

Southern Agricultural Growth Corridor of Tanzania

Appendix XI:

Cluster development projections to 2030

Draft

Introduction

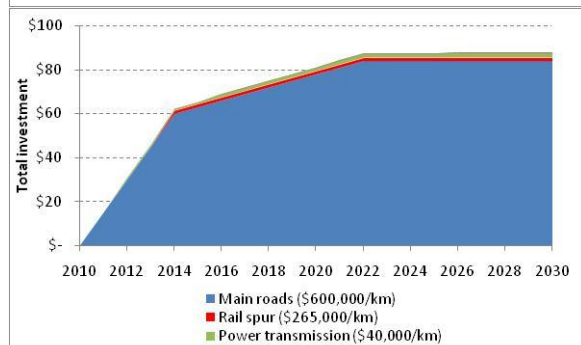
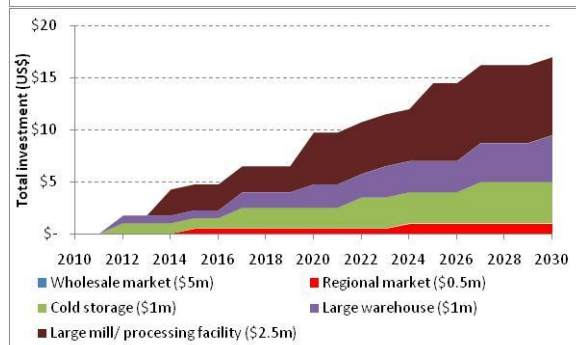
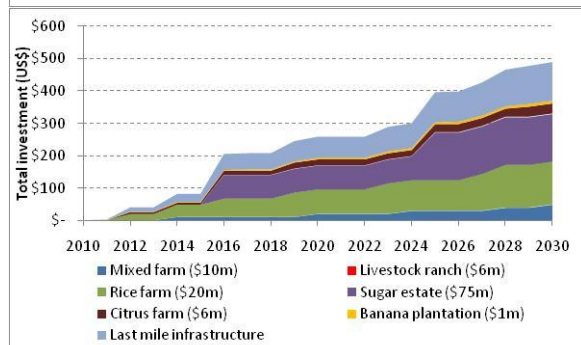
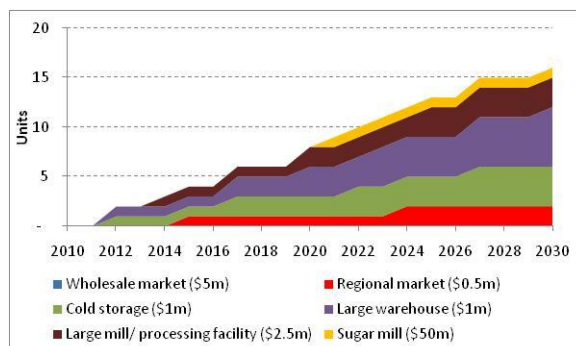
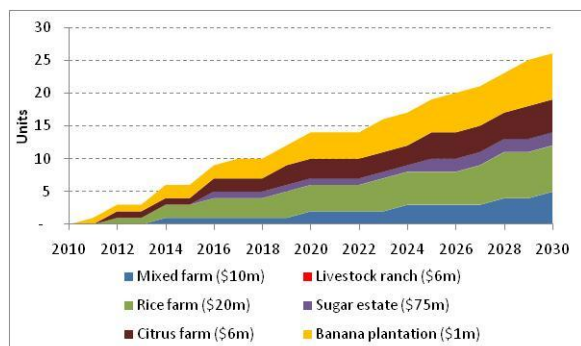
In reviewing this appendix, please refer to Appendices V – Cluster development to 2015, and IX – Production and investment model.

As Appendix IX notes, the cluster development profiles are significantly 'high level', in that the unit models, the development profiles of each cluster, and the exact nature of the infrastructure investment necessary to support these profiles are all estimates based on information available, and are necessarily simplistic. More detailed modelling of individual farm investment opportunities, of cluster development, and of infrastructure requirements are beyond the scope of this particular exercise, but are necessary for more detailed analysis and forecasting for investment purposes. The model is not intended to provide a detailed budget or investment analysis for individual components of SAGCOT.

Appendix V notes that there will be a need for sequencing of activities and investments and a clear understanding of the roles and responsibilities of the SAGCOT Partners.

This appendix takes output from the production and investment model and sets out further detail on the development profiles of each of the six clusters, providing projections of on-farm investment, last mile infrastructure, and necessary supporting agriculture and backbone infrastructure. From this, it details the resulting gross revenue and developmental impact of that investment.

Kilombero



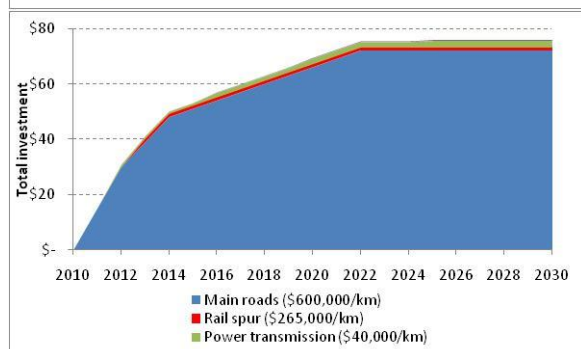
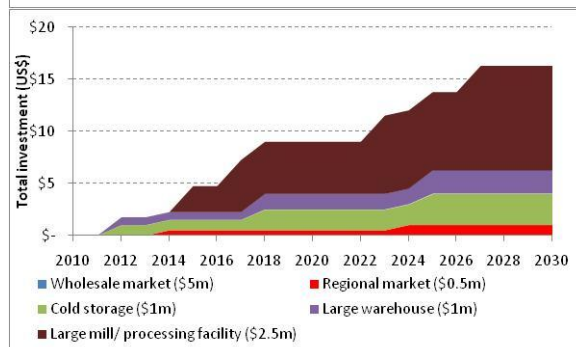
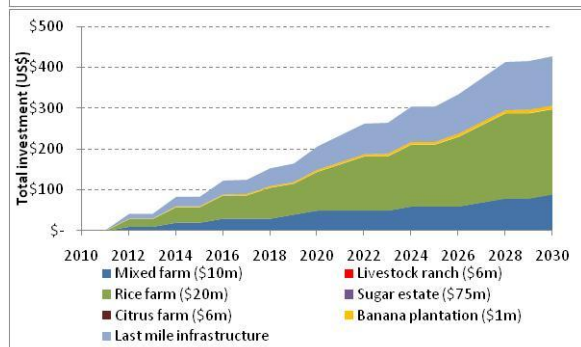
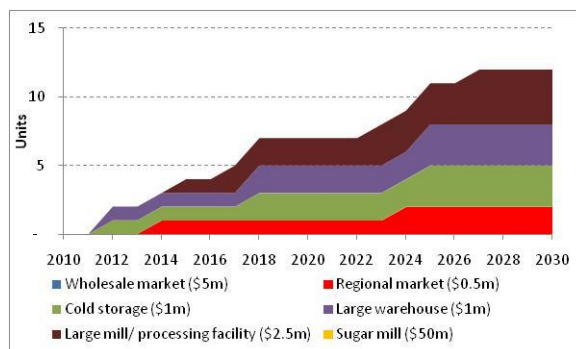
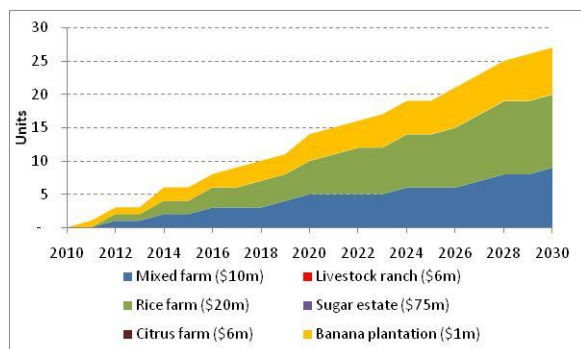
Investment outcomes

	2015	2030
Total area (ha)	7,550	51,800
Gross revenue (\$m)	35	256
Irrigated s/h farmers	630	3,620
Rain-fed s/h farmers	1,000	5,000
On-farm jobs	620	5,440
Processing jobs	2,070	15,500
Wider value chain jobs	2,690	20,940
Indirect beneficiaries	31,545	227,250

Total investment

	2015		2030	
	Units	Investment (\$m)	Units	Investment (\$m)
On-farm				
Mixed farm	1	10.0	5	50.0
Livestock ranch				
Rice farm	2	40.0	7	140.0
Sugar estate			2	150.0
Citrus farm	1	6.0	5	30.0
Banana plantation	2	2.0	7	7.0
		58.0		377.0
Off-farm				
Last mile infrastructure		25.0		120.0
Wholesale market				
Regional market	1	0.5	2	1.0
Cold storage	1	1.0	4	4.0
Large warehouse	1	1.0	6	6.0
Large mill/ processing facility	1	2.5	3	7.5
Sugar mill			1	50.0
		30.0		188.5
Backbone infrastructure				
Main roads (km)	105	63.0	140	84.0
Rail spur (km)	5	1.3	5	1.3
Power transmission (km)	20	0.8	60	2.4
Substation (units)	1	0.1	4	0.3
		65.2		88.0
Total		153.2		653.5

Mbarali



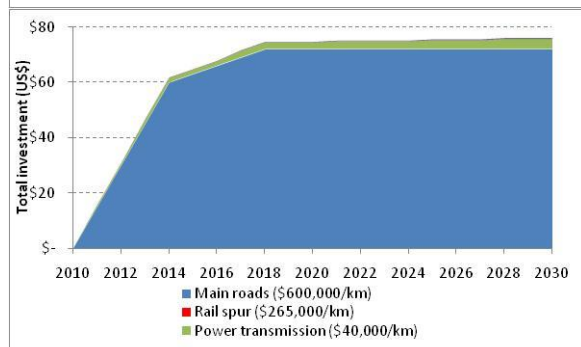
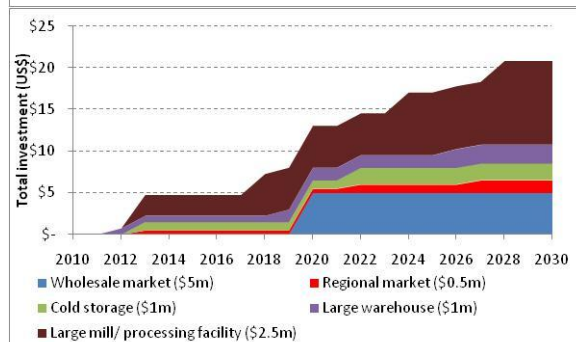
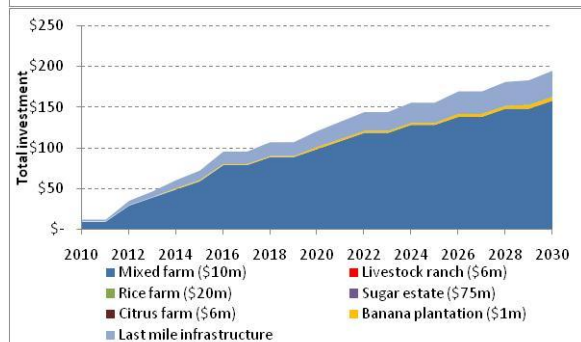
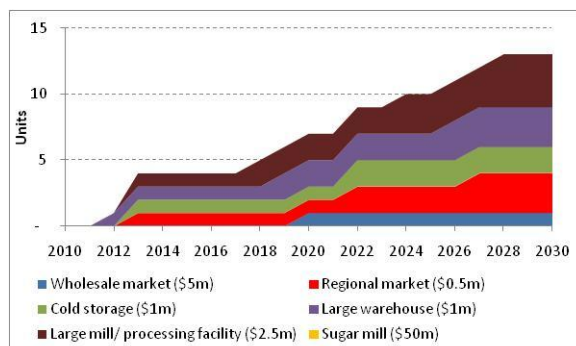
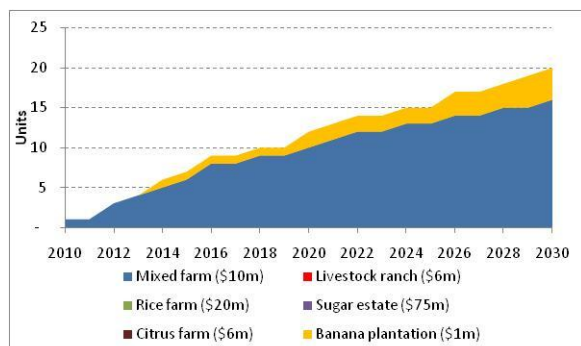
Investment outcomes

	2015	2030
Total area (ha)	9,600	46,900
Gross revenue (\$m)	27	172
Irrigated s/h farmers	720	3,620
Rain-fed s/h farmers	2,000	9,000
On-farm jobs	680	3,420
Processing jobs	2,480	12,260
Wider value chain jobs	3,160	15,680
Indirect beneficiaries	40,680	197,910

Total investment

	2015		2030	
	Units	Investment (\$m)	Units	Investment (\$m)
On-farm				
Mixed farm	2	20.0	9	90.0
Livestock ranch				
Rice farm	2	40.0	11	220.0
Sugar estate				
Citrus farm				
Banana plantation	2	2.0	7	7.0
		62.0		317.0
Off-farm				
Last mile infrastructure		23.3		121.0
Wholesale market				
Regional market	1	0.5	2	1.0
Cold storage	1	1.0	3	3.0
Large warehouse	1	1.0	3	3.0
Large mill/ processing facility	1	2.5	4	10.0
Sugar mill				
		28.3		138.0
Backbone infrastructure				
Main roads (km)	85	51.0	120	72.0
Rail spur (km)	5	1.3	5	1.3
Power transmission (km)	20	0.8	60	2.4
Substation (units)	1	0.1	4	0.3
		53.2		76.0
Total		143.5		531.0

Ihemi



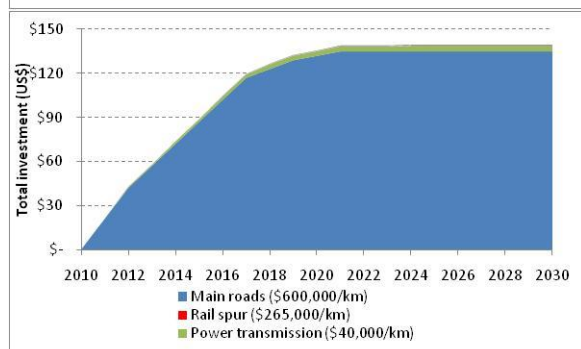
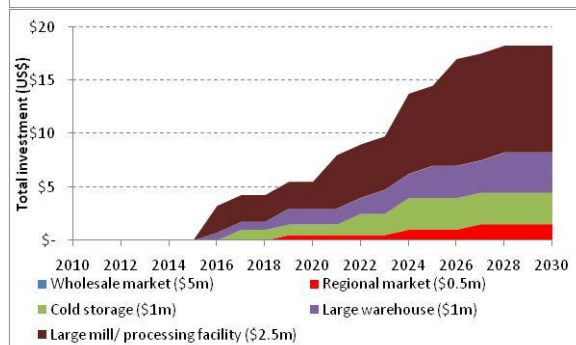
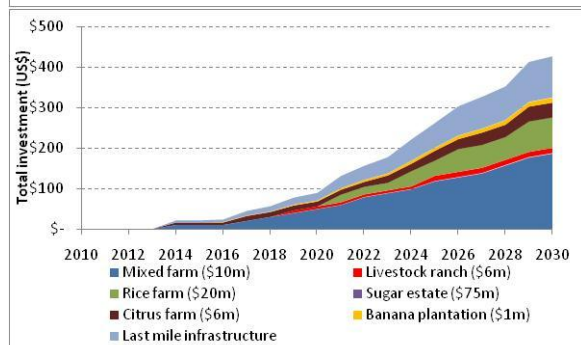
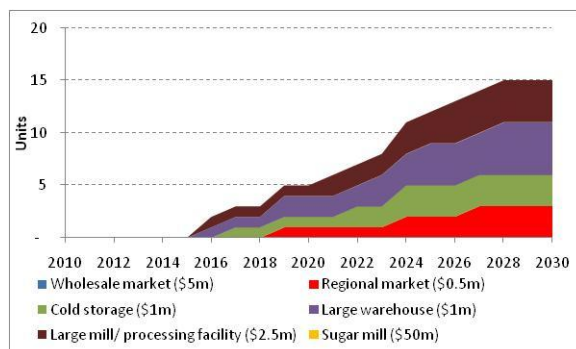
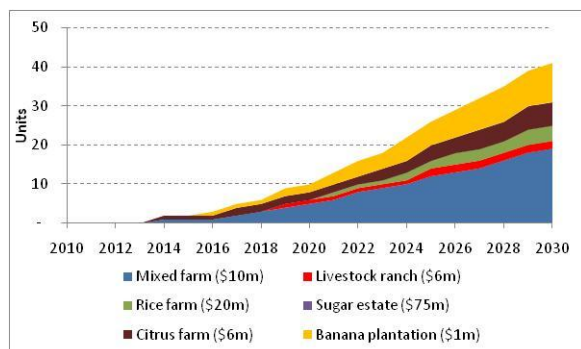
Investment outcomes

	2015	2030
Total area (ha)	16,050	43,000
Gross revenue (\$m)	22	76
Irrigated s/h farmers	910	2,440
Rain-fed s/h farmers	6,000	16,000
On-farm jobs	740	2,000
Processing jobs	3,590	9,640
Wider value chain jobs	4,330	11,640
Indirect beneficiaries	70,065	187,740

Total investment

	2015		2030	
	Units	Investment (\$m)	Units	Investment (\$m)
On-farm				
Mixed farm	6	60.0	16	160.0
Livestock ranch				
Rice farm				
Sugar estate				
Citrus farm				
Banana plantation	1	1.0	4	4.0
		61.0		200.0
Off-farm				
Last mile infrastructure		11.6		32.0
Wholesale market			1	5.0
Regional market	1	0.5	3	1.5
Cold storage	1	1.0	2	2.0
Large warehouse	1	1.0	3	3.0
Large mill/ processing facility	1	2.5	4	10.0
Sugar mill				
		16.6		54.5
Backbone infrastructure				
Main roads (km)	105	63.0	120	72.0
Rail spur (km)				
Power transmission (km)	40	1.6	90	3.6
Substation (units)	2	0.1	6	0.4
		64.7		76.0
Total		142.3		330.5

Ludewa



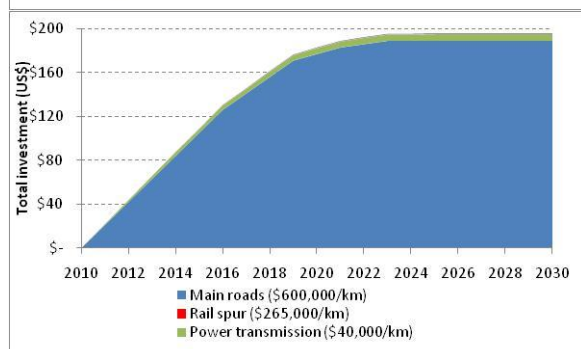
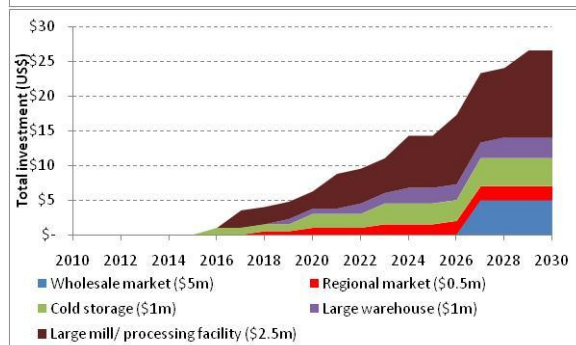
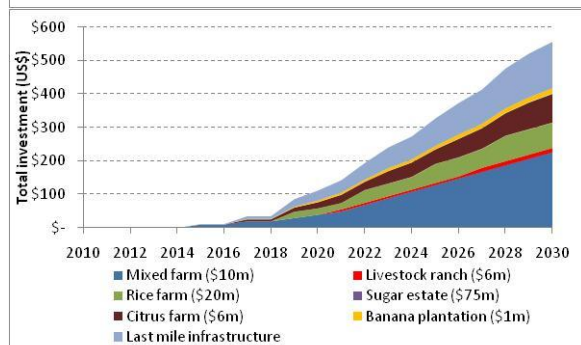
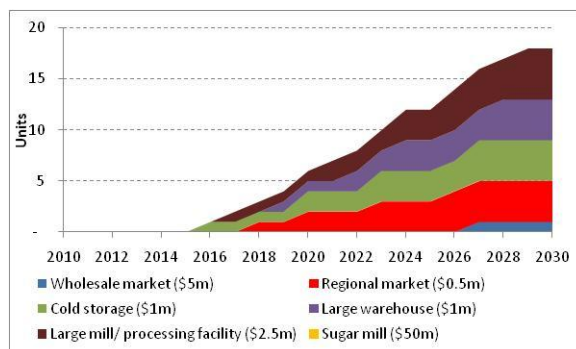
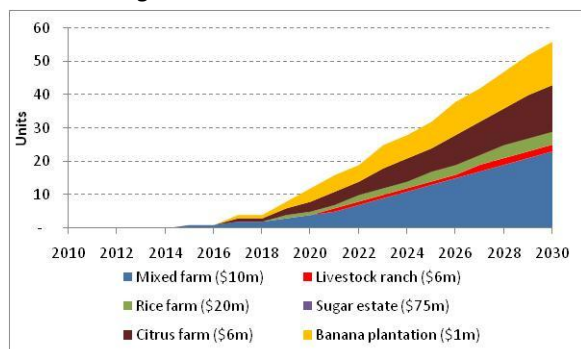
Investment outcomes

	2015	2030
Total area (ha)	3,250	84,050
Gross revenue (\$m)	8	210
Irrigated s/h farmers	210	4,150
Rain-fed s/h farmers	1,000	19,000
On-farm jobs	180	4,720
Processing jobs	770	17,390
Wider value chain jobs	950	22,110
Indirect beneficiaries	13,995	303,165

Total investment

	2015		2030	
	Units	Investment (\$m)	Units	Investment (\$m)
On-farm				
Mixed farm	1	10.0	19	190.0
Livestock ranch			2	12.0
Rice farm			4	80.0
Sugar estate				
Citrus farm	1	6.0	6	36.0
Banana plantation			10	10.0
		16.0		328.0
Off-farm				
Last mile infrastructure		5.2		101.5
Wholesale market				
Regional market			3	1.5
Cold storage			3	3.0
Large warehouse			5	5.0
Large mill/ processing facility			4	10.0
Sugar mill				
		5.2		121.0
Backbone infrastructure				
Main roads (km)	145	87.0	225	135.0
Rail spur (km)				
Power transmission (km)	40	1.6	100	4.0
Substation (units)	2	0.1	6	0.4
		88.7		140.3
Total		109.9		589.3

Sumbawanga



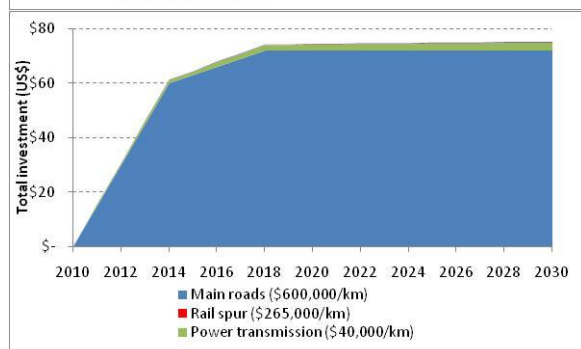
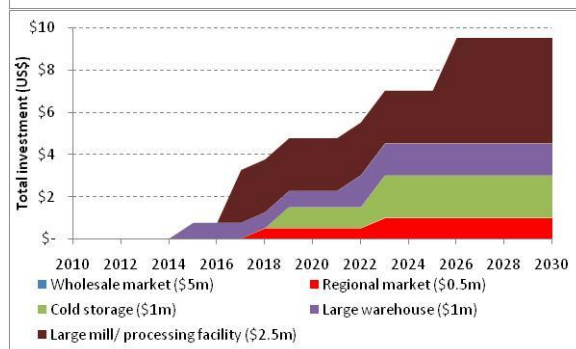
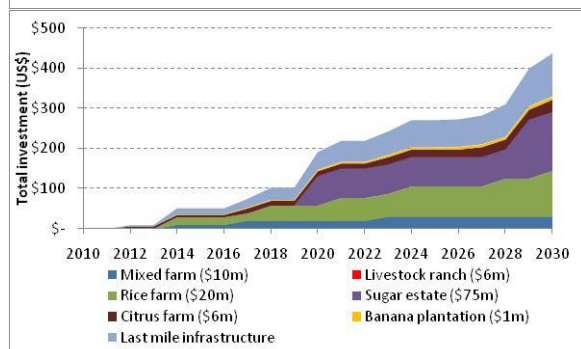
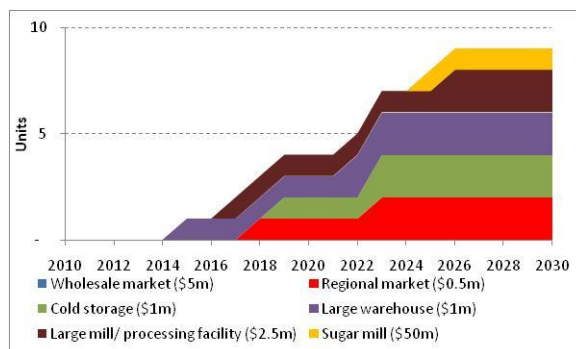
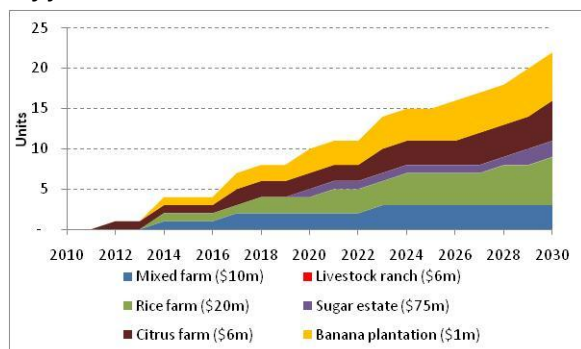
Investment outcomes

	2015	2030
Total area (ha)	2,650	99,900
Gross revenue (\$m)	0	316
Irrigated s/h farmers	150	5,260
Rain-fed s/h farmers	1,000	23,000
On-farm jobs	120	5,740
Processing jobs	590	21,340
Wider value chain jobs	710	27,080
Indirect beneficiaries	11,565	370,890

Total investment

	2015		2030	
	Units	Investment (\$m)	Units	Investment (\$m)
On-farm				
Mixed farm	1	10.0	23	230.0
Livestock ranch			2	20.0
Rice farm			4	80.0
Sugar estate				
Citrus farm			14	84.0
Banana plantation			13	13.0
		10.0		427.0
Off-farm				
Last mile infrastructure		1.8		138.5
Wholesale market			1	5.0
Regional market			4	2.0
Cold storage			4	4.0
Large warehouse			4	4.0
Large mill/ processing facility			5	7.5
Sugar mill				
		1.8		161.0
Backbone infrastructure				
Main roads (km)	175	105.0	315	189.0
Rail spur (km)				
Power transmission (km)	80	3.2	150	6.0
Substation (units)	4	0.3	9	0.6
		108.5		195.6
Total		120.3		783.6

Rufiji



Investment outcomes

	2015	2030
Total area (ha)	5,400	44,350
Gross revenue (\$m)	21	176
Irrigated s/h farmers	420	3,110
Rain-fed s/h farmers	1,000	3,000
On-farm jobs	400	4,980
Processing jobs	1,420	13,670
Wider value chain jobs	1,820	18,650
Indirect beneficiaries	22,770	195,345

Total investment

	2015		2030	
	Units	Investment (\$m)	Units	Investment (\$m)
On-farm				
Mixed farm	1	10.0	3	30.0
Livestock ranch				
Rice farm	1	20.0	6	120.0
Sugar estate			2	150.0
Citrus farm	1	6.0	5	30.0
Banana plantation	1	1.0	6	6.0
		37.0		336.0
Off-farm				
Last mile infrastructure		15.0		106.5
Wholesale market				
Regional market			2	1.0
Cold storage			2	2.0
Large warehouse	1	1.0	2	2.0
Large mill/ processing facility			2	5.0
Sugar mill			1	50.0
		16.0		166.5
Backbone infrastructure				
Main roads (km)	105	63.0	120	72.0
Rail spur (km)				
Power transmission (km)	30	1.2	70	2.8
Substation (units)	2	0.1	5	0.4
		64.3		75.2
Total		117.3		577.7

