having to serve exponentially more people and usages. Fossil fuel production, still a dominant part of the global energy mix, is highly water intensive, as is biofuel production. About 20% of cultivated land globally is irrigated. Asia is leading in irrigation (40%) while least irrigation is done in Africa (5%). In Tanzania 475,000 ha is under irrigation (2.5% of cultivated land)². ASDP II and NIMP projects to increase land under irrigation to 1 mil ha by 2035. Biomass fuels, charcoal and firewood are primary source of domestic energy in Tanzania. About 91% of Tanzania households use charcoal and firewood for cooking and heating. Charcoal consumption in the country is estimated to be 2.3 million tons annually. Annual deforestation is 465,000 ha annually (URT, 2014). The alternative source of domestic energy for cooking and lighting include paraffin, LP gas, (Liquefied Paraffin Gas), electricity and renewable energy (solar, wind, etc.). One-third (33%) of Tanzanians have access to electricity. Urban households have more access to electricity (65.3%) compared to rural areas (16.9%) (NBS 2016). Tanzania has the second largest livestock population in Africa after Ethiopia. According to livestock census, Tanzania has approximately 30.5 million cattle, 18.8 million goats and 5.3 million sheep. Other livestock kept in the country include 38.2 local breed chicken, 36.6 exotic breed chicken and 1.9 million pigs.

This session will discuss key policy issues in farm input such as:

- Regulatory reforms to reduce the timeline and cost of registration for seed/breed variety, pesticides/veterinary medicine, and fertilizer/livestock feed
- Regulatory reforms to enhance competition and efficiency in farm input value chain
- Extension policy to ensure farmers access to knowledge for appropriate agronomy and livestock husbandry
- Alternative policy options to enhance access to farm input without dependency on input subsidy



THEMATIC AREA 6: FOOD SECURITY, NUTRITION AND RESILIENCE

Tanzania has made significant progress in reducing malnutrition in the last two decades with significant reduction in the prevalence of stunting, wasting and underweight among children under five. The prevalence of chronic malnutrition (stunting) among children under five has been reduced from 50% in 1992 to 32% in 2018, while the prevalence of acute malnutrition (wasting) decreased from 8% in 1992 to 3.5% in 2018 (TNNS 2018). Despite this commendable progress, levels of under nutrition remain unacceptably high. The high rate of population growth in Tanzania is outstripping the rate of poverty reduction. Consequently, the absolute numbers of stunted and wasted children are high, and in some instances increasing. Indeed, the regional disparities in the absolute number of children affected by stunting has been observed being as high as 100,000 - 250,000 children in Kagera, Kigoma, Geita, Mwanza, Dar es Salaam, Dodoma, Tabora, Mara, Mbeya and Simiyu regions. Overall, more than 3 million children under five in Tanzania are stunted, which affects their future learning, productivity, and their opportunities to get out of the poverty cycle. In addition, the country is also experiencing a rise of overnutrition problems such as overweight, obesity and other Dietary Related Non-Communicable Diseases such as diabetes. Fruits and vegetables can provide a wide range of vitamins and minerals, increase dietary diversification and income which are essential in improving all forms of malnutrition. Currently, there is a global move to promote production and consumption of fruits and vegetables and much emphasis is being put on making agriculture line sectors to become more nutrition sensitive in their policies, strategies, programs and funding.



Policy Issues for discussion:

- How could production and consumption of fruits and vegetables be an integral part of NMNAP and ASDP2 for improved all forms of malnutrition?
- During the last two decades, stunting has been declining at an annual rate of 1 percent while poverty has been decreasing at a rate of 0.5 percent. Given the current levels of stunting (32%) and poverty (24%), it would take 32 years and 48 years, respectively to eliminate stunting and poverty in Tanzania. What are the drivers and enablers needed to promote production and consumption of fruits as part of the efforts to accelerate malnutrition and poverty reduction in Tanzania?
- Given the fact that globally about 3.9 million deaths in 2017 were attributed to inadequate intake of fruits and vegetables, rapid change in the food systems and population growth, what lessons can we draw from other countries as Tanzania debates on population management for better nutrition and economic outcomes?

PARTICIPANTS

The three-day conference will bring together over 250 stakeholders from the agricultural and nutrition sensitive sector. These include representatives from:

- Agriculture Sector Lead Ministries
- Nutrition specific and sensitive sector organizations
- Regulatory authorities in agriculture
- Members of the Parliamentary Committee on Agriculture
- Farmers and agribusiness associations
- Development Partners
- NGOs engaged in agriculture development
- Research and Training Institutions
- Private sector



THE APPROACH:

The format of the conference will be the “Davos” style in which thematic papers will be presented followed by a panel discussion before opening the session to the floor for questions and answers.



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