The United Republic of Tanzania
Agriculture Sector Lead Ministries

5TH ANNUAL AGRICULTURAL POLICY CONFERENCE (AAPC) REPORT

Partners

Contents

Abbreviations

AAPC	Annual Agricultural Policy Conference
ACT	Agricultural Council of Tanzania
ADGG	African Dairy Genetic Gain project
AGRA	Alliance for a Green Revolution in Africa
AMCOS	Agricultural Marketing Cooperative Societies
AMDT	Agriculture Markets Development Trust
ANSAF	Agricultural Non-State Actors Forum
AR	African Rising
ASA	Agricultural Seed Agency
ASDP	Agricultural Sector Development Programme
ASLM	Agriculture Sector Lead Ministries
ASPIRES	Agricultural Sector Policy and Institutional Reform Strengthening
AU	Africa Union
AWG	Agricultural Working Group
B2B	Business to Business
BDS	Building Development Services
BDSP	Building Development Service Providers
BMGF	Bill and Melinda Gates Foundation
BNFB	Building Nutritious Food Baskets
BPS	Bulk Procurement System
BRELA	Business Registration and Licensing Agency
CAADP	Comprehensive Africa Agriculture Development Programme
CEO	Chief Executive Officer
CIP	Crop Improvement Programme
CMSA	Capital Markets and Securities Authority
CRS	Catholic Relief Services
CSO	Civil Society Organization
CVC	Cold Value Chain
DOC	Day-Old Chicks
DVS	Director of Veterinary Services
EAC	East African Community
EAGC	East African Grain Council
ENGINE	Enabling Growth through Investment and Enterprise
EPZA	Tanzania's Export Processing Zones Authority
ESRF	Economic and Social Research Foundation
EU	European Union
FAO	Food and Agriculture Organization
FSDT	Financial Sector Deepening Trust
GAFCO	Great African Food Company
GAP	Good Agronomic Practices
GDP	Gross Domestic Product
GoT	Government of Tanzania
GPS	Global Positioning System
HST	Hermetic Storage Technologies
ICT	Information and Communication Technology

IFAD	International Fund for Agricultural Development
IFPRI	International Food Policy Research Institute
ILRI	International Livestock Research Institute
ISTA	International Seed Testing Association
JICA	Japan International Cooperation Agency
JRC	Joint Research Centre
Kg	Kilogramme
KPL	Kilombero Plantations Limited
LF	Lead Firms
LGA	Local Government Authority
LSA	Livestock Sector Analysis
MAFAP	Monitoring and Analyzing Food and Agriculture Policies
MITI	Ministry of Industries, Trade and Investment
MIVARF	Marketing Infrastructure Value Addition and Rural Finance
MLF	Ministry of Livestock and Fisheries
MoA	Ministry of Agriculture
MoFP	Ministry of Finance and Planning
MoHCDGEC	Ministry of Health, Community Development, Gender, Elderly and Children
MoLHS	Ministry of Lands, Housing and Human Settlement
MP	Member of Parliament
MSMEs	Micro Small and Medium Enterprises
MSU	Michigan State University
MT	Metric Tons
NEMC	National Environmental Management Council
NFRA	National Food Reserve Agency
NGOs	Non-Governmental Organizations
NMNAP	National Multi-Sectoral Nutrition Action Plan
NPS	National Panel Survey
NSSF	National Social Security Funds
OCP	The Office Chérifien des Phosphates
ODK	Open Data Kit
OECD	Organization for Economic Cooperation and Development
OSHA	The Occupational Safety and Health Authority
PAC	Partnership Accountability Committee
PAG	Policy Analysis Group
PAPAC	Platform for Agricultural Policy Analysis and Coordination
PASS	Private Agricultural Sector Support
PC-ALW	Parliamentary Committee for Agriculture Livestock and Water
PICS	Purdue Improved Crop Storage
PMO	Prime Minister's Office
PO-RALG	President's Office – Regional Administration and Local Government
PPP	Public Private Partnership
PS	Permanent Secretary
PSD	Private Sector Desk
QDS	Quality Declared Seeds
RAS	Regional Administrative Secretary

REPOA	Research on Poverty Alleviation
ReSAKSS	Regional Strategic Analysis and Knowledge Support System
RUBADA	Rufiji Basin Development Authority
SAGCOT	Southern Agricultural Growth Corridor of Tanzania
SDL	Skills Development Levy
SIDP	Sustainable Industrial Development Policy
SMEs	Small and Medium Enterprises
SPS	Sanitary and Phytosanitary (SPS)
SSL	Short Shelf Life
SUA	Sokoine University of Agriculture
SUGECO	Sokoine University Graduate Enterprises Cooperative
SUMATRA	Surface and Marine Transport Regulatory Authority
TADB	Tanzania Agricultural Development Bank
TAHA	Tanzania Horticultural Association
TASUPA	Tanzania Sunflower Processors Association
TBS	Tanzania Bureau of Standards
TFDA	Tanzania Food and Drugs Authority
TFNC	Tanzania Food and Nutrition Centre
TIC	Tanzania Investment Centre
TLMP	Tanzania Livestock Master Plan
TMEA	Trade Mark East Africa
TMX	Tanzania Mercantile Exchange
TORITA	Tobacco Research Institute of Tanzania
TOSCI	Tanzania Official Seed Certification Institute
TPRI	Tropical Pesticides Research Institute
TPSF	Tanzania Private Sector Foundation
TRA	Tanzania Revenue Authority
TSB	Tanzania Sugar Board
TTB	Tanzania Tourist Board
TZS	Tanzanian Shillings
UDSM	University of Dar Es Salaam
UN	United Nations
UNIDO	United Nations Industrial Development Organization
USAID	United States Agency for International Development
USD	United States Dollar
VAT	Value Added Tax
WCF	Workers Compensation Funds
WFP	World Food Programme
WRS	Warehouse Receipts System

EXECUTIVE SUMMARY

Introduction

From February 13 -15 2019, the Policy Analysis Group (PAG) in collaboration with the Prime Minister's Office and the Ministry of Agriculture (MoA) hosted the 5th Annual Agricultural Policy Conference (AAPC) at Treasury Square and Dodoma Hotel in Dodoma. The conference theme was, "Prioritizing Agriculture in the Industrialization Agenda for Tanzania under the Agricultural Sector Development Program (ASDP-2)". The convening brought together over 200 stakeholders in the agricultural sector from academia, research institutions, policy makers, advocacy groups and development practitioners from Tanzania and beyond. The overarching objective was to share experiences, collaborate and explore new opportunities to achieve agriculture-led industrialization. Among the participants were dignitaries from the Agriculture Sector Lead Ministries (ASLM) and the Parliamentary Committee for Agriculture, Livestock and Water (PC-ALW).

The 5th AAPC provided an opportunity to assess progress and implementation of policy reforms under the Comprehensive Africa Agriculture Development Programme (CAADP) framework of the New Alliance on Food Security and Nutrition. In a brief overview of the agricultural sector, Prof. David Nyange, the ASPIRES Chief of Party presented the 2017/18 statistics, which showed the country is food self-sufficient in two staples; maize and rice. Despite being food self-sufficient at national level, high incidences of child malnutrition in which stunting is at 34% is unacceptable. Traditional exports in 2016/17 are valued at USD 877.9 million. However, there are a number of policy issues of concern particularly in marketing. In her official opening address Hon. Angellah Mbelwa Kairuki (MP), Minister of State for Investment in the Prime Ministers' Office, pledged commitment to nurture domestic investors to grow and reach out to domestic, regional and international markets.

The conference program included two featured sessions; Agricultural transformation and Nutrition followed by seven thematic areas presented as value chain groups namely: Staples, Traditional exports, Non-traditional exports, Livestock and fisheries; Farm inputs, Import substitution and Farm services. Emerging policy issues were drawn for presentation to the Government and further discussions within PAG members.

Agricultural transformation

Progress has been made in agricultural policy reforms in the last three years and a number of success stories have been recorded particularly in the Southern Agricultural Growth Corridor of Tanzania (SAGCOT). However, there is a call for more concerted efforts in profiling stakeholders concerns and develop dialogue strategy, documenting regional experiences and international best practices and identifying and engaging champions of change in the agricultural transformation process. Evidence of agricultural transformation was reported, measured with indicators such as:

- Movement of people out of the rural areas and a shift in labor away from agriculture
- Increasing dependence on markets for food and increasing medium scale farms
- Increasing commercial orientation

Measures proposed to enhance transformation process include; increased public funding in agriculture, stable predictable policies, address problem of staff shortage in extension, research, animal/plant breeding, soil scientists and capacity building for young farmers to do agriculture as a business.

Nutrition

The session addressed the following issues: Why millions of children under five in Tanzania are still stunted? How is the value chain under ASDP2 contributing towards improving nutrition outcome? and what are the opportunities at the intersection of agriculture and health to improve food and nutrition security? It was noted there are changing food systems and nutrition leading to falling stunting and wasting but raising overweight, obesity and non-communicable diseases. Recommended having better understanding of how food environments are changing and influence consumers' food attitudes and practices. Suggested having policies conducive to economic growth and continued investment in programmatic interventions. Lack of effective disease control and weather challenges were the main setbacks observed in poultry-crop integration on food and nutrition security, calling for concerted efforts to strengthen synergies between ASDP2 and NMNAP for the agricultural sector to be more responsive to the nation's economic growth.

Thematic Area 1: Staples value chains

The session had four presentations; (i) effects of the National Food Reserve Agency (NFRA) on maize market prices, (ii) contribution of rice commercialization -the case of Mngeta in Kilombero District on livelihood impacts, (ii) do poor pay more for processed foods and (iv) seasonality of maize prices and implication to regional trade. Main findings suggest that NFRA under the current arrangement has an effect on maize market price, with some participants calling it "market distortion". Availability of reliable agricultural statistics was mentioned as a major setback to effective decision making particularly in NFRA operations. Rice commercialization benefits do not reach all the segments of the population, particularly women and those in remote villages due to poor services and low education. The question on, "Do the poor pay more for processed foods", was given a yes answer. Low quantities purchased per transaction, distances from highway and location (rural vs urban) influence price per unit. Preliminary results from the study in the fourth presentation showed temporal and spatial maize price differences, signalling when and where to trade. The findings can contribute to evidence-based policy decisions such as export/import bans that may negatively impact maize trade.

Thematic Area 2: Traditional exports value chains

It was noted that the export portfolio over the years has not changed much beyond the six traditional export crops. During the last 10 years, production of the traditional export crops has been dwindling. Implementing the Tanzania Mercantile Exchange (TMX) model faced challenges including lack of adequate infrastructure to support commodity storage; resistance from few but influential stakeholders (politicians); distortions of commodity exchange versus other systems such as the Warehouse Receipts System and cooperative systems; lack of binding contracts that hinder farmers and processors to participate in the exchange market and absence of government institutions in this marketing system is a setback. Having an agribusiness policy that harmonize agriculture and industry policies; value chains management, development strategy; value chains financing for all inputs including provision of production, processing and marketing services will ensure an innovative farming systems value chains for transformation, sustainable and predictable incomes.

Thematic Area 3: Non-traditional value chains

The thriving horticultural industry had an export value of USD 156 million in 2018 and was growing at 10-12% much above the growth of the overall agriculture sector. But the sector is struggling with policy issues including over regulations in fees and charges, land access challenges and costly registration of pesticides, seed and fertilizer. It was affirmed that the horticulture sector would help understand agriculture transformation as it integrates on-farm and off-farm activities in the food system. Sesame seed as a minor crop was gaining global attention and in recent years, Tanzania has become a leading producer in the world, followed by Myanmar, India, China and Sudan. Despite sesame being a sturdy crop, there are other opportunities for the crop including the growing demand of sesame seed edible oil and the increasing confectionery and other culinary, nutraceuticals, pharmaceuticals and other industrial uses. It was recommended that developing special market for different types of sesame seed; promoting Tanzania sesame seed as a special crop; branding of Tanzania sesame seed and investing in sesame research and development would highly promote the crop.

Thematic Area 4: Livestock and fisheries value chains

The sector's great opportunities to investment had not been fully exploited. The challenges include inadequate or poor supply management; processing constraints and weak marketing and trade systems. This calls for interventions in business enabling policies and governance issues addressing growth of the sector. Other issues to be looked into include accountability, political will, incentives in terms of tax regimes and regulations to reduce informal markets and pro-smallholder policies to maximize their contribution to ASDP2. Based on the Livestock Master Plan (TLMP), its analysis and supply-demand projections show huge potential for exceeding demand with additional investment especially in white meat. TLMP will be implemented through ASDP2 with a value chain orientation including clustering and involving the private sector. Aquaculture subsector creates an opportunity to substitute imports of fresh fish and this would meet domestic demand while creating skilled jobs, with potential for exports. Feeding, diseases, low animal productivity, poor sales and inadequate information remains the main barriers to improving productivity and income of smallholder dairy farming business in Tanzania.

Thematic Area 5: Farm inputs value chains

This session analysed the regulatory frameworks on farm inputs and observed a lengthy registration and importation process of regular fertilizers. Similarly, there is a lengthy registering and testing procedure of new agrochemicals and importation of pesticides. Demonstration plots and associated services (small packs) was seen as an effective model for enhancing technology adoption and should be complemented by facilitating access to agro-inputs through strengthening rural agro-dealer networks and strengthening producers' organizations and ICT integration. Removal of VAT, promoting further investment in the industry, treating hermetic storage technologies like any other agricultural inputs would enhance use of hermetic storage technologies (HST).

Thematic Area 6: Import substitution value chains

This session noted that the annual food import bill in Tanzania is estimated at USD 539.3 million with edible oil accounting for 50%. The domestic production has not increased fast enough to meet the demand. The Government is promoting the industrialization agenda which could help to reduce the country's dependency on imports and create employment opportunities particularly the youth, while creating market for farmers. It was viewed that investments in palm and cotton could be made more attractive in the medium and long term if challenges within the two value chains were resolved. Sunflower was seen as the best opportunity to expand domestic edible oils production and would replace crude palm oil imports with 200,000 MT of domestically produced and refined sunflower oil. Challenges behind Government interventions in the market in Tanzania were highlighted and noted that the rationale and reasons for Government intervention on commodity market were for regulating prices, addressing effects due to natural disaster and empowerment purposes. Modernization of commodity bodies, establishment of private sector specific organizations, using existing bodies or structures to intervene instead of using new bodies and stakeholder engagement and reaching consensus were recommended for addressing challenges under this subsector.

Thematic Area 7: Farm services value chains

The agricultural farm services value chain is often overlooked despite being critical for successful value chains development. Achievements obtained through strengthening and growing Business Development Service (BDS) providers were highlighted. Again, it was noted that Tanzanian seed sector is dominated by the informal sector and inorganic fertilizers were mostly imported and delivered late. It was recommended that improving profitability through productivity, quality, consistency and competitiveness in markets, accessibility to quality inputs, mechanization, finance and crop insurance will enhance the process of transforming from subsistence farming to farming as a business.

Closing ceremony

In closing, Hon. Mahmoud Mgimwa the Chairman of PC-ALW emphasized on the following issues:

- Close follow-up on legislation of the agriculture sector to ensure pro-farmer legal framework
- Stakeholders to be well informed of the outcome of ASDP2 monitoring and evaluation and annual progress reports should be a public good
- Future conferences to have more farmer/livestock keepers/fisherfolks representation
- Reiterated on his committee's support and cooperation with PAG and invited all stakeholders to freely consult and inform the PC-ALW on any issue which may require high level discussions especially the punitive regulations.

1. BACKGROUND

1.1 About AAPC and PAG

The Annual Agricultural Policy Conference (AAPC), which has been running for the last five years, is organized by the Policy Analysis Group (PAG) in collaboration with the Ministry of Agriculture. 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 (Box 1). Established in 2013, the group provides a platform for sharing information on policy research findings so as to enhance coordination, collaboration and synergy in the national policy reform process. PAG also aims at ensuring consistency in policy messaging building on the members' comparative advantages in the implementation of agricultural policy activities in the country.

Box 1 Policy Analysis Group 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 Analyzing Food and Agriculture Policies (FAO-MAFAP)
- Platform for Agricultural Policy Analysis and Coordination- PAPAC, representing the Ministry of Agriculture and Ministry of Livestock and Fisheries
- Research on Poverty Alleviation (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)

The AAPC brings together key stakeholders working on agricultural policy projects and initiatives to share key empirical findings from ongoing research in the sector, and deliberate on the challenges, opportunities, emerging issues and potential areas for further collaboration. Emerging policy issues and recommendations from AAPC inform the national macro and micro policy reform process through PAG's advocacy and lobbying functions with Agriculture Sector Lead Ministries (ASLM) and other entities such as PC-ALW as well as PAC.

PAG choice of AAPC themes and sub-themes have been strategic and aligned to the national, regional and global development agenda. The last four conference themes carried three key words; agricultural transformation, industrialization and value chains (Table 1).

Table 1. AAPC conference themes 2014 - 2018

Year	Theme
2014	Changing landscape of Africa's agriculture: The need for more evidence-based policy making to achieve greater food security and poverty reduction in Tanzania
2016	Agricultural sector transformation for food security, job creation and poverty reduction
2017	The role of agri-food systems in promoting industrialization in Tanzania: Enhancing linkages of upstream and downstream value chain activities in the context of agriculture transformation
2018	Integrating food and nutrition security into economic transformation and industrialization agenda in Tanzania

1.2 The 5th AAPC Concept and Thematic Areas

The 5th AAPC was held from 13-15 February 2019 in the capital city of Dodoma under the theme, "Prioritizing Agriculture in the Industrialization agenda for Tanzania within the Agriculture Sector Development Program (ASDP2). The conference provided an opportunity to assess progress in implementation of policy reforms under the CAADP framework of the new Alliance on Food Security and Nutrition. The 5th AAPC theme captured very well the 5th Phase Government agenda for industrialization in which agriculture has to be the driver and the source of raw materials and workforce for emerging industries. The theme broadened the industrialization agenda into the big picture of economic transformation in a manner that is inclusive. The transformation agenda captures key elements such as inclusive growth, poverty reduction, food and nutrition security and job creation especially for youth and women. The conference sub-theme brought into context regulatory reforms which are mostly value-chain specific. ASDP2 prioritizes value chains according to agro-ecological zones and hence it made sense to analyze policy issues in the context of value chains covered (Box 2).

Box 2 The 5th AAPC conference sub-themes

Staples Value Chains
Traditional Exports Value Chains
Non-traditional Exports Value Chains
Livestock and Fisheries Value Chains
Farm Inputs Value Chains: Fertilizer, pesticide, seed (day-old chicks, fingerlings, heifers etc.) and feed
Import Substitution Value Chains
Farm Services Value Chains: extensions, credit, machinery, storage, irrigation, water, energy and transport

This year's conference was organized in cognizance of great strides in policy reforms in the last five years to create an enabling environment for agriculture. The most notable ones include:

- Reduction in agricultural levy (produce cess) administered by local governments from 5 percent to 3 percent of the value of production
- Relaxation in trade restrictions for staples e.g. export ban
- Removal and reduction of over 100 levies and charges administered by regulatory agencies including crop board
- Waiver of VAT or import duty on various agricultural technologies such as irrigation equipment
- Temporarily raising of import tariff on some of the import substitution commodities to reduce competition with domestic industry

Another salient feature of the current AAPC relative to the previous ones, is the fact that it was coordinated by the Prime Minister's Office (PMO), which coordinates both ASDP2 and the National Multi-Sectoral Nutrition Action Plan (NMNAP). The uniqueness of the 5th AAPC was reflected in the high participation of ministers and senior Government officials from the Agriculture Lead Ministries, the Ministry of Health Community Development Gender, Elderly and Children (MoHCDGEC) as well as representation of the legislative body by the PC-ALW.

2. OFFICIAL OPENING SESSION

2.1 Welcome Remarks

The conference opening session was facilitated by Mr. Peter Anthony Mavunde, the former mayor of Dodoma. Madam Aziza Mumba the Regional Administrative Secretary (RAS) gave brief welcoming remarks on behalf of the Regional Commissioner of Dodoma the host region. Madam Mumba made reference to two priority commodities in the region;

grapes and sunflower, which require improvement interventions to contribute to the industrialization agenda. She noted that there are 491 small scale oil pressing plants operating under capacity due to shortage of sunflower seeds.

2.2 Conference Background, Objectives and Program

Prof. David Nyange, the ASPIRES Chief of Party, the Coordinator of PAG and Ministry Policy Advisor extended an appreciation note to the PMO for coordinating this year's AAPC which was characterized by good participation (>200 participants) and stakeholder-wide representation (Table 1). The list of the 3- day conference participants is shown in Appendix 1.

Table 2.2 Number of participants by gender and by type of organization

		Type of Organization								Total
		1	2	3	4	5	6	7	8	
	F	7	6	27	13	-	4	2	1	60
	M	27	11	32	46	3	6	2	4	131
DAY 1	Total	34	17	59	59	3	10	4	5	191
	F	8	6	26	15	2	9	2	1	69
	M	27	13	34	43	7	9	3	3	139
DAY 2	Total	35	19	60	58	9	18	5	4	208
	F	7	6	18	9	1		2	1	44
	M	23	4	27	36	1	1	1	3	96
DAY 3	Total	30	10	45	45	2	1	3	4	140

Key: F=Female, M =Male, 1=Government/Public, 2= Research/University, 3=Development partners/Donors, 4=Private/NGOs, 5=Farmer/Farmer organization, 6=Media, 7=Parliament, 8=Unspecified

The objectives of the conference were to: -

- share results on policy research
- provide a platform for high level policy dialogue
- takes stock of progress in policy reforms
- provide feedback to PAG to ensure demand driven research

The 3-day conference concept, objectives and program were presented highlighting the key issues in each session (Appendix 2). The national economy is showing signs of transformation as employment and GDP share of services and industry are increasing while the share of agriculture is declining. The sector of agriculture remains central to the national industrialization agenda, as it provides markets for industrial products and raw materials for industries. Three model agribusiness firms in the country, a sign of the happening agricultural transformation represented in the conference were introduced. These were:

Mr. Franklin Bagalla, Operations Director of Tomoni Farms-- This is a medium size farm agribusiness using drip irrigation, solar energy for water pumps, with processing and cooling room using renewable energy.

Madam Elizabeth Swai, Managing Director AKM Glitters Company—This is a poultry farm keeping Kuroiler parent stock, with a day-old-chick (DOC) production of up to 100,000 per week. AKM Glitters has an out-grower scheme with contract farming arrangement.

Madam Khadija Jabir, Managing Director GBRI-- one of the leading youth agribusiness entrepreneurs exporting horticultural products.

Dr. Anna Temu, Chair and Founder of Sokoine University Graduate Enterprises Cooperative Society (SUGECO) who has been instrumental in imparting practical skills to young graduates and helping them become self-employed.

The main topics covered in the program were: Agriculture transformation, Nutrition, Youth in Agriculture, and Progress in Policy Reforms. The conference main program was enriched with side events held in Day 2 and 3; Youth in Agriculture Breakfast Meeting, Feed the Future Tanzania Advancing Youth Project and a Financial Sector Deepening Trust (FSDT) meetings.

The contribution of development partners namely: USAID, BMGF, EU, IFAD and WFP in the agriculture sector development program and support to the conference was recognized.

2.3. Opening Remarks by Key Stakeholders

Six key stakeholders from the private sector gave opening remarks prior to the official opening address. These were, Mr. Nicomed Bohay, Managing Director of the Private Agriculture Sector Support (PASS) , Prof. Peter Gillah, Deputy Vice Chancellor, Sokoine University of Agriculture (SUA), Madam Jacqueline Mkindi, Chairperson of the Agricultural Council of Tanzania and the CEO of Tanzania Horticultural Association (TAHA), Mr. Salum Shamte, Chairman of Tanzania Private Sector Foundation (TPSF), Mr. Geoffrey Kirenga, CEO Southern Agricultural Growth corridor of Tanzania (SAGCOT) Ltd. and Madam Michelle Corzine Co Chair Agriculture Working Group (AWG).

Key points from the stakeholders opening statements:

- In view of the Government expectation that the private sector is to contribute 60% of the ASDP2 budget, there is a need for policy interventions in the availability of capital, harmonization of tax regimes in guarantee schemes and provision of agricultural risk assurance supported with a national agriculture risk insurance policy

- Recent reforms in the legal and regulatory framework towards improved business enabling environment through the Blueprint outcomes are commendable actions by the Government. The private sector call for more policy interventions to address pending conflicting and duplicative policies and laws but also for government support towards private sector-led markets and marketing systems for all agricultural commodities
- A call for harmonization of investment incentive schemes of Export Processing Zone Authority (EPZA) and the Tanzania Investment Centre (TIC) at both central and local government levels to attract local and foreign investments
- Increased direct public investment in agriculture in line with commitments to 2003 Maputo Declaration of 10% of the national budget to agriculture for a true agricultural transformation
- Policies supporting greater engagement of private sector and building strong effective Public Private Sector Partnership are crucial measures in the agricultural transformation process
- A call for more liberal trade policies that respond to changing agricultural markets and global socio-economic trends. Development partners

2.4 Updates on ASDP – 2 Implementation

Mr. Joseph Kiraiya from PMO Directorate of Policy Coordination, presented updates on ASDP-2 implementation. Program implementation is anchored on three Presidential directives given during the launch of the program on 4 June 2018 (Box 3).

Box 3 Presidential directives in the launching of ASDP 2 4 June 2018
Deploy multisectoral strategy in ensuring involvement of all stakeholders; government, development partners and private sector
A national coordination unit under the Prime Minister's Office to bring together the six Agriculture Sector Lead Ministries but also the private sector in implementing the process
Strong linkages between food security and nutrition with the two programs ASDP 2 and NMNAP coordination under the PMO.

Progress made include formation of a technical steering committee, development of working calendar for the technical committee and development of implementation manual.

2.5 Ministerial and PC-ALW opening statements:

In attendance from the high profile public sector stakeholder group were:

Hon. Omar Mgumba (MB), Deputy Minister Ministry of Agriculture

Hon. Eng. Stella Manyanya (MB), Deputy Minister Ministry of Industries Trade and Investment

Dr. Janeth Ndamba, Ministry of Health, Community Development, Gender, Eldrely and Children (MoHCDGEC)

Mr. Ezekiel Gwanda Ministry of Lands and Human Settlements (MLHS)

Mr. Ibrahim Minja Assistant Director, Ministry of State, Presidents Officer Regional Adminstration and Local Government (PO-RALG)

Hon. Mahmoud Mgimwa (MP) Chairman – Parliament Standing Committee Agriculture, Livestock and Water.

Hon. Dr. Christine Ishengoma (MP) Vice Chairperson-ALW.

Key points from the high profile Government officials in the opening session:

Elevation of the investment portfolio from the Ministry of Industries and Trade to the PMO is a positive move for effective inter-sectoral coordination.

Improvement of the nutritional status in the country in recent years is evident and the Government is committed toward more improvement with a target of reducing stunting levels from the 2015 level of 34% to 28% by 2021

Role of the agriculture sector lead ministries in eliminating malnutrition is factored in the NMNAP 2016 – 2021 strategy

Addressing malnutrition problems in the country require inter-sectoral collaboration on the basis of food security in broad dimensions; availability, access and utilization of food.

There was a call for more interaction with the legislative body through the PC-ALW so as to accelerate the legal and regulatory reform process

2.6 Official Opening Address

Hon. Omar Mgumba (MP), Deputy Minister of Agriculture made a brief statement on the state of the art of the sector and recent developments, before inviting the Guest of Honor to deliver the official opening address. Progress made in the sector in recent years was listed as:

- Surplus production of grains
- Increase in use of irrigation agriculture
- Fast growing non-traditional commodities e.g. horticulture, which employ 14 million people and generates USD 156.145m
- Review of the 2013 Agricultural Policy and plans to formulate legal framework for agricultural land to reduce land use conflicts and support commercialization of agriculture.

The Deputy Minister pledged commitment to work with all stakeholders and challenged participants to come up with constructive suggestions for policy reforms to support the national industrialization agenda.

The Guest of Honor Hon. Angellah Mbelwa Kairuki delivered the opening address on behalf of Hon. Kassim Majaliwa (MP) the Prime Minister of the United Republic of Tanzania. The Guest of Honor acknowledged the good work of PAG and all development partners in the agricultural transformation process. She noted that the 5th AAPC choice of the theme, Prioritizing Agriculture in the Industrialization Agenda for Tanzania under the Agricultural Sector Development Program (ASDP2) is timely because it is in sync with the national aspirations shared by His Excellency Dr. John Pombe Joseph Magufuli the President of the United republic of Tanzania, during the launch of ASDP2 in June 2018.

Opportunities highlighted by the Guest of Honor:

- Tanzania has enormous potential to increase agriculture production through effective use of land, water and natural resources of this country
- Demand of agriculture produce is high and is growing with over 450 million population in the region
- Political will over the years, testified by past slogans in Kiswahili such as; Siasa ni Kilimo, Ujamaa Vijijini, Chakula ni Uhai, Kilimo cha Kufa na Kupona all pointing to the importance of the agricultural sector to the national economy and livelihoods of people
- Launching of ASDP2 by His Excellency Dr. John Pombe Magufuli a program which provides a road map towards agricultural transformation anchored on value chain development approach
- Strong political will demonstrated by the recent approval of regulatory reforms – Blueprint and removal of disincentive or punitive taxes/fees/levies
- Emerging new opportunities with non-traditional export commodities and foodstuffs with niche markets such as sesame leaves

Photo 1 Hon. Angellah Kairuki officiating the opening of the 5th AAPC

Challenges and constraints in the transformation process

- Use of rudimentary agricultural tools, reliance on rain-fed agriculture, only 2% of land suitable for irrigation is under irrigation
- Low use of quality seed partly attributed to poor availability of quality seeds in the country. The country imports 70% of the seed requirement
- Low use of fertilizer and other farm inputs
- Poor agricultural practices – land preparation, planting, harvesting and storage
- Low number of extension workers
- Lack of capital for investment in agriculture --an area, which is being addressed by financial institutions such as TADB and PASS through provision of credit guarantee

The Guest of Honor concluded her opening address by declaring an open door policy and commitment to nurture domestic investors to grow and reach out to domestic, regional and international markets. She encouraged showcasing of success stories from the model farms for dissemination of technologies and promotion of domestic investors.

3 CONFERENCE PROCEEDINGS

Prof. Andrew Temu the conference Lead Facilitator took over the facilitation process. He made brief remarks on the conference program commending PAG for consistency in organizing the conferences and invited presentation of the keynote address on progress in policy reforms.

3.1 Key Note Address: Progress in Agriculture Policy Reforms

Agricultural transformation process was triggered by the 2008/2009 food prices crisis and this led to the formation of the New Alliance for Food Security and Nutrition. A tripartite partnership among the G8 nations, African partner countries and private sector partners pledged over 3bn dollars for 3yrs support in agricultural development. Policy reform is one of the commitments in the New Alliance in support of enabling environment for investment and accelerating agriculture sector growth. PAG has three main objectives:

- Share policy research information and avoid duplication of effort
- Promote collaboration and synergy in policy research by taking advantage of institutional comparative advantage among members
- Coordinate policy dialogue for consistent messaging

PAG adopted the New Alliance Policy Framework, which has six thematic areas; (1) Agricultural Sector Policy, (2) Agricultural Market and Trade, (3) Enabling Policy for Private Sector Investment, (4) Land Tenure Policy, (5) Access to and Finance Technology and (6) Agriculture Input Policy.

The initial priority policy issues under the New Alliance are shown in Appendix 3. Major progress has been made in the reform process and most of it from 2017 as shown in Appendices 4 – 6. Preliminary proposal for policy reforms for 2019/20 and the issues raised under the Regulatory Reforms Blueprint are shown in Appendix 8 and 9, respectively.

Successes made in the SAGCOT initiative were presented as one of the outcomes of the transformation process and the ongoing policy reforms.

Key points from the Key Note Address:

- The pace of policy reforms accelerated after accession of the 5th Administration of the GoT
- Most of the initial recommendations on policy reforms under the New Alliance have been implemented (except nutrition review)
- The reforms took longer than expected. e.g. removal of produce cess delayed from 2013 to 2017
- Some reforms were undergoing reversals (e.g. export bans) while new issues cropped up e.g. export permits

- More GoT involvement and oversight in agribusiness e.g. pension funds investment in sugar industry; Bulky Procurement System (BPS) for fertilizer; cereals and mixed crop board involvement in marketing
- Recent reforms are in fiscal policy but regulatory reforms are underway under the business environment improvement Blueprint approved by the cabinet last year

Lessons on what it takes for successful policy reforms were summed up as: -

- Defining the policy issue in the context of the national policy framework
- Understanding the evolution of the policy
- Profiling stakeholders' concerns and develop a dialogue strategy
- Acknowledging the role of political economy –asking the question who loses and who wins in the game
- Evidence-based research report versus activist approach (addressing the core issues of concern)
- Laying out alternative and coherent policy options
- Documenting regional experience and international best practice
- Finding the middle ground --if there is failure in reaching consensus, go for phased reforms
- Mapping out the process (e.g. non-legislative, amending an existing law)
- Consider appropriate timing and incentives for reforms – jump into an opportunity
- Identifying and engaging the champions (movers and shakers and partnering with those with a bigger convening power)
- Piloting reforms
- Sustained engagement

3.2. Featured Sessions

3.2.1 Agricultural sector transformation

Agricultural transformation is a global, continental, regional and national priority development agenda. It aims at transforming agriculture into a competitive and inclusive agribusiness sector that creates wealth and improves lives while preserving the environment (AfDB 2018)[1]. Under the Comprehensive African Agricultural Development Program (CAADP), the African Heads of State made bold statements in the 2003 Maputo

[1] AfDB Annual Report 2016

and 2014 Malabo Declarations respectively. One of the commitments was a direct public investment of 10% of the national budget in agriculture. Participants were urged to have in mind two key questions in the session: Is Tanzania experiencing agricultural transformation? Is *'the sector'* a leader or follower in the broader economic transformation process?

Presentation 1: The changing face of agriculture in Tanzania: Indicators of transformation.

Authors: Ayala Wineman, Thomas S. Jayne, Holger Kray and Emma Modamba Isinika

Presenter: Madam Emma Modamba Isinika

Key points from the presentation:

- The perception that the Tanzanian farm sector is dominated by subsistence-oriented smallholders is changing slowly. People are exiting agriculture and moving to cities, as poverty rates are falling. This is consistent with the notion that agricultural growth plays a vital role in structural change, strengthening the non-farm economy through backward and forward linkages, and enabling people to securely exit agriculture. Furthermore, the findings underscore the vital importance of continued/increased support for agriculture (especially productivity growth) as a catalyst for structural transformation and inclusive economic growth.
- Policy interventions should be directed to meeting farmers' diverse needs due to heterogeneity among farms and the rapidly shifting distribution of farm categories.

Key points from the panel discussion:

- Decline in proportion of labor force in agriculture as well as decreasing share of agriculture in national GDP in agricultural transformation is a universal phenomenon. Similar trends have been observed in developed countries
- Main indicators of agricultural transformation are; increased production efficiency i.e. producing more with less inputs, increased use of technology and existence of integrated markets
- SAGCOT initiative demonstrates success models of agricultural transformation. Alignment of public and private sector investment solved major infrastructure problems
- Agriculture transformation should be driven by a new generation with right attitudes and good skills at various levels of the value chain
- Creating platforms for policy dialogue at different levels will enhance the policy reform process

- Investing in science and technology is a pre-requisite for agriculture led industrialization agenda
- Production of popular versions of ASDP2 document with some in Kiswahili was proposed. This would enable the message to reach more agricultural stakeholders at all levels and particularly the youth

Questions, comments and emerging issues from the plenary discussion:

- Questioned the authors' explanation of increase in specialization and whether the path to develop agriculture is the same as that of Europe and Asia The presenter noted that in the study, specialization was based on the degree to which the farmer was planting a variety of crops. The more the crops, the less specialized the farmer was.
- A question on whether agriculture transformation in Africa is following the same path as that of Asia and Europe. It was noted that there are some common features in transformation process. The major difference between Africa and Europe or Asian countries is in availability of industries to absorb the population exiting agriculture.
- Is the happening transformation coming from traditional farmers or new entrants in the business and is it possible to trace where the migrating labor from agriculture is going?
- A small proportion of farmers contributing to agricultural transformation are new entrants although this is an area for research. Similarly, research is needed to find out the paths of the population exiting agriculture.
- More than 80% of primary school leavers go into agriculture. Question: Why not invest in producing primary school teachers with agriculture specialization?
- Noted that the underfunding in agriculture remain a major challenge in the transformation process.
- Stable and predictable policies will enhance transformation
- Shortage of staff in extension, research, animal and plant breeding as well as soil science is a long-term problem
- Time to focus and plan on taking SAGCOT success stories to scale
- Agricultural transformation indicators should be factored in the national agriculture census and/or the other national surveys in addition to poverty and economic growth.
- There is a need for rationalization of national and subnational policies, laws and regulations.
- Operationalizing contract farming can contribute positively to the transformation process.

3.2.2 Nutrition

Globally the current burden of malnutrition is unacceptably high (Global Nutrition Report 2018). About 22% or 150.8 million of children are stunted children (0-59 months). Corresponding figures for wasting are 7.5% (50.5 million) and 5.6% or 38.3million. Every country in the world is affected by malnutrition. Nutrition indicators are; adult high blood pressure, adult obesity, adult overweight, anemia, child stunting, child wasting, children overweight and salt intake. The story is not different at regional level (Figure 1).

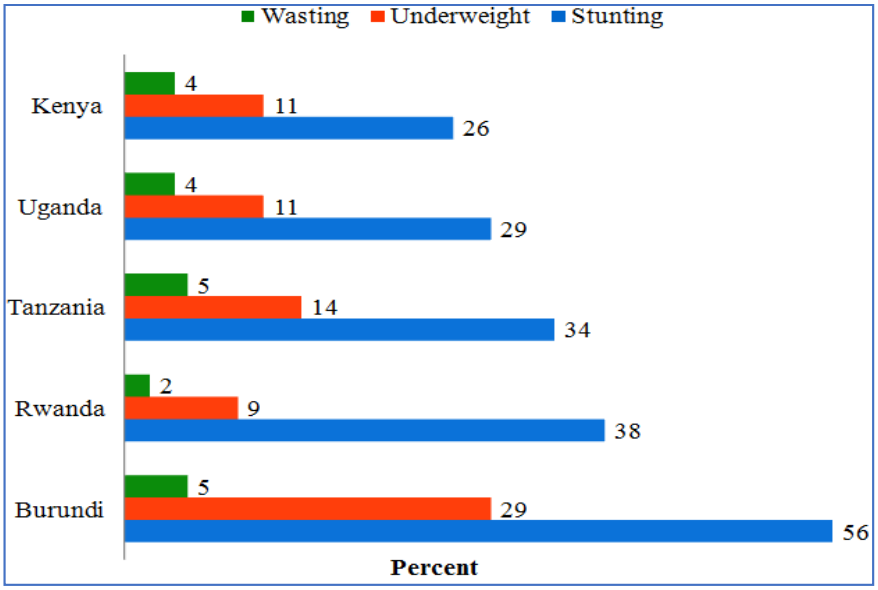


Figure 1: East Africa countries nutritional status

There has been slow progress in tackling the problems of malnutrition, although the world is now more informed of the problem. Three questions were put forward for reflection in the Nutrition Session:

Why millions of children under five in Tanzania are still stunted?

How is the value chain under ASDP2 contributing towards improving nutrition outcome?

What are the opportunities at the intersection of agriculture and health to improve food and nutrition security?

Presentation 1: Emerging evidence on the double burden of malnutrition in Tanzania

Authors: Tumaini Charles, Fortunata Chuwa, David De Young, Rahul Dhar and David Tschirley

Presenter: David Tschirley, Professor, MSU/ASPIRES

Using data from 2008/09 and 2014/15 National Panel Survey (NPS), facts about diet transformation and evidence on the double burden of malnutrition were presented. Double burden of malnutrition is a condition where both stunting/underweight and Obesity/overweight are manifested either in an individual or household. Food systems trends indicate that rural households are increasingly relying on purchased food, and that perishable food (fresh produce, milk, meat) and processed foods are increasing their share in total consumption, while the share of staple foods such as maize meal and rice food is falling. The diet transformation has resulted into nutrition transition with falling stunting and underweight but increasing over weight/obesity. The latter leads to rising of non-communicable diseases.

Key policy issues:

- Increased investment in known effective programmatic interventions for stunting as well as overweight and obesity
- Invest in research onto how food environments are changing in rural and urban areas and on how they influence food attitudes and practices
- Overweight/Obesity is becoming a problem of national concern due to associated health issues such as increasing non-communicable diseases and thus the need for mitigative approaches

Presentation 2: Strengthening Food and Nutrition Security through Family Poultry and Crop Integration

Authors: Peter Nnally, Wende Mwaulaga, Msafiri Kalloka and Said Komba

Presenter: Peter Nnally, Research Officer, TFNC

Research findings from a study on family poultry and crop integration in food and nutrition security conducted in Manyoni and Mpwapwa districts was presented. The objective of the research was to enhance chicken-crop systems as a sustainable solution to nutritional challenges targeting children between 6 – 23 months.

The findings of the intervention were reduction of cases of Newcastle Disease in poultry, increased proportion of households keeping chickens from 47.7 to 71.9%, improved flock size per household from 9 to 13 chickens and increased participation of women in poultry keeping. The outcomes observed include reduced number of children suffering from acute malnutrition and increased sorghum yields.

Presentation 3: Leveraging ASDP II-NMNAP synergy for improved food security and nutrition in Tanzania.

Author: Solomon Mkumbwa, Food Security and Nutrition Policy Specialist, EU/FAO FIRST Tanzania

Presenter: Solomon Mkumbwa, FAO

Tanzania aspires to become a middle-income country by year 2025. Tanzania also intends to reduce stunting from 34% in 2015/16 to 28% by 2021. According to the World Bank reports, over the past decade Tanzania's economy grew at an impressive average of 6.5% mostly driven by high growth rates in the urban-based service, construction and manufacturing sectors, with modest growth rates in the agricultural sector.

To spur agricultural-led economic growth and improvement of food security and nutrition, the Government of Tanzania has developed two parallel multisectoral investment programmes; The Agricultural Sector Development Programme II (ASDP II, 2017/18 – 2027/28), and ii) the National Multisectoral Nutrition Action Plan (NMNAP, 2016-2021) to guide the Government and development partners' investments in agriculture, food security and nutrition. Both ASDP II and NMNAP are designed and implemented as separate multisectoral frameworks, under the coordination of the PMO with specific activities being implemented by sectoral line ministries, government agencies and non-state actors.

Therefore, to enable the agricultural sector to be more responsive to the nation's economic growth aspirations and national food security and nutrition imperatives, there is a need to build and strengthen synergies between ASDP II and NMNAP by having a framework for inter ASDP II and NMNAP cooperation for implementation.

Key points from the panel discussion:

- Policy interventions to address obesity problems, drawing from Latin America experiences, where advertisements and promotions on what people should consume are regulated
- Behavioral change and communication through Local Government Authority (LGA) and clinical workers in rural areas sensitizing women on nutritional aspects
- Increased investments in research and development of bio-fortified crops such as Orange Fleshed Sweet Potato (OFSP), Pro. Vit A maize and high iron and zinc beans to address the problem of macronutrient malnutrition
- Mainstreaming of crop platforms in National Food Fortification Alliance and in strategic national programs such as ASDP-2 and NMNAP.
- Positive results are emerging in enhancing nutrition through crop/livestock integration

3.3. Thematic Areas

3.3.1: Staples Value Chains

The staples value chains comprise cereals; maize rice, millet and sorghum and non-cereals; pulses, roots and tubers. The 2017/18 agricultural statistics recorded annual production of 16.9 million tons vs national demand of 13.6 million tons (NBS 2018)[2]. Surplus production was recorded in maize (+1.6 million tons), cassava (+0.2 million tons) and rice (+1.3 million tons). Great opportunities as well as challenges exist in these value chains (Table 3).

Table 3. Opportunities and Challenges in Staples Value Chains

Opportunities	Challenges
Growing demand for food	Low usage of recommended farm inputs—e.g. Fertilizer and improved seeds
Increased demand for livestock feed (maize bran, sunflower cake and soya beans)	Dependency on rain fed agriculture
Potential for domestic and regional markets (over 450 million people in the east African region)	Unpredictability of trade policies e.g. export ban

Presentation 1: The effect of NFRA procurement on maize market prices in Tanzania: Policy options for cost-efficient and market-conducive operations

Authors: Guillaume Pierre, Karl Pauw and Emilano Magrini.

Presenter: Alethia Cameroon, Policy Analyst, Food and Agriculture Organization (FAO)

The National Food Reserve Agency (NFRA) became an executive agency in 2008 under the Ministry of Agriculture. The mandate of NFRA is to guarantee national food security through procuring, reserving and recycling grain stocks in a cost-effective manner.

[22] Production data NBS – Agriculture Sample Survey 2018

Objectives of NFRA are:

i) To maintain an optimal level of national food reserves to address local food shortages and to respond to immediate emergency food requirements, and
ii) To procure and store food stocks in an efficient and cost-effective manner

The presentation was based on a study of the effect of NFRA operations on maize market conducted by FAO on request from the Ministry of Agriculture. The study aimed at examining the NFRA impact on whole sale market price.

An econometric model was developed to disentangle the relationship between wholesale market prices and NFRA buying premiums in surplus maize production zones.

The recovered coefficients from the model were then used to simulate hypothetical maize price paths assuming NFRA procured and sold maize at the prevailing market price rather than at administratively set prices.

Key findings were: Limited spill-over effect of NFRA procurement premium on maize market prices, which was attributed to few market agents receiving the premium price and high cost to Government of procurement and operations

Recommendations based on the study findings are:

- Government and NFRA food procurement at competitive market prices following transparent and predictable approach
- Until ‘optimal’ storage estimates are updated, the most recent estimate of optimal storage volumes of 115,000 tons is considered sufficient for domestic food security and emergency preparedness

Areas requiring further investigation and analysis:

- Linkages between farmers and institutional buyers and prevailing contractual arrangements
- Potential synergies with ongoing initiatives in nutrition, agriculture, and trade
- Map existing and potential institutional demand, including regional demand
- Identify supply- and demand-side regulatory and budget reforms
- Incentives structure for quality grain, post-harvest management
- Explore PPP modalities for grain storage in Tanzania
- Update ‘optimal’ storage estimates to inform with confidence what could be considered ‘excess’ capacity
- Conduct in-depth budget analysis to inform budget discussions on increasing and diversifying composition of agriculture expenditure

Presentation 2. Rice commercialization effects on livelihood impacts: Experience from Mungeta in Kilombero district, Tanzania

Presenter: Aida Isinika, Professor, SUA

Authors: Aida Isinika, Gideon Boniface, Gilead Mlay and Ntengua Mdoe

The paper addressed two basic questions: (i) Has rice commercialization been inclusive? (ii) Has rice commercialization contributed to poverty reduction? The study was conducted in Mungeta division, Kilombero one of the SAGCOT clusters. Smallholder inclusion in commercialization is among the expected outcomes of interventions in SAGCOT initiative. Kilombero Plantation Limited (KPL) in Kilombero district has had positive impact on rice farming in the area through increased farm prices. Using descriptive and regression analysis from qualitative and quantitative data collected from 10 villages within 30 km from KPL, rice commercialization effects on livelihood impacts were studied.

Main findings of the study:

- Some segments of the population, particularly women, face challenges, limiting their potential to benefit from commercialization
- Commercialization gains by farmers in remote villages are undermined by poor water and health services and lower education making them more multidimensionally poor

Policy recommendation:

- For more inclusive rice commercialization in future, government policies and interventions by development agents should focus on broadening the spectrum of opportunities for all actors in the rice value chain.

Presentation 3. Do the poor pay more for processed foods? Evidence from Tanzanian consumers and retailers

Authors: Betty Waized, Roselyne Alphonce, Christina Sauer, Vincenzima Caputo, Daniel Ndyetabula, Thomas Reardon and David Tschirley

Presenter: Roselyn Alphonce, Researcher, SUA

The paper is part of collaborative research between SUA and Michigan State University (MSU). The main purpose of the study was to contribute into the debate on whether the poor pay more than the rich for both food and non-food goods with focus on access to bulk discounts. Consumer and retail survey were conducted in 22 towns of varying sizes distance from the highway and from the primary city, Dar es Salaam. Separate analyses for the consumer and retails surveys for maize were done. In the consumer survey relationships between income and characteristics of products, type of store and town were explored.

Justification for the research include the fact that there are significant differences in the state of the art on key issues pertaining to the debate in the 1970/90s and post 2000s; there has been significant increase of the urban share, increase in the share of purchased and processed foods and rise of supermarkets. Unit price is a function of quantity purchased, packaging or no packaging, distances from the city and retail types.

Regardless of income category, low quantities purchased per transaction, the store type visited, the size of town, distance from the highway and location (rural-urban) influence price paid per unit.

Presentation 4. Seasonality analysis of maize prices and implication to regional trade in East Africa: The case of Tanzania and Kenya

Authors: Claire Ijumba, Emmanuel Domonko, Edith Lazaro, David Deyoung, Isaac Minde and David Tschirley

Presenter: Edith Lazaro, Training and Capacity Building Specialist, ASPIRES

Maize is one of the most significant staples grown in Tanzania constituting over 70% of all cereals produced. Tanzania is the lead producer of maize within the Eastern Africa Region with an annual production of over 6.6 mil tons. Kenya on the other hand produces only half of Tanzanian's production annually (about 3.1 mil tons). The demand for maize in Kenya occasionally surpasses its supply requiring importation to cover the deficit. For several decades, maize has been traded across the Tanzanian borders both formally and informally. This study aims at empirically demonstrating how understanding the behavioral pattern of maize prices within and across countries can inform policy makers on why it is necessary to allow trade to take place despite the crop's value as a food security crop. Rational and sustainable market policy decisions can be made more effective if these seasonal price variations are well understood. In this paper the authors examine the potential for trade between Tanzania and Kenya using seasonality analysis on time series price data for maize from 2009 to 2018.

The data used were obtained from the Ministry of Industry, Trade and Investment (MITI-Tanzania) and Food and Agriculture Organization (FAO GIEWS). Findings from the study revealed some evidence of potential trade between the two countries based on their differences in price variations over time arising mainly from seasonality. Empirical results of the analysis showed that, the standard deviations were lowest between June and July for the case of Tanzania. This suggests minimum levels of market uncertainties as there is usually supply of maize from harvests in markets. For the case of Kenya, the opposite was true in the same period where the standard deviations were at their peak. This implies that, over the past 10 years Tanzania had a high potential of trading with Kenya especially between the months of May to July as prices seem to hit their peak during this period in Kenya. This information has the potential to inform policy decisions such as export/import ban that may negatively impact maize trade. Furthermore, market players can greatly benefit from this information as it signals when to buy, store, sell or process maize in a timely manner.

Although this study was about maize, the approach can be applied to several other staples that are regionally “tradeable”.

Key points from panel discussion:

- NFRA is a strategic food reserve institution for national emergency requirements
- NFRA share of the total national produce is small. In 2017 it was 1%
- Further analysis is required to come up with policy recommendation on the most appropriate reserve threshold for NFRA
- Data challenges lead to poor decision making, reflecting on a situation where delayed acquisition of data led to export ban, only to realize later there was surplus
- As to how NFRA can work differently, there are plans to have the institution bid for TMX like private dealers in the market
- NFRA current arrangements of having higher prices send a wrong message in the markets which negatively affect the market dynamics
- Future research should consider the diversification nature of most of our farmers, and factor in the farmer ecosystem
- The relationship between smallholder farmers with KPL has seen farmers increasing production from <1 ton per ha to >3.5 tons per ha. Similar cases in SAGCOT are; avocado in Njombe and soya in Iringa. The model facilitates smallholder access of technologies and markets
- Challenge on the smallholder – large scale farm partnership is caused by lack of a legal instrument to support the contractual arrangement. Contract farming legislation is needed to ensure farmers get a fair play in the partnership
- A concern on low use of research studies in the country was raised
- There is need for increased investments in agriculture statistics because currently the state of national data especially on production is daunting
- The debate on “Do the Poor Pay for More” should factor in cultural issues
- Routine seasonality studies on staples are important in informing policy makers as they make decisions on exports, imports and related permits and bans on the same.

3.3.2 Traditional Export Value Chains

Tanzania has six main traditional exports: cashew, tobacco, coffee, tea, cotton and sisal. Historically, traditional export crops were the major source of foreign exchange contributing more than 50% of national foreign exchange earnings. The performance of traditional exports decreased significantly since 2000s. Currently traditional exports contribute 13% of total export value. Traditional exports are grown by around 1.5 million farmers and indirectly benefits over 6 million people country wide. Total export earnings from traditional exports in 2018 were USD 1.1 billion[3]. Despite the decline in the overall share of export crops, there has been a significant growth in export earnings from tobacco and cashewnut by over 200 percent reaching USD 228.3 million and USD 575.6 million for tobacco and cashewnut, respectively.

Presentation 1: Progress in rolling out commodity exchange in Tanzania

Author: Godfrey Malekano, CEO, Tanzania Mercantile Exchange (TMX)
Presenter: Nicolaus Kuserwa, Senior Trade Operations Officer, TMX

Commodity Exchange was defined as, "A market in which multiple buyers and sellers trade commodities through linked contracts under rules and regulations set by the Exchange and Capital Markets and Securities Authority (CMSA)". Instruments traded include spot contracts where buying, selling, payment and delivery is done immediately and derivative contracts where price, quantity and quality is agreed today while payment and delivery of commodity is done in the future. TMX starts with spot contracts followed by derivative contracts.

TMX is addressing six challenges in commodity marketing; ccommodity prices not reflecting quality and quantity, commodity quality, weight and measures, lack of payment assurance, poor information flow and lack of reliable data. TMX operational legal framework is the Commodities Exchanges Act of 2015 and Commodities Exchanges Regulations of 2016. TMX benefits to the three main stakeholders are shown in Table 4.

Progress made by TMX to date include; six licensed and registered members, collaboration six settlement banks, online trading, clearing and settlement system soon to be aired (more than 75% completed), having more than 800 individuals including farmers, traders, financial institutions officers and other stakeholders trained since April 2018 in more than 25 regions of Tanzania. Commodities to be traded under TMX with its preparations at different stages include; Maize, Sesame, Paddy, Pigeon peas, Sisal,

[3] Bank of Tanzania Economic Review in 2018

Tobacco, Coffee, Cotton, Cashew nuts, Tea, Livestock and Minerals.

Table 4 Commodity Exchange benefits to the main stakeholders

Farmers/Sellers	Buyer/Industrial processor	Government
Enhance fair price in the market – reduces risk of market distortions Market information availability Payment assurance	Reduced costs (time and money) Reduced risks (i.e. quality, theft) Able to obtain large quantity and quality crops at one point Supports international trade at reduced costs	Availability of reliable data Easy means of revenue collection Crop Boards be able to concentrate in crop production Support industrialization campaign

TMX operational challenges include:

- Lack of adequate infrastructure to support commodity storage
- Resistance from few but powerful stakeholders
- Distortions of commodity exchange versus other systems such as Warehouse Receipts System and cooperative systems (TMX compliments other systems and not substituting them)
- Binding contracts that hinders farmers and processors to participate in the exchange market

Presentation 2. Innovative farming systems value chains for transformation, sustainable and predictable income with cashewnut example

Author and presenter: Herment Mrema, Africa Rural Development Support Initiative

An innovative farming systems value chains concept to address the problem of farmers unsustainable and unpredictable incomes was presented. The school of thought was based on cashew nut, an untapped high value commodity. Currently cashewnut farming is under low-input, low-output system and farmers are selling their crop before maturity (Kangomba), which lead to a vicious poverty cycle. The author advocated for a mindset change to transform farmers' subsistence thinking mindset to commercial orientation. Key points from the presentation were:

- Encourage farming as a business and deploy professional advisors paid on performance basis

- Adoption of Good Agricultural Practices (GAP)
- Enhance access to credit and appropriate inputs
- Deployment of professional services paid on performance basis.
- Adopt farmer ownership model that empower farmer ownership from farm to markets
- Promote farmer owned value added branded products
- Develop agriculture financing strategy including risk assurance
- Develop and manage quality standards within the value chains from farm to consumer
- Formulate agribusiness policies that harmonize agriculture and industry policies

Questions, comments and emerging issues from the plenary discussion:

- Noted that TMX set up was a PPP model, 51% private sector and 49% Public sector. So the question here was on how the private sector have been involved in rolling out commodity exchange in Tanzania
- In view of the importance of regional trade, the public understanding of standards and quality was questioned. A request was made for GoT to ratify East African Sanitary and Phytosanitary (SPS) protocol.

- Challenged the innovative farming systems concept of working directly with farmers in managing the whole chain from farm to processing and called for use of integrated technology such as Twiga foods in Kenya where using mobile technology farmers and vendors are linked to fair, trusted, modern markets.

- Viability and profitability of giving farmers professionals paid on performance basis was challenged in view of the complexity of farming in our country. Reference was made to IFAD and GoT project, Markets, Infrastructure, Value Addition and Rural Financing (MIVARF), where working through a 4Ps model i.e. Producer/Public Sector/Private and with a consortium of the different actors along the value chain, famer have accessed inputs, financing and markets.

- Commodity Exchange is a good marketing tool and Tanzania can learn from other countries in the region e.g. Ethiopia. There is need for more awareness raising and increase public knowledge on commodity exchange.

3.3.3 Non-Traditional Export Value Chains

Non-traditional exports value chains include horticulture (vegetables and fruits) and pulses (legumes including beans, garden peas, pigeon peas). Traditionally, these were produced for household consumption but currently these are among the leading commercial crops in the country. Non-traditional exports encompass the fastest growing value chains in the agricultural sector. The horticultural sector is estimated to grow at 10-12% which is far above the growth for overall agricultural sector (TAHA, 2018). The annual export earnings in 2018 for horticulture stood at USD 156 million and the sector is currently employing over 2.5 million Tanzanians especially youth and women. Despite its potential, horticultural sector is struggling with policy issues including over regulations- with over 40 fees and charges, land access challenges and delays and costly registration of pesticides, seed and fertilizer.

Presentation 1. Are Medium-Scale Farms Driving Agricultural Transformation in Africa? A Case Study of Horticultural Farms in Tanzania

Authors: David Nyange, Milu Muyanga, Thomas Jayne, Jacqueline Mkindi, Anthony Chamanga, Kelivin Swai and Titus Mwisomba

Presenter: Millu Muyanga, Assistant Professor, MSU

This study revealed the rise of medium size farms, a trend which has also been observed in many other countries in sub-Saharan Africa which signifies onset of agriculture transformation in the region. The authors explored factors that might have triggered rise of medium size farms. They attributed the rise to emanate from i) rise in food prices in domestic, regional and international markets which may have provided incentive for increased investment in agriculture. ii) food systems transformation is associated with population explosion, rapid urbanization, changing consumption habit and emerging middle class. The food systems transformation has created a lucrative market for food including fresh produce. The study further revealed that even the export data and various consumers/supermarkets survey indicate increased investment in horticulture at farm level, cold chains, retails and exports. Therefore, the horticulture sector would offer an interesting case of understanding agriculture transformation as it integrates on-farm and off-farm activities in the food system.

There has been an increased use of productivity enhancing technologies, an important element for agricultural sector transformation. Therefore, in order to better understand the dynamics of agriculture transformation in the horticulture sector, this study propose to conduct a survey focusing on medium size farms.

Presentation 2. Opportunities and challenges of sesame seed production and marketing in Tanzania

Author: Ephraim Nkonya, IFPRI

Presenter: David Nyange, Agriculture Policy Advisor, ASPIRES Project

This paper highlighted that sesame seed is one of the minor crops which is gaining global attention due to its health benefits and drought tolerant characteristics. Tanzania is currently the leading producer of sesame seed in Africa and recent estimates show the country will continue to be the leading producer to the year 2023. Tanzania achieved the highest production of sesame between 2011 and 2016 in which its production increased dramatically from 90,000 tons to about 1.2 million tons in 2015. About 90% of the sesame produced in Tanzania is exported and the major importers are China and India.

Tanzania has a comparative advantage of exploiting the fast-increasing global demand for confectionery and edible oil sesame seed. McDonald is one of the multi-national companies interested in procuring confectionery sesame seed from Africa. Given Tanzania's large production, it is imperative for the Government to increase investment in sesame seed development and setting marketing policies and strategies for enabling farmers to capture confectionery sesame seed market.

There are a number of opportunities in the sesame crop subsector and they include:

- Increasing demand of sesame seed edible oil believed to have greater health benefits than sunflower, maize and other vegetable oils – nicknamed queen of oilseeds
- Increasing confectionery and other culinary use of sesame seed products
- Sesame has other uses in nutraceuticals and pharmaceuticals as well
- Sesame is a sturdy crop which can grow under semi-arid conditions

The author advanced the following policy recommendations:

- Develop special market for different types of sesame seed (i.e. confectionery, culinary, oil seed, etc.)
- Promote Tanzania sesame seed as a special crop for large confectionery multinational companies and edible oil companies
- Need for branding of Tanzania sesame seed- Tanzania sesame does not brown when baked, a condition more appealing to McDonald company needs
- Private companies need to be encouraged and facilitated to process and brand Tanzania sesame seed
- Investment in sesame research and development need to be increased significantly
- In Tanzania sesame has been a neglected crop for too long. The recent spike in production and marketing is a wakeup call to treat it as a priority crop

- Due to its sturdiness sesame can be grown even in dry areas and hence investment in sesame development has the potential to address poverty
- Public auction needs to take into account the quality aspects of the crop
- ASA should facilitate sesame certified sesame seed production as a way of improving quality and yield of sesame

Questions, comments and emerging issues from the plenary discussion:

- Promotion of domestic consumption of the non-traditional commodities by their work force and members of the community around the areas of operation is crucial in addressing the problem of malnutrition in the country
- Create a policy around alternative financing of farmers and support them to build capital
- Caution was raised on relying too much on exports, drawing from experiences from pigeon pea, where farmers suffered heavy losses when the external markets collapsed. There is therefore a need to look at internal value addition of the commodity in addition to the export market

Key points from the panel discussions:

- Growth of non-traditional exports suffer from poor infrastructure which in turn limit access to smallholder farms
- Economies of scale and consequently viability of exports is a critical factor in non-traditional exports
- Information paucity and asymmetry on prices, standards and input quality is a barrier to sector growth
- Seed availability and lack of registered, certified seeds is a challenge
- Access to finance in non-traditional exports may have unique features calling for tailored financial products
- There is need for rationalization of policies nation-wide

Key Issues in Non-traditional Value Chains:

- Multiple taxation and overregulation within the subsector. For example, horticulture is subjected to nearly 40 different taxes and are regulated by 20 bodies
- Trade policy for non-traditional exports characterized by *ad hoc* restrictions on exports and unpredictable import regulation
- Investment for more value addition in non-traditional export crops for both domestic and foreign markets
- Develop a strategy to respond to emerging opportunities including those not captured in ASDP2 priority commodities, e.g. sesame

3.3.4 Livestock and fisheries value chains

The livestock and fisheries sub-sectors contribute 5.9 % and 2.2 % of the national GDP, respectively. Over 50% of households keep livestock and there are 202,553 livestock farmers and 230,977 fishermen/fish farmers. The 2017/18 national statistics recorded 30.5 million cattle, 18.8 million goats and 5.3 million sheep, 1.9 million pigs and 2.7 million fish. However, it is unfortunate that the 2017/18 import bill for the livestock and fisheries products was over USD100 million. Another salient statistic in the sector is the per capita consumption of livestock products, which is far below the recommended levels. All these facts point out to the untapped resource endowment and the numerous opportunities in the sector. The Tanzania Livestock Master Plan (TLPM) provides a road map towards transformation of the sector towards sustainable modernization. TLMP is an integral part of ASDP 2.

Presentation 1: Unleashing the potential of the livestock sector contribution to the Tanzania economy

Presenter: Honest Mseri- Project Officer, ANSAF

The paper presents an analysis of the sector from its contribution to the national GDP, the resource endowment, production aspects, processing, value addition and marketing. The opportunities, challenges, policy, governance and institutional issues are presented with suggestions for key areas of intervention.

Key points highlighted:

- The sector is under-developed and under-resourced. Yet there are great opportunities for investment to target the unmet and fast-growing demand for livestock products, import substitution and export to neighboring countries
- Huge resource base in terms of land, water resource and livestock population exist
- Most of the livestock commodity value chains are dominated by informal channels and unregulated operations, which limit growth of the sector and consequently low contribution to GDP
- The livestock feed industry is an avenue for industrialization
- The authors described the main challenges of the livestock value chains under three areas:

- Supply management constraints; poor incentives to invest in the improvement of productivity due to low returns, inadequate access to land and water resource, unavailability and high costs of inputs and services
- Processing constraints; inadequate facilities for handling and processing of livestock products
- Marketing and trade constraints: the informality of livestock trade, high transaction costs, inadequate supportive infrastructure, heavy taxation, lack of classification and grading systems, poor hygiene of most outlets and unfair competition from imported products

Policy, governance and institutional issues and proposed areas of intervention:

- Accountability and political will to implement inclusive livestock development policies and strategies
- Incentives in terms of tax regimes, unfair competition from untaxed imports, high degree of informal marketing system, collective marketing in order to exploit economies of scale, especially in perishable produce such as milk
- Investments in development of effective farmer organizations and institutions.
- Improve livestock services (quality grazing and feed resources, extension services, markets, and infrastructures)
- Increase public financing for livestock development
- Invest in R&D to support small scale livestock keepers
- Address post-harvest losses by improving marketing infrastructure e.g. milk collection and marketing centers

Livestock industry stakeholders were urged to exploit the available potentials in the sector by addressing the various value chain challenges ranging from raw material supply (quality and quantity) rationalizing investments in marketing infrastructure, inputs and service provision and institutional and organizational issues.

Presentation 2. Translating the Livestock Master Plan (TLMP)into Action through Private Sector Desk (PSD)

Presenter: Stephen Michael, Coordinator-Private Sector Desk, Ministry of Livestock and Fisheries

The presentation was about simulated projections of demand and supply of the three major livestock commodities; red meat, white meat and dairy, with and without additional investment between 2016 and 2031. The scenarios in the three commodities, demonstrated dramatic increase in supply with additional investment.

A production-consumption gap of 5.4 million liters in 15 years with current investment is an opportunity for additional investments.

The five-year-investment plan focuses on improving feeds and feeding, full utilization of milk processing capacity, construction of additional meat processing as well as plants for processing hides and skins to finished leather products.

TLMP will be implemented through ASDP2 program's main framework with the four components; Sustainable Water and Land Use Management; Enhanced Agricultural Productivity and Profitability; Commercialization and Value Addition; Sector Enablers; Monitoring and Evaluation.

A Private Sector Desk to link the Ministry of Livestock and Fisheries with private sector was established in October 2018.

Presentation 3. Market analysis and value chain prioritization in the livestock and fisheries sector in Tanzania: Aquaculture investment opportunities

Presenter: Neema Siama, Project Analyst, Dalberg

The presentation was based on a study to explore aquaculture investment opportunities as part of market analysis and value chains prioritization in the livestock and fisheries sector in Tanzania. The natural resource endowment of lakes and sea water bodies is a great opportunity for the fisheries industry in Tanzania. Yet aquaculture has strong commercial and social impact in the country on the basis of the three key elements described below:

- Increasing domestic demand - Population growth, urbanization and increasing income
- Constrained supply or stagnant inland and marine catches
- Untapped potential – current production of 5000 tons per year is unacceptable given the resource endowment,

Increased investment in cultured tilapia can contribute to import substitution. Fish products import bill in 2018 was USD 25 m. Areas which require policy interventions include:

- Putting in place specific aquaculture regulations,
- Resolve the long and costly environmental approvals
- Address the problem of competition from frozen fish imports
- Review the tax regime; domestic duties, taxes and tariffs on imported inputs and equipment

It is estimated that targeted investments will increase the number of jobs by 18% and improve current fishermen's income by 30%.

Presentation 4. Barriers to productivity improvement and income for smallholder dairy farming business in Tanzania

Authors: E.T. Lyatuu, A.M. Okeyo, D.M. Komwihangilo, G.T. Msuta, N.J. Kelya and E. Oyieng

Presenter: Eliamoni Lyatuu, National Coordinator, African Dairy Genetic Gain (ADGG) project

The presentation was drawn from an ongoing regional dairy project-- African Dairy Genetics Gain. The study aimed at developing an understanding of the following aspects of dairy business farming:

- Smallholder dairy farmers' knowledge on dairy business
- Status of smallholder dairy business in Tanzania
- Barriers to smallholder dairy farming business
- Stakeholder roles and responsibility in dairy farming business

Smallholder dairy farming business environment in Tanzania is characterized mainly by:

- Insufficient availability of information about dairy cow
- Low knowledge on good management practices
- Inadequate extension services
- Poor and unreliable breeding services
- Low productivity per cow

A mobile technology data collection system-- Open Data Kit (ODK) was used to develop a dairy database and provide feedback to stakeholders. Barriers to productivity improvement and income of the smallholders as per the data collected from farmers in the 24 Local Government authorities were mentioned by the following percentage of farmers:

- Feeds and feeding (33%) --with most farmers depending on natural pastures and crop residues
- Diseases (14%) --access limited by availability and high costs of drugs and treatment services
- Low production (13%)
- Poor genetics (11%) --exacerbated by inadequate animal breeding services
- Poor sales and lack of information (10%)
- Water shortage (9%)
- Others (10%)

Recommendations proposed to eliminate the barriers included:

- Improve information flow to different value chain actors

- Improve extension services to be available at least once per month
- Use modern technology to reach more farmers and offer precise advisory services
- Provide/conduct platform meeting in farmers' vicinity
- Improve health services delivery; vaccination & treatment
- Reduce cost of dairy farming through strategic feeding systems

    -Grow pasture instead of buying hey

    -Control diseases

    -Use cost-effective available supplements

Key points from panel discussion:

Overwhelmingly stakeholders welcomed the establishment of the private sector desk at the Ministry is a commendable initiative

- Improvement on communication lines between the private sector and the regulatory bodies is crucial. Currently, there are too many compliance requirements and hence the need for rationalization
- The livestock value chains are not clearly defined. Linkages among the actors in the different value chain nodes are crucial for market efficiency and performance
- Smallholder farmers are not adequately informed of production requirements, e.g. in dairy not many producers know what it takes to have optimal production
- Disease control programs and guidelines, specifically for vaccination programs should not be blanket recommendations but rather agro-ecological zone specific
- Regulatory system in the livestock sector is not working well. Multiple regulations are a burden to most actors in the livestock value chains and dairy processing plants are often most. The problem is aggravated by poor information flow and low awareness on legal requirements by smallholder producers but also other actors along the value chain
- Incentivizing commercial production in the livestock and fisheries value chains will yield multiple benefits of increased food security, nutrition, income and government revenues
- Poor marketing infrastructure is a major constraint in almost all livestock value chains

- Relative to neighboring countries, Tanzania has inadequate processing facilities in poultry, beef and dairy. This has triggered informal trading of live animals across the borders resulting in crowding out of employment and loss of valuable exports of processed products
- Aquaculture is a fast-growing industry with untapped resources including the skin of tilapia, which is of high value for medicinal purposes
- There is a need for strengthening public-private partnership in aquaculture

3.3.5 Import substitution value chains

The annual food import bill in Tanzania is estimated to be USD 539.3 million over the past five years and the major food imports are edible oil (USD 270 million), wheat (USD 225 million), and sugar (USD 132 million). Although most of the imported products are locally produced, the demand exceeds supply and hence the need to import in order to close the supply gap. The Government of Tanzania is promoting the industrialization agenda which could help to reduce the country's dependency on imports and create employment opportunities for Tanzanians particularly the youth, while creating market for farmers.

Presentation 1. Edible oil: Opportunities, challenges and prospects

Author and presenter: Ellykedo Nyongani, Dalberg

The market opportunities, value chain dynamics and potential investments in Tanzanian edible oils were presented. The author observed that investments in palm and cotton oil production could be made more attractive in the medium- to long-term, if challenges within the two value chains are resolved. He gave an option that sunflower provides the best opportunity to expand domestic edible oils production and could replace crude palm oil imports with 200,000 MT of domestically produced and refined sunflower oil.

The following were proposed to unlock the investment opportunities for the sunflower sector:

- Farmers should use high-yielding seeds and good agricultural practices to increase sunflower production
- Strengthen sunflower value chain to create additional jobs in small and medium enterprises
- Banks should develop more farmer-oriented support programs to ensure enhanced contribution to industry expansion

Presentation 2. Effect of Government interventions in commodity market

Author: Godfrey Simbeye, CEO, TPSF

Presenter: Ringo Iringo, Chairman, TASUPA

Previous challenges behind Government interventions in the market were highlighted. The author established the rationale and reasons for Government intervention on commodity market as controlling prices, addressing effects due to natural disaster and empowerment purposes. The author proposed an inclusive consultation process and additional analysis of the specifics of the regulations set under the bulk procurement system (BPS) and consider alternative modalities to reduce fertilizer costs and improve access to fertilizer for smallholder farmers. The Government should increase its commitment to develop the edible oil sub sector in the form of budget allocation, policy formulation and review of regulatory framework as well as formulation of effective monitoring and evaluation from production of oilseeds to the processing and marketing level. Citing cashewnut example, the Government would have intervened by considering using the existing institutions (like Cashewnut Board) by having consultation and consensus with all stakeholders along the value chain.

The author advanced the following recommendations for improving Government intervention including modernization of commodity specific boards:

- Establishing private sector commodity specific organizations where by the universal membership should be mandatory.
- Making use of existing board/structures to intervene instead of using new institutions this would bring more positive impact.
- Defining circumstances, under which Government should intervene.

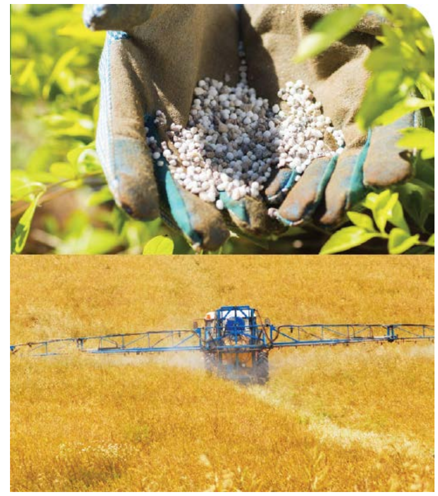
Key points from panel discussions:

It was recommended to incentivize local production by adopting a simplified flow chart of input/output value chain systems linking all the actors.

Observed that there was a disconnect on what was taking place at the ministry level and on the ground and proposed farmers near national borders should be allowed to trade in either country

There is a need to promote domestic consumption taking into account advantages of local markets

3.3.6 Farm Inputs Value Chains



This session is comprised of fertilizers, pesticides, seed (day-old chicks, fingerlings, heifers) and feeds. Tanzania imports 90% of its inorganic fertilizer requirement and 60% of all the fertilizer is used in the Southern Highland zone. However, fertilizer utilization in the country is still low which is 9 kg/ha compared to 27kg/ha in Malawi due to delays in fertilizer distribution in rural areas and providing blanket fertilizer recommendation due to inadequate soil fertility mapping. The BPS was established in February 2017 for importation of Urea and DAP. Since then fertilizer utilization increased by 44% between 2015/16 and 2017/18 (TFRA, 2018). However, the low use of fam inputs including fertilizer, improved seed and agro-chemicals has resulted in low productivity especially for most cereals with a yield below two tons per hectare compared to seven tons per hectare in Asia.

Presentation 1: Analysis of the Regulatory Framework for Fertilizer, Seed and Pesticides

Author: Onesmo Shuma, Consultant

Presenter: David Nyange, ASPIRES

The multiplicity of taxes on the same products by the regulatory bodies, LGAs and TRA to a total of 45 taxes, levies and fees was echoed. Again, the current lengthy registration and importation process of regular agricultural inputs like fertilizers which might end up being rejected thereafter was noted. The author also raised concern on the lengthy procedure to be followed by the applicant during registration and testing of new agrochemicals and importation of pesticides. Such repetitive taxations and importation and registration processes not only delay delivery of inputs but result in increased prices of the inputs.

Presentation 2 Effects of demonstration plots on farmers' decisions to adopt agro-inputs in Tanzania: implications for policy and practice:

Authors: Haroon Sseguya, Daniel Robinson, Hamisi Mwango, James Flock and Silvanus Mruma

Presenter: Haroon Sseguya, Technology Scaling Specialist, Africa RISING-ESA, IITA

The USAID Feed the Future initiative NAFAKA has been working on improving the productivity and competitiveness of maize and rice value chains that offer job and income opportunities for rural households and market systems strengthening while Africa Rising (AR) has been working on sustainable intensification of farming systems that improve food, nutrition, and income security, particularly for women and children, and conserving/enhancing the natural resource base by conducting demonstrations and associated services (small packs) as part of production enhancement efforts.

This presentation answered a question on whether demonstration plots and associated services (small seed packs) influence smallholder farmers' behaviors towards willingness to purchase agro-inputs. It was concluded that using demonstration plots and associated services (small packs) was an effective model for enhancing technology adoption. For better results, it was further recommended that the demonstration plot model be complemented with facilitating access to agro-inputs through strengthening rural agro-dealer networks, strengthening producers' organizations and information communication technologies (ICT).

Presentation 3. An Economic Assessment of the Impact of VAT on Utilization and Local Manufacture of Hermetic Storage Technologies in Tanzania – A preliminary analysis

Author and Presenter: Liston Njoroge, Project Officer, AGRA

The costs and benefits associated with increased use of hermetic storage technologies (HST) were presented. The presenter reported that the common storage methods used by farmers include sacks/open drum and hermetic technologies and farmers' criteria for selecting storage methods to use include cheapness, maintaining quality, availability, not easily being attacked by insects and maintaining weight.

It was noted that demand for HST was exponentially increasing as a function of increased awareness and thus raising awareness and having regulatory framework that addresses industrial organization issues were important in promoting wide scale utilization of HST. However, the HST sub-sector appears to be less organized with presence of a couple of brands without common minimum standards which have created room for potential malpractices and the weak regulatory environment hampers the ability for the hermetic bags manufacturing to make a transformational impact on farmer's welfare.

To ensure wide scale use and promote further investment in the industry, the presenter recommended:

- Removal of VAT on all hermetic storage technologies by treating hermetic storage technologies like any other agricultural inputs, e.g., fertilizer and seeds which are exempted from VAT
- Work with TBS to support establishment of industry quality standards and rationalize the quality benchmarks to enhance and simplify regulatory enforcement

- Support capacity building programs to Extension/Agricultural officers specifically on the development, regulation and utilization of HSTs

Main points from panelists:

It was noted that there have been reforms by Government by reducing the testing time, fees for testing and licensing of new fertilizer, packing of fertilizer in varying volumes of 5kg, 10 kg, 25 kgs lots to promote utilization and accessibility, adopting Bulk Procurement System for fertilizers that is already in use for two seasons and removal of some taxes for fertilizer dealers for the purpose of enhancing a competitive farm input market

The Government has made amendments on Fertilizer Regulations of 2011 to shorten duration and minimize costs of validation test while maintaining its scientific importance. Currently, one requires to carry out laboratory and field test for one cropping season in two agro-ecological zones instead of three seasons. This has reduced cost of field test, reduced time for processing applications for fertilizer licenses and allowed packaging of fertilizer in bags below 25 kg (e.g. 5 kg lots) to accommodate the demands of small-scale farmers.

Some of the fees and charges which were imposed to fertilizer dealers including application for registration of fertilizer and fertilizer supplements, application for registration and licensing of fertilizer dealers and application for lost certificate have been removed.

Key issues on inputs value chain:

- Further assessment of the BPS was proposed to determine its impact on increasing availability and affordability of fertilizer to farmers
- It was recommended to promote the location specific fertilizer recommendations instead of relying on current blanket recommendations by improving knowledge to extension workers, agro-dealers and farmers on proper use of seed and fertilizer and improving facilities and resources for soil testing
- Since fertilizers are by-products of natural gas and oil, care has to be taken when deciding on timing for importation as volatility in global oil prices has significant effects on global fertilizer prices
- Recommended to revisit the BPS efficiency and proposed to add to the list a number of importers to increase competition. For example, farmers' cooperatives the AMCOS could import fertilizer on behalf of farmers

3.3.7 Farm services value chains

This session is comprised of extension, credit, machinery, storage, irrigation, water, energy transport and logistics. The agricultural farm services value chain is often overlooked despite being critical for successful value chain development. The services are critical for agricultural transformation as they are necessary for farmers to access inputs.

Presentation 1. Enabling Growth through Investment and Enterprise (ENGINE)

Presenters: Rod Carval and Goodluck Mosha, ENGINE

The Enabling Growth through Investment and Enterprise (ENGINE) model was presented. They highlighted the business development services, maximizing opportunities for value chain enhancement. Informed delegates that ENGINE is 4 years USAID funded program and has been working through equipping business for growth through building capacity of business development services providers and stimulate market demand for their services among growing Micro Small and Medium-sized Enterprises (MSME); Broadening Entrepreneurs' Access to finance through helping financial institutions better respond to the needs of small enterprise clients and enabling SMEs access to services designed to improve their ability to qualify for credit. So far,

ENGINE has convened over 50 public-private dialogues with 270 business-related policies reviewed and 130 policy reforms by 18 public and private sector partners. ENGINE als has trained 125 unique Business Development Service Providers who trained and provided value-added services to over 5,500 micro, small and medium enterprises worth $483,269 and trained over 260 financial institution staff and facilitated more than USD $2,341,340 in agricultural-related credit on behalf of Tanzanian MSMEs, 57% owned by women and 39% by youth.

In BDS, ENGINE approach has two sides, the supply side Intervention providing capacity building to BDS service providers, providing incentives to BDSPs including matching grants and e-coupons and facilitating linkages through B2B events and BizFundi platform. On the demand side intervention BDS targets awareness raising campaigns, incentives to MSMEs: e-Coupon Support and facilitating linkages.

ENGINE proposed a lead firm value chain approach for BDS. The proposal is that markets should start by identifying large commercial enterprises with both backward and forward linkages with MSMEs; Identifying constraints from the lead firms and MSMEs that can be addressed through BDS; Design specific BDS for the LFs and the MSMEs and capacitate local BDSPs to offer the services on a market-based arrangement

Presentation 2. Effective regulation for equitable delivery of quality inputs to smallholder farmers in Tanzania

Presenter: Joseph Nyamboha, Policy and Budget Analysis Coordinator, ANSAF

The study aimed at identifying and understanding factors influencing access to good quality inputs by resource poor farming households, including an assessment of agro-inputs regulatory framework and proposed a cost-effective input regulatory delivery system for seeds, fertilizer and pesticides. The author highlighted that the Tanzanian seed sector is dominated by the informal sector (90%), 74% of the potential seeds demand imported and quality declared seed (QDS) is produced by registered and trained small-scale farmers or groups for their own use and/or for sale to neighboring farmers within the districts. Only 66% of farmers reported to use improved seeds obtained through stockists (49.2%) local seeds individual farmers (32.2%) and 18% from farmer associations and NGOs. Most hit input in fake products: seeds (47%), fertilizers (18%), animal feeds (10%), and pesticides (25%).

The authors reported that approximately 90% of inorganic fertilizers used in Tanzania is imported and this accounts for only 70% of the annual estimated total demand of 885,000 MT. About 90.7% respondents who applied fertilizers reported to have encountered problems including late time of purchase (22.8%), unavailability (23%), expensive (26.7%), and fake (27.1%). Pesticides application on crops in the season of 2015/16: coffee (26.2%), cotton (29.5%), rice (22%), and maize (22.3%) and the low use due to high pesticides prices, inadequate finance to cover crop production costs, inaccessibility, low crop price, low income, and response to demand for organic products. Sources of pesticides in the season of 2015/16 included 47 neighbor (17.1%), cooperative (18.1%), dealers (29.7%), own store (17.9%), and Government shops (17.2%).

The following proposals were advanced for improving the situation

- Involve private sector in production of quality seeds; establish a system of providing information on availability of seeds; provide adequate subsidy in order to enable smallholder farmers access quality seeds; supply seeds based on agriculture ecological zone demand
- Enforcement of the Seed Act to regulate the distributors/dealers in quality seed delivery
- Build capacity and formalize the system for enhancing quality seeds production
- Employ more extension workers and train them on specific crop and continue creating awareness on the importance of quality inputs use
- Manufacturers to be subsidized to reduce the costs of fertilizers production.
- Fertilizer packaging need be done in different sizes (e.g. 2kg, 5kg, 10kg, etc.) to meet the needs of smallholder farmers

- Improve the input (e.g. fertilizers) delivery and distribution systems to reduce the cost to SHFs.
- Encourage soil testing and provide extension workers with soil testing kits.
- Strengthen the agricultural statistics system through adequate supports to research institutions

Presentation 3. Implications of VAT on mechanization services and agricultural insurance to farmers in Tanzania

Presenter: Tim Andrews CEO, Great African Food Company (GAFCO)

Value Added Tax (VAT) is necessary but bares a heavy burden to the smallholder farmers in Tanzania as they transition from subsistence farming to farming as a business. The implications of the tax are felt both for mechanization services and agricultural insurance. Agriculture insurance is also key to ensure productivity and profitability to farmers. Lack of agricultural insurance is a barrier to farmers' access to financial services.

The authors established that under the mechanization policy commercial farmers are likely to win while smallholder farmers lose, because farmers have access to agricultural mechanization services through tax exempt purchase of equipment but mechanization services are not vat exempted.

Therefore, smallholders aspiring to become mid-scale farmers pay TSH 41,451 more per acre than commercial farmers – 62% of which is VAT. Additional amount for 25 acres is TSH 1,036,263 more than Commercial farmers of which 62% is VAT. This indicate a lost opportunity with eenormous competitive disadvantage as structural production cost is 33% higher for mid-scale farmers than commercial farmers; there is reduction of competitive disadvantage-removal of VAT reduces this structural cost increase to 13%; Improved Yields: Use of proper conservation agriculture equipment improves yields 2-3 times; Incentive Undermined by VAT: QFP's experience – approximately 90% of mid-scale farmers avoid opportunity rather than pay VAT they either: remain smallholders, or rent non-conservation agriculture equipment from individuals in the village owning outdated equipment.

By doing so, they avoid paying the 18% VAT that is required to be collected by commercial companies. Unfortunately, these disc plow methods available locally result in long-term damage to the soils and do not promote the dramatic improvements in yields possible with newer conservation agriculture implements. QFP estimates: in 2018 as many as 200 out 220 of their mid-scale farmers turned down the option of commercial mechanized services to avoid paying VAT. This equates to approximately a TSH 6 billion loss of production on 5,000 ha.

Key points from panel discussion:

- With provision of tractors acreage cultivated has increased and 90-97% of tractor owners hire tractors to others
- Fifth four percent of tractor owners migrate to accommodate varying farming seasons in the country (unimodal and bimodal) and made even non-tractor owners expand their farm sizes from 2 ha to 5 hectares
- Smallholder farmers do not pay VAT for services offered by tractor owners TRA should look on issue of VAT on ploughing services
- Using drones can make it easy to prioritize areas for action or that need immediate attention and therefore, Drone need to be promoted within the agriculture space to allow digitizing services required byour farmers
- Land use planning and surveys is limited by costs and hence a need to think how could the drone technology be taken on board and how much does that cost
- Doing land use planning requires a combination of technologies including drones- we need application of such advanced technologies as the drone can give you a map as quick and fast

4 EMERGING POLICY ISSUES

Emerging policy issues for closing sessions

- Progress made in policy reforms but what more is to be done in in policy research to guide the government in policy reforms in the agriculture sector towards an agriculture led industrialization agenda? ***Is the regulatory framework to support the reforms in place?***

- Policy Reversals have been a common feature. For example, the cross-border bans. ***Pursue reforms to ensure that there is consistency, predictability and long term sustainable of policy positions***

- There is a need to explore additional entry points to dialogue with government in pursuing for policy reforms. ***The budgetary review platform has contributed positively but has limited, or overly biased reforms to those related or linked to fiscal reforms.***

- A few model farms and agro-based companies emerging such as; Tomoni farms, AKM Glitters and GBRI Companies. ***What policy interventions are needed to support replication of these model farms.***

- Major positive changes in financial services delivery in Agriculture with the formation of Tanzania Agricultural Development Bank, financial institutions offering credit guarantees***. There is a need for policy on Risk Management and Agriculture insurance schemes. More government instruments to harmonize the guarantee schemes but also create a business environment conducive to private sector access to capital.***

- Call for policy interventions in increased direct public funding to Agriculture development – The fiscal process – referring to the Maputo Declaration. ***Direct funding towards agriculture human resource, research and technology development wanting.***

- PPP at local level eroding due to poor relationships between some LGAs and private sector. ***Policy interventions for incentivizing domestic and foreign investors and harmonious work with LGAS. Enhancing conformity of National and Sub-National Policies and Strategies***

- Harmonization of enabling Blue Print outcomes acknowledged but there is a ***general call for the regulatory framework to support agricultural investments, marketing and trade.***

- It is clear that the agriculture sector is not only a source of raw material for agriculture but it is also a source of labor and demand of industrial products. ***Design and alignment framework between ASDPII and The Industrialization Strategy under the 5-year development strategy.***

- The private sector commends establishment of ministry responsible for investment. ***Call for policy interventions that will see farmers' effective***

participation in the industrialization agenda including shareholding in value addition factories.

- SAGCOT a novel initiative demonstrating the value of strong PPP for agriculture development. ***What policy interventions are needed now to oversee sustainability, scaling up and out beyond southern Tanzania and further facilitate growth and replications of success?***

- Market based economy for export led growth is necessary. Implementation of the policy reforms will improve agriculture business environment. ***Call for more policy interventions in support of liberalized agricultural marketing and trade policies***

- The multisectoral nature of food and nutrition security – Commend the government for having ASDP-2 and NMNAP coordinated from the PMOs office. ***How to monitor results and scale up the positive outcomes.***

- The pace of policy reform in the agriculture, livestock and fisheries sub-sector in the country has increased. Furthermore, the current government is taking risk and has made tough decisions to improve the agricultural business environment. ***What policy interventions are needed to control potential negative effects resulting from the recent high turnover of leadership in the country, which has a bearing on decision making?***

- It is evident that agricultural transformation is happening in Tanzania and Ms. Modamba's paper point out a number of indicators. There is increased intensification, market engagement and commercialization. ***The key question is on how to sustain and enhance the trend.***

- Agricultural transformation translates as moving from subsistence agriculture to commercial oriented sustainable agriculture. Producing more with less thus increased efficiency and need to increase investment in research and technology. ***Call for policy interventions to support youth led agricultural transformation***.

- Frequent policy changes and lack of strategic application of policy research findings is an impediment in agricultural growth in the country. ***Call for policy consistence and predictability to support effective agricultural transformation.***

- Role of NFRA and its impact on the markets. Limited impact, highly costly to the government, economically unjustifiable. What are the correct estimate of reserves, implications and effects of markets / prices? ***What policy actions are needed to improve on transparency and accountability?***

- Functioning out grower schemes in the country; KPL model, Avocado in Njombe and Soya in Iringa. ***Call for a Contract farming legal framework that will support farmers bargaining power*****.**
- Export ban has been raised. ***What policy interventions are needed to avoid regressive policy changes – a strong trade policy backed with legal framework?***

- Recognized a number of policy research studies in the area of food security in the country. ***Can PAG collate and take a lead in pursuing the implementation of the many policy recommendations found in these reports?***

- Pursue policy actions to enhance trade within East Africa. ***For example, ratification of the East Africa Sanitary and Phytosanitary draft protocol for purposes of enhancing intra-regional trade.***

- Millions of children under five in Tanzania are still stunted
  How will the value chain development under ASDP2 contribute towards improving nutrition outcome? How will ASDP2 and NMNAP be linked?

What are the opportunities at the intersection of agriculture and health to improve food and nutrition security?

- Harmonize the operations of the following regulatory bodies in the space of agriculture: ***NEMC, OSHA, Ministry if Livestock – Registration of facilities, Business License, Tanzania Meat Board, WCF, NSSF, TFDA, TBS, BRELA, SUMATRA, Fire and Rescue brigade, TRA - income***

5 CLOSING SESSION

The closing session was officiated by Hon. Mgimwa (MP) who commended the organizers for inviting the PC-ALW, thus bringing in to the conference representation of the national legislative body. The Guest of Honor pledged support from the committee and the parliament, citing the recent regulatory reforms, which led to removal of 104 taxes/fees/levies. The Guest of Honor emphasized on the following issues: -

- Close follow-up on legislation in the agricultural sector to ensure pro-farmer legal framework
- Stakeholders to be well informed of outcome of ASDP2 monitoring and evaluation and annual Progress reports to be made public.
- Future conference to have more farmer/livestock keepers/fisher folks representation. For example, farmers working with PASS
- Assured participants of the good political will of the 5th Phase of the Government under the able leadership of His Excellency Dr. John Pombe Joseph Magufuli, the President of the United Republic of Tanzania. The recent regulatory reforms and the President's directive to release some of the protected natural reserves for agriculture are some of the positive indicators
- Reiterated on his committee's support and cooperation with PAG and invited all stakeholders to freely consult and inform the Parliamentary Committee on any issue which require high level discussions especially the punitive regulations.

Photo 2 The official closing session of the 5th AAPC

Appendix 1 List of Participants 5th AAPC 13 – 15 February 2019

Name	Gender		Organization	Designation	Email
	M	F			
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Appendix 2 5th AAPC Program 13 – 15 February 2019, Dodoma

TENTATIVE PROGRAM		
DAY ONE: 13th February 2019		
TIME	**ACTIVITY**	**RESPONSIBLE PERSON**
0800-0900	Registration	Secretariat
0900 - 1015	**OPENING SESSION** Announcements and Program Overview	Facilitator: MC Mavunde
	Arrival of the Guest of Honor and Welcoming Remarks	
	Welcoming Remarks and Objectives of the 5th Annual Agricultural Policy Conference (AAPC)	David Nyange, Coordinator, Policy Analysis Group (PAG)
	Update on ASDP 2 and facilitate introduction of ASLMs and facilitate introduction of Agricultural Sector Lead Ministries (ASLMs), the Private Sector and DPs	Dorothy Mwaluko, PS, PMO
	Short Remarks from the Private Sector	Salum Shamte, TPSF, Chairman
	Short Remarks from Development Partners/ Agricultural Working Group (AWG)	Michelle Corzine, Co-chair of the Agriculture Working Group
	*** Short Remarks from the Minister of Agriculture	Hon. Japhet Ngailonga Hasunga (MP)
	*** Short Remarks from the Minister of Livestock	Hon. Luhaga Joelson Mpina (MP)
	*** Short Remarks from the Minister of Industry, Trade and Investment	Hon. George Joseph Kakunda
	*** Short Remarks from the Minister of Health, Community Development, Gender, Elderly and Children	Hon. Ummy Mwalimu (MP)
	*** Short Remarks from the Minister of the State in the President's Office, Regional Administration and Local Government	Hon. Selemani Said Jafo (MP)
	*** Short Remarks from the Chairman of the Parliamentary Committee for Agriculture, Livestock and Water	Hon. Mahmoud Mgimwa (MP)
	Minister of State in the Prime Minister's Office (PMO) invites the Prime Minister to officially launch the 5th AAPC	Hon. Jenista Mhagama (MP)
	Official Opening of the 5th Annual Agricultural Policy Conference (AAPC) by the Prime Minister, United Republic of Tanzania	Hon. Kassim Majaliwa (MP)
	Keynote Address: Progress in agriculture policy reforms	Policy Analysis Group (PAG)

	Vote of thanks followed by media engagement	Audax Rukonge, Chairman, Policy Analysis Group
1030-1045	***Teal Coffee Break***	

5th AAPC Technical Sessions		**Facilitator**: Andrew Temu, ENGINE
Featured Session: Agricultural Sector Transformation		**Moderator**: Blandina Kilama, REPOA
1115-1230	The changing face of agriculture in Tanzania: Indicators of transformation	Emma Isinika-Modamba, Senior Agriculture Economist, World Bank Group
Panelists		
Nuhu Hatibu, Regional Head (Tanzania, Uganda and Rwanda), AGRA		
Titus Awokose, Chairman, Agriculture and Food Resource Economics Department, MSU		
Raphael Chibunda, Vice Chancellor, Sokoine University of Agriculture (SUA)		
Geoffrey Kirenga, CEO, SAGCOT Center		
Obey Assery, Director of Policy and Planning, Ministry of Agriculture		
Elisante Ole Gabriel, Permanent Secretary, Ministry of Livestock and Fisheries		
1230-1400	**Lunch Break**	
Featured Session: Nutrition		**Moderator:** Vincent Assey, Managing Director, TFNC
1400-1530	4.1 Current nutrition situation from National Nutrition Survey	Adam Hancy, Statistician, Tanzania Food and Nutrition Centre
	4.2 Nutrition study on stunting	David Tschirley, Professor–MSU/ASPIRES
	4.3 Poultry and crop integration: Evidence for policy decisions for improving food and nutrition security	Luitfrid Nnally, Research Officer, Tanzania Food and Nutrition Centre
Panelists		
Richard Kasuga , Former Senior Country Coordinator, Building Nutritious Food Baskets (BNFB)/ CIP		
John Msuya, Professor, Sokoine University of Agriculture (SUA)		
Silas Ng'habi, Deputy Chief of Party, USAID Feed the Future Tanzania - NAFAKA		
Obey Assery, Director, Policy and Planning, MoA		

1530-1545		***Tea/ Coffee Break***
1545-1630	***Recap and closing of Day 1***	
1800-2000	***Reception at Dodoma Hotel***	***All conference participants***

DAY TWO: 14th February 2019 Special Guest: Hon. Japhet Ngailonga Hasunga (MP), Minister of Agriculture		
0800-0900	Youth in Agriculture Breakfast Meeting | Feed the Future Tanzania Advancing Youth Project	**By Invitation**
5th AAPC Technical Sessions		**Facilitator**: Andrew Temu, ENGINE
Thematic Area 1: Staples Value Chains		**Moderator**: Janet Ngombalu, Regional Programs Coordinator, EAGC
0900-1030	1.1 Policy options to improve efficiency and optimize storage use of the National Food Reserve Agency (NFRA): Taking stock and looking ahead	Alethia Cameron, Policy Analyst, FAO
	1.2 Consumers' preferences for processed foods in secondary cities and small towns in Tanzania: effects of product origin and fortification information	Roselyne Alphonse, Researcher, SUA
	1.3 Seasonality of maize price and implications to regional trade in East and Southern Africa	Emmanuel Domonko, MIU Advisor/ Claire Ijumba, Assistant Researcher, ASPIRES
Panelists		
Peniel Lyimo, Former PS (MoA, MoFP and PMO)		
Fulgence Mishili, Senior Lecturer, SUA		
Gungu Mibavu, Assistant Director of Policy and Planning, MoA		
Hussein Mansoor, Cereals and Mixed Crop Board		
1030-1045		Tea Break

Thematic Area 2: Traditional Exports Value Chains		**Moderator**: Steve Kisakye, Associate Director, Dalberg
1045-1230	2.1 A proposal for agricultural board reforms to improve efficiency and effectiveness of service delivery	David Nyange, Chief of Party, ASPIRES
	2.2 Progress in rolling out commodity exchange in Tanzania	Godfrey Malekano, CEO, Tanzania Mercantile Exchange (TMX)
	2.3 The agricultural produce cess in Tanzania: Effects of reform options using farm household scale model	Aymeric Ricome, Researcher, European Commission
	2.3. Agribusiness value chain development, management and financing	Herment Mrema, Executive Director, Africa Rural
Panelists		
Japhet Justine, Managing Director, TADB		
Fatma Riyami, Managing Director, Nature Tanzania Ltd		
Mr Hamza, Coffee Association of Tanzania		
Dunstan Kaijage, Acting Director General, Cashewnut Board of Tanzania		

1230 - 1400		**Lunch Break**
Thematic Area 3: Non-traditional Value Chains		**Moderator:** Jacqueline Mkindi, CEO, TAHA
1400-1500	3.1 The rise of medium sized farms in Tanzania: A case of horticulture in agriculture transformation	Milu Muyanga, Assistant Professor, MSU
	3.2 Trends in global sesame market and an opportunity for Tanzania to diversify its export market to the US	Ephraim Nkonya, Economist, IFPRI
Panelists		
Neema Mrema, Project Director for Soya ni Pesa Project, Catholic Relief Services (CRS)		
Franklin Bagalla, Operations Director, Tomoni Farms		
Elizabeth Swai, Managing Director, AKM Glitters Company		
Khadija Jabiry, Managing Director, GBRI		
Emmanuel Lyimo, Cluster Manager, SAGCOT		
1600-1615		Tea Break
1615-1645	Recap and closing of Day 2	

Day THREE: 15th February 2019 **Special Guest: Hon. Luhaga Mpina (MP), Minister of Livestock and Fisheries**		
0730-0900 Breakfast Meeting FSDT		**By Invitation**
Thematic Area 4: Livestock and Fisheries Value Chains		**Moderator:** Byela Tibesigwa, Senior Research Fellow, University of Dar es Salaam
0900-1015	4.1 Analysis of the livestock subsector in Ngorongoro District:	Audax Rukonge, Executive Director, ANSAF
	4.2 Translating the livestock masterplan into action through the Private Sector Desk (PSD)	Steven Michael, Coordinator – Private Sector Desk, MLF
	4.3 Market analysis and value chain prioritization in the livestock and fisheries sector in Tanzania – Aquaculture investment opportunities	Neema Siama, Project Analyst, Dalberg
	4.4. Barrier to improving productivity and income of dairy farming business in Tanzania	Eliamoni Lyatuu, National Coordinator, African Dairy Genetic Gain (ADGG) project
Panelists		
Faustin Lekule, Managing Director, Tanfeeds		
Elizabeth Swai, Managing Director, AKM Glitters Company		
Simba Mfaume, Technical Manager, Silverlands		
Zainali Bhiman, CEO, Shazain Fisheries Company		
Fuad Jaffer, Managing Director, ASAS Dairies		
Amos Omore, Epidemiologist/ Researcher, ILRI		
1015-1030		**Tea Break**

Thematic Area 5: Farm Inputs Value Chains: Fertilizer, pesticide, seed (day-old chicks, fingerlings, heifers, etc), feed		**Moderator**: Isaac Minde, ASPIRES
1030-1230	6.1 Building a competitive farm input market: Alternative policies to bulk procurement	Hoseana Lunogelo, ASPIRES
	6.2 Effects of demonstration plots on farmers' decisions to adopt agro-inputs in Tanzania: Implications for policy and practice	Haroon Sseguya, Technology Scaling Specialist, IITA
	6.3 An ex-ante impact assessment of removing VAT on hermetic storage technologies	Liston Njoroge, Project Officer, AGRA
Panelists		
Mshindo Msolla, Country Manager, OCP Africa		
Neema Lugangira, Director of Policy, SAGCOT		
Ahadi Katera, CEO, GUAVAY		
Joseph Nyamboha, Policy Analysis Coordinator, ANSAF		

1230-1400		Lunch Break
Thematic Area 6: Import Substitution Value Chains		**Moderator:** David Nyange, Chief of Party, ASPIRES
1400-1530	5.1 Effect of Government interventions on commodity market (sunflower, cashewnut and fertilizer)	Godfrey Simbeye, Executive Director, TPSF
Panelists		
Peniel Lyimo, Former PS (MoFP, MoA and PMO)		
Faustin Kamuzora, Regional Administrative Secretary, Kagera Region		
Devang Vussonji, Partner, Dalberg		
Japhet Justine, Managing Director, TADB		
George Kaishozi, Acting Country Manager-Tanzania, TechnoServe		

Thematic Area 7: Farm Services Value Chains: Extension, credit, machinery, storage, irrigation, water, energy, transport, logistics, etc.		**Moderator:** Kelvin Remen, Business Environment Manager, TAHA
1530-1630	7.1 Enabling Growth through Investment and Enterprise (ENGINE)	Rod Carval, Chief of Party, ENGINE
	7.2 Business development services, maximizing opportunities for value chain enhancement	Goodluck Mosha, Component Lead, Business Development Service Provision (BDSP), ENGINE
	7.3 VAT on mechanized and insurance services for farmers: Implications for farmer competitiveness	Joseph Nyamboha, Policy Analysis Coordinator, ANSAF
	7.4 Implications of VAT on mechanization services and agricultural insurance to smallholder farmers in Tanzania	Tim Andrews, CEO- Great African Food Company (GAFCO)
Panelists		
Mwombeki Baregu, Head of Agriculture & Rural Finance, FSDT		
Nicomed Bohay, Managing Director, Private Agriculture Sector Support		
Stephen Nindi, Director General, National Land Use Planning Commission		
Richard Shetto, Tanzania Tractors		
Rose Funja, Managing Director, Agrinfo		
1630-1645		Tea break
1645 -1700	Emerging Policy Issues and Closing	**Moderator**: Andrew Temu, ENGINE
	Closing Ceremony's Special Guest: Hon. George Joseph Kakunda (MP), Minister of Industry, Trade and Investment	

Appendix 3 Initial Priority Policy Issues Under New Alliance (2013 - 2015)

Implement alternative policy to export ban on staples (2015)

Pre-profit tax at farm gate ("cess") on crops removed or reduced (2017)

VAT on spare part for farm machinery and equipment removed or reduced

Secure certificates of land rights (granted or customary) for smallholder and investors (2014 – on going)

Instrument developed to clarify the role of land policy implementing agencies (MoLHS, PO-RALG, TIC and RUBADA) in order to transparently and responsibly allocate land for investment in SAGCOT region (2017)

Taxes (Cess and VAT) on seed and seed packaging lifted or reduced (Clarified 2017)

Secured transactions reforms and collateral registry (on-going)

ISTA and OECD seed testing accreditations achieved to enable regional and international seed sales (2016)

Qualified private sector companies authorized to produce foundation seed under proper supervision and testing (Clarified)

Time required to register imported agrochemicals outside the region to be reviewed and benchmarked with international best practices (Harmonized with EAC)

Update and align the National Food and Nutrition Policy with the National Nutrition Strategy (On-going)

Appendix 4 2016/17 Reforms – Removal of 104 Fees & Charges

Tobacco	Charges paid to TORITA for research development
	Import licence fee for green tobacco
Coffee	Charges paid for research development in coffee
	Contribution to Coffee Development trust fund
	Coffee export fee
Tea	Tea import Cess
	Charges paid for research development in Tea
	Contribution to cover the cost for stakeholders meetings
Seed	Certificates and tags
	Variety Registration Certificate
	Certificate of seed testing
	DUS testing certificate
	Certified copy of certificate
Seed	Recognition letter of cooperative society
	Issuing registration certificate for primary cooperatives
	Issuing registration certificate for secondary cooperatives
	Issuing registration certificate for Union cooperatives
	Issuing registration certificate for federation of cooperatives Union
	Issuing registration certificate for Joint venture investment
Sugar	Molasses Export license fee
Cotton	Contribution to Cotton Development trust fund

Appendix 5 2017/2018 Reforms

Corporate tax reduced from 30% to 10% during the first 5 years of assemblers of vehicles, tractors and fishing boats

Tax exemptions – VAT on:

- Capital goods on machines and plants in production of edible oil, textiles, leather and pharmaceuticals (including vet.)
- Fertilized eggs for incubation
- Locally produced animal fees

Import duty reduced on wheat from 35% to 10%; Escrow account established to easy refund of import duty on industrial sugar

Excise duty increased on carbonated drinks, mineral water, juice, beer, etc.

Produce cess – reduced from 5% to 3%

Others: Reduction of 108 nuisance fee and charges – crops=80, livestock=23, fisheries=5

Appendix 6 The 2018/2019 reforms

Exemption of VAT on soya cake

Exemption of VAT on additives for livestock and poultry feed

5-year corporate tax holiday on new leather industry

Removal of Produce Cess for producer/processors

Increased import duty on crude edible oil from 0%/10% to 25%

Exemption of import duty on raw materials for veterinary pharmaceuticals

Increased import duty on potato

Increased import duty on tomato sauce from 25% to 35%

Increased import duty on beef, sausages, offals, etc. from 25% to 35%

Increased import duty on juice, and wines

Appendix 7 Preliminary proposal for policy Reforms for 2019/20 by PAG/PAC

Increase the size and quality of public investment in agriculture

Tax relief on agriculture production technologies to enhance the competitiveness agriculture value chains

VAT relief on production and storage technologies e.g. PICS bags, cocoon, silos, cold storage

Ensure predictability and coherence in trade and marketing policy; Temporary tariff increase on some food imports

Establish a legal framework to enable SMEs leverage movable assets as collateral for accessing credit; Remove service levy on empowerment funds

Reduction of statutory payments for agriculture agro-processors workforce e.g. SDL

Appendix 8 Issues Raised Under Regulatory Reforms Blueprint

Hides and Skin: Lengthy and costly licensing procedure; Dumping of cheap imports e.g. used shoes

Overlapping regulatory framework: Tanzania Meat Board, TFDA, DVS, TBS; High fees for export/import certificates

Tea: Multiplicity and overlapping roles of regulatory agencies – TTB, TFDA, OSHA, etc.; High land rent

Cashew nut: Restrictions on imports during off-season

Cotton: Challenges on contracts farming arising from weak regulatory enforcement

Tanzania Sugar Board: Illegal imports due to weak enforcement/port inspection by TSB; Land acquisition for investment in plantations is cumbersome

Tanzania Coffee Board: Multiplicity of regulators and fees

Fisheries: Overlapping regulatory framework among Fisheries Act and other regulatory agencies – TBS, TFDA etc.; Fish export royalty imposed only in Tanzania and not in other EAC countries: Surcharges and levies imposed by LGAs are too high

Seed sub-sector: New variety registration taking 3 years and $15,000; ASA's ownership of certified seed production is a conflict of interest; Private sector having challenges accessing ASA's basic seed; Overlap in seed regulations – Seed Unit, TOSCI, Plant Health Service and TPRI

Fertilizer: Restrictions on importation of specialized and customized fertilizer; Lengthy and costly new fertilizer registration