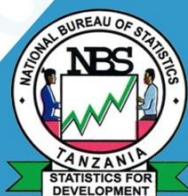
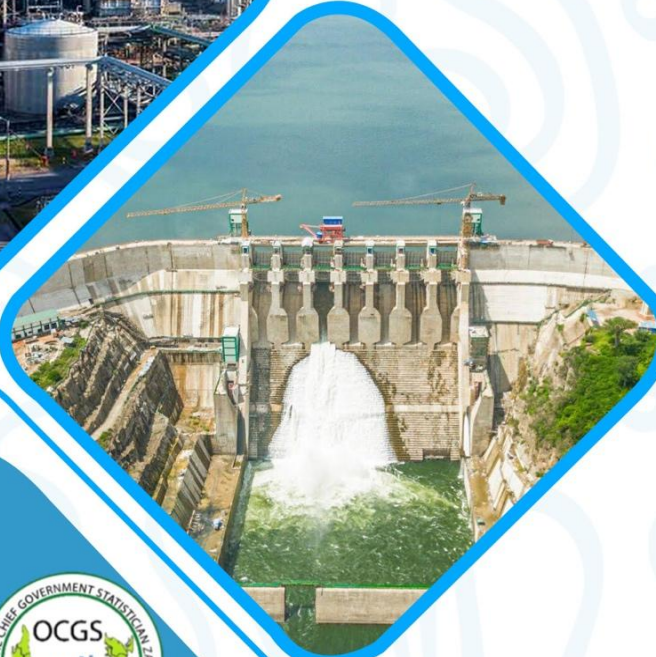




CENSUS OF INDUSTRIAL PRODUCTION 2023 ANALYTICAL REPORT



May 2026



THE UNITED REPUBLIC OF TANZANIA

CENSUS OF INDUSTRIAL PRODUCTION 2023 TANZANIA

ANALYTICAL REPORT



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Abbreviations and Acronyms

AIDS	Acquired Immunodeficiency Syndrome
ATE	Association of Tanzania Employees
CAMARTEC	Centre for Agricultural Mechanization and Rural Technology
CGCLA	Chief Government Chemist Laboratory Agency
CIP	Census of Industrial Production
CPC	Central Product Classification
CSPRO	Census and Survey Processing System
CTI	Confederation of Tanzania Industries
EA	Environmental Assessment
EAC	East African Community
EIA	Environmental Impact Assessment
EMP	Environmental Management Plan
ESIA	Environmental and Social Impact Assessment
ESMP	Environmental and Social Management Plan
ESRF	Economic and Social Research Foundation
EWURA	Energy and Water Utility Regulatory Authority
FYDP	Five Year Development Plan
HIV	Human Immunodeficiency Virus
ICT	Information and Communication Technology
ISO	International Organization for Standardization
LAN	Local Area Network
MIT	Ministry of Industry and Trade
MoE	Ministry of Energy
MoW	Ministry of Water
PORALG	President's Office Regional Administrative and Local Government
RSM	Regional Statistical Manager
SIDO	Small Industrial Development Organization
TANESCO	Tanzania National Electricity Supply Corporation
TBS	Tanzania Bureau of Standards
TCCIA	Tanzania Chamber of Commerce Industry & Agriculture
TIRDO	Tanzania Industrial and Research Development Organization
TMC	Tanzania Mining Commission
TMDA	Tanzania Medicines and Medical Devices Authority
TPSF	Tanzania Private Sector Federation
ZBS	Zanzibar Bureau of Standards
ZFDA	Zanzibar Food and Drug Agency
ZNCC	Zanzibar National Chamber of Commerce
-	Means Zero



Acknowledgments

The National Bureau of Statistics (NBS) and Office of the Chief Government Statistician (OCGS), are pleased to present the major findings of the Census of Industrial Production (CIP) 2023. This report comes at a time when the Government continues to prioritise industrialization as a central pillar of the national development agenda. This commitment is reflected in the Third “Five-Year Development Plan” (FYDP III) 2021/22 – 2025/26, the Tanzania Development Vision 2025, the Zanzibar Development Vision 2050 and the 2030 Sustainable Development Goals (SDGs), particularly Goal 9, which promotes resilient infrastructure, inclusive and sustainable industrialization, and innovation. Reliable and timely industrial statistics are therefore crucial for informing policy decisions, planning and economic transformation.

We would like to express our sincere appreciation and gratitude to the President’s Office-Regional Administration and Local Government (PO-RALG), the Ministry of Industry and Trade (MIT), the Ministry of Trade and Industrial Development (MTID), the Ministry of Water (MoW), the Ministry of Energy (MoE), the Tanzania National Electricity Supply Corporation (TANESCO), the Small Industrial Development Organization (SIDO), Tanzania Industrial and Research Development Organization (TIRDO), the Confederation of Tanzania Industries (CTI), Zanzibar Economic Empowerment Agency (ZEEA) and the United Nations Industrial Development Organisation (UNIDO) for their participation in the design and implementation of this important project.

We would also like to extend our gratitude to the census technical team, authors, field enumerators, Regional Statistical Managers, Regional and District Commissioners for their tireless effort at different stages during the execution of this census. We also, recognise and provide our special thanks for the cooperation of establishment executive officers/managers or owners throughout the country, as they were very essential for the success of this industrial census.

It is our hope that policymakers, researchers, investors, and other stakeholders will find this report useful in shaping evidence-based decisions and interventions to drive sustainable industrial growth in Tanzania.



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Executive Summary

Introduction

The industrial sector continues to play a critical role in driving economic growth, employment creation, and structural transformation. Reliable and timely data on industrial activities are therefore essential for tracking progress, identifying emerging opportunities, and addressing challenges that may hinder sustainable development.

Main Findings

The CIP 2023 revealed that, there were a total of 57,684 establishments operating in 2023 in Tanzania with a majority of 53,149 (92.1 percent) classified as small and 4,535 (7.9 percent) as large establishments. The manufacturing sector accounted for the highest number of small establishments, amounting to 51,902 (97.7 percent), while lowest was recorded for electricity, gas, steam, and air conditioning supply with 33 (0.1 percent). Likewise, for large establishments, manufacturing had the highest number 3,489 (76.9 percent), whereas electricity, gas, steam, and air conditioning supply had the lowest number with 95 (2.1 percent) establishments.

Single establishments comprised the vast majority of all industries, accounting for 56,313 (97.6 percent) of the totals. This was followed by head offices 751 (1.3 percent) and finally branches with 620 (1.1 percent) establishments. This implies that industrial sector is largely driven by single establishments.

In Tanzania, most establishments were engaged in manufacturing (96.0 percent). Whereby, the majority were engaged in production of food (40.4 percent), manufacturing of wearing apparel (20.7 percent), manufacture of furniture (14.1 percent) and manufacture of fabricated metal products except machinery and equipment (12.2 percent). This highlights the importance of agriculture in supporting manufacturing. Within the non-manufacturing sectors, the largest share was recorded in mining and quarrying (3.3 percent), followed by water supply; sewerage, waste management and remediation activities (0.5 percent) and the electricity, gas, steam and air conditioning supply sector contributed a marginal share of 0.2 percent.

Ownership was predominantly private for both small (99.9 percent) and large (93.0 percent) establishments. Among large establishments, 6.7 percent were publicly owned, and 0.3 percent were mixed owned (public and private). The proportion of public ownership is higher in large establishments compared to small (0.1 percent) establishments.



Many establishments were operating below capacity due to several key challenges. The most frequently reported issue during the census was limited market demand (11.7 percent), followed by an inadequate electricity supply (9.8 percent) and shortage of domestic inputs (9.4 percent). Establishments operations were further hindered by import competition, costly transportation, and expensive credit facilities.

The industrial sector created 471,482 jobs in Tanzania, underscoring its vital role in economic development. Total personal engaged for large establishments were 276,196 persons representing 58.6 percent of the total. Small establishments contributed the remaining 195,286 persons engaged accounting for 41.4 percent. This distribution highlights the dominant role of large-scale operations in driving employment, while also affirming the essential contribution of small establishments in supporting inclusive growth across diverse industries.

Tanzania's total value added amounted to TZS 19,791,037 million, with Mainland Tanzania contributing the largest share of TZS 19,463,064 million, while Zanzibar recorded TZS 327,973 million of value added. Looking on industrial sector, manufacturing was the leading contributor to total value added (58.2 percent), followed by mining and quarrying (37.8 percent), while electricity, gas, steam and air conditioning supply (2.5 percent) and water supply; sewerage, waste management and remediation activities (1.5 percent) accounted for relatively small shares.

The results indicate that, total investment in fixed assets was TZS 22,556,314 million at the beginning of the year 2023. Out of this amount, 62.6 percent was observed in manufacturing sector, while the other three sectors collectively accounted for 37.4 percent of the total fixed asset.

The CIP 2023 results for Tanzania revealed a notable difference in registration status between large and small establishments. Among large establishments, the majority (80.6 percent) were officially registered and 19.4 percent remain unregistered. Conversely, the distribution of registration among small establishments was 54.8 percent being registered and 45.2 percent being unregistered. These findings highlight the need for targeted policy interventions to improve formalization among small establishment to support inclusive industrial development.

In terms of quality certification, 29.4 percent of large establishments certified their products through TBS, followed by CGCLA (18.3 percent), TMC (13.8 percent) and ISO (5.7 percent). For small establishments, only 7.3 percent were certified by TBS and most of them 86.5 percent not certified their products.



Tanzania establishments sold only 10.3 percent to the international markets. Among the reasons for the low performance of the establishments to access international markets were; inadequate supply, limited promotion, inadequate trade negotiation skills and market access and low compliance to the market standards.

The census identifies persistent structural and operational challenges affecting manufacturing across both Mainland Tanzania and Zanzibar. Key challenges include high production costs, inadequate infrastructure, high tax rates, unreliable power supply, multiple taxes, limited access to modern technology, and insufficient production capacity. These challenges collectively hinder productivity, reduce competitiveness, and limit the sector's potential to contribute fully to economic growth.

Key industrial Statistics Indicators from CIP 2023

Indicator	Mainland Tanzania		Zanzibar		Tanzania		Total
	Large	Small	Large	Small	Large	Small	
Number of Establishment ^D	4,228	49,856	307	3,293	4,535	53,149	57,684
Number of Establishment by Sector							
Mining and quarrying	702	1,096	39	54	741	1,150	1,891
Manufacturing	3,222	48,664	267	3,238	3,489	51,902	55,391
Electricity, gas, steam and Air conditioning supply	95	33	0	0	95	33	128
Water supply; Sewerage, Waste Management and Remediation Activities	209	63	1	1	210	64	274
Number of Establishments by Type of Ownership							
Public ^D	299	69	4	2	303	71	374
Private ^D	3,914	49,784	303	3,291	4,217	53,075	57,292
Mixed	15	3	0	0	15	3	18
Number of Establishments by Origin of Ownership							
National	3,705	49,791	302	3,293	4,007	53,084	57,091
Foreign	418	65	5	0	423	65	488
Joint	105	0	0	0	105	-	105
Number of Persons Engaged by Sector ^D							
Mining and quarrying	36,519	6,466	598	338	37,117	6,804	43,921
Manufacturing	210,137	177,377	5,324	10,641	215,461	188,018	403,479
Electricity, gas, steam and Air conditioning supply	5,029	161	-	-	5,029	161	5,190
Water supply; Sewerage, Waste Management and Remediation Activities	18,555	302	34	1	18,589	303	18,892
Female participation in employment (%)	29.0	18.7	17.0	7.7	28.7	18.1	24.3
Labour cost (TZS Mill.)	2,717,439	309,332	18,450	15,043	2,735,889	324,375	3,060,264
Gross Output (TZS Mill.) ^D	37,295,986	2,962,690	184,508	253,250	37,480,494	3,215,940	40,696,434
Intermediate Consumption (TZS Mill.)	19,710,607	1,085,005	55,600	54,186	19,766,207	1,139,191	20,905,398
Value Added (TZS Mill.) ^D	17,585,380	1,877,684	128,909	199,064	17,714,289	2,076,748	19,791,037
Capacity Utilization (%)		75.9		78.8			76.1



Indicator	Mainland Tanzania	Zanzibar	Tanzania
Research and Development (%) for large establishments			
Mining and quarrying	1.1	-	1.0
Manufacturing	6.3	1.6	6.0
Electricity, gas, steam and Air conditioning supply	0.3		0.3
Water supply; Sewerage, Waste Management and Remediation Activities	1.0	-	1.0
Market for the Products (%) large establishments			
Domestic	80.7	97.7	81.9
International	11.0	1.6	10.4
Both	8.3	0.7	7.7
Sustainable Development Goals Indicators			
Goal No. 9: Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation			
Target	Indicator code and Description	National Indicator	2023
9.b Support domestic technology development, research and innovation in developing countries, including by ensuring a conducive policy environment for, inter alia, industrial diversification and value addition to commodities	9.b.1: Proportion of medium and high-tech industry value added in total value added	Proportion of medium and high-tech industry value added in total value added	9.2
9.3 Increase the access of small-scale industrial and other enterprises, in particular in developing countries, to financial services, including affordable credit, and their integration into value chains and markets	9.3.1: Proportion of small-scale industries in total industry value added	Proportion of small-scale industries in total industry value added	9.6

Note: ^D Dira 2050 Indicators



Chapter One:

Concepts, Definition and Census Methodology

1.0 Introduction

The methodology adopted in the CIP 2023 was intended to collect quality data that would facilitate a better understanding of the structure of the industrial sector and to provide instrument that will enable appropriate follow up and monitoring of the sector performance during the reference period.

1.1 Background Information

The Government of the United Republic of Tanzania through the National Bureau of Statistics (NBS) and Office of the Chief Government Statistician (OCGS), in collaboration with Ministry of Industry and Trade for Mainland Tanzania and Ministry of Trade and Industrial Development Zanzibar, conducted the Census of Industrial Production, 2023 (CIP 2023). The CIP was funded by the Government of Tanzania and Development Partners through the Tanzania Statistical Master Plan (TSMP II) basket funding arrangements.

Since independence in 1961, the first Census of Industrial Production (CIP) for Mainland Tanzania was undertaken in 1963, the second in 1978, the third in 1989, the fourth in 2013, while the fifth CIP was conducted in 2023. For Zanzibar, this is the fifth CIP since the Revolution of 1964. Others were conducted in the years 1989, 2002, 2008 and 2012. The CIP 2023 was the first to be conducted in the United Republic of Tanzania. It is recognized that, over time, production structures and composition changes due to advancement in technology and innovations. The CIP 2023 has provided most recent and up to date industrial statistics for both Mainland Tanzania and Zanzibar. These statistics provide a key foundation for decision making and policy formulation

1.2 Objectives of the Census

The main objective of the 2023 Census of Industrial Production was to collect data on the economic attributes of the industrial sector. This information serves as a foundation for enhancing industrial performance, shaping effective policies, supporting planning efforts, monitoring and evaluating programs, and offering strategic guidance to the sector to ensure consistent product quality and increased productivity. The specific objectives of the CIP 2023 were to update:

- i. Structure, composition and activities of the industrial sector in the economy;
- ii. The sector's contribution to the Gross Domestic Product (GDP);



- iii. A list of commodities used in compiling the Indices of Industrial Production (IIP) and Producer Price Index (PPI);
- iv. Data to support the evidence-based policies for the industrial sector;
- v. Market-related insights and information; and
- vi. A comprehensive list or sampling frame for industrial establishments-based surveys.

1.3 National Development Policies, Strategies, and Goals for the Industrial Sector

Tanzania's national development policies, strategies, and goals for the industrial sector are centered on transforming the country into a semi-industrialized and middle-income economy through sustainable industrial growth, structural transformation, and value addition. Key frameworks such as the Tanzania Development Vision 2025, the Five-Year Development Plans (FYDP III), and the Sustainable Industrial Development Policy (SIDP 1996–2020) emphasize industrialization as a core driver of economic diversification, employment creation, technological advancement, and export competitiveness. These strategies prioritize the expansion of manufacturing industries, agro-processing, mineral beneficiation, and the development of strategic industries while strengthening linkages between agriculture, mining, and manufacturing sectors.

Government initiatives also focus on improving infrastructure, energy supply, investment climate, and private sector participation to enhance industrial productivity. Special Economic Zones (SEZs), Export Processing Zones (EPZs), and local content policies are promoted to attract domestic and foreign investment. Overall, Tanzania's industrial policies aim to increase the manufacturing sector's contribution to GDP, boost exports of value-added products, reduce import dependence, and foster inclusive economic growth, making industrialization a central pillar of long-term national development.

1.4 Justification for the Implementation of the 2023 CIP

The industrial sector constitutes a critical pillar in the economic structure in many countries, including Tanzania. Recognising its strategic importance, the Government of Tanzania has consistently undertaken regulatory, promotional, and facilitative measures to enhance industrial performance and ensure alignment with the overarching objectives of the National Development Framework. The 2023 CIP generates comprehensive datasets which are essential for assessing policy efficacy, monitoring sectoral progress, and guiding future interventions within the industrial domain.



1.5 Concepts and definitions

The concepts and definitions use in this report are based on the recommendations of the International Recommendations for Industrial Statistics (IRIS 2008) and relevant UNIDO Industrial Statistics Guidelines and Methodology of 2010.

- (i) **Establishment:** The statistical unit used for this census is an establishment. Establishment is an economic unit, under a single ownership or control, engaging one or predominantly one kind of economic activity at a single physical location (i.e. an individual firm, mines, quarries, plants, factory or workshop).
- (ii) **Industrial Activity:** This means the four major divisions of the International Standard Industrial Classification (ISIC) Revision 4 of all Economic Activities, that is Mining and quarrying; Manufacturing; Electricity, gas, steam and air conditioning supply and Water supply; sewerage, waste management and remediation activities.
- (iii) **Persons Engaged:** Refers to all persons/workers who, during a specified period, worked in or for the establishment. It includes working proprietors, unpaid family workers and employees (operatives, managerial and professional staff). Also, includes even those who during the specified period were temporary absent from work e.g. on sick leave, on annual leave or vacation. It excludes persons on military leave, pension and other forms of unlimited leave.
- (iv) **Casual/temporary labour** refer to workers that engaged on a daily or short-term basis who receive regular payment for their labour, in cash and/or in kind.
- (v) **Working Proprietors and Partners:** Persons who control the establishment and share in its profits i.e. those who own the establishment. It may be a single individual or many persons as in partnership. Working proprietors are those who are actually engaged in the work of the establishment.
- (vi) **Unpaid Workers:** Persons like members of religious institutions, prisoners, J.K.T. militia, family members and the like who work for at least 1/3 of the



normal working time of the establishment. They work without regular pay or any agreed amount to be paid for the work done.

- (vii) **Employees:** Persons who, during a specified period, worked for an agreed amount of pay, either in cash or in kind.
- (viii) **Operatives non-skilled:** Persons who perform routine tasks which require little or no formal training or tasks that do not need specialized skills or technical knowledge.
- (ix) **Operatives Skilled:** Persons with specialized skills engaged in production, for example persons engaged in fabricating, processing or assembling, fitters, packers, repairmen, record-keeping personnel, foremen and inspectors.
- (x) **Labour Costs:** Refer to the total expenses incurred by an employer for hiring and maintaining employees. Comprised of gross wages and salaries, overtime payments, reimbursement of travel expenses, payments in kind, employer's contributions to social security schemes, training expenses and other labour costs related to employees.
- (xi) **Gross Wages and Salaries:** Refers to the total remuneration payable to employees before any deductions.
- (xii) **Overtime Payments:** Extra payments for employees who worked after normal working hours.
- (xiii) **Reimbursement of Travel Expenses:** Refers to re-payments made by an employer to employees to cover costs incurred during work-related travel.
- (xiv) **Intermediate Consumption:** Refers to the value of goods and services used up as inputs in the production process during a given period valued at purchasers' price, excluding fixed assets
- (xv) **Gross Output:** Value in the market of industrial goods and services produced including work in progress and products for own use and valued at basic price. Value of goods sold is adjusted by the change in stocks of finished goods and work in progress.



- (xvi) **Value Added:** is the gross output at basic prices less than intermediate consumption at purchaser's price.
- (xvii) **Depreciation:** Represents the estimated allowance for wear and tear of fixed assets during the respective accounting year.
- (xviii) **Value of Fixed Assets:** Refers to the total worth of long-term assets owned and used by an establishment in the production of goods and services.
- (xix) **Value of Inventories (stocks):** Refers to the total monetary value of goods held by an establishment for production, sale, or future use at a specific point in time.
- (xx) **Employment Size:** refers to the classification of an establishment according to the total number of persons engaged during a specified reference period, grouped into categories based on workforce size.

Employment size groups are as follows:

1–4	Establishments with 1 to 4 persons engaged
5 – 9	Establishments with 5 to 9 persons engaged
10 – 19	Establishments with 10 to 19 persons engaged
20 – 49	Establishments with 20 to 49 persons engaged
50 – 99	Establishments with 50 to 99 persons engaged
100 – 499	Establishments with 100 to 499 persons engaged
500+	Establishments with 500 or more persons engaged

- (xxi) **Large Establishments:** refers to establishments that engaged ten or more persons in their operations during the reference period.
- (xxii) **Small Establishments:** refers to establishments that engaged 1 to 9 persons in their operations during the reference period.
- (xxiii) **Capacity utilization:** refers to the extent to which an establishment uses its available production capacity during the reference period. It is the ratio of actual production to installed production capacity at a specific period usually expressed in percentage.



- (xxiv) **Non-industrial services:** refer to the services purchased or received by establishments from outside providers that support business operations but are not part of the production activities. It includes telephone, internet postage and other communication costs, cost of repairs and maintenance of buildings and structure, rental of buildings, machinery, plant and equipment, storage and hire transport, bank charges, consultancy and other professional fees (legal, fiscal, accountancy, etc.), security services, marketing and publicity and cleaning services etc.
- (xxv) **Industrial services:** refer to specialized support activities provided to industrial establishments to facilitate, maintain, and improve production processes, operations, and infrastructure, it includes services such as contract and commission works, cost of repair, maintenance and installation work, waste treatment cost, cost of sewerage services, engineering and technical services, product certification, market research etc.

1.6 Reference Period

The Census involved establishments that were active in 2023. Thus, information requested for and supplied was based on calendar year covering January to December 2023, or the period that covered most part of calendar year 2023.

1.7 Industrial Classification

Industrial establishments were classified based on major activities that conforms to the International Standards Industrial Classification of All Economic Activities (ISIC), Revision Four. Each industrial activity is basically defined in terms of its principal products or services that had highest proportion of the total value added.

1.8 Scope and Coverage

The CIP 2023 covered all establishments with fixed premises which fall under the International Standard Industrial Classification of All Economic Activities (ISIC) Revision 4. Industrial information collected covers sectors of economic activities as recommended by International Recommendations for Industrial Statistics 2008 (IRIS 2008) and Industrial Statistics Guidelines and Methodology 2010 (UNIDO 2010). The industrial sector covered includes, Mining and Quarrying; Manufacturing Electricity, gas, steam and air conditioning supply and Water supply; sewerage, waste management and remediation activities. The census covered all establishments that engaged ten or more persons (referred to large establishments) and a sample technique was applied to



establishments engaging one to nine persons (referred to small establishments). In Zanzibar, total enumeration was done to all establishments.

Industrial Sectors Covered

Mining and quarrying

Mining and quarrying include the activities relating to extraction of minerals occurring naturally as solids (coal and ores), liquids (petroleum) or gases (natural gas). Extraction can be achieved by different methods such as under-ground or surface mining, well operation, seabed mining, etc. Also, included are supplementary activities aimed at preparing the crude materials for marketing, for example crushing and grinding, cleaning, drying, sorting, concentrating ores, liquefaction of natural gas and agglomeration of solid fuels. These operations are often carried out by the units that extract the resources and/or others that are located nearby.

Manufacturing

Manufacturing includes; the physical or chemical transformation of materials, substances, or components into new products, although this cannot be used as the single universal criterion for defining manufacturing. The materials, substances, or components transformed are raw materials that are products of agriculture, forestry, fishing, mining or quarrying as well as products of other manufacturing activities. Substantial alteration, renovation or reconstruction of goods is generally considered to be manufacturing.

Assembly of the component parts of manufactured products is considered as manufacturing. This includes the assembly of manufactured products from either self-produced or purchased components. Specialized maintenance and repair of industrial, commercial and similar machinery and equipment is included in manufacturing. However, the repair of computers and personal and household goods and the repair of motor vehicles are not included in this section. As a general rule, the activities in the manufacturing section involve the transformation of materials into new products.

Electricity, gas, steam and air conditioning supply

Economic activities included under this section are the activities of providing electric power, natural gas, steam, hot water and the like through a permanent infrastructure (network) of lines, mains and pipes. The boundary of the network is not decisive, because it also includes the distribution of electricity, gas, steam, hot water and the like in industrial parks or residential buildings. This sub-sector therefore includes the operation of electric and gas utilities, which generate, control and distribute electrical power or gas; as well as the provision of steam and air-conditioning supply. However, the sub-sector excludes the operation of water and sewerage utilities, (typically long-distance) and transport of gas through pipelines.



Water supply; sewerage, waste management and remediation activities

This sector includes activities related to the management (including collection, treatment and disposal) of various forms of waste, such as solid or non-solid industrial or household waste, as well as contaminated sites. The output of the waste or sewage treatment process can either be disposed-of or become an input into other production processes. Activities of water supply are also included in this sub-sector, since they are often carried out in connection with, or by, units engaged in the treatment of sewerage.

1.9 Sample Design

The Census of Industrial Production (CIP) 2023 adopted an integrated census-survey design to produce comprehensive and reliable statistics on industrial production activities in Tanzania. The design combined complete enumeration and probability sampling to achieve full coverage of industrial activities while ensuring operational efficiency for industrial activities with a large concentration of small establishments. Under this approach, all economically significant establishments and all industrial activity domains were covered either through complete enumeration or through probability sampling as recommended by international Recommendations for Industrial Statistics (IRIS). The sampling weights were applied to produce representative estimates for the sampled domains.

Sampling Frame

The sampling frame comprises of 57,684 industrial establishments operating during the reference year 2023, of which 54,084 establishments were located in Mainland Tanzania and 3,600 establishments in Zanzibar. The frame was developed using the Statistical Business Register (SBR) maintained by the National Bureau of Statistics (NBS) and the Office of the Chief Government Statistician (OCGS), supplemented by administrative records obtained from business licensing authorities, tax administration records, local government business registers, sector regulatory authorities, and business registration databases.

Census and Sample Components

The sampling frame was implemented differently in Zanzibar and Mainland Tanzania. In Zanzibar, because the number of industrial establishments was relatively small (3,600 establishments), all establishments were completely enumerated. Consequently, no sampling was undertaken, and estimates for Zanzibar are not subject to sampling error.

In Mainland Tanzania, the sampling frame (54,084 establishments) was divided into three mutually exclusive components according to employment size and industrial characteristics. The first component comprised 4,228 large establishments employing 10 or more persons. Because these establishments contribute substantially to industrial



production, employment, value added, and investment, all were included in the census through complete enumeration.

The second component consisted of 5,682 small establishments employing one to nine persons operating in industrial activities with relatively few establishments. Since the number of establishments in these activities was operationally manageable, all establishments were completely enumerated.

The third component comprised 44,174 small establishments employing one to nine persons, concentrated in seven manufacturing activities with a large number of establishments namely;

- (i) Manufacture of vegetable and animal oils and fats;
- (ii) Manufacture of grain mill products;
- (iii) Manufacture of wearing apparel, except fur apparel;
- (iv) Saw milling and planning of wood;
- (v) Manufacture of articles of concrete, cement and plaster;
- (vi) Manufacture of structural metal products; and
- (vii) Manufacture of furniture.

Complete enumeration of these establishments was operationally impractical because of their size and homogeneity. Consequently, a probability sampling approach was adopted for this component.

Sample Design and Selection for the Third Component

A stratified sampling design was employed to select establishments in the third component in order to improve the precision of estimates and ensure adequate representation across geographical and economic domains. In this component, establishments were stratified by:

- (i) Region;
- (ii) Industrial activity (ISIC Rev.4 class); and
- (iii) Employment size class.

A total sample of 7,920 establishments was selected from the 44,174 establishments using probability sampling procedures. The allocation of the sample across strata considered the distribution of establishments by region, industrial activity, and employment size to ensure adequate representation across the principal domains of analysis. Survey weights were subsequently applied during estimation to account for the unequal probabilities of selection and to produce representative estimates for the sampled establishments.



Final Coverage

The Census of Industrial Production (CIP) 2023 covered a total of 21,430 industrial establishments selected for data collection from a frame of 57,684 establishments national wide. Of these, 17,830 establishments were from Mainland Tanzania and 3,600 from Zanzibar. In Mainland Tanzania, the selected establishments comprised 4,541 large establishments that were completely enumerated, 5,682 small establishments operating in heterogeneous industrial activities that were also completely enumerated, and a probability sample of 7,920 small establishments selected from the seven industrial activities characterized by a high concentration of establishments. In Zanzibar, all 3,600 industrial establishments were covered through complete enumeration.

Table 1. 1: Number of Establishments in Frame and Sample Selection, Tanzania, CIP 2023

Location	Frame			Sample Selection		
	Small	Large	Total	Small	Large	Total
Tanzania	53,149	4,535	57,684	16,895	4,535	21,430
Mainland Tanzania	49,856	4,228	54,084	13,602	4,228	17,830
Zanzibar	3,293	307	3,600	3,293	307	3,600

1.10 The Questionnaire

The CIP 2023 employed two questionnaire types; a detailed questionnaire for large establishments and a short questionnaire for small establishments. Both questionnaires were structured to align with the United Nations' International Recommendations for Industrial Statistics (IRIS) 2008 to ensure regional and global comparability. The questionnaire design also incorporated the data requirements of key stakeholders, including National Accounts, government institutions, researchers, and the business community, thereby ensuring both internationally consistence and local relevance.

1.11 Data Collection

Data collection was conducted using Computer Assisted Personal Interviewing (CAPI) by qualified enumerators equipped with tablets and working under the close supervision of designated supervisors across all regions of Mainland Tanzania and Zanzibar. The distribution of enumerators was based on the work load in each region. In total, 277 enumerators were engaged in the exercise, comprising 245 (240 enumerators and 5 editors) from Mainland Tanzania and 32 from Zanzibar. Additionally, five editors were recruited to work with NBS staff during data editing in Mainland Tanzania, while in Zanzibar the data editing was carried out by OCGS staff.

Both Mainland Tanzania and Zanzibar, data from large establishments were collected using paper questionnaires, which were later entered into the tablets by enumerators in regional offices. For the small establishments, data were captured direct into tablets



during field collection in both Mainland Tanzania and Zanzibar. As part of the data quality assurance process, enumerators were also responsible for validating the information provided by respondents through cross-checking it against the establishments audited financial statements. All completed questionnaires were then transmitted electronically to the servers at the NBS and OCGS headquarters for processing and data management.

The field work was conducted over a period of three months from March to June 2025. Respondents were asked to provide data from audited financial statements for the year 2023 or from their financial years that covered the largest part of 2023.

1.12 Response Rate

The response rate for the CIP 2023 was generally high across both Mainland Tanzania and Zanzibar. Most establishments cooperated with the data collection teams and submitted the required information though it takes too long to submit within the stipulated period. Large establishments demonstrated compliance due to their structured record-keeping systems, while smaller establishments also provided a satisfactory level of response following close follow-up by field supervisors. The strong response rate reflects effective field coordination, timely supervision, and the active engagement of respondents, ensuring that the data collected is reliable and representative of the industrial sector.

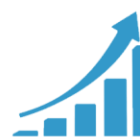
In Mainland Tanzania, the CIP 2023 covered a total of 54,084 establishments of which 49,856 (92.2 percent) were small and 4,228 establishments equivalent to 7.8 percent were large establishments. whereby 17,830 were sampled establishments, of which 13,602 were small establishments and 4,228 were large establishments which were fully (100 percent) covered. In total, 17,447 (13,368 small establishments and 4,079 large establishments) responded, giving an overall response rate of 97.9 percent. This was considered adequate for producing reliable statistics. However, 383 establishments (2.1 percent) did not respond because the owners were absent and others refused to participate.

In Zanzibar, the CIP 2023 covered a total of 3,606 establishments, out of which 3,293 (91.3 percent) were small and 313 (8.7 percent) were large. The overall response rate for all establishments is 99.8 percent.



Table 1. 2: Number of Sampled Establishments and Response Rate, Tanzania, CIP 2023

Location	Number of Sampled Establishments			Response Rate					
	Small	Large	Total	Small		Large		Total	
				Number	Percent	Number	Percent	Number	percent
Tanzania	16,895	4,541	21,436	16,661	98.6	4,386	96.5	21,047	98.2
Mainland Tanzania	13,602	4,228	17,830	13,368	98.3	4,079	96.5	17,447	97.9
Zanzibar	3,293	313	3,606	3,293	100	307	98.1	3,600	99.8



Chapter Two:

Main Industrial Characteristics

2.0 Introduction

The industrial sector is one of the crucial pillars in the economic development of Tanzania and plays a significant role in improving social well-being of its citizens. Its impact is evident across various aspects of daily life, such as in the processing of raw material into finished products, creating forward and backward linkages with other sectors, acting as a source of employment, value addition in agricultural products and mining, export promotion, as well as foreign exchange earnings. This chapter comprises the following sections: organisation of the establishments, main industrial activities, number of establishments, ownership by origin, form of ownership, legal organisations, and the year an establishment started to operate.

2.1 Organizational Structure of Establishments

The organization of establishments is crucial for evaluating industrial performance of the industrial sector. Table 2.1 reveals that in Tanzania, single establishments comprised the vast majority of all industrial establishments with 97.6 percent followed by head offices 1.3 percent which were owned or controlled other establishments and branch establishments 1.1 percent. Single establishments accounted for the largest share of industrial establishments in both Mainland Tanzania and Zanzibar, compared to head offices and branch establishments. This indicates that most businesses operate as independent units rather than multi-branch enterprises, reflecting a dominance of small and standalone firms within the industrial structure

Table 2. 1: Organization Structure of Establishments by Type, Tanzania CIP 2023

Type	Large Establishments		Small Establishments		Total	
	Number	Percent	Number	Percent	Number	Percent
Tanzania						
Single	3,972	87.6	52,341	98.5	56,313	97.6
Head office	236	5.2	515	1	751	1.3
Branch	327	7.2	293	0.6	620	1.1
Total	4,535	100	53,149	100	57,684	100
Mainland Tanzania						
Single	3,681	87.1	49,082	98.4	52,763	97.6
Head office	227	5.4	494	1	721	1.3
Branch	320	7.6	280	0.6	600	1.1
Total	4,228	100	49,856	100	54,084	100
Zanzibar						
Single	291	94.8	3,259	99	3,550	98.6
Head office	9	2.9	21	0.6	30	0.8
Branch	7	2.3	13	0.4	20	0.6
Total	307	100	3,293	100	3,600	100



2.2 Distribution of Establishments

The distribution of establishments shows how businesses are spread across industrial sector. Table 2.2 provides highlights of the sectors and level of industrial diversification in Tanzania. The findings show that there were 57,684 establishments of which 4,535 were large and 53,149 small establishments. The majority of establishments were engaged in manufacturing 55,391 followed by mining and quarrying 1,891, water supply, sewerage, waste management, and remediation activities 274 and electricity, gas, steam, and air conditioning supply 128. In Mainland Tanzania there were 54,084 establishments of which 4,228 were large and 49,856 were small. Zanzibar has 3,600 establishments of which 307 were large and 3,293 small establishments.

Table 2. 2: Distribution of Establishments by Industrial sector, Tanzania, CIP 2023

Industrial sector	Tanzania		Mainland Tanzania		Zanzibar	
	Number	Percent	Number	Percent	Number	Percent
Large Establishment						
Mining and quarrying	741	16.4	702	16.6	39	12.7
Manufacturing	3,489	76.9	3,222	76.2	267	87.0
Electricity, gas, steam and air conditioning supply	95	2.1	95	2.3	0	0.0
Water supply; sewerage waste management and remediation activities	210	4.6	209	4.9	1	0.3
Total	4,535	100	4,228	100	307	100
Small Establishment						
Mining and quarrying	1,150	2.2	1,096	2.2	54	1.6
Manufacturing	51,902	97.6	48,664	97.6	3,238	98.3
Electricity, gas, steam and air conditioning supply	33	0.1	33	0.1	0	0.0
Water supply; sewerage waste management and remediation activities	64	0.1	63	0.1	1	0.1
Total	53,149	100	49,856	100	3,293	100
Total Establishments						
Mining and quarrying	1,891	3.3	1,798	3.3	93	2.6
Manufacturing	55,391	96.0	51,886	95.9	3,505	97.4
Electricity, gas, steam and air conditioning supply	128	0.2	128	0.2	0	0.0
Water supply; sewerage waste management and remediation activities	274	0.5	272	0.5	2	0.1
Grand total	57,684	100.0	54,084	100.0	3,600	100.0

2.3 Main Industrial Sectors

The CIP 2023 collected data across four industrial sectors: mining and quarrying; manufacturing accounted; electricity, gas, steam and air conditioning supply; and water supply, sewerage waste management and remediation activities. The following sub-sections present the distribution of establishments by main industrial sector, distinguishing between manufacturing and non-manufacturing activities.



2.4 Manufacturing Establishments in Tanzania

Manufacturing establishments in Tanzania engaged in production of goods for domestic consumption and export. These establishments range from micro, small-scale to large industrial plants operating in sectors such as food processing, beverages, textiles, leather, chemicals, cement, metals, and pharmaceuticals etc. As presented in Table 2.3, the manufacturing sector accounted a total of 55,391 establishments. The leading manufacturing activities were food products 40.4 percent, wearing apparel 20.7 percent, furniture 14.1 percent and fabricated metal products except machinery and equipment 12.2 percent. The remaining manufacturing activities each had a share of less than ten percent of the total.

Table 2. 3: Distribution of Manufacturing Establishments by Industrial Activity and Establishment Type, CIP-2023

ISIC	Industrial Activity	Large Establishments		Small Establishments		Total	
		Number	Percent	Number	Percent	Number	Percent
10	Manufacture of food products	1,284	36.80	21,072	40.60	22,356	40.36
11	Manufacture of beverages	144	4.13	48	0.09	192	0.35
12	Manufacture of tobacco products	4	0.11	0	0.00	4	0.01
13	Manufacture of textiles	92	2.64	296	0.57	388	0.70
14	Manufacture of wearing apparel	89	2.55	11,355	21.88	11,444	20.66
15	Manufacture of leather and related products	61	1.75	255	0.49	316	0.57
16	Manufacture of wood and of products of wood and cork except furniture; manufacture of articles of straw and plaiting materials	207	5.93	1,858	3.58	2,065	3.73
17	Manufacture of paper and paper products	32	0.92	12	0.02	44	0.08
18	Printing and reproduction of recorded media	61	1.75	199	0.38	260	0.47
19	Manufacture of coke and refined petroleum products	5	0.14	0	0.00	5	0.01
20	Manufacture of chemicals and chemical products	116	3.32	100	0.19	216	0.39
21	Manufacture of pharmaceuticals medicinal chemical and botanical products	15	0.43	3	0.01	18	0.03
22	Manufacture of rubber and plastics products	130	3.73	42	0.08	172	0.31
23	Manufacture of other non-metallic mineral products	536	15.36	2,223	4.28	2,759	4.98
24	Manufacture of basic metals	76	2.18	14	0.03	90	0.16
25	Manufacture of fabricated metal products except machinery and equipment	198	5.67	6,576	12.67	6,774	12.23
26	Manufacture of computer electronic and optical products	1	0.03	9	0.02	10	0.02
27	Manufacture of electrical equipment	33	0.95	19	0.04	52	0.09
28	Manufacture of machinery and equipment n.e.c.	24	0.69	75	0.14	99	0.18
29	Manufacture of motor vehicles trailers and semi-trailers	22	0.63	24	0.05	46	0.08
30	Manufacture of other transport equipment	12	0.34	11	0.02	23	0.04
31	Manufacture of furniture	286	8.20	7,515	14.48	7,801	14.08
32	Other manufacturing	55	1.58	177	0.34	232	0.42
33	Repair and installation of machinery and equipment	6	0.17	19	0.04	25	0.05
	Total	3,489	100	51,902	100	55,391	100

Note: n.e.c not elsewhere classified



2.5 Manufacturing Establishments in Mainland Tanzania

The manufacturing sector in Mainland Tanzania accounted for 95.9 percent of all establishments, with a total of 51,886 establishments. The leading manufacturing activities were food products 42.3 percent, wearing apparel 20.5 percent, furniture 13.6 percent and fabricated metal products except machinery and equipment 11.8 percent. The remaining manufacturing activities each had a share of less than five percent of the total as shown in Table 2.4.

Table 2. 4: Distribution of Manufacturing Establishments by Industrial Activity and Establishment Type, Mainland Tanzania, CIP-2023

ISIC	Industrial Activity	Large Establishments		Small Establishments		Total	
		Number	Percent	Number	Percent	Number	Percent
10	Manufacture of food products	1,249	38.76	20,706	42.55	21,955	42.31
11	Manufacture of beverages	138	4.28	48	0.10	186	0.36
12	Manufacture of tobacco products	4	0.12	0	0.00	4	0.01
13	Manufacture of textiles	83	2.58	261	0.54	344	0.66
14	Manufacture of wearing apparel	71	2.20	10,540	21.66	10,611	20.45
15	Manufacture of leather and related products	61	1.89	233	0.48	294	0.57
16	Manufacture of wood and of products of wood and cork except furniture; manufacture of articles of straw and plaiting materials	181	5.62	1,458	3.00	1,639	3.16
17	Manufacture of paper and paper products	30	0.93	12	0.02	42	0.08
18	Printing and reproduction of recorded media	59	1.83	198	0.41	257	0.50
19	Manufacture of coke and refined petroleum products	5	0.16	0	0.00	5	0.01
20	Manufacture of chemicals and chemical products	109	3.38	96	0.20	205	0.40
21	Manufacture of pharmaceuticals medicinal chemical and botanical products	15	0.47	1	0.00	16	0.03
22	Manufacture of rubber and plastics products	129	4.00	42	0.09	171	0.33
23	Manufacture of other non-metallic mineral products	425	13.19	2,025	4.16	2,450	4.72
24	Manufacture of basic metals	76	2.36	13	0.03	89	0.17
25	Manufacture of fabricated metal products except machinery and equipment	187	5.80	5,919	12.16	6,106	11.77
26	Manufacture of computer electronic and optical products	1	0.03	9	0.02	10	0.02
27	Manufacture of electrical equipment	33	1.02	19	0.04	52	0.10
28	Manufacture of machinery and equipment n.e.c.	24	0.74	74	0.15	98	0.19
29	Manufacture of motor vehicles trailers and semi-trailers	22	0.68	24	0.05	46	0.09
30	Manufacture of other transport equipment	11	0.34	4	0.01	15	0.03
31	Manufacture of furniture	248	7.70	6,801	13.98	7,049	13.59
32	Other manufacturing	55	1.71	164	0.34	219	0.42
33	Repair and installation of machinery and equipment	6	0.19	17	0.03	23	0.04
Total		3,222	100	48,664	100	51,886	100

Note: n.e.c not elsewhere classified

2.6 Manufacturing Establishments in Zanzibar

The manufacturing sector accounted for 97.4 percent of all establishments in Zanzibar with 3,505 establishments. The leading manufacturing activities were wearing apparel



23.8 percent, furniture 21.5 percent, fabricated metal products except machinery and equipment 19.1 percent, wood and of products of wood and cork except furniture; manufacture of articles of straw and plaiting materials 12.2 percent and food products 11.4 percent. The remaining activities each had a share of less than ten percent of the total as shown in Table 2.5.

Table 2. 5: Distribution of Manufacturing Establishments by Industrial Activity and Establishment Type, Zanzibar, CIP-2023

IS IC	Industrial Activity	Large Establishments		Small Establishments		Total	
		Number	Percent	Number	Percent	Number	Percent
10	Manufacture of food products	35	13.11	366	11.30	401	11.44
11	Manufacture of beverages	6	2.25	0	0.00	6	0.17
12	Manufacture of tobacco products	0	0.00	0	0.00	0	0.00
13	Manufacture of textiles	9	3.37	35	1.08	44	1.26
14	Manufacture of wearing apparel	18	6.74	815	25.17	833	23.77
15	Manufacture of leather and related products	0	0.00	22	0.68	22	0.63
16	Manufacture of wood and of products of wood and cork except furniture; manufacture of articles of straw and plaiting materials	26	9.74	400	12.35	426	12.15
17	Manufacture of paper and paper products	2	0.75	0	0.00	2	0.06
18	Printing and reproduction of recorded media	2	0.75	1	0.03	3	0.09
19	Manufacture of coke and refined petroleum products	0	0.00	0	0.00	0	0.00
20	Manufacture of chemicals and chemical products	7	2.62	4	0.12	11	0.31
21	Manufacture of pharmaceuticals medicinal chemical and botanical products	0	0.00	2	0.06	2	0.06
22	Manufacture of rubber and plastics products	1	0.37	0	0.00	1	0.03
23	Manufacture of other non-metallic mineral products	111	41.57	198	6.11	309	8.82
24	Manufacture of basic metals	0	0.00	1	0.03	1	0.03
25	Manufacture of fabricated metal products except machinery and equipment	11	4.12	657	20.29	668	19.06
26	Manufacture of computer electronic and optical products	0	0.00	0	0.00	0	0.00
27	Manufacture of electrical equipment	0	0.00	0	0.00	0	0.00
28	Manufacture of machinery and equipment n.e.c.	0	0.00	1	0.03	1	0.03
29	Manufacture of motor vehicles trailers and semi-trailers	0	0.00	0	0.00	0	0.00
30	Manufacture of other transport equipment	1	0.37	7	0.22	8	0.23
31	Manufacture of furniture	38	14.23	714	22.05	752	21.46
32	Other manufacturing	0	0.00	13	0.40	13	0.37
33	Repair and installation of machinery and equipment	0	0.00	2	0.06	2	0.06
	Total	267	100	3,238	100	3,505	100

Note: n.e.c not elsewhere classified

2.7 Non-Manufacturing Industrial Activities in Tanzania

The non-manufacturing establishments include mining and quarrying; electricity, gas, steam and air conditioning supply; and water supply, sewerage waste management and remediation activities. Table 2.6 presents the distribution of industrial activities across three industrial sectors for both large and small establishments in Tanzania. The mining of metal ores represented the largest portion of activity for both large (84.5 percent) and



small (83.6 percent) establishments. A similar pattern was observed in the water supply; sewerage waste management and remediation activities sector, where water collection, treatment, and supply accounted for the largest share of 92.9 percent and 87.5 percent for large and small establishments, respectively.

Mining of metal ores represented the largest portion of activity for both large (89.2 percent) and small (87.7 percent) establishments in Mainland Tanzania. A similar pattern was observed in the water supply; sewerage waste management and remediation activities, whereby water collection, treatment, and supply accounted for the dominant share of 93.3 percent and 88.9 percent for large and small establishments, and Electricity gas steam and air conditioning supply accounted for 100 percent in both large and small establishments.

The industrial profile comprised of 39 large and 54 small establishments all in other mining and quarrying activities and only two establishments of which one was large and another small in waste collection, disposal, and materials recovery industrial activity.

Table 2. 6: Distribution of Establishments of Non-Manufacturing by Industrial Activity and Type of Establishments, Tanzania, CIP-2023

ISIC	Industrial Activity	Large Establishments		Small Establishments		Total	
		Number	Percent	Number	Percent	Number	Percent
Tanzania							
05	Mining of coal and lignite	2	0.27	0	0.00	2	0.11
06	Extraction of crude petroleum and natural gas	5	0.67	1	0.09	6	0.32
07	Mining of metal ores	626	84.48	961	83.57	1,587	83.92
08	Other mining and quarrying	107	14.44	187	16.26	294	15.55
09	Mining support service activities	1	0.13	1	0.09	2	0.11
B	Mining and quarrying	741	100	1,150	100	1,891	100
35	Electricity gas steam and air conditioning supply	95	100.00	33	100.00	128	100.00
D	Electricity, gas, steam and air conditioning supply	95	100	33	100	128	100
36	Water collection treatment and supply	195	92.86	56	87.50	251	91.61
37	Sewerage	1	0.48	1	1.56	2	0.73
38	Waste collection treatment and disposal activities; materials recovery	14	6.67	7	10.94	21	7.66
39	Remediation activities and other waste management services	0	0.00	0	0.00	0	0.00
E	Water supply; sewerage, waste management and remediation activities	210	100.00	64	100	274	100
Mainland Tanzania							
05	Mining of coal and lignite	2	0.28	0	0.00	2	0.11
06	Extraction of crude petroleum and natural gas	5	0.71	1	0.09	6	0.33
07	Mining of metal ores	626	89.17	961	87.68	1,587	88.26



ISIC	Industrial Activity	Large Establishments		Small Establishments		Total	
		Number	Percent	Number	Percent	Number	Percent
08	Other mining and quarrying	68	9.69	133	12.14	201	11.18
09	Mining support service activities	1	0.14	1	0.09	2	0.11
B	Mining and quarrying	702	100	1,096	100	1,798	100
35	Electricity, gas, steam and air conditioning supply	95	100	33	100	128	100
D	Electricity, gas, steam and air conditioning supply	95	100	33	100	128	100
36	Water collection treatment and supply	195	93.30	56	88.89	251	92.28
37	Sewerage	1	0.48	1	1.59	2	0.74
38	Waste collection treatment and disposal activities; materials recovery	13	6.22	6	9.52	19	6.99
39	Remediation activities and other waste management services	0	0	0	0	0	0.00
E	Water supply; sewerage, waste management and remediation activities	209	100	63	100	272	100
Zanzibar							
05	Mining of coal and lignite	0	0.00	0	0.00	0	0.00
06	Extraction of crude petroleum and natural gas	0	0.00	0	0.00	0	0.00
07	Mining of metal ores	0	0.00	0	0.00	0	0.00
08	Other mining and quarrying	39	100.00	54	100.00	93	100.00
09	Mining support service activities	0	0.00	0	0.00	0	0.00
B	Mining and quarrying	39	100	54	100	93	100
35	Electricity gas steam and air conditioning supply	0	0.00	0	0.00	0	0.00
D	Electricity gas steam and air conditioning supply	0	0	0	0	0	0
36	Water collection treatment and supply	0	0.00	0	0.00	0	0.00
37	Sewerage	0	0.00	0	0.00	0	0.00
38	Waste collection treatment and disposal activities; materials recovery	1	100.00	1	100.00	2	100.00
39	Remediation activities and other waste management services	0	0.00	0	0.00	0	0.00
E	Water supply; sewerage waste management and remediation activities	1	100	1	100	2	100

2.8 Number of Establishments by Region and Employment Size

This part presents the number of establishments across regions and employment size categories in Tanzania, highlighting regional business concentration and the distribution of small and large establishments. Results in Table 2.7 show that, Dar es Salaam had the largest number of establishments 8,044 (13.9 percent), followed by Tanga 4,104 (7.1 percent), Mara 3,719 (6.4 percent), and the lowest number was observed in Kaskazini Unguja 394 and Kusini Unguja 398 equivalent to 0.7 percent each. Small establishments (employing 1–9 persons) dominated the industrial sector, with those in the 1–4 size group accounting for 65.6 percent of the total and the size group 5–9 with 26.58 percent.



Table 2. 7: Distribution of Establishments by Region and Employment Size Group, Tanzania, CIP-2023

Region	Employment Size							Total	Percent
	1-4	5-9	10-19	20-49	50-99	100-499	500+		
Mainland Tanzania									
Dodoma	748	389	82	32	7	5	1	1,264	2.19
Arusha	1,268	400	134	60	22	26	4	1,914	3.32
Kilimanjaro	1,449	622	143	56	16	21	2	2,309	4.00
Tanga	2,889	1,037	97	37	17	22	5	4,104	7.11
Morogoro	1,639	1,198	96	34	9	9	8	2,993	5.19
Pwani	839	372	65	74	49	56	7	1,462	2.53
Dar es Salaam	4,361	2,870	413	169	82	132	17	8,044	13.94
Lindi	543	188	7	7	3	2	0	750	1.30
Mtwara	825	188	22	18	17	11	2	1,083	1.88
Ruvuma	614	277	14	6	4	5	2	922	1.60
Iringa	1,078	229	9	8	13	16	1	1,354	2.35
Mbeya	1,985	859	228	319	35	17	1	3,444	5.97
Singida	1,592	551	149	22	12	10	0	2,336	4.05
Tabora	638	225	33	8	1	4	0	909	1.58
Rukwa	1,761	246	10	5	1	0	0	2,023	3.51
Kigoma	630	258	99	22	5	6	0	1,020	1.77
Shinyanga	1,048	567	176	55	9	12	3	1,870	3.24
Kagera	1,874	518	54	16	11	7	2	2,482	4.30
Mwanza	659	384	91	44	17	26	2	1,223	2.12
Mara	3,148	474	54	25	6	11	1	3,719	6.45
Manyara	1,507	807	51	51	16	23	0	2,455	4.26
Njombe	1,522	655	23	12	10	7	1	2,230	3.87
Katavi	673	92	70	17	3	2	0	857	1.49
Simiyu	553	180	22	10	2	5	2	774	1.34
Geita	1,213	691	48	32	8	4	2	1,998	3.46
Songwe	298	225	3	15	1	2	1	545	0.94
Zanzibar									
Kaskazini Unguja	272	91	24	6	0	1	0	394	0.68
Kusini Unguja	241	72	64	20	1	0	0	398	0.69
Mjini Magharibi	1,270	382	68	22	6	2	0	1,750	3.03
Kaskazini Pemba	332	158	46	12	0	0	0	548	0.95
Kusini Pemba	349	126	28	7	0	0	0	510	0.88
Tanzania	37,818	15,331	2,423	1,221	383	444	64	57,684	100
Percent	65.56	26.58	4.20	2.12	0.66	0.77	0.11	100	



2.9 Ownership by Origin

The classification of ownership is based on the nationality of the shareholders, whether an establishment is controlled by domestic or foreign entities. Table 2.8 shows that industrial establishments in Tanzania are largely owned by national investors, both in large and small establishments. For large establishments overall, 88.4 percent are nationally owned, while 9.3 percent are foreign owned and 2.3 percent are jointly owned. Foreign ownership is more visible in the manufacturing sector at 11.3 percent and in electricity, gas, steam and air conditioning supply 8.4 percent.

A similar pattern is observed in Mainland Tanzania, where 87.6 percent of large establishments are nationally owned, 9.9 percent are foreign owned, and 2.5 percent are jointly owned. Foreign participation is again relatively higher in the manufacturing sector at 12.0 percent and electricity, gas, steam and air conditioning supply 8.4 percent. However, small establishments are almost entirely nationally owned, with 99.9 percent under local ownership and only 0.1 percent foreign owned. This suggests that small-scale industrial activities are mainly driven by local entrepreneurs and domestic investment.

In Zanzibar, the industrial sector shows an even stronger dominance of national ownership. Nearly all large establishments 98.4 percent are nationally owned, with only 1.6 percent foreign ownership, mainly in manufacturing. Small establishments in Zanzibar are fully owned by national investors 100 percent. Overall, this pattern indicates that local ownership plays a central role in industrial development across Tanzania, while foreign investment is more concentrated in large-scale industries.

Table 2. 8: Percentage of Establishments by Industrial Sector and Origin of Ownership, Tanzania, CIP-2023

Industrial Sector	National	Foreign	Joint*	Total
Tanzania				
Large establishments				
Mining and quarrying	96.1	2.2	1.8	100
Manufacturing	86.2	11.3	2.5	100
Electricity, gas, steam and air conditioning supply	88.4	8.4	3.2	100
Water supply; sewerage waste management and remediation activities	96.7	2.9	0.5	100
Total	88.4	9.3	2.3	100
Small establishments				
Mining and quarrying	99.9	0.1	0	100
Manufacturing	99.9	0.1	0	100
Electricity, gas, steam and air conditioning supply	90.9	9.1	0	100
Water supply; sewerage waste management and remediation activities	98.4	1.6	0	100
Total	99.9	0.1	0	100



Industrial Sector	National	Foreign	Joint*	Total
Mainland Tanzania				
Large establishments				
Mining and quarrying	95.9	2.3	1.9	100
Manufacturing	85.2	12.0	2.7	100
Electricity, gas, steam and air conditioning supply	88.4	8.4	3.2	100
Water supply, sewerage waste management and remediation activities	96.7	2.9	0.5	100
Total	87.6	9.9	2.5	100
Small establishment				
Mining and quarrying	99.9	0.1	0	100
Manufacturing	99.9	0.1	0	100
Electricity, gas, steam and air conditioning supply	90.9	9.1	0	100
Water supply, sewerage waste management and remediation activities	98.4	1.6	0	100
Total	99.9	0.1	0	100
Zanzibar				
Large establishments				
Mining and quarrying	100	0	0	100
Manufacturing	98.1	1.9	0	100
Electricity gas steam and air conditioning supply	0	0	0	0
Water supply; sewerage waste management and remediation activities	100	0	0	100
Total	98.4	1.6	0	100
Small establishment				
Mining and quarrying	100	0	0	100
Manufacturing	100	0	0	100
Electricity, gas, steam and air conditioning supply	0	0	0	0
Water supply; sewerage waste management and remediation activities	100	0	0	100
Total	100	0	0	100

Note: * Implies joint ownership implies owned by Nationals and Foreign

2.10 Form of Ownership

The industrial sector in Tanzania consists public, private and mixed form of ownership. The classification is based on whether an establishment is owned or controlled by a public authority, private institutions or a mix of public and private. Table 2.9 indicates that private ownership dominates the industrial sector in Tanzania, in both large and small establishments. For large establishments in Tanzania overall, about 93.0 percent are privately owned, while 6.7 percent are publicly owned and only 0.3 percent are under mixed ownership. Public ownership is mainly concentrated in sectors that provide essential services such as water supply, sewerage and waste management at 87.1 percent and electricity, gas, steam and air conditioning supply at 83.2 percent. In contrast, sectors such as mining and quarrying and manufacturing are almost entirely operated by the private sector.

In Mainland Tanzania 92.6 percent of large establishments are privately owned, 7.1 percent publicly owned, and 0.4 percent mixed ownership. Private ownership dominates



particularly in mining and quarrying at 99.0 percent and manufacturing 98.6 percent indicating strong participation of private investors in productive industries. However, public ownership remains high in utilities such as electricity and water supply, reflecting the government's role in providing essential infrastructure and services.

For small establishments, the dominance of the private sector is even more noticeable. In Tanzania overall, 99.9 percent of small establishments are privately owned, with only 0.1 percent publicly owned and virtually no mixed ownership. In Zanzibar, almost all establishments are privately owned, particularly in manufacturing and mining and quarrying. These results suggest that small-scale industrial activities are largely driven by private entrepreneurs, while the public sector mainly focuses on utility-related services and infrastructure provision.

Table 2. 9: Percentage of Establishments by Industrial sector and Form of Ownership, Tanzania, CIP-2023

Industrial Sub-Sector	Form of Ownership			Total
	Public	Private	Mixed	
Tanzania				
Large establishments				
Mining and quarrying	0.7	99.1	0.3	100
Manufacturing	1	98.6	0.4	100
Electricity, gas, steam and air conditioning supply	83.2	16.8	0	100
Water supply; sewerage waste management and remediation activities	87.1	12.9	0	100
Total	6.7	93	0.3	100
Small establishment				
Mining and quarrying	0	99.9	0.1	100
Manufacturing	0	100	0	100
Electricity, gas, steam and air conditioning supply	12.1	87.9	0	100
Water supply; sewerage waste management and remediation activities	70.3	29.7	0	100
Total	0.1	99.9	0	100
Mainland Tanzania				
Large establishments				
Mining and quarrying	0.7	99	0.3	100
Manufacturing	1	98.6	0.4	100
Electricity gas steam and air conditioning supply	83.2	16.8	0	100
Water supply; sewerage waste management and remediation activities	87.6	12.4	0	100
Total	7.1	92.6	0.4	100
Small establishment				
Mining and quarrying	0	99.9	0.1	100
Manufacturing	0	100	0	100
Electricity gas steam and air conditioning supply	12.1	87.9	0	100
Water supply; sewerage waste management and remediation activities	71.4	28.6	0	100
Total	0.1	99.9	0	100
Zanzibar				
Large establishments				

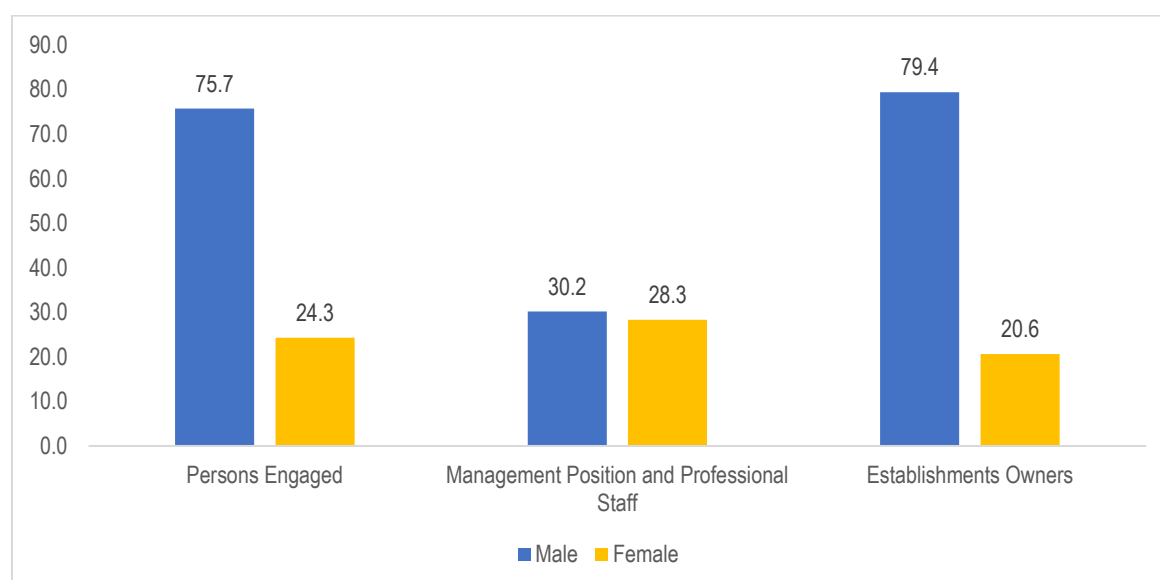


Industrial Sub-Sector	Form of Ownership			Total
	Public	Private	Mixed	
Mining and quarrying	0	100	0	100
Manufacturing	1.5	98.5	0	100
Electricity gas steam and air conditioning supply	0	0	0	0
Water supply; sewerage waste management and remediation activities	0	100	0	100
Total	1.3	98.7	0	100
Small establishment				
Mining and quarrying	0.0	100	0.0	100
Manufacturing	0.1	99.9	0.0	100
Electricity gas steam and air conditioning supply	0.0	0.0	0.0	0
Water supply; sewerage waste management and remediation activities	0.0	100	0.0	100
Total	0.1	99.9	0.0	100

2.10(a) Ownership of Establishments by Gender

Ownership of industrial establishments is an important indicator of the extent of male and female participation in industrial activities. Figure 2.1 provides the percentage of gender participation in total employment, management positions and professional staff and in establishment ownership. Male account for 75.7 percent of persons engaged, compared with 24.3 percent female, indicating limited female participation in the industrial workforce. The gap is even more observed among establishment owners, where male represent 79.4 percent compared with 20.6 percent female. However, the management and professional's category show a relatively smaller gap, with male at 30.2 percent and female at 28.3 percent of the total persons engaged. This indicates that although female remain underrepresented in ownership and overall employment, their participation in leadership and professionalism is comparatively stronger.

Figure 2. 1 Participation in Employment, Ownership and Management Positions and Professional Staff by Gender, Tanzania, CIP-2023



Further, ownership of industrial establishments was dominated by male with 79.4 percent of the establishments being male owned, compared with 20.6 percent female owned establishments. Manufacturing accounted for the largest share with 78.6 percent male owned and 21.4 percent of female owned establishments. Mining and quarrying had 87.9 percent male owned and 12.1 percent of female owned establishments.

In manufacturing sector, female ownership was higher in chemical manufacturing with 56.6 percent and relatively balanced in textiles 47.2 percent and wearing apparel 46.7 percent. In contrast, male ownership was particularly high in fabricated metal products 96.4 percent, furniture 95.7 percent and other transport equipment with 96.9 percent male owned establishments.

Table 2. 10(a): Percentage of Establishments Owners by Industrial Activity and Gender, Tanzania, CIP-2023

ISIC	Industrial Activity	Male	Female
		Percent	Percent
5	Mining of coal and lignite	66.7	33.3
6	Extraction of crude petroleum and natural gas	100	0
7	Mining of metal ores	89.1	10.9
8	Other mining and quarrying	83	17
9	Mining support service activities	80	20
B	Mining and quarrying	87.9	12.1
10	Manufacture of food products	72.4	27.6
11	Manufacture of beverages	78.6	21.4
12	Manufacture of tobacco products	78.6	21.4
13	Manufacture of textiles	52.8	47.2
14	Manufacture of wearing apparel	53.3	46.7
15	Manufacture of leather and related products	84.2	15.8
16	Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	89.1	10.9
17	Manufacture of paper and paper products	86.6	13.4
18	Printing and reproduction of recorded media	77.3	22.7
19	Manufacture of coke and refined petroleum products	100	0
20	Manufacture of chemicals and chemical products	43.4	56.6
21	Manufacture of basic pharmaceutical products and pharmaceutical preparations	71.4	28.6
22	Manufacture of rubber and plastics products	80.5	19.5
23	Manufacture of other non-metallic mineral products	80.4	19.6
24	Manufacture of basic metals	91.5	8.5
25	Manufacture of fabricated metal products, except machinery and equipment	96.4	3.6
26	Manufacture of computer, electronic and optical products	100	0
27	Manufacture of electrical equipment	90.4	9.6
28	Manufacture of machinery and equipment n.e.c.	88.9	11.1
29	Manufacture of motor vehicles, trailers and semi-trailers	95.5	4.5
30	Manufacture of other transport equipment	96.9	3.1
31	Manufacture of furniture	95.7	4.3
32	Other manufacturing	75	25
33	Repair and installation of machinery and equipment	93.5	6.5
C	Manufacturing	78.6	21.4
35	Electricity, gas, steam and air conditioning supply	71.8	28.2
D	Electricity, gas, steam and air conditioning supply	71.8	28.2
36	Water collection, treatment and supply	73.1	26.9
37	Sewerage	100	0
38	Waste collection, treatment and disposal activities; materials recovery	89.8	10.2
39	Remediation activities and other waste management services	0	0
E	Water supply; sewerage, waste management and remediation activities	84.9	15.1
	Total	79.4	20.6



2.11 Types of Legal Organisations for Large Establishments

This section provides the distribution of establishments in Tanzania by legal organisation across different industrial sectors. Overall, sole proprietorship is the most common form of legal organization, accounting for 60.4 percent of all establishments in Tanzania as shown in Table 2.10. This dominance is particularly evident in mining and quarrying 82.5 percent and manufacturing 60.7 percent, indicating that many industrial activities are operated by individual owners, especially in small and medium-scale enterprises. Partnerships also play a role, representing 9.5 percent of establishments, mainly in manufacturing and mining and quarrying activities.

In contrast, sectors related to utilities such as electricity, gas, steam and air conditioning supply, and water supply and waste management show a different pattern of legal organization. These sectors are largely dominated by public and parastatal institutions, which account for 26.3 percent and 56.8 percent respectively in electricity supply, and 50.4 percent and 36.7 percent respectively in water supply and waste management. This indicates the significant role of the government in managing infrastructure and essential service sectors. Meanwhile, private companies limited by shares 18.3 percent overall are also important, particularly in manufacturing 22.0 percent, reflecting formal private sector participation in industrial production.

Structure differences were observed across Mainland Tanzania and Zanzibar. In Mainland Tanzania sole proprietorships comprised 58.3 percent and private companies limited by shares 19.4 percent dominating most industrial activities. In Zanzibar, sole proprietorship accounted for 88.3 percent of establishments, especially in mining and manufacturing sectors. Other legal forms such as partnerships, cooperatives, and companies play a relatively minor role. This suggests that industrial activities in Zanzibar are largely driven by individually owned businesses and small-scale enterprises.



Table 2. 11: Percentage Distribution of Large Establishments by Industrial sector and Types of Legal Organisation, Tanzania, CIP-2023

Legal Organisation	Mining and quarrying	Manufacturing	Electricity, gas, steam and air conditioning supply	Water supply; sewerage waste management and remediation activities	Total
Tanzania					
Sole proprietorship	82.5	60.7	3.2	2.8	60.4
Partnership	8.1	10.4	6.3	1.9	9.5
Public	0.7	0.9	26.3	50.4	3.7
Parastatal	0	0.1	56.8	36.7	3
Cooperative	1.2	1.9	0	1	1.7
Private company limited by guarantee	1.5	3.3	1.1	1	2.8
Private company limited by shares	6.1	22	6.3	5.7	18.3
Other	0	0.8	0	0.5	0.6
Total	100	100	100	100	100
Mainland Tanzania					
Sole proprietorship	82.1	58.4	3.2	2.4	58.3
Partnership	8.4	11	6.3	1.9	10
Public	0.7	0.8	26.3	50.7	3.9
Parastatal	0	0.1	56.8	36.8	3.2
Cooperative	0.9	1.9	0	1	1.6
Private company limited by guarantee	1.6	3.4	1.1	1	2.9
Private company limited by shares	6.4	23.6	6.3	5.7	19.4
Other	0	0.8	0	0.5	0.7
Total	100	100	100	100	100
Zanzibar					
Sole proprietorship	89.7	88	0	100	88.3
Partnership	2.6	3.4	0	0	3.3
Public	0	1.1	0	0	1
Parastatal	0	0.4	0	0	0.3
Cooperative	7.7	1.5	0	0	2.3
Private company limited by guarantee	0	1.9	0	0	1.6
Private company limited by shares	0	3.7	0	0	3.3
Other	0	0	0	0	0
Total	100	100	0	100	100

2.12 Types of Legal Organisations for Small Establishments

Results presented in Table 2.11 show that sole proprietorship is the dominant legal form of small industrial establishments in Tanzania, accounting for 95.3 percent of all establishments. This dominance is particularly evident in manufacturing 95.5 percent and mining and quarrying 90.8 percent, indicating that most industrial activities are run by individual owners. Partnerships represent a small share 3.2 percent overall, mainly found in mining and quarrying 7.9 percent and manufacturing 3.0 percent. This pattern suggests



that a large proportion of industrial activities are small-scale enterprises managed by individual entrepreneurs.

The structure differs in utility-related sectors, particularly water supply, sewerage, waste management and remediation activities, where public institutions dominate by 67.2 percent. In addition, electricity, gas, steam and air conditioning supply shows a mix of legal forms, with 66.7 percent sole proprietorship and small shares of public, parastatal, and other forms about 6.1 percent each. These sectors tend to require significant infrastructure and government involvement, which explains the relatively higher presence of public and parastatal organizations compared to other industrial subsectors.

Mainland Tanzania and Zanzibar show a similar pattern but with even stronger dominance of sole proprietorship in Zanzibar, accounting for 96.5 percent and Mainland Tanzania 95.2 percent. In Zanzibar, 98.1 percent of mining establishments and 96.5 percent of manufacturing establishments are sole proprietorships, while other legal forms such as partnerships, cooperatives, and private companies contribute very little. Overall, the results indicate that the industrial sector in Tanzania especially in mining and manufacturing is largely driven by individually owned businesses, while government and institutional ownership is more concentrated in public utility sectors such as water and electricity supply.

Table 2. 12: Percentage of Small Establishments by Industrial sector and Types of Legal Organisation, Tanzania, CIP-2023

Legal Organisation	Industrial Sector				Total
	Mining and quarrying	Manufacturing	Electricity, gas, steam and air conditioning supply	Water supply; sewerage waste management and remediation activities	
Tanzania					
Sole proprietorship	90.8	95.5	66.7	15.6	95.3
Partnership	7.9	3	6.1	4.7	3.2
Public	0	0	6.1	67.2	0.1
Parastatal	0	0	6.1	3.1	0
Cooperative	0.8	0.7	0	6.3	0.7
Private company limited by guarantee	0.3	0.2	6.1	1.6	0.2
Private company limited by shares	0.3	0.3	3	0	0.3
Other	0	0.2	6.1	1.6	0.2
Total	100	100	100	100	100
Mainland Tanzania					
Sole proprietorship	90.4	95.5	66.7	14.3	95.2
Partnership	8.3	3.1	6.1	4.8	3.2
Public	0	0	6.1	68.3	0.1
Parastatal	0	0	6.1	3.2	0
Cooperative	0.7	0.7	0	6.3	0.7
Private company limited by guarantee	0.3	0.2	6.1	1.6	0.2
Private company limited by shares	0.3	0.4	3	0	0.4
Other	0	0.3	6.1	1.6	0.3
Total	100	100	100	100	100



Legal Organisation	Industrial Sector				Total
	Mining and quarrying	Manufacturing	Electricity, gas, steam and air conditioning supply	Water supply; sewerage waste management and remediation activities	
Zanzibar					
Sole proprietorship	98.1	96.5	-	100	96.5
Partnership	0	2.9	-	0	2.8
Public	0	0.1	-	0	0.1
Parastatal	0	0	-	0	0
Cooperative	1.9	0.2	-	0	0.2
Private company limited by guarantee	0	0.2	-	0	0.2
Private company limited by shares	0	0.1	-	0	0.1
Other	0	0.1	-	0	0.1
Total	100	100	-	100	100

2.13 Commencement of Operation

The year in which an establishment first commenced its operations provides useful information on the age and development of industrial establishments over time. The data help to analyse trends in industrial growth, entry of new businesses into the sector, and the longevity of establishments within the industrial sector.

Table 2.12 shows the period when industrial establishments in Tanzania commenced their operations, indicating that most establishments are relatively new, particularly those established after 2015. For large establishments, about 28.3 percent started operations between 2015–2019 and 29.4 percent between 2020–2023, meaning nearly six out of ten large establishments began operating in the last decade. This pattern is particularly evident in mining and quarrying, where 41.7 percent started between 2020–2023 and 37.1 percent between 2015–2019, reflecting strong recent investment and expansion in this sector.

For small establishments, the pattern is even more notable. Out of 53,149 small establishments in Tanzania, about 41.5 percent started between 2020–2023, while 30.9 percent started between 2015–2019. In the manufacturing sector, which has the largest number of establishments (51,902), 41.7 percent began operations between 2020–2023, indicating a large proportion of existing establishments were established between 2020–2023. Similarly, mining and quarrying small establishments show increasing growth, with 33.9 percent starting between 2020–2023.

A similar trend is observed in Mainland Tanzania and Zanzibar, where most establishments were established in the recent periods after 2015. In Zanzibar, for example, 47.4 percent of small manufacturing establishments started between 2020–2023, indicating a significant increase in entrepreneurial activities.



Table 2. 13: Percentage of Establishments by Industrial sector and Period Operation Started, Tanzania, CIP-2023

Industrial Sector	Establishment s	Period Operation Started					
		<2000	2000- 2004	2005- 2009	2010- 2014	2015- 2019	2020- 2023
Tanzania							
Large establishments							
Mining and quarrying	741	4.3	4.5	5.1	7.3	37.1	41.7
Manufacturing	3,489	12	6.9	9.7	15.7	26.8	28.9
Electricity, gas, steam and air conditioning supply	95	51.6	7.4	6.3	9.5	23.2	2.1
Water supply; sewerage waste management and remediation activities	210	22.9	21.9	12.4	11.9	24.8	6.2
Total	4,535	12.1	7.2	9	14	28.3	29.4
Small establishment							
Mining and quarrying	1,150	8.7	7.8	7.5	11.7	30.3	33.9
Manufacturing	51,902	3.8	4.7	6.1	12.8	30.9	41.7
Electricity gas, steam, and air conditioning supply	33	12.1	3	15.2	27.3	15.2	27.3
Water supply; sewerage waste management and remediation activities	64	6.3	10.9	6.3	9.4	40.6	26.6
Total	53,149	3.9	4.8	6.1	12.8	30.9	41.5
Mainland Tanzania							
Large establishments							
Mining and quarrying	702	3.1	4.7	4.7	7	38.2	42.3
Manufacturing	3,222	12.1	6.8	10	15.9	27.3	28
Electricity, gas, steam and air conditioning supply	95	51.6	7.4	6.3	9.5	23.2	2.1
Water supply; sewerage waste management and remediation activities	209	23	22	12.4	12	24.4	6.2
Total	4,228	12	7.2	9.2	14.1	28.8	28.7
Small establishment							
Mining and quarrying	1,096	8.3	7.8	7.4	12.1	31	33.4
Manufacturing	48,664	3.6	4.5	6.1	13	31.5	41.3
Electricity gas steam and air conditioning supply	33	12.1	3	15.2	27.3	15.2	27.3
Water supply; sewerage waste management and remediation activities	63	6.3	11.1	6.3	7.9	41.3	27
Total	49,856	3.8	4.6	6.1	12.9	31.5	41.1
Zanzibar							
Large establishments							
Mining and quarrying	39	25.6	0	12.8	12.8	17.9	30.8
Manufacturing	267	11.2	8.2	6	13.5	21.3	39.7
Electricity, gas, steam and air conditioning supply	-	-	-	-	-	-	-
Water supply; sewerage waste management and remediation activities	1	0	0	0	0	100	0
Total	307	13	7.2	6.8	13.4	21.2	38.4
Small establishment							
Mining and quarrying	54	16.7	9.3	9.3	3.7	16.7	44.4
Manufacturing	3,238	6.8	7.5	5.6	10.6	22.1	47.4
Electricity gas steam and air conditioning supply	-	-	-	-	-	-	-
Water supply; sewerage waste management and remediation activities	1	0	0	0	100	0	0
Total	3,293	6.9	7.5	5.7	10.5	22	47.4



Chapter Three:

Employment Performance in the Industrial Sector

3.0 Introduction

Employment performance in the industrial sector reflects the sector's capacity to generate jobs and absorb labor within the economy. It provides insight into the number of people engaged, sex distribution, nationality, skills level and associated labour costs across different establishments and helps assess trends in job creation, workforce distribution, and the overall contribution of the sector to employment. This information is important for monitoring industrial growth, productivity, and the role of the sector in supporting economic development. The analysis is based on the average number of persons engaged in the establishments during the reference period.

3.1 Number of Persons Engaged by Industrial Sector

This section outlines the distribution of persons engaged in the industrial sector categorised by nationality and sex. The Table 3.1 presents the distribution of persons engaged in industrial activities in Tanzania by nationality and sex. Overall, the industrial sector employed 471,482 persons, of which 466,222 (98.9 percent) are Tanzanians, while 5,260 (1.1 percent) are foreigners. The manufacturing sector accounts for the largest share of employment with 403,479 persons engaged (85.6 percent), followed by mining and quarrying with 43,921 persons engaged (9.3 percent). The water supply, sewerage and waste management sector contributes 4.0 percent, while electricity, gas, steam and air conditioning supply accounts for 1.1 percent of employment. This indicates that manufacturing is the main source of industrial employment in Tanzania.

The data also shows that men dominate employment in industrial activities in Tanzania. overall, 75.7 percent of persons engaged are male, while 24.3 percent are female. This pattern is similar among both Tanzanian and foreign employees. Among Tanzanian workers, 75.6 percent are male and 24.4 percent are female, while among foreigner's 85.4 percent are male and 14.6 percent female. This suggests that industrial activities, particularly in sectors such as mining and manufacturing, tend to employ more male than female.

Mainland Tanzania accounts for the majority of industrial employment with 454,546 employees, while Zanzibar has 16,936 persons engaged. In Zanzibar, manufacturing dominates employment, accounting for 94.3 percent of all industrial workers, while mining and quarrying contributes 5.5 percent. Additionally, the gender gap is larger in Zanzibar, where 89.0 percent of persons engaged are male and only 11.0 percent are female. Overall, the results indicate that industrial employment in Tanzania is heavily concentrated in manufacturing, dominated by Tanzanian nationals, and characterized by a higher proportion of male workers.



Table 3. 1: Total Number of Persons Engaged by Industrial Sector, Nationality and Sex in Tanzania, CIP-2023

Industrial activity	Tanzanians			Foreigners			Total			Percent
	Male	Female	Both	Male	Female	Both	Male	Female	Both	
Tanzania										
Mining and quarrying	40,278	3,462	43,740	147	34	181	40,425	3,496	43,921	9.3
Manufacturing	294,069	104,385	398,454	4,293	732	5,025	298,362	105,117	403,479	85.6
Electricity gas steam and air conditioning supply	4,226	942	5,168	21	1	22	4,247	943	5,190	1.1
Water supply; sewerage waste management and remediation activities	13,842	5,018	18,860	31	1	32	13,873	5,019	18,892	4.0
Total	352,415	113,807	466,222	4,492	768	5,260	356,907	114,575	471,482	100.0
Percent	75.6	24.4	100.0	85.4	14.6	100.0	75.7	24.3	100.0	
Mainland Tanzania										
Mining and quarrying	39,621	3,208	42,829	126	30	156	39,747	3,238	42,985	9.5
Manufacturing	280,200	102,858	383,058	3,776	680	4,456	283,976	103,538	387,514	85.3
Electricity gas steam and air conditioning supply	4,226	942	5,168	21	1	22	4,247	943	5,190	1.1
Water supply; sewerage waste management and remediation activities	13,832	4,993	18,825	31	1	32	13,863	4,994	18,857	4.1
Total	337,879	112,001	449,880	3,954	712	4,666	341,833	112,713	454,546	100.0
Percent	75.1	24.9	100.0	84.7	15.3	100.0	75.2	24.8	100.0	
Zanzibar										
Mining and quarrying	657	254	911	21	4	25	678	258	936	5.5
Manufacturing	13,869	1,527	15,396	517	52	569	14,386	1,579	15,965	94.3
Electricity gas steam and air conditioning supply	-	-	-	-	-	-	-	-	-	-
Water supply; sewerage waste management and remediation activities	10	25	35	-	-	-	10	25	35	0.2
Total	14,536	1,806	16,342	538	56	594	15,074	1,862	16,936	100.0
Percent	88.9	11.1	100.0	90.6	9.4	100.0	89.0	11.0	100.0	

3.2 Number of Persons Engaged by Employment Status

Table 3.2 shows the distribution of persons engaged in industrial activities in Tanzania by employment status and sex, working proprietors, unpaid workers, and employees. The industrial sector engages 471,482 persons, of whom 376,173 are employees, 88,847 are working proprietors, and 6,462 are unpaid workers. In terms of sectoral distribution, manufacturing accounts for the largest share of persons engaged with 403,479 people (85.6 percent), followed by mining and quarrying with 43,921 people (9.3 percent). The water supply, sewerage, waste management and remediation activities sector accounts for 4.0 percent, while electricity, gas, steam and air conditioning supply contributes 1.1 percent.

The data also highlights differences in types of engagement across sectors. In manufacturing, the majority of persons engaged are employees (311,007), but the sector also has the largest number of working proprietors (86,235) and unpaid workers (6,237), reflecting the presence of many small and medium-scale enterprises. In contrast, sectors such as electricity and water supply are dominated by employees, with very few working proprietors or unpaid workers, which reflects the more formal and structured nature of these industries.

In terms of gender distribution, the industrial sector is largely dominated by male participation. Overall, 75.7 percent of persons engaged are male, while 24.3 percent are female. Among working proprietors, male account for 77.6 percent, suggesting that most industrial businesses are owned or managed by male. However, the share of female is relatively higher among unpaid workers 39.2 percent, indicating that female are more likely to participate in supportive roles.



Table 3. 2: Number of Persons Engaged by Industrial Sector, Employment Status and Sex in Tanzania, CIP-2023

Industrial sector	Working Proprietor			Unpaid Workers			Employees			Total Persons Engaged			Percent
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	
Tanzania													
Mining and quarrying	2,206	234	2,440	195	11	206	38,024	3,251	41,275	40,425	3,496	43,921	9.3
Manufacturing	66,605	19,630	86,235	3,723	2,514	6237	228,034	82,973	311,007	298,362	105,117	403,479	85.6
Electricity, gas, steam and air conditioning supply	67	30	97	9	0	9	4,171	913	5,084	4,247	943	5,190	1.1
Water supply, sewerage, waste management and remediation activities	67	8	75	5	5	10	13,801	5,006	18,807	13,873	5,019	18,892	4.0
Total	68,945	19,902	88,847	3,932	2,530	6462	284,030	92,143	376,173	356,907	114,575	471,482	100.0
Percent	77.6	22.4	100.0	60.8	39.2	100.0	75.5	24.5	100.0	75.7	24.3	100.0	
Mainland Tanzania													
Mining and quarrying	2,140	227	2,367	195	11	206	37,412	3,000	40,412	39,747	3,238	42,985	9.5
Manufacturing	64,022	19,348	83,370	3,410	2,423	5833	216,544	81,767	298,311	283,976	103,538	387,514	85.3
Electricity, gas, steam and air conditioning supply	67	30	97	9	0	9	4,171	913	5,084	4,247	943	5,190	1.1
Water supply, sewerage, waste management and remediation activities	66	8	74	5	5	10	13,792	4,981	18,773	13,863	4,994	18,857	4.1
Total	66,295	19,613	85,908	3,619	2,439	6058	271,919	90,661	362,580	341,833	112,713	454,546	100.0
Percent	77.2	22.8	100.0	59.7	40.3	100.0	75.0	25.0	100.0	75.2	24.8	100.0	
Zanzibar													
Mining and quarrying	66	7	73	0	0	0	612	251	863	678	258	936	5.5
Manufacturing	2,583	282	2,865	313	91	404	11,490	1,206	12,696	14,386	1,579	15,965	94.3
Electricity, gas, steam and air conditioning supply	0	0	0	0	0	0	0	0	0	0	0	0	-
Water supply, sewerage, waste management and remediation activities	1	0	1	0	0	0	9	25	34	10	25	35	0.2
Total	2,650	289	2,939	313	91	404	12,111	1,482	13,593	15,074	1,862	16,936	100.0
Percent	90.2	9.8	100.0	77.5	22.5	100.0	89.1	10.9	100.0	89.0	11.0	100.0	

3.3 Number of Employees by Industrial Sector in Tanzania

Table 3.3 shows the distribution of employees in the industrial sector in Tanzania by occupation category and sex. In total, the sector employs 376,173 workers, of whom 284,030 (75.5 percent) are male and 92,143 (24.5 percent) are female. Most employees are concentrated in non-skilled operator positions, which account for 203,515 workers, followed by skilled operators with 107,564 workers, and managerial and professional staff with 51,429 workers. A smaller share of employees falls under other categories with 13,665 workers. This indicates that the industrial sector relies heavily on operational labour, particularly in production-related activities.

Manufacturing accounts for the largest share of persons engaged, employing 311,007 workers (82.7 percent). Within this sector, a large proportion are non-skilled operators 175,195 workers, followed by skilled operators 83,498 workers and managerial and professional staff 40,158 workers. The mining and quarrying sector employs 41,275 workers (11 percent), with most workers also concentrated in non-skilled operator positions 24,748 workers. Meanwhile, the water supply, sewerage, waste management and remediation sector employs 18,807 workers (5 percent), and the electricity, gas, steam and air conditioning supply sector accounts for 5,084 workers (1.4 percent).

The gender distribution shows that male workers dominate across all occupational categories. Male represent 75.6 percent of managerial and professional staff, 77.6 percent of skilled operators, and 75.0 percent of non-skilled operators. However, the share of female is relatively higher in the other occupational category, where female account for 34.1 percent of workers. Overall, the results suggest that industrial employment in Tanzania is heavily concentrated in manufacturing, largely composed of operational labour, and characterized by higher male participation.



Table 3. 3: Number of Employees by Industrial Sector, Employee Category and Sex in Tanzania, CIP-2023

Industrial Sector	Managerial & Professional Staff			Skilled Operators			Non-Skilled Operators			Other			Total Employees			Percent
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	
Tanzania																
Mining and quarrying	3,901	565	4,466	10,697	748	11,445	22,904	1,844	24,748	522	94	616	38,024	3,251	41,275	11
Manufacturing	30,088	10,070	40,158	62,781	20,717	83,498	127,317	47,878	175,195	7,848	4,308	12,156	228,034	82,973	311,007	82.7
Electricity gas steam and air conditioning supply	1,334	308	1,642	2,069	403	2,472	562	146	708	206	56	262	4,171	913	5,084	1.4
Water supply; sewerage waste management and remediation activities	3,542	1,621	5,163	7,881	2,268	10,149	1,946	918	2,864	432	199	631	13,801	5,006	18,807	5
Total	38,865	12,564	51,429	83,428	24,136	107,564	152,729	50,786	203,515	9,008	4,657	13,665	284,030	92,143	376,173	100
Percent	75.6	24.4	100.0	77.6	22.4	100.0	75.0	25.0	100.0	65.9	34.1	100.0	75.5	24.5	100.0	
Mainland Tanzania																
Mining and quarrying	3,816	535	4,351	10,666	724	11,390	22,474	1,677	24,151	456	64	520	37,412	3,000	40,412	11.1
Manufacturing	28,114	9,796	37,910	61,105	20,605	81,710	120,182	47,150	167,332	7,143	4,216	11,359	216,544	81,767	298,311	82.3
Electricity gas steam and air conditioning supply	1,334	308	1,642	2,069	403	2,472	562	146	708	206	56	262	4,171	913	5,084	1.4
Water supply; sewerage waste management and remediation activities	3,542	1,621	5,163	7,881	2,268	10,149	1,937	893	2,830	432	199	631	13,792	4,981	18,773	5.2
Total	36,806	12,260	49,066	81,721	24,000	105,721	145,155	49,866	195,021	8,237	4,535	12,772	271,919	90,661	362,580	100
Percent	75.0	25.0	100.0	77.3	22.7	100.0	74.4	25.6	100.0	64.5	35.5	100.0	75.0	25.0	100.0	
Zanzibar																
Mining and quarrying	85	30	115	31	24	55	430	167	597	66	30	96	612	251	863	6.3
Manufacturing	1,974	274	2,248	1,676	112	1,788	7,135	728	7,863	705	92	797	11,490	1,206	12,696	93.4
Electricity gas steam and air conditioning supply	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Water supply; sewerage waste management and remediation activities	0	0	0	0	0	0	9	25	34	0	0	0	9	25	34	0.3
Total	2,059	304	2,363	1,707	136	1,843	7,574	920	8,494	771	122	893	12,111	1,482	13,593	100
Percent	87.1	12.9	100.0	92.6	7.4	100.0	89.2	10.8	100.0	86.3	13.7	100.0	89.1	10.9	100.0	

3.4 Labour Costs

This section presents information on the total labour costs incurred by the establishment during the reference period. Labour costs include all payments made by the establishment to employees in return for work performed. These payments cover gross wages and salaries, overtime payments, reimbursements for training, payment in kind, employers' contributions to social security schemes and pension schemes (e.g., NSSF, ZSSF and PSSSF.), training expenses for staff, and any other labour expenses related to employees. The information collected will help in understanding the structure of employment costs in the industrial sector and in estimating the contribution of labour to production and economic activities.

3.5 Labour Costs by Industrial Sector

Table 3.4 shows the distribution of labour costs in the industrial sector in Tanzania. Industrial establishments incurred a total labour cost amounting to TZS 3,060,264 million. The largest component of labour costs is gross wages and salaries with TZS 2,505,249 million which accounts for 81.9 percent of total labour costs. Other components such as social security contributions (6.2 percent) and payments in kind (4.3 percent) also contribute to labour expenses, while overtime payments (2.8 percent), reimbursements (1.4 percent), training expenses (0.8 percent), and health insurance contributions (0.8 percent) represent smaller shares. This indicates that the majority of labour expenditure in the industrial sector is directed toward direct employee compensation.

Across industrial sectors, manufacturing accounts for the largest share of labour costs, amounting to TZS 2,310,149 million, which represents 75.5 percent of total labour costs. This reflects the large number of employees engaged in manufacturing activities. The mining and quarrying sector is the second-largest contributor with TZS 407,132 million (13.3 percent), followed by water supply, sewerage, waste management and remediation activities with TZS 264,295 million (8.6 percent). The electricity, gas, steam and air conditioning supply sector contributes TZS 78,688 million (2.6 percent), indicating a relatively smaller share of labour costs compared to other sectors.

The structure of labour costs also highlights the importance of employee benefits and social protection in industrial employment. Contributions to social security schemes (TZS 189,099 million) and health insurance funds (TZS 25,324 million) demonstrate the role of formal employment arrangements in the sector. Additionally, expenditures on training (TZS 25,343 million) indicate investment in workforce development, although the share remains relatively small.



Table 3. 4: Labour Costs by Industrial Sector in Tanzania, CIP-2023

(TZS Million)										
Industrial Sector	Gross Wages & Salaries	Overtime Payment	Reimbursement	Payments in kind	Social Security Schemes Fund	Health insurance Fund	Training expense	Other	Total Labour Costs	Percent
Tanzania										
Mining and quarrying	322,258	5,226	5,299	35,110	25,246	1,685	8,607	3,700	407,132	13.3
Manufacturing	1,918,347	66,980	32,524	86,136	144,337	17,706	11,681	32,437	2,310,149	75.5
Electricity gas steam and air conditioning supply	59,558	8,387	1,868	2,466	4,668	727	743	272	78,688	2.6
Water supply; sewerage waste management and remediation activities	205,087	5,120	4,094	7,709	14,847	5,207	4,312	17,921	264,295	8.6
Total	2,505,249	85,713	43,785	131,422	189,099	25,324	25,343	54,330	3,060,264	100
Percent	81.9	2.8	1.4	4.3	6.2	0.8	0.8	1.8	100	
Mainland Tanzania										
Mining and quarrying	320,938	5,220	5,279	35,089	25,246	1,682	8,607	3,700	405,761	13.4
Manufacturing	1,888,012	66,793	32,357	85,955	143,473	17,473	11,612	32,382	2,278,057	75.3
Electricity gas steam and air conditioning supply	59,558	8,387	1,868	2,466	4,668	727	743	272	78,688	2.6
Water supply; sewerage waste management and remediation activities	205,056	5,120	4,094	7,709	14,847	5,207	4,312	17,921	264,265	8.7
Total	2,473,564	85,520	43,597	131,219	188,234	25,087	25,274	54,274	3,026,771	100
Percent	81.7	2.8	1.4	4.3	6.2	0.8	0.8	1.8	100	
Zanzibar										
Mining and quarrying	1,320	6	20	21	0	4	0	0	1,371	4.1
Manufacturing	30,335	187	168	180	865	232	69	56	32,091	95.8
Electricity gas steam and air conditioning supply	0	0	0	0	0	0	0	0	0	0
Water supply; sewerage waste management and remediation activities	31	0	0	0	0	0	0	0	31	0.1
Total	31,685	193	188	202	865	236	69	56	33,493	100
Percent	94.6	0.6	0.6	0.6	2.6	0.7	0.2	0.2	100	

Chapter Four:

The Performance of the Industrial Sector

4.0 Introduction

The industrial sector plays a significant role in economic development by contributing to production, generating employment, and adding value to raw materials. The performance of the sector is typically evaluated using key indicators such as capacity utilisation, production output, employment levels, revenue from industrial and non-industrial services, which provide important insights into the level of industrial activity and overall economic progress.

4.1 Production Capacity Utilisation

Capacity utilisation measures the current level of output against the maximum installed capacity achievable if all machinery and equipment and other factors were fully engaged in production. The level of capacity utilisation is determined by various factors, including the supply of skilled labour, the availability of raw materials, and the mechanical condition of the machinery in use. In CIP 2023, Tanzania recorded an average production capacity utilisation of 76.1 percent whereas Mainland Tanzania 75.9 percent and Zanzibar 78.8 percent as shown in Figure 4.1.

Figure 4. 1: Percentage of Production Capacity Utilisation, Tanzania, CIP 2023

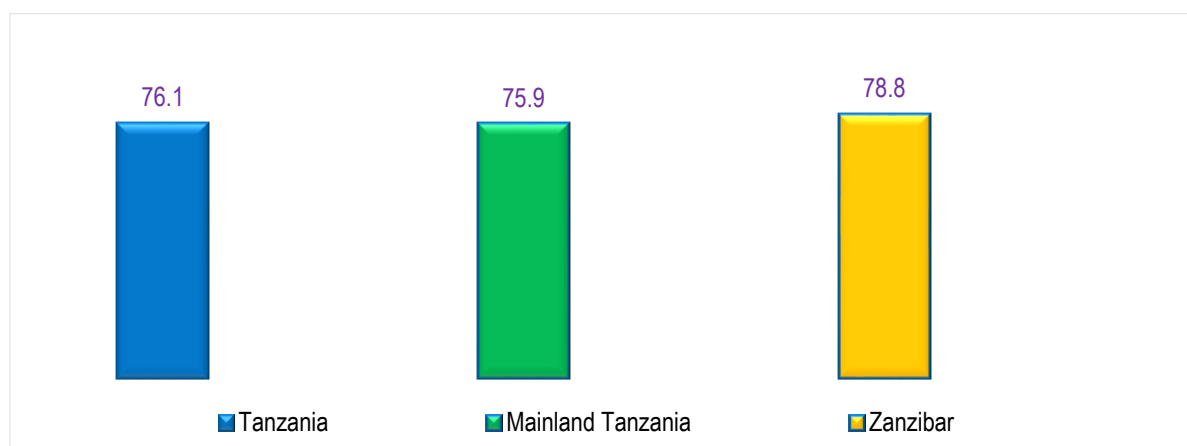


Table 4.1 shows the average capacity utilisation of various industrial products in Tanzania. At the national level, the highest utilisation rates were recorded in tobacco products (87.6 percent), coke oven and refined petroleum products (85.0 percent), and general-purpose machinery (83.2 percent), indicating relatively high levels of production

activity in these industries. Other products such as yarn and thread; woven and tufted textile fabrics (82.9 percent) and forestry and logging products (81.8 percent) also recorded strong utilisation levels.

In Mainland Tanzania, high-capacity utilisation was also observed in yarn and thread; woven and tufted textile fabrics (84.1 percent), special-purpose machinery (80.3 percent), and basic metals (78.3 percent), reflecting active manufacturing operations. In Zanzibar, some products recorded very high utilisation rates such as electrical machinery and apparatus (100 percent), metal ores (100 percent), fabricated metal products except machinery and equipment (92.8 percent), and Meat, fish, fruits, vegetables, oils and fats (91.7 percent), although several products recorded zero values, indicating limited or no production activities for those products in the period under review.

Overall, the average capacity utilization data suggests that Tanzania's industrial sector has moderate utilisation overall, with specific sub-sectors and highlighting areas for potential investment and efficiency improvements.

Table 4. 1: Average Utilisation of Production Capacity by Products for large establishments, Tanzania, CIP-2023

CPC Code	Product Description	Average Capacity Utilisation (percent)		
		Tanzania	Mainland Tanzania	Zanzibar
1	Products of agriculture, horticulture and market gardening	77.5	77.6	70.3
2	Live animals and animal products (excluding meat)	63.1	63.1	0.0
3	Forestry and logging products	81.8	81.8	0.0
4	Fish and other fishing products	69.3	69.3	0.0
11	Coal and peat	69.6	69.6	0.0
12	Crude petroleum and natural gas	76.2	76.2	0.0
14	Metal ores	71.9	70.0	100.0
15	Stone, sand and clay	70.5	69.8	75.3
16	Other minerals	71.6	71.6	0.0
17	Electricity, gas, steam and hot water	68.9	68.9	0.0
18	Natural water	70.7	70.7	0.0
21	Meat, fish, fruits, vegetables, oils and fats	72.3	72.1	91.7
22	Dairy products and egg products	70.6	70.6	0.0
23	Grain mill products, starches and starch products; other food products	78.7	78.4	83.4
24	Beverages	75.3	74.8	88.9
25	Tobacco products	87.6	87.6	0.0
26	Yarn and thread; woven and tufted textile fabrics	82.9	84.1	66.7
27	Textile articles other than apparel	76.2	75.7	83.0
28	Knitted or crocheted fabrics; wearing apparel	71.2	69.9	92.6
29	Leather and leather products; footwear	72.6	72.5	80.0
31	Products of wood, cork, straw and plaiting materials	66.7	66.1	74.0



CPC Code	Product Description	Average Capacity Utilisation (percent)		
		Tanzania	Mainland Tanzania	Zanzibar
32	Pulp, paper and paper products; printed matter and related articles	72.9	72.6	79.4
33	Coke oven products; refined petroleum products; nuclear fuel	85.0	85.0	0.0
34	Basic chemicals	72.5	72.5	0.0
35	Other chemical products; man-made fibres	72.6	74.7	0.0
36	Rubber and plastic products	70.0	70.3	50.0
37	Glass and glass products and other non-metallic products n.e.c.	79.8	79.1	83.1
38	Furniture; other transportable goods n.e.c.	77.3	76.7	87.1
39	Wastes or scraps	78.6	78.4	91.2
41	Basic metals	78.2	78.3	10.0
42	Fabricated metal products except machinery and equipment	76.0	75.4	92.8
43	General-purpose machinery	83.2	82.6	86.2
44	Special-purpose machinery	78.0	80.3	69.3
45	Office accounting and computing machinery	75.3	75.3	0.0
46	Electrical machinery and apparatus	75.0	74.3	100.0
47	Radio, television and communication equipment and apparatus	58.7	58.7	0.0
48	Medical appliances, precision and optical instruments, watches and clocks	80.7	80.7	0.0
49	Transport equipment	71.2	70.8	84.0
Total		76.1	75.9	78.8

Note: n.e.c. not elsewhere classified

4.2 Reasons for Capacity Under-Utilisation

The average production capacity utilisation for some products in Tanzania was below 75 percent, indicating that establishments were operating below their potential production levels. Therefore, it is important to examine the underlying factors contributing to this underutilization.

The findings in Table 4.2 indicates that insufficient demand was the most frequently reported constraint at 11.7 percent, suggesting that many establishments could not operate at full capacity due to limited market demand for their products. This was followed by power supply interruptions caused by blackouts 9.8 percent, which disrupt production processes and reduce the effective operating time of machinery. The shortage of domestic inputs 9.4 percent also limited production as industries faced difficulties accessing locally available raw materials required for production.

A similar pattern was observed in Mainland Tanzania, where the leading constraints included insufficient demand (11.7 percent), insufficient power supply due to blackouts (9.8 percent), and shortage of domestic inputs (9.4 percent). These findings highlight persistent challenges related to market demand, infrastructure reliability, and the



availability of production inputs that affect the ability of industries to fully utilise their installed capacity.

In Zanzibar, although industrial activities operate on a relatively smaller scale, similar constraints were observed. The most significant factors included insufficient demand (11.7 percent), shortage of imported inputs (3.1 percent), and high transport costs (5.9 percent). These challenges are partly associated with the limited domestic market size and the dependence on imported raw materials, which increase production costs and constrain industrial output.

Table 4. 2: Reasons for Under-Utilisation of Production Capacity by Products, Tanzania, CIP-2023

Reasons Under Utilisation	High		Moderate		Low		Not Applicable	
	Numb er	Perce nt	Numb er	Perce nt	Numb er	Perce nt	Numb er	Perce nt
Insufficient demand	318	11.7	329	8.4	150	5.2	434	2.9
Shortage of domestic inputs	256	9.4	315	8.1	157	5.5	504	3.3
Shortage of imported inputs	84	3.1	148	3.8	124	4.3	876	5.8
Old (Obsolete) plant/machinery and equipment	127	4.7	293	7.5	160	5.6	653	4.3
Plant maintenance problems due to a lack of spare parts	100	3.7	218	5.6	198	6.9	715	4.7
Plant maintenance problems due to a shortage of skilled labour	102	3.7	201	5.1	184	6.4	746	4.9
High cost of credits	182	6.7	179	4.6	113	3.9	758	5
Inadequate access to financial services	170	6.2	181	4.6	151	5.2	731	4.8
Insufficient power supply (blackouts)	268	9.8	303	7.7	166	5.8	495	3.3
Insufficient power supply (low voltage)	145	5.3	259	6.6	151	5.2	677	4.5
Insufficient water supply	67	2.5	181	4.6	137	4.8	848	5.6
Competition from imports	98	3.6	88	2.2	142	4.9	905	6
Strikes or stoppages by workers	58	2.1	89	2.3	135	4.7	950	6.3
Uncompetitiveness of exports	82	3	126	3.2	132	4.6	893	5.9
Poor transport facilities	118	4.3	202	5.2	153	5.3	759	5
High transport cost	162	5.9	238	6.1	126	4.4	707	4.7
Inability to grant credits to customers	94	3.4	151	3.9	158	5.5	828	5.5
Counterfeits	70	2.6	122	3.1	127	4.4	913	6
Climatic Change Impact	130	4.8	199	5.1	149	5.2	755	5
Others	94	3.4	91	2.3	66	2.3	980	6.5
Total	2,725	100	3,913	100	2,879	100	15,127	100



4.3 Exports and Local Sales

Industrial performance is assessed through local sales and exports, which show how industries serve domestic markets and participate in foreign trade. In Tanzania, local sales dominate, especially in manufacturing, while exports are concentrated in mining and quarrying. At the national level, large establishments had total sales of TZS 36,160,327 million, with exports contributing 30.7 percent (TZS 11,118,049 million) as shown in Table 4.3. The bulk of these exports came from mining and quarrying (78.4 percent) of exports, while manufacturing contributed 21.5 percent. Local sales, however, were dominated by manufacturing, which accounted for 86.5 percent of domestic sales. Small establishments relied almost entirely on local markets, with total sales of TZS 2,752,111 million, of which exports were negligible at 1.0 percent. Local sales made up 99.0 percent of their total, mostly from manufacturing.

In Mainland Tanzania, the pattern was similar to the national level. Large establishments recorded total sales of TZS 35,996,629 million, with exports representing 30.8 percent (TZS 11,106,352 million), again dominated by mining and quarrying (78.5 percent of exports), while manufacturing drove most of the domestic sales (86.3 percent). Small establishments had total sales of TZS 2,513,216 million, with exports accounting for only 1.0 percent, and local sales comprising the remaining 99.0 percent, mainly from manufacturing.

In Zanzibar, both large and small establishments were overwhelmingly oriented toward the local market. Large firms had total sales of TZS 163,698 million, with exports contributing only 7.1 percent (TZS 11,697 million), predominantly from manufacturing, while local sales accounted for 92.9 percent. Small establishments' total sales were TZS 238,895 million, with negligible exports (0.4 percent) and 99.6 percent of sales coming from local manufacturing.



Table 4. 3: Value of Industrial Products Exports and Local Sales of Products by Industrial Sector of Large and Small Establishments, Tanzania, CIP-2023

Industrial Sector	TZS Million											
	Large Establishment						Small Establishment					
	Exports		Local Sales		Total Sales		Exports		Local Sales		Total Sales	
	Value	Percent	Value	Percent	Value	Percent	Value	Percent	Value	Percent	Value	Percent
Tanzania												
Mining and quarrying	8,724,322	78.4	953,902	3.8	9,678,224	26.8	3,754	14.3	280,789	10.3	284,542	10.3
Manufacturing	2,387,104	21.5	21,640,782	86.5	24,027,886	66.4	22,423	85.7	2,428,750	89.1	2,451,173	89.1
Electricity, gas, steam and air conditioning supply	0	0	1,588,192	6.3	1,588,192	4.4	0	0	2,151	0.1	2,151	0.1
Water supply, sewerage waste management and remediation activities	6,623	0.1	859,401	3.4	866,024	2.4	0	0	14,246	0.5	14,246	0.5
Total	11,118,049	100	25,042,278	100	36,160,327	100	26,177	100	2,725,935	100	2,752,111	100
Mainland Tanzania												
Mining and quarrying	8,724,322	78.5	943,694	3.8	9,668,016	26.9	3,753	14.8	277,478	11.2	281,231	11.2
Manufacturing	2,375,407	21.4	21,499,270	86.3	23,874,678	66.3	21,525	85.2	2,194,071	88.2	2,215,596	88.1
Electricity, gas, steam and air conditioning supply	0	0	1,588,192	6.4	1,588,192	4.4	0	0	2,151	0.1	2,151	0.1
Water supply, sewerage waste management and remediation activities	6,623	0.1	859,121	3.5	865,744	2.4	0	0	14,238	0.6	14,238	0.6
Total	11,106,352	100	24,890,277	100	35,996,629	100	25,278	100	2,487,938	100	2,513,216	100
Zanzibar												
Mining and quarrying	0	0	10,209	6.7	10,209	6.2	0	0	3,311	1.4	3,311	1.4
Manufacturing	11,697	100	141,512	93.1	153,209	93.6	898	100	234,679	98.6	235,577	98.6
Electricity, gas, steam and air conditioning supply	0	0	0	0	0	0	0	0	0	0	0	0
Water supply, sewerage waste management and remediation activities	0	0	280	0.2	280	0.2	0	0	8	0	8	0
Total	11,697	100	152,001	100	163,698	100	898	100	237,997	100	238,895	100

4.4 Other Income from Industrial and Non-industrial Services for Large Establishments

Table 4.4 indicates that Tanzania industrial services contributed TZS 114,285 million (10.9 percent) of total receipts from other services other than income from sales of own production, with manufacturing dominating this income at 57.1 percent, followed by water supply (16.6 percent) and mining (19.1 percent). Non-industrial services generated TZS 749,369 million (71.5 percent), mainly from manufacturing (84.7 percent), while other receipts accounted for TZS 184,252 million (17.6 percent), with manufacturing again the largest contributor (48.8 percent). Overall, total receipts amounted to TZS 1,047,906 million.

In Mainland Tanzania, the pattern reflects national trends. Industrial services income was TZS 105,165 million (10.2 percent), with manufacturing contributing 53.6 percent, mining and quarrying 20.6 percent, and water supply, sewerage, waste management, and remediation activities 18.1 percent. Non-industrial services brought in TZS 746,588 million (72.1 percent), primarily from manufacturing (84.7 percent). Other receipts with amount of TZS 184,220 million (17.8 percent), dominated by manufacturing at 48.8 percent. This shows that, on the Mainland Tanzania, manufacturing remains the principal source of both production-based and service-based income, while mining, electricity, and water services contribute to a smaller share of total receipts.

In Zanzibar, industrial income is highly concentrated in manufacturing, which generated TZS 8,919 million (76.4 percent) of industrial services and dominated non-industrial services (98.2 percent). Mining contributed only 2.2 percent of total receipts, and electricity and water services were negligible. Other receipts with 32 million (0.3 percent), further emphasizing that Zanzibar's industrial sector relies overwhelmingly on manufacturing activities, with minimal diversification into other industrial or service-based revenue streams.



Table 4. 4: Income from Services by Industrial Sector for Large Establishments, Tanzania, CIP-2023
(Million TZS)

Industrial Sector	Industrial Services	Percent	Non-Industrial Services	Percent	Other Income	Percent	Total	Percent
Tanzania								
Mining and quarrying	21,839	19.1	81,791	10.9	28,907	15.7	132,537	12.6
Manufacturing	65,288	57.1	634,793	84.7	89,899	48.8	789,980	75.4
Electricity gas steam and air conditioning supply	8,172	7.2	5,879	0.8	978	0.5	15,028	1.4
Water supply; sewerage waste management and remediation activities	18,987	16.6	26,906	3.6	64,468	35	110,361	10.5
Total	114,285	100	749,369	100	184,252	100	1,047,906	
Percent	10.9		71.5		17.6		100	
Mainland Tanzania								
Mining and quarrying	21,637	20.6	81,740	10.9	28,892	15.7	132,269	12.8
Manufacturing	56,369	53.6	632,064	84.7	89,882	48.8	778,315	75.1
Electricity gas steam and air conditioning supply	8,172	7.8	5,879	0.8	978	0.5	15,028	1.5
Water supply; sewerage waste management and remediation activities	18,987	18.1	26,906	3.6	64,468	35	110,361	10.7
Total	105,165	100	746,588	100	184,220	100	1,035,973	
Percent	10.2		72.1		17.8		100	
Zanzibar								
Mining and quarrying	201	2.2	51	1.8	15	46.9	267	2.2
Manufacturing	8,919	97.8	2,730	98.2	17	53.1	11,665	97.8
Electricity gas steam and air conditioning supply	0	0	0	0	0	0	0	0
Water supply; sewerage waste management and remediation activities	0	0	0	0	0	0	0	0
Total	9,120	100	2,781	100	32	100	11,933	
Percent	76.4		23.3		0.3		100	



4.5 Value Added by Industrial Sector

Value added was calculated as the difference between the gross output (total sales/receipts) and the cost of intermediate inputs used in production.

The industrial sector generated a total value added of TZS 19,791,037 million at national level, with manufacturing contributing 58.2 percent and mining and quarrying 37.8 percent. Electricity, gas, steam, and air conditioning supply contributed 2.5 percent, while water supply; sewerage waste management and remediation activities accounted for 1.5 percent. This shows that manufacturing and mining and quarrying activities are the main drivers of industrial value added in Tanzania as shown in Table 4.5.

In Mainland Tanzania, the pattern is similar, with manufacturing contributing 57.6 percent and mining and quarrying 38.4 percent of total value added (TZS 19,463,064 million). In Zanzibar, the sector is heavily dominated by manufacturing (95.4 percent), with mining and quarrying at 4.6 percent and negligible contribution from electricity and water services.

Table 4. 5: Value Added by Industrial sector for All Establishment, Tanzania, CIP-2023

(TZS Million)				
Industrial Sector	Gross Output	Intermediate Consumption	Value Added	Percent
Tanzania				
Mining and quarrying	10,067,670	2,590,052	7,477,618	37.8
Manufacturing	28,074,809	16,551,864	11,522,945	58.2
Electricity gas steam and air conditioning supply	1,605,590	1,116,010	489,580	2.5
Water supply; sewerage waste management and remediation activities	948,365	647,471	300,894	1.5
Total	40,696,435	20,905,398	19,791,037	100
Mainland Tanzania				
Mining and quarrying	10,048,967	2,586,330	7,462,637	38.4
Manufacturing	27,655,942	16,445,855	11,210,087	57.6
Electricity gas steam and air conditioning supply	1,605,590	1,116,010	489,580	2.5
Water supply; sewerage waste management and remediation activities	948,178	647,417	300,761	1.5
Total	40,258,676	20,795,612	19,463,064	100
Zanzibar				
Mining and quarrying	18,704	3,722	14,981	4.6
Manufacturing	418,868	106,009	312,859	95.4
Electricity gas steam and air conditioning supply	0	0	0	0
Water supply; sewerage waste management and remediation activities	188	55	133	0
Total	437,759	109,786	327,973	100



4.6 Manufacturing Net Value Added

The manufacturing sector plays a significant role in Tanzania's economy, contributing the largest share of net value added among industrial sectors. Manufacturing Net Value Added measures the net wealth generated by manufacturing activities after accounting for depreciation of machinery, equipment, and buildings, reflecting the sector's true economic contribution.

Table 4.6 presents the results for manufacturing net value added by activity for both small and large establishments in Tanzania. The largest contributors to manufacturing net value added are the manufacture of food products, beverages, and other non-metallic mineral products, with net value added of 3,616,057 million TZS, 1,172,468 million TZS, and 1,014,565 million TZS respectively. These three activities together account for a significant portion of total manufacturing wealth, highlighting the dominance of food processing, beverage production, and mineral-based industries in driving industrial growth. In contrast, the smallest contributors are the repair and installation of machinery and equipment, manufacture of computer, electronic and optical products, and manufacture of machinery and equipment n.e.c., with manufacturing net value added of 2,281 million TZS, 5,028 million TZS, and 20,801 million TZS respectively.



Table 4. 6: Manufacturing Net Value Added by Industrial Activity, Tanzania, CIP-2023

ISIC	Industrial Activity	(TZS Million)					
		GO	IC	VA	Depreciation	Net Value Added	MVA (percent)
10	Manufacture of food products	9,756,527	5,616,417	4,140,110	524,054	3,616,057	37.0
11	Manufacture of beverages	3,324,067	1,860,686	1,463,381	290,913	1,172,468	12.0
12	Manufacture of tobacco products	488,070	210,367	277,703	11,946	265,757	2.7
13	Manufacture of textiles	829,690	555,771	273,918	162,592	111,326	1.1
14	Manufacture of wearing apparel	389,060	158,007	231,053	9,469	221,584	2.3
15	Manufacture of leather and related products	857,478	625,441	232,037	41,794	190,243	1.9
16	Manufacture of wood and of products of wood and cork except furniture; manufacture of articles of straw and plaiting materials	460,676	241,792	218,884	50,725	168,159	1.7
17	Manufacture of paper and paper products	341,986	234,826	107,160	19,996	87,164	0.9
18	Printing and reproduction of recorded media	120,203	78,261	41,942	11,888	30,054	0.3
19	Manufacture of coke and refined petroleum products	198,474	153,768	44,706	11,823	32,883	0.3
20	Manufacture of chemicals and chemical products	1,144,873	671,490	473,383	21,223	452,160	4.6
21	Manufacture of basic pharmaceutical products and pharmaceutical preparations	169,651	95,390	74,261	24,233	50,028	0.5
22	Manufacture of rubber and plastics products	1,247,251	809,008	438,244	54,488	383,756	3.9
23	Manufacture of other non-metallic mineral products	2,976,114	1,629,520	1,346,594	332,029	1,014,565	10.4
24	Manufacture of basic metals	2,008,253	1,257,687	750,566	104,451	646,116	6.6
25	Manufacture of fabricated metal products except machinery and equipment	739,466	340,306	399,160	10,634	388,526	4.0
26	Manufacture of computer electronic and optical products	5,462	434	5,028	0	5,028	0.1
27	Manufacture of electrical equipment	1,748,578	1,370,359	378,219	24,688	353,531	3.6
28	Manufacture of machinery and equipment n.e.c.	47,467	24,142	23,325	2,524	20,801	0.2
29	Manufacture of motor vehicles trailers and semi-trailers	125,265	76,847	48,417	8,736	39,681	0.4
30	Manufacture of other transport equipment	142,142	108,993	33,150	3,645	29,504	0.3
31	Manufacture of furniture	766,806	340,802	426,004	16,179	409,825	4.2
32	Other manufacturing	182,093	89,059	93,033	10,973	82,060	0.8
33	Repair and installation of machinery and equipment	5,157	2,491	2,666	385	2,281	0.0
C	Manufacturing	28,074,809	16,551,864	11,522,945	1,749,389	9,773,556	100.0

Note: GO: Gross Output IC: Intermediate Consumption VA: Value Added MVA: Manufacturing Value added



Chapter Five

Materials and Services Input Utilisation

5.0 Introduction

This chapter examines the utilisation of materials and services within the industrial sector. Materials and services input utilisation refers to the value of goods and services consumed during the production process by industrial establishments. These include the cost of raw materials and supplies, energy consumption, goods purchased for resale, industrial and non-industrial services, and other operational expenses incurred during the reference period.

5.1 Material Inputs Utilisation

Material inputs utilisation are essential components that are transformed into finished or semi-finished goods during manufacturing and other industrial activities. They include items such as raw materials, packaging materials, spare parts, fuels, and other consumables required for production.

Table 5.1 depicts that in Tanzania, the total value of materials and services inputs utilised by large establishments amounted to TZS 23,429,526 million. The largest share of inputs was spent on local and imported raw materials and supplies, accounting for 64.5 percent of total inputs, followed by other expenses at 20.9 percent. Energy purchases contributed 6.1 percent, while non-industrial services and industrial services consumed accounted for 4.7 percent and 3.7 percent, respectively. Among the industrial sectors, manufacturing recorded the highest utilisation of inputs, reflecting the material-intensive nature of production activities, followed by mining and quarrying, electricity gas steam and air conditioning supply and water supply; sewerage waste management and remediation activities.

Expenditure on raw materials and supplies in Mainland Tanzania accounted for 64.5 percent, while other expenses at 20.9 percent of total inputs. Energy purchases contributed 6.1 percent, whereas industrial services and non-industrial services represented relatively smaller shares. In Zanzibar, total input utilisation amounted to TZS 57,821 million, with raw materials and supplies forming the largest share at 69.7 percent, while other expenses accounted for 11.3 percent and energy purchases represented 11.0 percent.



Table 5. 1: Cost of Material Inputs Used in Production by Industrial sector for Large Establishments, Tanzania CIP-2023

(TZS Million)						
Industrial Sector	Energy	Materials and supplies	Industrial services consumed	Non-industrial services consumed	Other Expenses	Total
Tanzania						
Mining and quarrying	221,889	1,854,739	247,553	109,646	1,135,494	3,569,320
Manufacturing	792,792	12,409,250	546,335	925,193	2,957,270	17,630,840
Electricity gas steam and air conditioning supply	155,398	600,796	25,816	15,621	779,069	1,576,700
Water supply; sewerage waste management and remediation activities	265,612	245,501	53,311	58,728	29,513	652,666
Total	1,435,691	15,110,286	873,015	1,109,188	4,901,346	23,429,526
Percent	6.1	64.5	3.7	4.7	20.9	100
Mainland Tanzania						
Mining and quarrying	221,614	1,852,592	247,526	109,619	1,135,424	3,566,775
Manufacturing	786,721	12,371,152	543,683	923,276	2,950,789	17,575,621
Electricity gas steam and air conditioning supply	155,398	600,796	25,816	15,621	779,069	1,576,700
Water supply; sewerage waste management and remediation activities	265,594	245,466	53,311	58,728	29,510	652,609
Total	1,429,327	15,070,007	870,335	1,107,244	4,894,791	23,371,704
Percent	6.1	64.5	3.7	4.7	20.9	100
Zanzibar						
Mining and quarrying	275	2,147	27	27	71	2,546
Manufacturing	6,071	38,098	2,652	1,917	6,481	55,219
Electricity gas steam and air conditioning supply	0	0	0	0	0	0
Water supply; sewerage waste management and remediation activities	18	35	0	0	3	57
Total	6,364	40,279	2,680	1,944	6,555	57,821
Percent	11	69.7	4.6	3.4	11.3	100

5.2 Energy Consumption

Energy consumption refers to the amount of energy used by industrial establishments to support production and operational activities. Energy is a critical input required to operate machinery, power equipment, provide heating or cooling, and sustain manufacturing and processing activities. Common sources of energy used by industries include electricity, fuel, gas, and other energy products.

As shown in Table 5.2 in Tanzania total industrial energy consumption was TZS 1,435,691 million, with the manufacturing sector accounting for the largest share at 55.2 percent, reflecting its energy-intensive production processes. Water supply, sewerage, waste management and remediation activities accounted for 18.5 percent, while mining and quarrying contributed 15.5 percent, and electricity, gas, steam and air conditioning supply represented 10.8 percent. In terms of energy types, fuel for machines accounted for the largest share of total energy consumption at 43.8 percent, while electricity contributed 21.3 percent and fuel for vehicles accounted for 19.6 percent. Other energy sources such as gas, wood, charcoal and coal, water made relatively smaller contributions.

A similar distribution is observed in Mainland Tanzania, where total energy consumption reached TZS 1,429,327 million, with manufacturing remaining the dominant consumer at 55.0 percent. Water supply, sewerage, waste management and remediation activities contributed 18.6 percent, mining and quarrying accounted for 15.5 percent, and electricity, gas, steam and air conditioning supply represented 10.9 percent. In terms of energy types, fuel for machines accounted for the largest share at 44.0 percent, while electricity contributed 21.2 percent and fuel for vehicles accounted for 19.7 percent. Other sources such as gas, water, and wood or charcoal represented smaller proportions of total energy use.

In Zanzibar, total energy consumption was TZS 6,364 million, with manufacturing accounting for 95.4 percent of the total. In terms of energy types, electricity represented the largest share at 49.7 percent, while other fuels accounted for 31.6 percent. Fuel for vehicles and machines contributed 8.5 percent and 7.7 percent respectively, while gas and water made only minimal contributions.



Table 5. 2: Utility Cost Structure by Industrial sector for Large Establishments, Tanzania CIP-2023

(TZS Million)									
Industrial Sector	Electricity	Water	Gas	Wood, charcoal, coal and peat	Fuel		Other fuels	Total	Percent
					machines	vehicles			
Tanzania									
Mining and quarrying	32,732	6,824	2,784	623	126,452	52,100	374	221,889	15.5
Manufacturing	211,363	30,369	93,882	39,681	214,307	195,947	7,242	792,792	55.2
Electricity gas steam and air conditioning supply	14,985	306	11,738	0	116,864	11,503	1	155,398	10.8
Water supply; sewerage waste management and remediation activities	47,262	17,568	2,273	4,702	171,480	22,321	7	265,612	18.5
Total	306,341	55,068	110,678	45,006	629,103	281,871	7,624	1,435,691	100
Percent	21.3	3.8	7.7	3.1	43.8	19.6	0.5	100	
Mainland Tanzania									
Mining and quarrying	32,591	6,824	2,783	623	126,333	52,086	374	221,614	15.5
Manufacturing	208,359	30,236	93,860	37,669	213,933	195,423	7,241	786,721	55
Electricity gas steam and air conditioning supply	14,985	306	11,738	0	116,864	11,503	1	155,398	10.9
Water supply; sewerage waste management and remediation activities	47,244	17,568	2,273	4,702	171,479	22,321	7	265,594	18.6
Total	303,178	54,934	110,655	42,993	628,609	281,333	7,624	1,429,327	100
Percent	21.2	3.8	7.7	3	44	19.7	0.5	100	
Zanzibar									
Mining and quarrying	141	0	1	0	119	13	0	275	4.3
Manufacturing	3,004	134	22	2,012	374	525	1	6,071	95.4
Electricity gas steam and air conditioning supply	0	0	0	0	0	0	0	0	0
Water supply; sewerage waste management and remediation activities	18	0	0	0	0	0	0	18	0.3
Total	3,163	134	23	2,012	493	538	1	6,364	100
Percent	49.7	2.1	0.4	31.6	7.7	8.5	0	100	

5.3 Sources of Raw Materials Consumed

Sources of raw materials consumption refer to the origin from which industrial establishments obtain the materials and supplies used in their production processes. These sources may include locally available raw materials within the country as well as imported materials from international markets. Raw materials constitute a major component of intermediate consumption and are essential for transforming inputs into finished or semi-finished products in industrial production.

As reported in Table 5.3 in Tanzania overall, total raw materials and supplies purchased reached TZS 15,110,286 million, with local sources contributing 9,281,472 million (61.4 percent) and imports with amount of TZS 5,828,814 million (38.6 percent). Among industrial sectors, manufacturing dominated with TZS 12,409,250 million (82.1 percent of total purchases), of which 6,607,115 million (53.2 percent) were locally sourced and 5,802,135 million (46.8 percent) imported. Mining and quarrying purchased a total of TZS 1,854,739 million, almost entirely from local sources at 1,849,282 million (99.7 percent). Electricity, gas, steam, and air conditioning supply recorded TZS 600,796 million, mostly local at 586,487 million (97.6 percent), while water supply and waste management purchased TZS 245,501 million, with 238,588 million (97.2 percent) sourced locally.

In Mainland Tanzania, total raw material purchases were at TZS 15,070,007 million, with local sources accounting for 9,251,604 million (61.4 percent) and imports 5,818,402 million (38.6 percent). Manufacturing remained the largest consumer with TZS 12,371,152 million (82.1 percent), of which 6,579,429 million (53.2 percent) were local and 5,791,723 million (46.8 percent) imported. Mining and quarrying purchased TZS 1,852,592 million, almost entirely local (1,847,135 million, 99.7 percent). Electricity, gas, steam, and air conditioning supply had TZS 600,796 million, while water supply and waste management recorded TZS 245,466 million, both mostly sourced locally.

In Zanzibar, total raw material purchases were TZS 40,279 million, with local sources contributing 29,867 million (74.2 percent) and imports 10,412 million (25.8 percent). Manufacturing dominated with TZS 38,098 million (94.6 percent of total purchases), sourcing 27,686 million (72.7 percent) locally and 10,412 million (27.3 percent) from imports. Mining and water supply were minor contributors at TZS 2,147 million and TZS 35 million, entirely sourced locally.



Table 5. 3: Value of Raw Materials by Industrial sector and Source for Large Establishments, Tanzania CIP-2023

(TZS Million)

Industrial Sector	Imported		Local		Total	
	Value	Percent	Value	Percent	Value	Percent
Tanzania						
Mining and quarrying	5,457	0.3	1,849,282	99.7	1,854,739	12.3
Manufacturing	5,802,135	46.8	6,607,115	53.2	12,409,250	82.1
Electricity gas steam and air conditioning supply	14,309	2.4	586,487	97.6	600,796	4.0
Water supply; sewerage waste management and remediation activities	6,913	2.8	238,588	97.2	245,501	1.6
Total	5,828,814	38.6	9,281,472	61.4	15,110,286	100
Mainland Tanzania						
Mining and quarrying	5,457	0.3	1,847,135	99.7	1,852,592	12.3
Manufacturing	5,791,723	46.8	6,579,429	53.2	12,371,152	82.1
Electricity gas steam and air conditioning supply	14,309	2.4	586,487	97.6	600,796	4.0
Water supply; sewerage waste management and remediation activities	6,913	2.8	238,553	97.2	245,466	1.6
Total	5,818,402	38.6	9,251,604	61.4	15,070,007	100
Zanzibar						
Mining and quarrying	0	0.0	2,147	100	2,147	5.3
Manufacturing	10,412	27.3	27,686	72.7	38,098	94.6
Electricity gas steam and air conditioning supply	0	0.0	0	0.0	0	0.0
Water supply; sewerage waste management and remediation activities	0	0.0	35	100	35	0.1
Total	10,412	25.8	29,867	74.2	40,279	100

5.4 Industrial Services

Industrial services are expenses for specialized industrial tasks provided by external entities, including contracted work, equipment maintenance, waste management, technical support, product certification, market research, and auxiliary services such as packaging, soil excavation, and logistics.

Table 5.4 presents, industrial services expenditure making up TZS 873,015 million in Tanzania, with the largest share allocated to repairs, maintenance, and installation works at 43.1 percent, reflecting the critical role of equipment upkeep in industrial operations. Contract and commission work followed at 30.2 percent, covering outsourced specialized tasks and project contracts. Other notable services include engineering and technical services (8.9 percent).

In Mainland Tanzania, the total expenditure on industrial services was TZS 870,335 million, closely reflecting the national total. The distribution of services shows repairs and maintenance as the largest component at 42.9 percent, followed by contract and commission work at 30.3 percent. In Zanzibar, industrial services are minimal, with



amount of TZS 2,680 million, with repairs, maintenance, and installation works dominating at 85.2 percent. Other notable expenditures include engineering and technical services (4.3 percent).

Table 5. 4: Costs from Industrial Services by Industrial sector for Large Establishments, Tanzania CIP-2023

(TZS Million)					
Industrial Sector	Contract and commission	Repairs maintenance and installation	Engineering and technical services	Other	Total
Tanzania					
Mining and quarrying	83,114	81,249	30,392	52,797	247,553
Manufacturing	155,864	262,703	44,880	82,889	546,335
Electricity gas steam and air conditioning supply	5,850	17,637	2,190	138	25,816
Water supply; sewerage waste management and remediation activities	19,122	14,364	608	19,218	53,311
Total	263,950	375,954	78,071	155,041	873,015
Percent	30.2	43.1	8.9	17.8	100
Mainland Tanzania					
Mining and quarrying	83,114	81,226	30,392	52,793	247,526
Manufacturing	155,864	260,445	44,766	82,608	543,683
Electricity gas steam and air conditioning supply	5,850	17,637	2,190	138	25,816
Water supply; sewerage waste management and remediation activities	19,122	14,364	608	19,218	53,311
Total	263,950	373,672	77,956	154,758	870,335
Percent	30.3	42.9	9	17.8	100
Zanzibar					
Mining and quarrying	0	23	0	4	27
Manufacturing	0	2,258	114	279	2,652
Electricity gas steam and air conditioning supply	0	0	0	0	0
Water supply; sewerage waste management and remediation activities	0	0	0	0	0
Total	0	2,282	114	283	2,680
Percent	0	85.2	4.3	10.6	100

5.5 Non-Industrial Services

Non-industrial services refer to support services acquired from external providers that facilitate business operations but are not directly involved in the industrial production process. These services include the Telephone, internet, postage and other communication costs, Cost of repairs and maintenance of buildings and structures, Rental of Buildings, Machinery, Plant and Equipment, Storage and hire transport, bank charges, Consultancy and other professional fees, security services, marketing and publicity, cleaning services and other ancillary services.



Table 5.5 presents the distribution of service-related operating costs in the industrial sector in Tanzania, with total expenditure amounting to TZS 1,109,188 million. At the national level, the largest share of expenditure was recorded in storage and hire transport services (24.6 percent). This was followed by marketing and publicity (9.4 percent), repairs and maintenance of buildings and structures (9.0 percent), and security services (8.9 percent). Expenditure on rental of buildings, machinery, plant and equipment accounted for 8.8 percent, while consultancy and other professional fees contributed 8.7 percent. The remaining proportion was categorized under other services (30.6 percent). The manufacturing sector recorded the highest expenditure at TZS 925,193 million, representing the largest share of total industrial service costs.

In Mainland Tanzania, total non-industrial service costs were also dominated by storage and hire transport services (24.6 percent). Other important expenditure categories included marketing and publicity (9.5 percent), repairs and maintenance of buildings and structures (9.0 percent), and security services (8.8 percent). Expenditure on rental of buildings, machinery, plant and equipment accounted for 8.8 percent, while consultancy and professional fees contributed 8.7 percent. The manufacturing sector remained the main contributor to industrial service costs, recording TZS 925,193 million, reflecting the concentration of industrial activities within this sector.

In Zanzibar, the highest proportion non-industrial service costs were recorded in security services (33.0 percent), followed by other services (19.3 percent) and repairs and maintenance of buildings and structures (19.1 percent). Storage and hire transport services accounted for 10.6 percent, while consultancy and other professional fees (5.4 percent) and marketing and publicity services (4.4 percent) recorded the smallest shares. The manufacturing sector accounted for TZS 1,917 million (98.6 percent) of total industrial service costs, while mining and quarrying contributed TZS 27 million (1.4 percent). No expenditure was recorded for electricity, gas, steam and air conditioning supply, and water supply; sewerage, waste management and remediation activities.



Table 5.5: Cost of Non-Industrial Services for Large Establishments by Industrial sector, Tanzania, CIP-2023

								(TZS Million)
Industrial Sector	Repairs and maintenance of buildings and structure	Rental of buildings, machinery plant and equipment	Storage and hire transport	Consultancy and other professional fees	Security Services	Marketing and publicity	Other	Total
Tanzania								
Mining and quarrying	4,620	6,683	6,293	11,855	24,956	503	54,735	109,646
Manufacturing	90,105	88,232	262,131	77,692	58,094	99,810	249,128	925,193
Electricity gas steam and air conditioning supply	2,498	1,199	2,112	338	3,815	367	5,291	15,621
Water supply; sewerage waste management and remediation activities	2,433	1,084	1,797	7,140	11,707	4,081	30,487	58,728
Total	99,655	97,198	272,333	97,026	98,573	104,762	339,641	1,109,188
Percent	9.0	8.8	24.6	8.7	8.9	9.4	30.6	100
Mainland Tanzania								
Mining and quarrying	4,613	6,680	6,293	11,855	24,941	503	54,733	109,619
Manufacturing	89,741	88,077	261,925	77,587	57,468	99,725	248,754	923,276
Electricity gas steam and air conditioning supply	2,498	1,199	2,112	338	3,815	367	5,291	15,621
Water supply; sewerage waste management and remediation activities	2,433	1,084	1,797	7,140	11,707	4,081	30,487	58,728
Total	99,284	97,040	272,127	96,920	97,932	104,677	339,265	1,107,244
Percent	9.0	8.8	24.6	8.8	8.8	9.5	30.6	100
Zanzibar								
Mining and quarrying	7	4	0	0	15	0	2	27
Manufacturing	364	155	206	106	626	85	375	1,917
Electricity gas steam and air conditioning supply	0	0	0	0	0	0	0	0
Water supply; sewerage waste management and remediation activities	0	0	0	0	0	0	0	0
Total	371	158	206	106	641	85	376	1,944
Percent	19.1	8.2	10.6	5.4	33.0	4.4	19.3	100



5.6 Other Expenses

These are costs incurred from service-related transactions not covered in the previous classifications for the large establishments. These include Patents, royalties and copyright, interests paid excluding bank charges, dividends paid, insurance paid, income tax, net value-added tax paid, licenses, other taxes on production, public relations and donation, and others as shown in Table 5.6.

The results show the distribution of other operating expenses incurred by industrial establishments in Tanzania. Overall, total expenses amounted to TZS 4,901,346 million, with the largest share attributed to Net VAT paid (27.2 percent), followed by other taxes (23.7 percent) and income tax (12.8 percent). Financial costs such as interest paid excluding bank charges accounted for 9.0 percent, while patents, royalties and copyrights represented 8.0 percent of total expenses. These results indicate that tax-related obligations constitute the largest component of industrial operating expenses.

In Mainland Tanzania, a total expense reached TZS 4,894,791 million, with taxes and VAT forming the largest portion of expenditures. In Zanzibar recorded a much smaller total of TZS 6,555 million, with interest payments (23.1 percent), other taxes (21.7 percent), and dividends paid accounted for (19.3 percent) of expenses. Overall, the results suggest that taxes and financial obligations are key components of other industrial expenditure, particularly in Mainland Tanzania where most industrial activity is concentrated.

Table 5. 6: Other Expenses for Large Establishments by Industrial Sector, Tanzania CIP-2023

(TZS Million)

Expenses	Tanzania		Mainland Tanzania		Zanzibar	
	Value	Percent	Value	Percent	Value	Percent
Patents royalties and copyrights	392,591	8.0	392,583	8.0	7	0.1
Interests paid excluding bank charges	443,027	9.0	441,512	9.0	1,515	23.1
Dividends paid	360,696	7.4	359,434	7.3	1,262	19.3
Insurance paid	189,678	3.9	189,553	3.9	125	1.9
Income tax	625,733	12.8	624,820	12.8	913	13.9
Net VAT paid	1,332,320	27.2	1,331,192	27.2	1,128	17.2
Licenses	91,331	1.9	91,167	1.9	164	2.5
Other taxes	1,161,380	23.7	1,159,958	23.7	1,422	21.7
Public relation and donation	146,307	3.0	146,289	3.0	19	0.3
Other	158,283	3.2	158,283	3.2	-	-
Total	4,901,346	100.0	4,894,791	100.0	6,555	100.0



Chapter Six

Value of Inventories and Fixed Assets

6.0 Introduction

This chapter presents the value of inventories and fixed assets in the industrial sector for the year 2023. The analysis focuses on the composition and evolution of industrial stocks, namely materials and supplies, work in progress (semi-finished products), and finished goods in Tanzania. The objective is to provide insights into asset allocation and stock dynamics within establishments during the reference period.

6.1 Value of Stocks for Large Establishments

Table 6.1 presents the value and composition of inventories held by industrial establishments at the beginning and end of the reference period in Tanzania. At the beginning of the period, total inventories amounted to 6,077,731 million, with the manufacturing subsector accounting for the largest share (70.5 percent), followed by electricity, gas, steam and air conditioning supply (24.3 percent) and mining and quarrying (3.5 percent). In terms of inventory composition, materials and suppliers constituted the largest component (55.0 percent), followed by fuel (13.8 percent) and goods purchased (13.0 percent), indicating that most inventories were held in the form of raw materials and production inputs required for industrial activities.

By the end of the period, total inventories declined to 5,210,931 million, although the overall distribution remained largely unchanged. The manufacturing sector continued to dominate with 72.0 percent of total inventories, while electricity supply accounted for 22.3 percent and mining and quarrying for 4.1 percent. Materials and supplies remained the largest component at 54.5 percent, while the share of goods purchased increased to 19.2 percent and finished products rose to 11.7 percent, suggesting an increase in completed goods and purchased items held by establishments toward the end of the period.



Table 6. 1: Value and Percentage of Stocks by Industrial Sector for Large Establishments, Tanzania, CIP-2023,

(TZS Million)							
Industrial Sector	Materials and Supplies	Fuel	Work in progress	Finished products	Goods Purchased	Other	Total Percent
At the beginning							
Mining and quarrying	136,550	20,393	10,406	7,493	15,705	19,342	209,888 3.5
Manufacturing	1,671,311	816,436	241,529	512,169	762,000	280,896	4,284,342 70.5
Electricity gas steam and air conditioning supply	1,475,396	600	50	1,847	3,296	714	1,481,903 24.3
Water supply; sewerage waste management and remediation activities	57,498	2,540	14,364	1,973	12,862	12,361	101,598 1.7
Total	3,340,755	839,969	266,348	523,482	793,864	313,313	6,077,731 100.0
Percent	55.0	13.8	4.4	8.6	13.0	5.2	100.0
At the end							
Mining and quarrying	91,426	15,966	11,088	15,350	58,931	19,989	212,750 4.1
Manufacturing	1,552,036	85,418	272,901	587,074	923,129	329,012	3,749,571 72.0
Electricity gas steam and air conditioning supply	1,157,795	865	54	2,008	3,715	966	1,165,403 22.3
Water supply; sewerage waste management and remediation activities	35,413	3,778	14,588	2,850	17,065	9,513	83,207 1.6
Total	2,836,670	106,027	298,631	607,281	1,002,840	359,481	5,210,931 100.0
Percent	54.5	2.0	5.7	11.7	19.2	6.9	100.0

6.2 Value of Stocks for Small Establishments

Table 6.2 presents the distribution of inventories by type and industrial sector in Tanzania measured at the end of the period. Overall, the total value of inventories in the industrial sector amounted to TZS 280,871 million, with the manufacturing sector accounting for the largest share (85.3 percent), followed by mining and quarrying (14.1 percent), while electricity and water-related activities contributed only a small proportion. In terms of inventory composition, goods purchased represented the largest share (33.9 percent) of total inventories, followed by finished products (27.7 percent) and materials and supplies (27.3 percent). These results indicate that industrial establishments mainly held inventories in the form of goods purchased for resale and finished products ready for the market.

A total inventory in Mainland Tanzania reached TZS 265,902 million, with manufacturing dominating inventory holdings at 84.5 percent. In contrast, Zanzibar recorded a much smaller total inventory value of TZS 14,969 million, almost entirely driven by the manufacturing subsector (99.1 percent). In Zanzibar, goods purchased accounted for the largest share of inventories (53 percent) followed by finished products (36.2 percent).

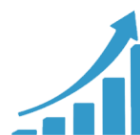


Table 6. 2: Value of Stocks by Industrial Sector Small Establishments, Tanzania, CIP-2023

TZS Million								
Industrial Sector	Material and supplies	Fuel	Work in progress	Finished products	Goods Purchased	Other	Total	Percent
Tanzania								
Mining and quarrying	17,221	955	10,842	4,802	5,638	87	39,545	14.1
Manufacturing	59,253	1,536	17,356	71,683	89,525	286	239,639	85.3
Electricity gas steam and air conditioning supply	1	28	11	11	17	0	68	0.0
Water supply; sewerage waste management and remediation activities	194	20	0	1,214	173	18	1,619	0.6
Total	76,669	2,539	28,209	77,710	95,353	391	280,871	100.0
Percent	27.3	0.9	10.1	27.7	33.9	0.1	100.0	
Mainland Tanzania								
Mining and quarrying	17,197	950	10,821	4,711	5,638	87	39,404	14.8
Manufacturing	58,659	1,460	16,471	66,356	81,590	275	224,811	84.5
Electricity gas steam and air conditioning supply	1	28	11	11	17	0	68	0.1
Water supply; sewerage waste management and remediation activities	194	20	0	1,214	173	18	1,619	0.6
Total	76,051	2,458	27,303	72,292	87,418	380	265,902	100.0
Percent	28.6	0.9	10.3	27.2	32.9	0.1	100.0	
Zanzibar								
Mining and quarrying	24	5	21	91	0	0	141	0.9
Manufacturing	594	76	885	5,327	7,935	11	14,828	99.1
Electricity gas steam and air conditioning supply	0	0	0	0	0	0	0	0.0
Water supply; sewerage waste management and remediation activities	0	0	0	0	0	0	0	0.0
Total	618	81	906	5,418	7,935	11	14,969	100.0
Percent	4.1	0.5	6.1	36.2	53	0.1	100.0	

6.3 Value of Fixed Assets

Fixed assets, also referred to as non-current assets or property, plant, and equipment, represent long-term investments in industrial infrastructure and production capacity. These assets are not readily convertible into cash and are subject to standard accounting treatments, including depreciation (for tangible assets), amortization (for intangible assets), impairment adjustments, and disposal accounting. In financial records, fixed assets are reported a net book value, calculated as the original cost-plus additions, minus disposals and depreciation over the accounting period.

6.4 Value of Fixed Assets at the Beginning

Table 6.3 presents the distribution of fixed assets at the beginning of the reference period by type and industrial sector for large establishments in Tanzania. Overall, the total value of fixed assets in the industrial sector amounted to TZS 22,556,314 million, with the



manufacturing sector accounting for the largest share (62.6 percent), followed by water supply, sewerage, waste management and remediation activities (16.2 percent), mining and quarrying (13.3 percent) and electricity, gas, steam and air conditioning supply (7.9 percent). In terms of asset composition, machinery and other equipment constituted the largest share (40.8 percent) of total fixed assets, reflecting the capital-intensive nature of industrial production. This was followed by buildings and other construction works (17.6 percent), other assets (15.4 percent) and land (15.3 percent), while transport equipment (5.4 percent), mineral exploration (3.3 percent) and other categories accounted for relatively smaller shares.

In Mainland Tanzania, a total fixed assets reached TZS 22,441,006 million, with manufacturing dominating the asset structure at 62.4 percent. In Zanzibar recorded a significantly smaller total of TZS 115,308 million, largely concentrated in the manufacturing subsector (98.1 percent), followed by land (62.6 percent) and machinery and other equipment (25.8 percent) constituted the largest components of fixed assets, followed by buildings and construction works (9.6 percent).



Table 6. 3: Value of Fixed Assets at the Beginning by Industrial Sector and Type of Asset, Large Establishments, CIP-2023

(TZS Million)										
Industrial Sector	Land	Buildings and other construction works	Transport equipment	Machinery and other equipment	Computer and other data processing equipment	Furniture and Fittings	Mineral explorat ion	Others	Total	Percent
Tanzania										
Mining and quarrying	80,984	188,831	374,659	699,603	6,706	7,807	135,060	1,491,552	2,985,202	13.3
Manufacturing	3,112,641	2,702,235	735,546	5,942,738	185,617	138,416	597,514	709,423	14,124,130	62.6
Electricity gas steam and air conditioning supply	85,762	233,073	27,912	1,440,362	2,429	1,941	0	894	1,792,373	7.9
Water supply; sewerage waste management and remediation activities	164,861	847,838	83,000	1,127,608	21,909	126,096	2,560	1,280,737	3,654,609	16.2
Total	3,444,248	3,971,977	1,221,117	9,210,311	216,661	274,260	735,134	3,482,606	22,556,314	100.0
Percent	15.3	17.6	5.4	40.8	1.0	1.2	3.3	15.4	100.0	
Mainland Tanzania										
Mining and quarrying	79,255	188,747	374,619	699,259	6,706	7,807	135,060	1,491,552	2,983,005	13.3
Manufacturing	3,042,196	2,691,219	733,635	5,913,328	185,422	138,282	597,514	709,423	14,011,019	62.4
Electricity gas steam and air conditioning supply	85,762	233,073	27,912	1,440,362	2,429	1,941	0	894	1,792,373	8.0
Water supply; sewerage waste management and remediation activities	164,861	847,838	83,000	1,127,608	21,909	126,096	2,560	1,280,737	3,654,609	16.3
Total	3,372,074	3,960,877	1,219,166	9,180,557	216,466	274,126	735,134	3,482,606	22,441,006	100.0
Percent	15.0	17.7	5.4	40.9	1.0	1.2	3.3	15.5	100.0	
Zanzibar										
Mining and quarrying	1,729	85	40	343	0	0	0	0	2,197	1.9
Manufacturing	70,444	11,016	1,912	29,411	195	133	0	0	113,111	98.1
Electricity gas steam and air conditioning supply	0	0	0	0	0	0	0	0	0	0.0
Water supply; sewerage waste management and remediation activities	0	0	0	0	0	0	0	0	0	0.0
Total	72,173	11,101	1,952	29,754	195	133	0	0	115,308	100.0
Percent	62.6	9.6	1.7	25.8	0.2	0.1	0.0	0.0	100.0	

6.5 Net Value of Fixed Assets at the End

Table 6.4 presents the distribution of value fixed assets at the end of the reference period by type and industrial sector for large establishments in Tanzania. Overall, the total value of fixed assets at the end of the period amounted to TZS 25,234,089 million, with the manufacturing sector accounting for the largest share (65.4 percent), followed by water supply, sewerage, waste management and remediation activities (14.6 percent) and mining and quarrying (13.0 percent), while electricity, gas, steam and air conditioning supply contributed 7.1 percent. In terms of asset composition, machinery and other equipment remained the largest component (39.1 percent) of total fixed assets, followed by land (19.0 percent) and buildings and other construction works (17.3 percent).

In Mainland Tanzania, a total fixed assets reached TZS 25,075,861 million, with manufacturing dominating the asset structure at 65.2 percent. In Zanzibar recorded a much smaller total fixed asset value of TZS 158,227 million, largely concentrated in the manufacturing subsector (97.5 percent) while land accounted for the largest share of assets (62.9 percent) followed by machinery and other equipment (25.8 percent) and buildings and construction works (9.1 percent).



Table 6. 4: Value of Fixed Assets at the End by Industrial Sector and Type of Asset, Tanzania, CIP-2023

(TZS Million)										
Industrial Sector	Land	Buildings and other construction works	Transport equipment	Machinery and other equipment	Computer and other data processing equipment	Furniture and Fittings	Mineral exploration	Others	Total	Percent
Tanzania										
Mining and quarrying	103,721	242,825	403,806	764,022	7,741	9,114	192,736	1,544,448	3,268,412	13.0
Manufacturing	4,439,451	3,041,684	823,859	6,511,998	200,108	154,327	599,883	723,974	16,495,285	65.4
Electricity gas steam and air conditioning supply	85,838	233,194	28,006	1,442,796	2,499	2,125	-	915	1,795,373	7.1
Water supply; sewerage waste management and remediation activities	166,830	853,250	85,321	1,136,768	22,353	126,317	2,595	1,281,584	3,675,019	14.6
Total	4,795,840	4,370,953	1,340,992	9,855,584	232,702	291,883	795,213	3,550,921	25,234,089	100.0
Percent	19.0	17.3	5.3	39.1	0.9	1.2	3.2	14.1	100.0	
Mainland Tanzania										
Mining and quarrying	100,777	242,659	403,521	763,421	7,740	9,114	192,736	1,544,448	3,264,416	13.0
Manufacturing	4,342,846	3,027,408	821,199	6,471,718	199,897	154,151	599,868	723,971	16,341,058	65.2
Electricity gas steam and air conditioning supply	85,838	233,194	28,006	1,442,796	2,499	2,125	-	915	1,795,373	7.2
Water supply; sewerage waste management and remediation activities	166,826	853,250	85,321	1,136,768	22,353	126,317	2,595	1,281,584	3,675,015	14.7
Total	4,696,287	4,356,511	1,338,046	9,814,703	232,490	291,707	795,198	3,550,919	25,075,861	100.0
Percent	18.7	17.4	5.3	39.1	0.9	1.2	3.2	14.2	100.0	
Zanzibar										
Mining and quarrying	2,944	166	285	601	1	-	-	-	3,996	2.5
Manufacturing	96,605	14,276	2,661	40,280	211	176	15	3	154,227	97.5
Electricity gas steam and air conditioning supply	-	-	-	-	-	-	-	-	-	0.0
Water supply; sewerage waste management and remediation activities	4	-	-	-	-	-	-	-	4	0.0
Total	99,553	14,441	2,946	40,881	212	176	15	3	158,227	100.0
Percent	62.9	9.1	1.9	25.8	0.1	0.1	0.0	0.0	100.0	

Table 6.5 shows the net value of fixed assets by type and industrial sector. Large establishments in Tanzania held net value of fixed assets worth TZS 23,026,441 million at the end of 2023, compared with TZS 22,556,313 million at the beginning of the year. This represents an increase of about TZS 470,128 million, mainly reflecting investment in new assets. Machinery and other equipment accounted for the largest increase, rising from TZS 9,210,311 million to TZS 9,407,312 million, followed by buildings and other construction works and land. Overall, additions through purchases amounted to TZS 668,679 million, while own-produced assets added TZS 140,419 million. Disposals were relatively small at TZS 61,170 million, compared with a depreciation charge of TZS 277,800 million, indicating continued investment in the industrial asset base.

Manufacturing accounted for the largest share of the increase, with fixed assets rising from TZS 14,124,131 million to TZS 14,499,827 million. Machinery and other equipment were the main asset in this sector, increasing from TZS 5,942,738 million to TZS 6,125,899 million, supported by TZS 608,493 million for the purchased assets. Mining and quarrying recorded fixed assets of TZS 3,071,360 million at the end of the year, while electricity, gas, steam and air conditioning supply reached TZS 1,793,686 million, largely driven by machinery and equipment. Water supply, sewerage, waste management and remediation activities recorded the net value of fixed asset of TZS 3,661,568 million, with buildings, machinery and other assets making substantial contributions.



Table 6. 5: Net Value of Fixed Assets at the End by Industrial Sector for Large Establishments, Tanzania, CIP-2023

(TZS Million)						
Industrial Sector	Value at the Beginning	Additions		Disposal	Depreciation	Net Value at the End
		Purchased	Own Production			
Total						
Land	3,444,247	52,935	0	9,599	0	3,487,584
Buildings and other construction works	3,971,977	119,972	26,390	7,271	33,007	4,078,061
Transport equipment	1,221,118	72,587	10,309	8,899	35,364	1,259,752
Machinery and other equipment	9,210,311	348,859	54,086	21,092	184,852	9,407,313
Computer and other data processing equipment	216,660	17,937	23	201	5,837	228,582
Furniture and Fittings	274,260	13,228	1,125	485	5,887	282,241
Mineral exploration	735,134	2,472	45	274	361	737,016
Others (specify)	3,482,606	40,688	48,441	13,350	12,493	3,545,893
Total	22,556,313	668,679	140,419	61,170	277,800	23,026,441
Mining and quarrying						
Land	80,984	1,038	0	305	0	81,716
Buildings and other construction work	188,831	12,730	6,036	11	1,991	205,595
Transport equipment	374,659	5,081	13	422	764	378,568
Machinery and other equipment	699,603	16,300	47,224	270	51,916	710,941
Computer and other data processing equipment	6,706	744	9	6	587	6,866
Furniture and Fittings	7,807	844	74	26	534	8,166
Mineral exploration	135,060	172	45	17	129	135,130
Others	1,491,552	7,782	46,771	294	1,430	1,544,380
Total	2,985,201	44,691	100,171	1,353	57,350	3,071,361
Manufacturing						
Land	3,112,641	50,884	0	9,292	0	3,154,233
Buildings and other construction work	2,702,235	103,748	20,145	7,134	29,523	2,789,471
Transport equipment	735,546	65,475	10,226	8,365	33,823	769,059
Machinery and other equipment	5,942,738	327,600	6,854	20,683	130,610	6,125,900
Computer and other data processing equipment	185,617	16,520	8	154	4,935	197,056
Furniture and Fittings	138,416	11,106	854	205	4,367	145,803
Mineral exploration	597,514	2,147	0	257	113	599,291
Others	709,423	31,013	1,670	13,055	10,038	719,013
Total	14,124,131	608,493	39,757	59,145	213,409	14,499,826

Industrial Sector	Value at the Beginning	Additions		Disposal	Depreciation	Net Value at the End
		Purchased	Own Production			
Electricity gas steam and air conditioning supply						
Land	85,762	26	0	0	0	85,787
Buildings and other construction work	233,073	138	1	0	58	233,153
Transport equipment	27,912	103	5	0	44	27,976
Machinery and other equipment	1,440,362	1,513	3	3	633	1,441,242
Computer and other data processing equipment	2,429	177	5	3	116	2,492
Furniture and Fittings	1,941	14	196	0	32	2,119
Mineral exploration	0	0	0	0	0	0
Others	894	34	0	0	13	915
Total	1,792,373	2,006	210	6	897	1,793,686
Water supply; sewerage waste management and remediation activities						
Land	164,861	987	0	1	0	165,847
Buildings and other construction work	847,838	3,356	209	126	1,435	849,842
Transport equipment	83,000	1,928	65	111	732	84,150
Machinery and other equipment	1,127,608	3,446	5	137	1,692	1,129,230
Computer and other data processing equipment	21,909	495	1	38	199	22,167
Furniture and Fittings	126,096	1,265	1	254	954	126,153
Mineral exploration	2,560	154	0	0	119	2,595
Others	1,280,737	1,859	0	0	1,011	1,281,584
Total	3,654,607	13,490	281	667	6,143	3,661,568

Chapter Seven

Business Environment and Establishments Competitiveness

7.0 Introduction

The business environment in Tanzania presents a complex interplay of regulatory, infrastructural, and institutional factors that shape the performance and competitiveness of establishments. The business environment plays a vital role in shaping the performance and growth of industrial establishments, as it encompasses a range of internal and external factors such as economic conditions, government policies, infrastructure, access to finance, technology, and market dynamics. In the context of an industrial census, understanding these factors is essential for interpreting industrial performance and identifying the opportunities and challenges faced by establishments. The information generated provides important insights for policymakers and stakeholders to design effective strategies that promote industrial development, enhance competitiveness, and support sustainable economic growth.

7.1 Business Registration

Business formalization is the process through which enterprises become officially registered and comply with applicable legal, tax, and regulatory requirements. Membership in organizations such as the Confederation of Tanzania Industries (CTI), Manufacturing Council of Zanzibar (MCZ), and the Tanzania Chamber of Commerce, Industry and Agriculture (TCCIA) e.t.c facilitates this process by supporting business reforms, enhancing access to training and market information, and representing industrial interests.

The results in Table 7.1 shows that membership of establishments in any business associations in Tanzania is concentrated in a few key organizations, with the Tanzania Chamber of Commerce, Industry and Agriculture (TCCIA) having the highest frequency of 572, followed by the Confederation of Tanzania Industries (CTI) at 493. Other notable associations include the Association of Tanzania Employers (ATE) (247), Tanzania Construction Materials Employers (TCME) (214) and Tanzania Private Sector Foundation (TPSF) (179), and. In Mainland Tanzania, with most establishments affiliated to TCCIA (572) and CTI (493). In Zanzibar, membership to association is mainly in the Manufacturers' Council of Zanzibar (MCZ) (11) and Zanzibar National Chamber of Commerce (ZNCC) (7).



Table 7. 1: Frequency distribution of Establishment by type of Membership to any Association, Tanzania, CIP 2023

Membership	TCCIA	CTI	Other	ATE	TCME	TPSF	ASSP	MCZ	ZNCC
Tanzania	572	493	337	247	214	179	62	11	7
Mainland Tanzania	572	493	334	247	214	179	60	0	0
Zanzibar	0	0	3	0	0	0	2	11	7

Note: This table involves multiple responses "0" means membership association Not Applicable

7.2 Establishments Awareness of Industry and business organization Functions

The findings indicate that awareness of business associations among establishments in Tanzania was highest for the Confederation of Tanzania Industries (CTI), with 1,309 establishments, followed by the Tanzania Chamber of Commerce, Industry and Agriculture (TCCIA) with 970 establishments. Other associations with notable awareness levels included the Association of Tanzania Employers (ATE) (462 establishments), Tanzania Private Sector Foundation (TPSF) (439 establishments), and the Tanzania Chamber of Minerals and Energy (TCME) (406 establishments), as presented in Table 7.2.

In Mainland Tanzania, awareness among establishments was reported for CTI, with 1,298 establishments, followed by TCCIA (966 establishments), ATE (457 establishments), TPSF (435 establishments), and TCME (403 establishments). This indicates that national business and industry-related associations had higher recognition among establishments operating in Mainland Tanzania.

In Zanzibar, awareness was concentrated on Zanzibar-based associations, with the Manufacturers' Council of Zanzibar (MCZ) recording the highest awareness (40 establishments), followed by the Zanzibar National Chamber of Commerce (ZNCC) (17 establishments) and Zanzibar National Association of Microfinance and Enterprises (ZANEMA) (11 establishments). Awareness of national associations was lower, with CTI reported by 11 establishments.

Table 7. 2: Frequency distribution of Establishment Awareness of Association services/functions by Industrial Sector Tanzania, CIP 2023

Awareness to Associations	Not aware	CTI	TCCIA	ATE	TPSF	TCME	ASSP	Other	MCZ	ZNCC	ZANEMA
Tanzania	2,181	1,309	970	462	439	406	218	112	40	17	11
Mainland Tanzania	1,932	1,298	966	457	435	403	210	105	0	0	0
Zanzibar	249	11	4	5	4	3	8	7	40	17	11

Note: This table involves multiple responses

7.3 Registration Status of Establishments

The results indicate that majority of establishments in Tanzania are registered with any licenses or certificates, though compliance varies by size and location. Overall results in table 7.3 show that among small establishments, 54.8 percent were registered, while 45.2



percent were not registered. For large establishments, 3,654 (80.6 percent) were registered, whereas 881 (19.4 percent) were not registered. This indicates that registration was higher among large establishments compared to small establishments.

In Mainland Tanzania, small establishments 55.9 percent were registered, while 44.1 percent were not registered. Large establishments totalled 4,228, of which 81.6 percent were registered and 18.4 percent were not registered. The results show that formal registration was more common among large establishments, while a considerable proportion of small establishments remained unregistered.

In Zanzibar, there were 3,293 small establishments and 307 large establishments. Among small establishments, 38.1 percent were registered, while 61.9 percent were not registered. For large establishments, 66.1 percent were registered and 33.9 percent were not registered. The findings indicate that small establishments constituted the largest share of unregistered establishments in Zanzibar, while large establishments had higher registration levels.

Table 7. 3: Registration Status by Location and Establishments Size, Tanzania, CIP 2023

Establishment Size	Location	Tanzania		Mainland Tanzania		Zanzibar	
	Registered	Number	Percent	Number	Percent	Number	Percent
Small (1-90)	Yes	29,104	54.8	27,849	55.9	1,255	38.1
	No	24,045	45.2	22,007	44.1	2,038	61.9
	Total	53,149	100	49,856	100	3,293	100
Large (10+)	Yes	3,654	80.6	3,451	81.6	203	66.1
	No	881	19.4	777	18.4	104	33.9
	Total	4,535	100	4,228	100	307	100
	Yes	32,758	56.8	31,300	57.9	1,458	40.5
	No	24,926	43.2	22,784	42.1	2,142	59.5
	Total	57,684	100.0	54,084	100.0	3,600	100

7.4 Reasons for Non- Registration in Tanzania

The findings in Table 7.4 show that large establishments report multiple reasons for non-registration, with no single dominant factor. Among large establishments the main reason reported for not being registered was financial problems (30.8 percent), followed by bureaucratic procedures (26.8 percent) and other reasons (26.0 percent). A further 24.1 percent indicated that they did not see the need for registration, while 21.5 percent reported being very small businesses

Small establishments are primarily constrained by their size, with 57.4 percent reporting that they are too small to require registration. Financial problems are also significant at 42.1 percent, while 15.9 percent cite bureaucratic procedures. Zanzibar has slightly higher proportions of establishments citing small size (58.5 percent) and financial



constraints (44.9 percent) compared to Mainland Tanzania. These results highlight the need for targeted interventions to support small businesses, particularly by reducing financial barriers and simplifying registration processes to encourage formalization.

Table 7. 4: Percentage for Non-Registration Reasons by size, Tanzania, CIP 2023

Establishment size	Reason	Financial problems	Bureaucratic procedures	Very small business	Does not see the need	Other
Large (10+)	Tanzania	30.8	26.8	21.5	24.1	26
	Mainland Tanzania	30.9	27.3	19.9	25	27.7
	Zanzibar	29.8	23.1	32.7	17.3	13.5
Small (1-9)	Tanzania	42.1	15.9	57.4	3.6	10.8
	Mainland Tanzania	41.9	16.3	57.3	2.9	11.1
	Zanzibar	44.9	10.9	58.5	10.9	7.4

Note: This table involves multiple responses

7.5 Tenure of buildings

Tenure of buildings refers to the type of occupancy or legal arrangement through which an establishment uses its operating premises. The results in Table 7.5 show that large establishments buildings in Tanzania are predominantly wholly owned (67.5 percent), followed by wholly rented (17.8 percent) and partly rented (13.3 percent). This indicates that large establishment tend to invest in owning their premises, reflecting stronger financial capacity and long-term business stability. In contrast, small establishments buildings are mainly wholly rented (59.5 percent), while only 34.8 percent are wholly owned, suggesting limited access to capital and a greater reliance on rental arrangements to operate.

In Zanzibar, ownership of buildings among small establishments is relatively higher (45.7 percent) compared to the Mainland Tanzania with 34.1 percent, while the percentage of wholly rented for small businesses is lower. For large establishments, Zanzibar shows slightly higher ownership of buildings with 70.0 percent compared to Mainland Tanzania with 67.4 percent.

Table 7. 5: Percentage Distribution of Establishments by Type of Tenure and Size, Tanzania, CIP 2023

Tenure	Large Establishments			Small Establishments		
	Tanzania	Mainland Tanzania	Zanzibar	Tanzania	Mainland Tanzania	Zanzibar
Wholly owned	67.5	67.4	70.0	34.8	34.1	45.7
Wholly rented	17.8	17.3	25.1	59.5	60.3	46.9
Partly rented	13.3	14.2	0.3	3.7	3.9	1
Others	1.4	1.2	4.6	2	1.7	6.4
Total	100	100	100	100	100	100



7.6 Product Quality Certification

In line with the Government's commitment to strengthening industrial quality infrastructure, several regulatory bodies exist to oversee product certification and ensure compliance with national and international standards. The results in Table 7.6 indicate that large establishments have higher levels of product certification compared to small establishments. Among large establishments in Tanzania, the most common certification authority is TBS (29.4 percent), followed by CGCLA (18.3 percent) and TMC (13.8 percent). Certifications such as TMDA (6.0 percent) and ISO (5.7 percent) are relatively limited, while 44.2 percent of products for large establishments are not certified.

Small establishments in Tanzania show very low levels of product certification, with the majority (86.5 percent) being not certified. Only a small share of establishments certifies their products under TBS (7.3 percent) and TMDA (1.6 percent). In Zanzibar is characterized by ZBS (13.7 percent) and ZFDA (13.4 percent) among large establishments, alongside a much higher share of uncertified firms (76.2 percent for large and 95.2 percent for small establishments).

Table 7. 6: Percentage Distribution on Certification of the Products by Authority and Size, Tanzania CIP 2023

Authority	Large Establishments			Small Establishments		
	Tanzania	Mainland Tanzania	Zanzibar	Tanzania	Mainland Tanzania	Zanzibar
TMDA	6.0	6.4	0.0	1.6	1.7	0.0
ISO	5.7	6.1	0.3	0.2	0.3	0.0
TBS	29.4	31.6	0.0	7.3	7.8	0.0
ZBS	0.9	0.0	13.7	0.2	0.0	2.7
ZFDA	0.9	0.0	13.4	0.1	0.0	2.4
CGCLA	18.3	19.5	2.0	1.5	1.6	0.0
TMC	13.8	14.8	0.7	1.4	1.5	0.0
CAMARTEC	1.7	1.8	0.3	0.2	0.2	0.1
Not certified	44.2	41.9	76.2	86.5	86.0	95.2
Other	4.6	4.8	1.0	3.9	4.0	2.0

Note: In this table "0" means certification authority Not Applicable

7.7 Laboratory for Quality Control

Existence of laboratory with quality control and testing facilities is one among the necessities for quality control of raw materials used in production. The results in Table 7.7 show that the majority of establishments in Tanzania lack laboratory and testing facilities, with 57.9 percent reporting no access to either. Only 23.5 percent of establishments have a laboratory with testing facilities, while 18.6 percent rely on testing facilities only. This indicates that a significant proportion of businesses operate without



adequate quality control infrastructure, which may affect product standards, compliance, and competitiveness in both domestic and international markets.

In Mainland Tanzania, access to quality control infrastructure is relatively better, with 24.1 percent having laboratories and 19.1 percent having testing facilities only, leaving 56.8 percent without any facilities. In contrast, Zanzibar shows very limited access, where only 8.6 percent of establishments have laboratories and 4.8 percent have testing facilities only, while a large majority (86.7 percent) have none.

Table 7. 7: Percentage of Establishments by Ownership of Laboratory for Quality Control and Testing Facilities, Tanzania, CIP 2023

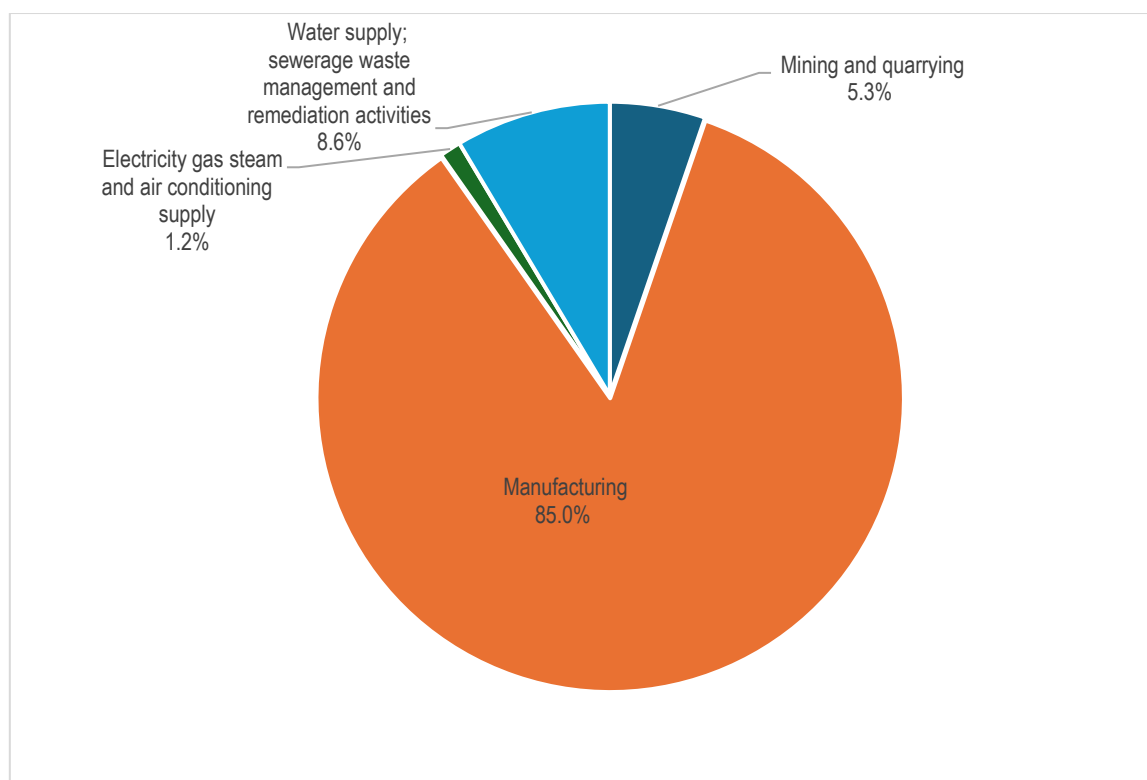
Location	Laboratory with testing facilities	Testing facilities only	None
Tanzania	23.5	18.6	57.9
Mainland Tanzania	24.1	19.1	56.8
Zanzibar	8.6	4.8	86.7

7.8 Quality Control Staff

Quality control staff are employed in establishments to ensure that products meet quality and safety standards in every stage involved from raw materials to finished products. The distribution of quality control staff across industrial sectors in Tanzania is highly concentrated in the manufacturing sector as shown in Figure 7.1, which accounts for 85.0 percent of all quality control personnel. This reflects the sector's strong emphasis on product quality, regulatory compliance, and process standardization.

Other sectors contribute relatively small shares of quality control staff, with water supply, sewerage, waste management and remediation activities accounting for 8.6 percent, followed by mining and quarrying at 5.3 percent. The electricity, gas, steam and air conditioning supply sector has the lowest share at 1.2 percent, reflecting its capital-intensive nature and reliance on automated systems rather than large quality control workforces. Overall, the distribution indicates that quality control staffing is most prominent in sectors where product quality and standardization are critical, particularly in manufacturing.



Figure 7. 1: Distribution of Quality Control Staff by Industrial Sector, Tanzania

7.9 Research and Development

Research and Development (R&D) plays a critical role in enhancing productivity, competitiveness, and sustainability across industrial sectors. However, the extent and nature of R&D activities vary significantly among manufacturing, mining and quarrying, electricity, and water-related industries.

The results in Table 7.8 show that most manufacturing engaged in Research and Development activities among large establishments in Tanzania accounting for 72.9 percent compared to 77.3 percent. This indicates that manufacturing is the leading sector in terms of participation in innovation-related activities. Other sectors such as mining and quarrying (12.3 percent) and water supply, sewerage and waste management (11.5 percent) engage modestly to R&D engagement, while electricity, gas, steam and air conditioning supply (3.2 percent) has minimal engagement. In Mainland Tanzania, manufacturing remains the dominant sector in R&D (72.6 percent of those engaged), followed by mining and quarrying (12.5 percent) and water-related activities (11.7 percent). In Zanzibar all manufacturing establishments engaged in R&D.



Table 7. 8: Percentage Distribution of Research and Development activities by Industrial Sector, large establishments Tanzania, CIP 2023

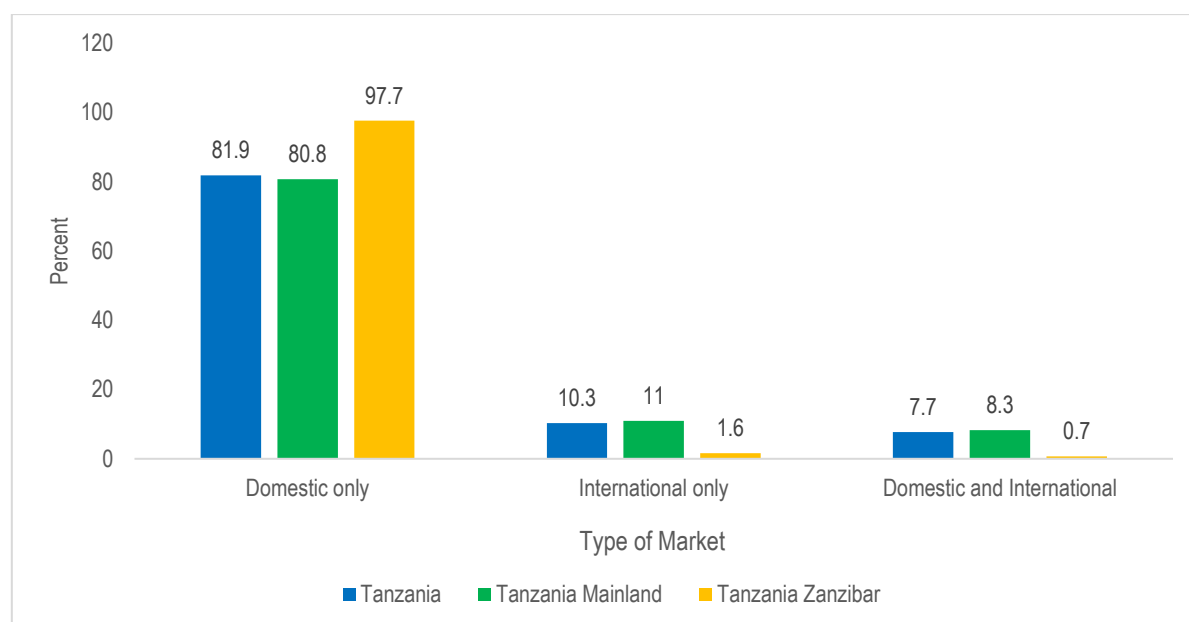
Industrial Sector	Total Establishments	Engaged in R&D		Not in R&D	
		Number	Percent	Number	Percent
Tanzania					
Mining and quarrying	741	46	12.3	695	16.7
Manufacturing	3,489	272	72.9	3,217	77.29
Electricity gas steam and air conditioning supply	95	12	3.2	83	1.99
Water supply; sewerage waste management and remediation activities	210	43	11.5	167	4.01
Total	4,535	373	100	4,162	100
Percent	100	8.2		91.8	
Mainland Tanzania					
Mining and quarrying	702	46	12.5	656	16.99
Manufacturing	3,222	267	72.6	2,955	76.55
Electricity gas steam and air conditioning supply	95	12	3.3	83	2.15
Water supply; sewerage waste management and remediation activities	209	43	11.7	166	4.3
Total	4,228	368	100	3,860	100
Percent	100	8.7		91.3	
Zanzibar					
Mining and quarrying	39	0	0	39	12.91
Manufacturing	267	5	100	262	86.75
Electricity gas steam and air conditioning supply	0	0	0	0	0
Water supply; sewerage waste management and remediation activities	1	0	0	1	0.33
Total	307	5	100	302	100
Percent	100	1.6		98.4	

7.10 Marketing Access

Marketing is the comprehensive process of promoting, distributing and selling of products to its customers. It plays an important role in expanding market share of the products, it addresses prices, products promotion issues important in disposing commodities to the market either domestically, internationally or both domestically and internationally. Figure 7.2 shows that the domestic market is the dominant market for large establishments in Tanzania, with 81.9 percent of establishments operating only domestically. In Mainland Tanzania (80.8 percent) domestic market, in Zanzibar dependence on domestic markets is high at 97.7 percent.

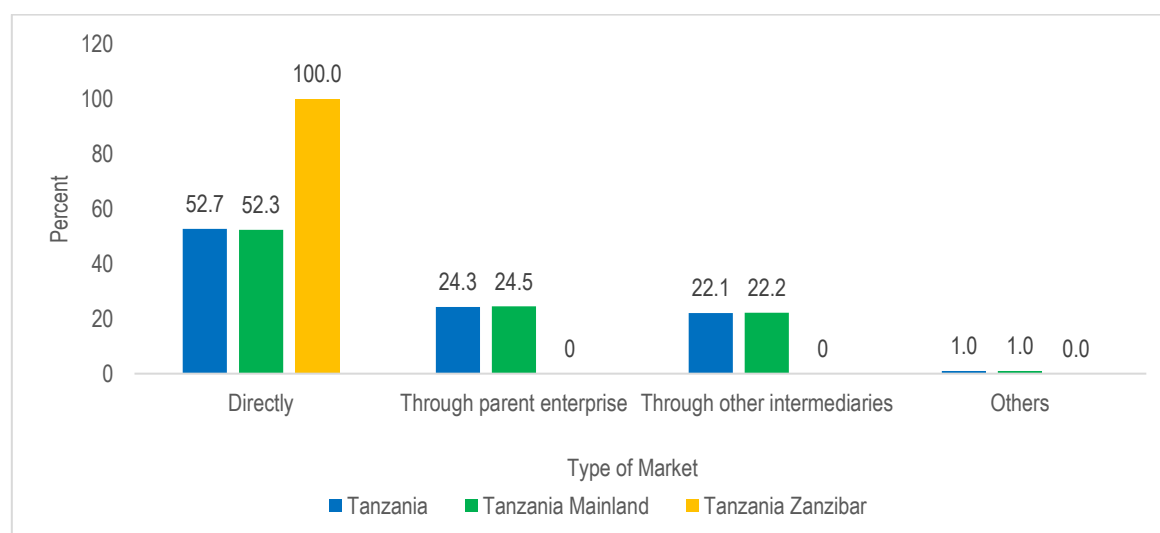
Participation in international markets is relatively low, with only 10.3 percent of establishments in Tanzania operating exclusively in international markets, and 7.7 percent serving both domestic and international markets. Mainland Tanzania shows slightly higher engagement in international trade (11.0 percent international only and 8.3 percent both markets) compared to Zanzibar, where participation is minimal (1.6 percent international only and 0.7 percent both markets).



Figure 7. 2: Distribution of Large Establishments Marketing Access, Tanzania, CIP 2023.

7.11 Channels for Export

Export channels refer to the various ways through which products are delivered from producers to international markets. The major channels used by the establishments that exports are directly, through parent enterprise and through other intermediaries. Figure 7.3 show that direct exporting is the most common channel for establishments in Tanzania, accounting for 52.7 percent export directly. In Mainland Tanzania (52.3 percent) also exports directly, followed by exports through parent enterprises (24.3 percent) and other intermediaries (22.1 percent). Zanzibar exhibits a highly concentrated export structure, where by all establishments that exports reported that they export products directly, with no exports through parent enterprises or intermediaries.

Figure 7. 3: Distribution of Large Establishments by Major Media for Export, Tanzania, CIP 2023

7.12 Barriers for Expanding Exports for Large Establishments

Export expansion in Tanzania faces multiple challenges that stem from both internal firm limitations and external market conditions. These barriers make entering and competing in international markets difficult. In Tanzania, insufficient supply capacity is the most significant obstacle, affecting nearly half of the respondents (48.2 percent). Other notable challenges include limited promotion (22.9 percent), difficulties in meeting quality standards (17.6 percent), low compliance with market regulations (15.5 percent), technical barriers (17.6 percent), and limited ability to leverage preferential trade agreements (16.7 percent) as shown in Table 7.9. These issues collectively hinder Tanzanian establishments from fully exploiting export opportunities.

In Mainland Tanzania, insufficient supply capacity remains the top barrier at 47.6 percent, followed by limited promotion (21.6 percent) and technical barriers (18.1 percent), reflecting engagement with regulated markets. Quality standards (17.4 percent) and compliance issues (15.6 percent) are also important. In Zanzibar, insufficient supply capacity affecting 56.0 percent of establishments and limited promotion impacting 41.4 percent. Additionally, Zanzibar shows higher constraints in exploiting preferential trade agreements (27.4 percent) and quality challenges (19.5 percent), highlighting both institutional and technical limitations that restrict export growth.

Table 7. 9: Percentage of Large Establishments by Barriers for Expanding Exports, Tanzania, CIP 2023

Barrier	Tanzania	Mainland Tanzania	Zanzibar
Insufficient supply capacity	48.2	47.6	56.0
Sanitary and Phytosanitary Rules	6.9	7.2	2.0
Low compliance to the market standards	15.5	15.6	13.7
Inability to meet quality standards	17.6	17.4	19.5
Inadequate capacity to exploit preferential trade agreements	16.7	15.9	27.4
Inability to meet delivery time	11.2	11.3	9.4
Limited promotion	22.9	21.6	41.4
Inadequate trade negotiation skills and market access	13.5	13.6	12.1
Technical Barriers to Trade	17.6	18.1	10.4

Note: This table involves multiple responses

7.13 Trade Agreements

Regional trade agreements are treaties between nearby countries that aim to facilitate trade by reducing or eliminating barriers such as tariffs, quotas, and import/export restrictions. They are designed to encourage economic integration, increase market access, and promote investment among member countries. The CIP 2023 highlights how industrial establishments across sectors perceive the relevance of regional frameworks



such as the East African Community (EAC), Southern African Development Community (SADC), and African Continental Free Trade Area (AfCFTA), alongside international agreements like the World Trade Organisation (WTO).

In Tanzania, 37.8 percent consider regional trade agreements very important and 29.4 percent important, while only 7 percent see them as not important. However, awareness gaps exist by 25.8 percent of establishments reporting being not aware of these agreements. In Mainland Tanzania, perceptions are similar, with 39.2 percent rating them very important and 29.2 percent important, while 24.7 percent are not aware. In Zanzibar, fewer establishments see regional agreements as very important (17.3 percent), although 32.6 percent consider them important, and a significant 40.7 percent are not aware of them.

For international trade agreements in Tanzania, 33.5 percent of businesses rate them very important and 31.9 percent important, with 27.1 percent not aware. In Mainland Tanzania, 35 percent consider them very important and 32 percent important, with 26 percent not aware while in Zanzibar, only 13 percent see international agreements as very important, 30.6 percent as important, while 42.3 percent are not aware as shown in Table 7.10.

Table 7. 10: Percentage of Regional and International Trade Agreements of Large Establishments by category, Tanzania, CIP 2023

Trade Agreements	Category	Tanzania	Mainland Tanzania	Zanzibar
Regional	Very important	37.8	39.2	17.3
	Important	29.4	29.2	32.6
	Not important	7	6.8	9.4
	Not aware	25.8	24.7	40.7
	Total	100	100	100
International	Very important	33.5	35	13
	Important	31.9	32	30.6
	Not important	7.5	7	14
	Not aware	27.1	26	42.3
	Total	100	100	100



Chapter Eight

Technology, Sustainability and Establishments Development

8.1 Main Source of Water

Water is an important input in industrial production that influences both operational efficiency and environmental sustainability. This section presents the distribution of main water sources used by the establishments for production purposes. The results in Table 8.1 show that water supply sources vary significantly by establishment size in Tanzania. Among large establishments, the main source is the Water Supply Authority (41.4 percent), followed by underground water (30.3 percent), while 19.1 percent report not applicable. This indicates that large firms are likely to rely on formal and structured water supply systems, although a considerable share still depends on alternative sources such as groundwater.

Small establishments are mostly not connected to formal water sources, with 59.4 percent reporting “not applicable”, suggesting limited or no direct water usage in production. Among those with access, the Water Supply Authority (26.4 percent) and underground water (10.8 percent) are the main sources. In Zanzibar, reliance on underground water is particularly high among large establishments (47.9 percent), while a large share of small establishments (85 percent) report not applicable.

Table 8. 1: Percentage Distribution of Responses by Main Source of Water and Size, Tanzania, CIP 2023

Source	Large Establishments			Small Establishments		
	Tanzania	Mainland Tanzania	Zanzibar	Tanzania	Mainland Tanzania	Zanzibar
Water Supply Authority	41.4	43.7	9.8	26.4	27.8	5.2
River/lake/spring	7.9	8.2	2.9	2.2	2.3	1.1
Underground water	30.3	29	47.9	10.8	11	8.1
Others	1.3	1.1	4.2	1.2	1.2	0.6
Not applicable	19.1	17.9	35.2	59.4	57.7	85.0

8.2 Environmental Management Plan-Compliance

Environmental Management Plans (EMPs) serve as an important regulatory tool for promoting environmentally sound industrial operations. They set out actions for minimizing adverse environmental impacts, ensuring compliance monitoring, and supporting sustainable use of resources. Examining EMP compliance offers valuable information on the strength of environmental governance, the extent of regulatory compliance, and the adoption of sustainable practices across the industrial sector.



Environmental compliance is relatively moderate in Tanzania, about 39.9 percent possess at least one environment management certificate (EIA, ESIA, or EA), while a share 40.0 percent has an environmental management plan (EMP/ESMP). Compliance is strong in water supply, sewerage, waste management and remediation activities, where nearly two-thirds hold certifications and EMPs. Manufacturing shows lower compliance with 36.3 percent, reflecting the large number of establishments without formal environmental documentation as shown in Table 8.2

Mainland Tanzania accounted for 41.9 percent having environmental certification, and 42.0 percent have an EMP or ESMP. Mining and quarrying and manufacturing dominate the totals, with gradual gains in certification coverage. However, more than half of establishments still operate without formal environmental certification. In Zanzibar, 12.4 percent reported having environmental certifications. Manufacturing recorded 12.7 percent, mining and quarrying 10.3 percent. On Environmental Management Plans, 13.0 percent of had either an EMP or ESMP, with manufacturing at 13.5 percent and mining at 10.3 percent. The findings indicate that environmental compliance among large establishments in Tanzania remains low, with only about 40 percent holding environmental certifications or management plans. Compliance is relatively higher in the water supply, sewerage, waste management and remediation sector, while manufacturing, despite its scale, shows weaker performance.



Table 8. 2: Distribution of Environmental Certificates, Environmental Management Plans by Industrial Sector for Large Establishments, Tanzania, CIP-2023

Industrial Sector	Environment Management Certificates						Environmental Management Plans					Total
	EIA	ESIA	EA	None	Any (EIA, ESIA EA)	EMP	ESMP	None	Any (EMP ESMP)			
	Number			Percent			Number		Percent			
Tanzania												
Mining and quarrying	265	48	115	375	366	49.4	180	125	480	261	35.2	741
Manufacturing	738	367	592	2,222	1267	36.3	926	663	2,125	1364	39.1	3,489
Electricity, gas, steam and air conditioning supply	25	22	9	57	38	40.0	34	31	45	50	52.6	95
Water supply, sewerage, waste management and remediation activities	85	63	67	73	137	65.2	96	87	70	140	66.7	210
Total	1,113	500	783	2,727	1,808	39.9	1,236	906	2,720	1,815	40.0	4,535
Mainland Tanzania												
Mining and quarrying	263	47	111	340	362	51.6	178	122	445	257	36.6	702
Manufacturing	730	362	569	1,989	1233	38.3	908	640	1,894	1328	41.2	3,222
Electricity, gas, steam and air conditioning supply	25	22	9	57	38	40.0	34	31	45	50	52.6	95
Water supply, sewerage, waste management and remediation activities	85	63	67	72	137	65.6	96	87	69	140	67	209
Total	1,103	494	756	2,458	1,770	41.9	1,216	880	2,453	1775	42.0	4,228
Zanzibar												
Mining and quarrying	2	1	4	35	4	10.3	2	3	35	4	10.3	39
Manufacturing	8	5	23	233	34	12.7	18	23	231	36	13.5	267
Electricity, gas, steam and air conditioning supply	0	0	0	0	0	0.0	0	0	0	0	0	0
Water supply, sewerage, waste management and remediation activities	0	0	0	1	0	0.0	0	0	1	0	0	1
Total	10	6	27	269	38	12.4	20	26	267	40	13.0	307

Note: This table involves multiple responses

8.3 Waste Management Facilities

This section describes various methods used by establishments to manage and dispose waste, including recycling, incineration, landfilling, composting, and the use of municipal waste facilities. This information helps to assess environmental impact of establishments' operations, monitor compliance with waste management regulations, and promote sustainable and responsible waste handling practices.

Waste treatment ponds are the most commonly used method in Tanzania for both large (42.9 percent) and small establishments (41.5 percent) as shown in Table 8.3. Large establishments show a mix of disposal and treatment approaches by using landfill (23.5 percent), recycling (20.9 percent), and municipal facilities (20.8 percent), while small establishments rely on landfill (30.9 percent) and have limited access to formal waste services. In Mainland Tanzania, waste treatment ponds dominate and large firms benefit from structured waste management systems, including municipal facilities, compared to smaller establishments. Zanzibar shows a different pattern, with landfill and incineration as the dominant waste management methods for both large and small establishments, followed by recycling. The use of waste treatment ponds is relatively lower, and access to municipal facilities is minimal.

Table 8. 3: Percentage Distribution of Responses by Size and Method of Waste Treatment, Tanzania, CIP-2023

Method	Large Establishments			Small Establishments		
	Tanzania	Mainland Tanzania	Zanzibar	Tanzania	Mainland Tanzania	Zanzibar
Recycling	20.9	19.9	27.7	19.3	18.6	31.5
Incineration	18.0	16.0	31.9	17.7	17.1	30.5
Landfill	23.5	22.2	32.4	30.9	30.6	37.1
Composting	8.5	8.5	8.5	5.0	5.0	4.7
Municipal facilities	20.8	23.3	2.1	5.8	6.0	2.3
Waste treatment ponds	42.9	45.3	25.5	41.5	42.4	23.0
Other	2.8	3.0	1.1	2.7	2.6	3.3

Note: This table involves multiple responses

8.4 Plant Technology

Plant technology refers to the degree of mechanisation and automation applied in industrial production processes. In this report, three categories are distinguished: manual systems, which depend entirely on human operation; semi-automatic systems, which combine human input with mechanical or digital controls; and fully automatic systems, which execute all operations independently with minimal human intervention.



Semi-automatic technology dominates across all sectors in Tanzania. Table 8.4 indicates that large establishments rely on semi-automatic systems where by mining and quarrying with (77.7 percent), manufacturing (59.1 percent), Electricity, gas, steam, and air conditioning supply (44.2 percent), and water and Water supply, sewerage, waste management and Remediation activities (51.9 percent). Full-automatic systems are higher in electricity (30.5 percent) and water (18.6 percent), while manual methods remain moderate in manufacturing (20.1 percent) and water (24.8 percent). Small establishments show a stronger reliance on manual methods, especially in manufacturing (39.1 percent) and mining (22.4 percent). Full automation is generally low among small establishments.

Mainland Tanzania reflects to the national pattern. Large establishments use semi-automatic technology extensively in mining (76.5 percent), manufacturing (57.1 percent), electricity (44.2 percent), and water and waste management (51.7 percent). Full-automatic systems are notable in electricity (30.5 percent) and water sectors (18.7 percent). Manual methods are moderate, especially in manufacturing (20.7 percent) and water (24.9 percent). Small establishments continue to depend more on manual methods (up to 40 percent in manufacturing) but semi-automatic remains dominant, while full automation is limited.

In Zanzibar, semi-automatic technology dominates almost entirely. Large establishments use 100 percent semi-automatic in mining and water and waste management, with minimal full automation (2.2 percent in manufacturing) and limited manual use (13.5 percent in manufacturing). Small establishments also rely mostly on semi-automatic systems (81.5 percent in mining, 100 percent in water), with manual methods used in manufacturing (25.2 percent) and minimal full automation (1.9 percent). Overall, Zanzibar shows a narrow technological structure with very low adoption of full automation.

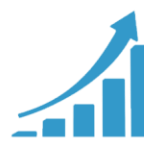
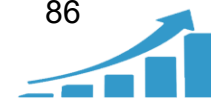


Table 8. 4: Percentage Distribution of Plant Technology by Industrial sector, Tanzania, CIP-2023

Industrial Sector	Tanzania				Mainland Tanzania				Zanzibar			
	Manual	Semi-Automatic	Full-Automatic	Others	Manual	Semi-automatic	Full-automatic	Others	Manual	Semi-automatic	Full-automatic	Others
Large Establishments												
Mining and Quarrying	9.3	77.7	8.8	4.2	9.8	76.5	9.3	4.4	0	100	0	0
Manufacturing	20.1	59.1	9.7	11	20.7	57.1	10.3	11.9	13.5	83.9	2.2	0.4
Electricity, gas, steam, and air conditioning supply	18.9	44.2	30.5	6.4	18.9	44.2	30.5	6.4	0	0	0	0
Water supply, sewerage, waste management and Remediation activities	24.8	51.9	18.6	4.8	24.9	51.7	18.7	4.8	0	100	0	0
Small Establishments												
Mining and Quarrying	22.4	68.9	5.4	3.3	22.7	68.2	5.6	3.5	16.7	81.5	1.9	0
Manufacturing	39.1	54.8	3.6	2.6	40	53.6	3.7	2.7	25.2	72.5	1.9	0.4
Electricity, gas, steam, and air conditioning supply	24.2	60.6	12.1	3	24.2	60.6	12.1	3	0	0	0	0
Water supply, sewerage, waste management and Remediation activities	9.4	62.5	20.3	7.9	9.5	61.9	20.6	8	0	100	0	0
Total	38.7	55.1	3.6	2.6	39.6	53.9	3.8	2.8	25.1	72.6	1.9	0.4



8.5 Source of Plant Technology

The results in Table 8.5 show that imported technology is the dominant source of current plant technology across all industrial sectors in Tanzania, both overall and by level of automation. Imported technology accounts for the majority in water supply and waste management (88.7 percent), mining and quarrying (77.4 percent) and manufacturing (74.2 percent). This pattern persists across manual, semi-automatic, and fully automatic systems, where imported technology consistently exceeds local sources. Local technology plays a relatively smaller role highlighting dependence on foreign technology in Tanzania.

Mainland Tanzania closely reflects the national pattern, with slightly higher percent of local technology in some sectors, especially in manufacturing and mining. Zanzibar reported a much stronger dependence on imported technology across manual, semi-automatic, and fully automatic in mining and quarrying 100.0 percent and manufacturing 95.6 percent highlighting very minimal local technology use absent in several cases.

Table 8. 5: Percentage Distribution of Plant Technology by Source of original and Industrial Sector, Tanzania, CIP – 2023

Industrial Sector	Tanzania		Mainland Tanzania		Zanzibar	
	Local	Imported	Local	Imported	Local	Imported
Total						
Mining and quarrying	22.6	77.4	23.5	76.5	2.1	97.9
Manufacturing	25.8	74.2	26.6	73.4	12.3	87.7
Electricity, gas, steam and air conditioning supply	30.0	70.0	30.0	70.0	0.0	0.0
Water supply, sewerage, waste management and remediation activities	11.3	88.7	11.4	88.6	0.0	100.0
Manual						
Mining and quarrying	30.5	69.5	31.2	68.8	0.0	100.0
Manufacturing	31.9	68.1	32.0	68.0	27.5	72.5
Electricity, gas, steam and air conditioning supply	70.0	30.0	70.0	30.0	0.0	0.0
Water supply, sewerage, waste management and remediation activities	31.8	68.2	31.8	68.2	0.0	0.0
Semi-Automatic						
Mining and quarrying	20.0	80.0	21.1	78.9	2.4	97.6
Manufacturing	22.0	78.0	23.2	76.8	7.6	92.4
Electricity, gas, steam and air conditioning supply	19.1	80.9	19.1	80.9	0.0	0.0
Water supply, sewerage, waste management and remediation activities	7.1	92.9	7.2	92.8	0.0	100.0
Fully Automatic						
Mining and quarrying	26.6	73.4	26.7	73.3	0.0	100.0
Manufacturing	21.2	78.8	21.7	78.3	4.4	95.6
Electricity, gas, steam and air conditioning supply	19.0	81.0	19.0	81.0	0.0	0.0
Water supply, sewerage, waste management and remediation activities	1.6	98.4	1.6	98.4	0.0	0.0



8.6 Investment Plan

Investment planning was relatively high among establishments in Tanzania, where 56.0 percent reported having investment plans as shown in Table 8.6. The highest proportion of establishments with investment plans was observed in the mining and quarrying sector (77.0 percent), followed by water supply, sewerage, waste management and remediation activities (74.1 percent), while the manufacturing sector recorded a comparatively lower proportion (55.2 percent). In Mainland Tanzania, investment planning was stronger, with 58.0 percent of establishments reporting investment plans, compared to only 26.5 percent in Zanzibar.

Expansion of production capacity was the common form of investment implementation across all industrial sectors, accounting for 87.4 percent of establishments in Tanzania. This suggests that industries were primarily focused on increasing output and meeting growing market demand. Technology upgrading was also significant, implemented by 54.5 percent of establishments, reflecting gradual modernization efforts within the industrial sector. Replacement of old machinery accounted for 46.9 percent, indicating moderate reinvestment in improving operational efficiency. Similar patterns were observed in both Mainland Tanzania and Zanzibar, where expansion of production capacity remained the leading investment activity. However, Zanzibar recorded relatively lower levels of investment planning and implementation, which may imply limited industrial expansion and lower investment capacity compared to Mainland Tanzania.

Table 8. 6: Distribution Investment plan and Implementation by Industrial Sector Tanzania, CIP-2023

Industrial Sector	Investment Plan	Investment Plan Implemented			
		Replacement of old machinery	Expanding production capacity	Technology upgrading	Other
Tanzania					
Mining and quarrying	77.0	57.3	81.8	76.9	0.2
Manufacturing	55.2	46.3	87.7	53.4	0.8
Electricity, gas, steam and air conditioning supply	65.6	65.5	73.8	69	0
Water supply, sewerage, waste management and remediation activities	74.1	61.1	81.3	62.6	1.5
Total	56	46.9	87.4	54.5	0.8
Mainland Tanzania					
Mining and quarrying	79.3	57.3	81.8	77.5	0.2
Manufacturing	57.1	45.8	87.7	53.4	0.8
Electricity, gas, steam and air conditioning supply	65.6	65.5	73.8	69	0
Water supply, sewerage, waste management and remediation activities	74.6	61.1	81.3	62.6	1.5
Total	58	46.5	87.3	54.6	0.8
Zanzibar					
Mining and quarrying	33.3	58.1	83.9	45.2	0
Manufacturing	26.3	60.6	89.3	53.4	0.7
Electricity, gas, steam and air conditioning supply		0	0	0	0
Water supply, sewerage, waste management and remediation activities	0	0	0	0	0
Total	26.5	60.5	89.1	53.1	0.6

8.7 Access to Loans and Credit for Large Establishments in Tanzania

Table 8.7 presents the distribution of large establishments by sector and access to loans or credit, including the sources of financing, for establishments that accessed loans or credit in Tanzania. The results show that access to loans or credit among large establishments in Tanzania remained relatively low, with only 18.0 percent of establishments reporting that they received loans or credit facilities. The manufacturing sector accounted for the largest share of establishments accessing loans, with 738 establishments receiving credit, followed by mining and quarrying with 60 establishments. Commercial banks were the dominant source of financing, supporting 63.6 percent of establishments that accessed loans, indicating that formal banking institutions continue to play a major role in industrial financing. Other important financing sources included other credit institutions (15.0 percent), relatives and friends (13.1 percent), government sources (11.6 percent), and development banks (10.5 percent). Financing from foreign countries and Savings and Credit Cooperative Societies (SACCOS) contributed relatively smaller shares.

Mainland Tanzania recorded higher loan access, with 798 establishments receiving loans compared to only 18 establishments in Zanzibar. Commercial banks remained the leading source of financing, accounting for 63.9 percent in Mainland Tanzania and 50.0 percent in Zanzibar. Zanzibar, however, showed dependence on informal financing sources such as relatives and friends, which accounted for 27.8 percent of financing sources, compared to 12.8 percent in Mainland Tanzania. The low level of access to development banks and foreign credit in Zanzibar may indicate limited financial outreach and lower industrial financing opportunities.



Table 8. 7: Distribution of Industrial Sector access to loan or credit and source of financing large establishments Tanzania, CIP 2023

Industrial Sector	Source of loan								
	Receive any loan	Government	Development banks	Commercial banks	Other credit institutions	Credit/loan from foreign countries	Saving and Credit Cooperative Societies	Relatives/friends	Other
Tanzania									
Mining and quarrying	60	4	3	41	7	10	3	10	1
Manufacturing	738	85	80	472	111	72	75	92	5
Electricity gas steam and air conditioning supply	5	1	0	1	3	4	0	2	0
Water supply; sewerage waste management and remediation activities	13	5	3	5	1	1	2	3	0
Total	816	95	86	519	122	87	80	107	6
Percent	18.0	11.6	10.5	63.6	15.0	10.7	9.8	13.1	0.7
Mainland Tanzania									
Mining and quarrying	59	4	3	41	7	10	3	10	0
Manufacturing	721	81	80	463	110	72	75	87	4
Electricity gas steam and air conditioning supply	5	1	0	1	3	4	0	2	0
Water supply; sewerage waste management and remediation activities	13	5	3	5	1	1	2	3	0
Total	798	91	86	510	121	87	80	102	4
Percent	18.9	11.4	10.8	63.9	15.2	10.9	10.0	12.8	0.5
Zanzibar									
Mining and quarrying	1	0	0	0	0	0	0	0	1
Manufacturing	17	4	0	9	1	0	0	5	1
Electricity gas steam and air conditioning supply	0	0	0	0	0	0	0	0	0
Water supply; sewerage waste management and remediation activities	0	0	0	0	0	0	0	0	0
Total	18	4	0	9	1	0	0	5	2
Percent	5.9	22.2	0.0	50.0	5.6	0	0	27.8	11.1

8.8 HIV/AIDS control at workplace

HIV/AIDS remains a critical public health challenge with significant implications for workplace productivity and industrial development. In Table 8.8 the findings indicate that 32,405 establishments (56.2 percent) provided HIV/AIDS control support programmes. The manufacturing sector accounted for the largest share of establishments offering support, with 30,912 establishments and a participation rate of 55.8 percent, and also dominated across all methods of reducing vulnerability, including workplace education (94.8 percent), viral load suppression (92.5 percent), counselling (95.1 percent), and other measures (94.7 percent). In comparison, other sectors such as mining and quarrying (62.7 percent), water supply, sewerage, waste management and remediation activities (70.1 percent), and electricity, gas, steam and air conditioning supply (89.8 percent) recorded varying participation rates, but contributed relatively small shares to the overall support programmes.

Mainland Tanzania, 31,468 establishments (58.2 percent) reported providing HIV/AIDS support programmes, with manufacturing dominating both in number and across all intervention methods. Zanzibar recorded significantly lower participation, with only 937 establishments (26.0 percent) providing such support. The manufacturing sector remained the main contributor in Zanzibar as well, although at a much lower participation rate (25.6 percent), while other sectors showed minimal or no engagement.

Table 8. 8: Distribution of industrial sector by HIV/AIDS Control and Support Programme at Workplace, CIP-2023

Industrial Sector	HIV/AIDS Control Support Program		Methods for reducing vulnerability to HIV/AIDS			
	Yes	Percent	HIV/AIDS workplace education	Viral load suppression	Counselling	Other
Tanzania						
Mining and quarrying	1,186	62.7	4.0	5.4	3.9	1.5
Manufacturing	30,912	55.8	94.8	92.5	95.1	94.7
Electricity, gas, steam and air conditioning supply	115	89.8	0.4	0.6	0.4	1.0
Water supply, sewerage, waste management and remediation activities	192	70.1	0.8	1.5	0.6	2.9
Total	32,405	56.2	100.0	100.0	100.0	100.0
Mainland Tanzania						
Mining and quarrying	1,147	63.8	4.0	5.7	3.8	1.6
Manufacturing	30,015	57.8	94.8	92.0	95.1	94.0
Electricity, gas, steam and air conditioning supply	115	89.8	0.4	0.6	0.4	1.1
Water supply, sewerage, waste management and remediation activities	191	70.2	0.8	1.7	0.6	3.3
Total	31,468	58.2	100.0	100.0	100.0	100.0
Zanzibar						
Mining and quarrying	39	41.9	4.5	1.3	4.5	-

Industrial Sector	HIV/AIDS Control Support Program		Methods for reducing vulnerability to HIV/AIDS			
	Yes	Percent	HIV/AIDS workplace education	Viral load suppression	Counselling	Other
Manufacturing	897	25.6	95.5	98.7	95.4	100.0
Electricity, gas, steam and air conditioning supply	0	0.0	-	-	-	-
Water supply, sewerage, waste management and remediation activities	1	50.0	-	-	0.1	-
Total	937	26.0	100.0	100.0	100.0	100.0

8.9 Information Technology Infrastructure

Information technology infrastructure is enabler of industrial development, as it supports efficiency in production processes, enhances communication and coordination, strengthens data management, and improves competitiveness in both domestic and global markets. In Table 8.9 the findings indicate that mobile phones accounted for (89.1 percent) and computers (77.4 percent) being the most widely adopted technologies. In contrast, more advanced digital systems such as servers (13.2 percent), websites (14.6 percent), and local area networks (10.0 percent) had relatively low adoption rates. Similarly, connectivity-related infrastructure such as internet access (36.5 percent) and intranet (10.4 percent) remained limited.

Mainland Tanzania adoption rates for IT infrastructure were slightly higher for mobile phones (89.0 percent) followed by computers (82.5 percent), internet (38.4 percent), and CCTV cameras (28.4 percent). In Zanzibar mobile phones were highly used at (89.0 percent), with very limited use of computers (8.1 percent), internet (11.4 percent), websites (2.6 percent), and networking systems such as LAN (1.6 percent).



Table 8. 9: Percentage distribution of Large Establishments on Information Technology by Infrastructure, Tanzania, CIP – 2023

Infrastructures	Tanzania	Mainland Tanzania	Zanzibar
Computer	77.4	82.5	8.1
Server	13.2	14.0	2.3
Landline telephone	13.9	14.4	7.8
Mobile phones	89.1	89.0	89.6
Website	14.6	15.5	2.6
Local Area Network	10	10.6	1.6
Intranet	10.4	10.9	3.9
Extranet	3.6	3.8	1
Internet	36.5	38.4	11.4
Biometric scanner	6.4	6.8	1.6
Radio call	5.7	6.0	1.6
CCTV camera	27.1	28.4	10.4
Other	1.9	1.7	5.2

8.10 Internet Connectivity

Internet connectivity enables communication, information sharing, and access to online services such as websites, email, cloud storage, and streaming platforms. Table 8.10 the results indicate that wireless connectivity was commonly used, accounting for 60.7 percent of establishments, followed by the use of routers (33.8 percent) and mobile modems (26.1 percent). Other forms of connectivity such as fibre connections (20.9 percent) and fixed line connections (16.8 percent) were less prevalent, while satellite connections (4.3 percent) were minimally used. Mainland Tanzania wireless connectivity dominated at 60.5 percent followed by routers (34.1 percent) and mobile modems (26.3 percent). Zanzibar exhibited a different connectivity pattern, with relatively higher reliance on wireless (71.4 percent), fixed line connections (42.9 percent) and with limited use of advanced infrastructure such as fibre (2.9 percent). The findings reveal clear disparities in internet connectivity across Tanzania's establishments.

Table 8. 10: Distribution of Large Establishments by Type of Internet Connectivity in Tanzania, CIP 2023

Internet Connectivity	Tanzania	Mainland Tanzania	Zanzibar
Fixed line	16.8	16.2	42.9
Wireless	60.7	60.5	71.4
Satellite	4.3	4.4	0
Mobile Modem	26.1	26.3	14.3
Fibre connection	20.9	21.3	2.9
Router	33.8	34.1	20
Other	0.4	0.2	8.6



8.11 Electronic Business Technologies

Electronic Business (e-business) refers to the application of digital technologies to enhance core business functions, including customer service, sales, marketing, supply chain operations, and human resource management. The findings in Table 8.11 indicate that the use of digital systems and electronic platforms in production and business operations among industrial establishments in Tanzania was relatively low in most operational areas, except for selling goods and services. Nationally, 61.1 percent of establishments reported using digital systems for selling goods and services, making it the most adopted area of digital application. This was followed by payment of taxes at 47.1 percent and delivery services at 29.6 percent. However, usage remained low in other important operational areas such as salaries payment (19.4 percent), statutory deductions including NSSF and ZSSF (18.8 percent), and issuing and management of bills (19.2 percent).

Mainland Tanzania recorded significantly higher use of digital systems across nearly all production and business activities. The data indicates that 64.6 percent of establishments used digital platforms for selling goods and services and 49.5 percent for tax payments. In Zanzibar 11.7 percent used digital platforms for selling goods and services and 14.0 percent for tax payments. Usage in payroll management, statutory deductions, and bill management was also considerably lower in Zanzibar, with less than 6 percent of establishments utilizing such systems.



Table 8. 11: Distribution of Large Establishments by Usage of Digital Technologies in Tanzania, CIP-2023

Area of Production	User	Not User
Tanzania		
Place orders for goods and services	28.3	71.7
Receiving orders for goods and services	22.2	77.8
Purchase of goods and services	25.2	74.8
Selling of goods and services	61.1	38.9
Delivery services	29.6	70.4
Pay taxes	47.1	52.9
Statutory deduction (e.g. NSSF ZSSF)	18.8	81.2
Salaries	19.4	80.6
Issuing and management of bills	19.2	80.8
Other	30.8	69.2
Mainland Tanzania		
Place orders for goods and services	29.6	70.4
Receiving orders for goods and services	23.3	76.7
Purchase of goods and services	26.3	73.7
Selling of goods and services	64.6	35.4
Delivery services	31.3	68.7
Pay taxes	49.5	50.5
Statutory deduction (e.g. NSSF ZSSF)	19.8	80.2
Salaries	20.5	79.5
Issuing and management of bills	20.3	79.7
Other	28.1	71.9
Zanzibar		
Place orders for goods and services	10.7	89.3
Receiving orders for goods and services	7.2	92.8
Purchase of goods and services	11.4	88.6
Selling of goods and services	11.7	88.3
Delivery services	5.9	94.1
Pay taxes	14.0	86.0
Statutory deduction (e.g. NSSF ZSSF)	5.2	94.8
Salaries	3.9	96.1
Issuing and management of bills	3.3	96.7
Other	67.8	32.2

8.12 Corporate Social Responsibility

Corporate Social Responsibility (CSR) refers to the initiatives and programs that companies undertake to contribute to society, protect the environment, and support sustainable development, beyond their core business operations. The findings in Table 8.12 show that establishments in Tanzania actively participated in various social responsibility activities, with the largest contribution directed towards education issues, accounting for 30.2 percent of all reported social responsibility initiatives. Social welfare accounted for 10.2 percent which was followed by health services (9.2 percent).



Manufacturing establishments also demonstrated substantial involvement in social responsibilities, particularly in education, social welfare and water services.

Mainland Tanzania accounted for the majority of contributions across all categories due to its larger industrial base, especially in, education, social welfare and health services. In Zanzibar, although the overall number of initiatives was considerably lower, a relatively higher proportion of social responsibility efforts was directed towards water services (26.1 percent), social welfare (19.9 percent), and education (19.4 percent). Manufacturing establishments in Zanzibar played the leading role in most community support initiatives

Table 8. 12: Frequency Distribution of Establishment by Sector and Amount Spent for Corporate Social Responsibilities, Tanzania, CIP 2023.

(Million TZS)									
Industrial Sector/Social Responsibilities	Education	Health	Security	Sports	Environment	Water	Roads	Social welfare	Others
Tanzania									
Mining and quarrying	2,471	740	703	266	89	133	1,294	614	293
Manufacturing	6,932	2,559	3,058	2,494	1,182	3,503	2,311	3,835	7,098
Electricity gas steam and air conditioning supply	408	202	523	46	12	32	102	39	21
Water supply; sewerage waste management and remediation activities	4,473	828	65	72	192	235	10	339	73
Total	14,283	4,329	4,350	2,878	1,475	3,903	3,717	4,826	7,485
Percent	30.2	9.2	9.2	6.1	3.1	8.3	7.9	10.2	15.8
Mainland Tanzania									
Mining and quarrying	2,468	737	701	266	89	130	1,290	560	292
Manufacturing	6,844	2,548	2,977	2,441	1,180	3,383	2,307	3,795	7,098
Electricity gas steam and air conditioning supply	408	202	523	46	12	32	102	39	21
Water supply; sewerage waste management and remediation activities	4,473	828	65	72	192	235	10	339	73
Total	14,193	4,315	4,267	2,824	1,474	3,781	3,709	4,733	7,484
Percent	30.3	9.2	9.1	6.0	3.2	8.1	7.9	10.1	16.0
Zanzibar									
Mining and quarrying	3	3	2	0	0	3	4	53	1
Manufacturing	87	11	81	54	1	119	4	40	0
Electricity gas steam and air conditioning supply	0	0	0	0	0	0	0	0	0
Water supply; sewerage waste management and remediation activities	0	0	0	0	0	0	0	0	0
Total	91	15	83	54	1	122	8	93	1
Percent	19.4	3.1	17.7	11.5	0.3	26.1	1.7	19.9	0.3



8.13 Main Challenges Facing Establishments in Tanzania

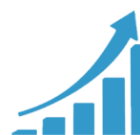
Establishments in Tanzania continue to face a diverse set of operational challenges that constrain productivity, competitiveness, and sustainability. Table 8.13 indicates that establishments in Tanzania faced several significant operational and business challenges, with high cost of production and unreliable power supply emerging as the most constraints for both large and small establishments. Among large establishments, 54.6 percent identified high production costs as a major challenge, while 51.1 percent reported unreliable power supply. Similarly, small establishments were highly affected by unreliable electricity supply (51.3 percent) and high production costs (39.2 percent). Other major challenges included shortage of raw materials, high tax rates, multiple taxes, and insufficient production capacity. Small establishments were particularly affected by insufficient production capacity (33.1 percent) and inadequate technology (21.5 percent), indicating structural limitations in productivity and modernization.

A comparison between Mainland Tanzania and Zanzibar shows notable differences in the severity of challenges facing establishments. In Zanzibar, unreliable power supply was the most reported challenge, affecting 67.4 percent of large establishments and 62.1 percent of small establishments, much higher than in Mainland Tanzania. Zanzibar establishments also reported higher levels of shortage of raw materials and insufficient production capacity, particularly among small establishments where 43.5 percent cited inadequate production capacity as a major issue. In contrast, Mainland Tanzania establishments were more concerned with high production costs, multiple taxes, and unreliable infrastructure. Limited access to financial services was also more pronounced in Zanzibar, especially among small establishments (24.5 percent), suggesting weaker financial inclusion and investment support.



Table 8. 13: Percentage Distribution of Main Challenges Facing Establishments by Size, Tanzania, CIP – 2023

Challenges	Large Establishments			Small Establishments		
	Tanzania	Mainland Tanzania	Zanzibar	Tanzania	Mainland Tanzania	Zanzibar
High cost of production	54.6	55.7	40.1	39.2	39.8	30.3
Inadequate technology	21	21.2	18.6	21.5	21.2	25.4
Unreliable physical infrastructure (roads water etc.)	26.8	28.3	5.9	11.7	12.2	4.2
Bureaucracy (administrative procedures)	8.9	9.4	2	4.3	4.6	0.8
Shortage of skilled labour	6.5	6.6	5.2	5.5	5.1	11.6
Foreign currency fluctuations	12.2	12.8	3.6	1.4	1.4	0.8
Insufficient production capacity	19.5	18.6	32.6	33.1	32.5	43.5
Shortage of raw materials	29.7	28.6	44.3	26.6	26	35
Tax administration procedures	13.5	14	6.5	9.6	9.7	7.2
High tax rates	33.4	34.3	20.8	25	25.5	18.1
Multiple taxes	31.8	33.4	9.4	22.2	23.3	6.3
Multiple regulatory bodies	14	14.7	5.2	4.8	5	2.7
Insufficient demand	13.7	12.7	28	26.3	26.4	25.5
Unfair competition	10.6	11	4.6	9.8	10.2	3.8
Infant private sector with weak support	14.8	15.1	11.7	26.1	26.5	19.3
Environmental challenges	18.4	18.4	17.6	16.6	16.4	19.6
HIV/AIDS	2.6	2.8	0	0.7	0.7	0.4
Uncertain economic environment	12.8	12.8	13.4	19.9	20.3	14.2
Limited access to financial services	8.8	8.4	14.7	11.4	10.5	24.5
High interest rates	13.1	14	1.6	5.4	5.7	0.6
Illegal imports	3.9	4.1	1.6	1.2	1.2	0.7
Unreliable power supply	51.1	49.9	67.4	51.3	50.6	62.1
Counterfeit products	4.1	4.1	3.9	1.7	1.7	1.3



Chapter Nine

Key Findings, Policy Implications and Recommendations

9.0 Introduction

This chapter presents some of the key findings derived from census that need policy implications aimed at strengthening the performance, competitiveness, and sustainability of industrial sector. The policy implications outlined herein are intended to inform government ministries, regulatory authorities, development partners, and private sector and other stakeholders in the design and implementation of interventions that promote industrial growth.

9.1 Employment Performance

Mainland Tanzania shows a substantial increase in employment within the industrial sector. The number of persons engaged rose from 264,223 in 2013 to 454,546 in 2023, representing a 72.0 percent increase between 2013 and 2023. The number of persons engaged in Zanzibar, increased from 10,427 in CIP 2012 to 16,936 in 2023, equivalent to a 62.4 percent increase.

Policy Implications

- Employment increase in both Mainland Tanzania and Zanzibar suggests significant expansion and job creation capacity; and
- Rapid employment growth especially when combined with a high share of low-skilled labour may dilute productivity if skills development does not keep pace.

Recommendations

- Expand technical and vocational training to match the pace of employment growth and prioritize skills relevant to expanding industries by promoting technology adoption.

9.2 Female participation in industrial activities

Only 24.3 of women in Tanzania are engaged in industrial activities. The findings reveal a substantial gender gap in industrial employment, with men compared to for women.

Policy Implications

- Increasing women's participation in industrial activities would contribute to inclusive industrialization, higher productivity, and sustainable economic growth.



Recommendations

- Strengthen gender-responsive policies to promote equal employment opportunities for women in the industrial sector;
- Expand access to technical and vocational education and training to equip women with industry-relevant skills; and
- Improve women's access to finance, technology, and business development services to support their participation in industrial production.

9.3 Skilled and non-skilled operatives

In Tanzania, skilled operatives accounted for 28.6 percent and non-skilled operatives constituted 54.1 percent of the industrial workforce, indicating a predominance of low-skilled workforce.

Policy Implications

- Establishments may struggle to adopt modern machinery or digital systems due to a lack of adequately trained personnel; and
- A high proportion of low-skilled jobs is often associated with lower wages, limited job security, and fewer opportunities for career progression.

Recommendations

- Strengthen Technical and Vocational Education Training and promote apprenticeship and dual training systems to support establishments to adopt advanced technologies that require skilled workers; and
- Offer tax incentives or grants to establishments that invest in workforce training and hire skilled labour.

9.4 Research and Development

Vast majority (91.8 percent) of establishments did not undertake any research and development activities with only 8.2 percent engaged in research and development.

Policy implications:

- The majority of establishments not engaged in research and development, indicating limited focus on innovation and technological advancement;
- Lack of research and development reduces establishments' ability to improve processes, develop new products, and enhance efficiency; and
- Minimal investment in innovation may hinder industrial transformation and the ability to compete in higher-value markets.



Recommendations:

- Promote awareness among establishments on the long-term benefits of research and development for productivity, competitiveness, and market expansion; and
- Strengthen universities, technical institutions, and research centres to enhance their capacity to conduct applied industrial research and support technology transfer.

9.5 Barriers to Expanding Exports

The most frequently reported barriers to starting or expanding exports were insufficient supply capacity (48.2 percent), limited promotion (22.9 percent), and technical barriers to trade and inability to meet quality standards, each accounting for 17.6 percent.

Policy implications:

- Insufficient production capacity limit establishments' ability to meet export demand;
- Limited promotion reduces visibility and access to international markets; and
- Technical barriers and inability to meet required standards hinder establishments from successfully entering and sustaining exports.

Recommendations:

- Support expansion of production capacity through incentives, access to affordable finance, and targeted support for export-oriented industries;
- Strengthen quality and technical standards compliance by enhancing certification support, testing facilities, and technical assistance to exporters;
- Build capacity in trade negotiations and utilization of preferential trade agreements, particularly AfCFTA, EAC, and SADC frameworks; and
- Improve logistics, delivery systems, and supply chain efficiency to enable establishments to meet international delivery timelines.



Annexes

Annex 1: Survey Quality Measurement

Introduction

The CIP 2023 adopted an integrated census–survey design to produce comprehensive and reliable statistics on industrial production. The census covered the first and second components of the survey frame through complete enumeration, while sampling was applied to the third component, comprising selected establishments from seven manufacturing activities. As part of the quality assurance process, survey quality measurements¹ were conducted to evaluate the reliability and precision of the estimates derived from this sampled component. These measurements are essential for assessing the extent of sampling variability and ensuring that the survey estimates are sufficiently accurate and reliable for statistical analysis.

Statistical quality measures were computed, including the Standard Error (SE), Coefficient of Variation (CV), Design Effect (DEFF), and Design Factor (DEFT). These provide important indicators of the precision and efficiency of the survey design and help users assess the quality and reliability of the survey estimates for planning, policy formulation, and evidence based decision making.

Standard Error (SE)

Measures the amount of sampling variability associated with an estimate. Smaller standard errors indicate that repeated samples would produce estimates close to the reported value, reflecting greater precision.

Coefficient of Variation (CV)

Expresses the standard error as a percentage of the estimate. At national level, estimates with a CV below 10 percent are generally regarded as highly reliable, those between 10 and 20 percent are considered reliable, estimates between 20 and 30 percent should be interpreted with some caution, while estimates above 30 percent are generally considered too unreliable for publication.

Design Effect (DEFF)

Measures the impact of the complex survey design on the precision of estimates by comparing the variance under the actual survey design with the variance that would have been obtained under a simple random sample of the same size. A DEFF value close to 1 indicates that the survey design performs similarly to simple random sampling, values greater than 1 indicate increased sampling variance due to clustering or unequal

¹ Sampling errors mainly apply to Mainland Tanzania, as Zanzibar was covered through total enumeration.



weighting, whereas values less than 1 indicate that the survey design is better than if it was implemented under simple random sampling approach.

The sampling quality measures presented in Tables A1–A6 indicate the reliability and precision of the estimates for the CIP 2023.

Table A1: Survey Quality Measures of Average Gross Output by Selected Manufacturing Activities, Tanzania, CIP 2023

Industry	Mean	LINEARIZED STD.ERR.	CV (%)	DEFF	DEFT
Manufacture of vegetable and animal oils and fats	88,024,934	7,712,036	8.7612	1.0964	1.0471
Manufacture of grain mill products	73,501,947	4,806,449	6.5392	1.1229	1.0597
Manufacture of wearing apparel, except fur apparel	13,890,813	1,308,710	9.4214	3.2514	1.8032
Sawmilling and planning of wood	80,742,559	12,557,083	15.5520	0.5341	0.7308
Manufacture of articles of concrete, cement and plaster	121,404,539	11,369,634	9.3651	2.4315	1.5593
Manufacture of structural metal products	39,134,083	1,939,041	4.9549	1.2636	1.1241
Manufacture of furniture	37,422,759	2,726,957	7.2869	1.8532	1.3613

Table A2: Survey Quality Measures of Average Gross Output Region, Tanzania, CIP 2023

Industry	Mean	LINEARIZED STD.ERR.	CV (%)	DEFF	DEFT
Dodoma	64,462,285	8,097,578	12.5617	1.2285	1.1084
Arusha	64,944,161	6,790,472	10.4559	0.7000	0.8367
Kilimanjaro	33,074,444	2,950,907	8.9220	0.8862	0.9414
Tanga	40,927,131	6,427,262	15.7042	1.7042	1.3054
Morogoro	133,617,285	21,054,125	15.7570	3.5597	1.8867
Pwani	52,692,800	4,563,708	8.6610	1.3056	1.1426
Dar es Salaam	53,759,864	4,857,161	9.0349	0.9703	0.9851
Lindi	52,226,213	18,812,959	36.0221	3.2932	1.8147
Mtwara	49,854,610	9,955,437	19.9689	2.1918	1.4805
Ruvuma	92,390,916	21,545,563	23.3200	3.0806	1.7552
Iringa	64,908,979	14,434,977	22.2388	1.8067	1.3441
Mbeya	44,070,534	9,886,523	22.4334	3.8380	1.9591
Singida	71,258,491	13,212,414	18.5415	1.4920	1.2215
Tabora	37,075,038	3,266,156	8.8096	0.5804	0.7619
Rukwa	41,750,660	9,736,127	23.3197	0.1843	0.4293
Kigoma	29,985,712	3,786,347	12.6272	0.4968	0.7048
Shinyanga	96,205,642	15,401,696	16.0091	1.4915	1.2213
Kagera	28,735,490	4,900,420	17.0535	1.0658	1.0324
Mwanza	38,112,100	8,954,124	23.4942	1.8994	1.3782
Mara	23,568,164	4,626,420	19.6300	2.5546	1.5983
Manyara	31,691,626	2,858,033	9.0183	0.5692	0.7545
Njombe	30,663,598	3,623,401	11.8166	0.7063	0.8404
Katavi	85,160,961	16,309,998	19.1520	1.2756	1.1294
Simiyu	29,304,547	3,592,955	12.2607	0.7400	0.8602
Geita	40,783,522	7,977,596	19.5608	1.6614	1.2890
Songwe	148,010,178	27,111,917	18.3176	1.2226	1.1057



Table A3: Survey Quality Measures of Average Intermediate Consumption by Selected Manufacturing Activities, Tanzania, CIP 2023

Industry	Mean	LINEARIZED STD.ERR.	CV (%)	DEFF	DEFT
Manufacture of vegetable and animal oils and fats	36,071,464	3,808,912	10.5593	1.7741	1.3319
Manufacture of grain mill products	28,082,987	1,888,950	6.7263	1.0704	1.0346
Manufacture of wearing apparel, except fur apparel	4,717,792	392,652	8.3228	1.3747	1.1725
Sawmilling and planning of wood	26,282,865	4,217,908	16.0481	1.2795	1.1312
Manufacture of articles of concrete, cement and plaster	53,346,723	5,800,687	10.8736	3.2338	1.7983
Manufacture of structural metal products	12,679,816	548,021	4.3220	1.0465	1.0230
Manufacture of furniture	12,044,038	936,397	7.7748	1.4947	1.2226

Table A4: Survey Quality Measures of Average Intermediate Consumption Region, Tanzania, CIP 2023

Industry	Mean	LINEARIZED STD.ERR.	CV (%)	DEFF	DEFT
Dodoma	22,903,290	2,944,133	12.8546	1.2056	1.0980
Arusha	29,364,542	3,897,542	13.2730	0.9076	0.9527
Kilimanjaro	13,404,546	1,560,918	11.6447	1.2042	1.0974
Tanga	19,515,615	3,279,386	16.8039	1.2828	1.1326
Morogoro	42,497,187	6,518,120	15.3378	3.3540	1.8314
Pwani	22,541,751	2,196,631	9.7447	1.3627	1.1673
Dar es Salaam	18,967,123	2,012,778	10.6119	1.2218	1.1054
Lindi	11,464,724	2,587,678	22.5708	1.1259	1.0611
Mtwara	11,555,133	1,667,349	14.4295	0.8385	0.9157
Ruvuma	42,987,306	12,144,099	28.2504	3.1682	1.7799
Iringa	20,922,963	4,477,003	21.3976	1.7171	1.3104
Mbeya	15,576,914	3,986,142	25.5901	3.1628	1.7784
Singida	34,753,192	5,999,995	17.2646	1.3493	1.1616
Tabora	15,151,022	1,795,569	11.8511	1.1404	1.0679
Rukwa	11,321,659	4,628,932	40.8856	5.0953	2.2573
Kigoma	10,918,989	1,645,975	15.0744	0.9325	0.9657
Shinyanga	44,023,006	8,032,709	18.2466	2.1073	1.4517
Kagera	7,223,347	813,164	11.2574	0.4625	0.6801
Mwanza	14,331,671	2,261,476	15.7796	1.3073	1.1434
Mara	8,940,777	2,222,848	24.8619	2.8762	1.6959
Manyara	17,398,394	2,008,239	11.5427	0.7350	0.8573
Njombe	11,479,287	1,928,659	16.8012	1.4142	1.1892
Katavi	21,052,472	6,529,181	31.0138	1.2680	1.1260
Simiyu	11,542,053	2,050,815	17.7682	0.9183	0.9583
Geita	11,434,522	1,626,599	14.2253	1.2914	1.1364
Songwe	51,842,126	10,016,109	19.3204	1.3552	1.1641

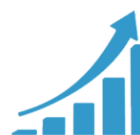


Table A5: Survey Quality Measures of Average Value Added by Selected Manufacturing Activities, Tanzania, CIP 2023

Industry	Mean	LINEARIZED STD.ERR.	CV (%)	DEFF	DEFT
Manufacture of vegetable and animal oils and fats	51,953,470	5,048,556	9.7175	0.7326	0.8559
Manufacture of grain mill products	45,418,960	3,499,673	7.7053	1.1469	1.0709
Manufacture of wearing apparel, except fur apparel	9,173,022	1,182,474	12.8908	3.9321	1.9830
Sawmilling and planning of wood	54,459,695	10,812,497	19.8541	0.4470	0.6686
Manufacture of articles of concrete, cement and plaster	68,057,816	6,731,846	9.8914	1.8863	1.3734
Manufacture of structural metal products	26,454,267	1,584,977	5.9914	1.3390	1.1572
Manufacture of furniture	12,044,038	936,397	7.7748	1.4947	1.2226

Table A6: Survey Quality Measures of Total Average Value Added Region, Tanzania, CIP 2023

Industry	Mean	LINEARIZED STD.ERR.	CV (%)	DEFF	DEFT
Dodoma	41,558,995	5,463,252	13.1458	1.1626	1.0782
Arusha	35,579,619	4,173,754	11.7307	0.7060	0.8403
Kilimanjaro	19,669,897	1,754,680	8.9206	0.6990	0.8361
Tanga	21,411,516	3,585,566	16.7460	2.1815	1.4770
Morogoro	91,120,097	17,386,111	19.0804	3.8173	1.9538
Pwani	30,151,049	2,810,073	9.3200	1.3305	1.1535
Dar es Salaam	34,792,741	3,359,984	9.6571	0.8432	0.9183
Lindi	40,761,489	16,608,111	40.7446	3.5852	1.8935
Mtwara	38,299,476	9,450,772	24.6760	2.8860	1.6988
Ruvuma	49,403,611	10,317,614	20.8843	2.9459	1.7164
Iringa	43,986,016	10,838,921	24.6417	1.8534	1.3614
Mbeya	28,493,619	6,705,999	23.5351	4.1313	2.0326
Singida	36,505,299	7,507,193	20.5647	1.3404	1.1578
Tabora	21,924,016	2,082,567	9.4990	0.4595	0.6779
Rukwa	30,429,001	6,567,399	21.5827	0.0857	0.2928
Kigoma	19,066,723	2,687,584	14.0957	0.4335	0.6584
Shinyanga	52,182,636	8,596,722	16.4743	0.9085	0.9532
Kagera	21,512,144	4,685,734	21.7818	1.1664	1.0800
Mwanza	23,780,429	6,903,241	29.0291	1.9780	1.4064
Mara	14,627,386	2,822,890	19.2987	2.1586	1.4692
Manyara	14,293,232	1,333,130	9.3270	0.4769	0.6906
Njombe	19,184,311	2,377,160	12.3912	0.5763	0.7591
Katavi	64,108,489	12,842,466	20.0324	1.2749	1.1291
Simiyu	17,762,493	2,164,908	12.1881	0.7727	0.8790
Geita	29,349,000	7,453,267	25.3953	1.7951	1.3398
Songwe	96,168,052	20,039,573	20.8381	1.0246	1.0122



Non-Sampling Errors

In addition to sampling errors, the quality of the CIP may be affected by non-sampling errors that can occur during frame development, data collection, processing, and analysis. These include coverage errors, non-response, measurement errors, data processing errors, and response bias, all of which may influence the accuracy of the survey estimates.

Coverage errors were minimized through a comprehensive review and updating of the establishment frame shortly before the commencement of the census. Regional Statical Officers updated list from the Statistical Business Register (SBR) to verify the existence and status of establishments and to ensure that eligible industrial establishments were included in the census frame and were in operation in 2023. This process enhanced the completeness of coverage and reduced the likelihood of establishments being omitted from the census.

During the implementation of CIP, a total of 21,430 establishments were selected from a frame of 57,684 establishments in the URT and all selected establishments were covered. The overall response rate for URT was 98.2 where by 97.9 percent on the Mainland Tanzania and 99.8 percent in Zanzibar, indicating that the majority of establishments covered by the census provided the required information.

To minimize these errors, the NBS implemented several quality assurance measures, including the use of an updated business register, comprehensive training of field staff, Computer-Assisted Personal Interviewing (CAPI) with built-in validation checks, close field supervision, rigorous data editing and cleaning, and follow-up of non-responding establishments. Respondents were also assured of the confidentiality of the information provided. These measures significantly reduced the potential impact of non-sampling errors, ensuring that the CIP 2023 results are reliable and suitable for official statistics, policy formulation, and planning.



Annex 2: The Questionnaire



THE UNITED REPUBLIC OF TANZANIA

CONFIDENTIAL

CIP – 23 – Q1

Establishment No

--	--	--	--	--	--	--	--	--

To:

.....

.....

.....

.....

(For office use only)

Region Code

District Code

Council Code

Ward/Shehia Code

CENSUS OF INDUSTRIAL PRODUCTION, 2023

DETAILED QUESTIONNAIRE

Dear Sir/Madam,

This Census is conducted in accordance with the Statistics Act Cap 351 R.E. 2019 Tanzania Mainland and Statistics Act, No. 9, 2007 of Zanzibar. According to the Acts, all information supplied will be treated **STRICTLY CONFIDENTIAL**. The information will be used to provide aggregate statistics for statistical purposes only. You are kindly required to complete this Questionnaire and return it to the Statistical Office together with a copy of your Financial Statement(s) within seven (7) days. The figures should be taken from the accounts of the establishment for the accounting year covering larger part of the reference year 2023. If precise figures are not available, please give your best estimates.

Thank you for your cooperation.

Yours truly,

REGIONAL STATISTICAL MANAGER

Mobile no:

P. O. Box:

Signature & Stamp:

Date:



SECTION I: ESTABLISHMENT DESCRIPTION *(Information to be filled in capital letters)*

1.1 Name of the Establishment:

1.2 Physical location of the Establishment:

1.2.1 Region:

1.2.5 Division:

1.2.2 District:

1.2.6 Ward/Shehia:

1.2.3 Council:

1.2.7 Village/Mtaa:

1.2.4 Constituent:

1.2.8 Plot No:

1.3 Contact address of the Establishment:

1.3.1 P. O. Box: 1.3.2 Street/Road: 1.3.3 Post Code:

1.3.4 Town/City:

1.3.5 Tel:

1.3.6 Mobile:

1.3.7 E-mail:

1.3.8 Website:

1.3.9 GPS Code:

1.4 Details of contact person

1.4.1 Full name of contact person:

1.4.2 Designation:

1.4.3 Tel/Mobile:

1.4.4 E-mail:

1.5 Type of the Establishment: *(Please fill the appropriate code in the provided box)*

Single Establishment 1

Head office (owns or controls other Establishments) 2

A branch (owned and controlled by head office) 3

If coded "1" go to Qn. 1.6**If coded "3" go to Qn. 1.5.3**

1.5.1 If Qn 1.5 coded 2, Is your financial statement for 2023 covers more than one establishments?

Yes..... 1

No..... 2

If coded "2", go to Qn. 1.6

1.5.2 If Qn 1.5.1 coded 1, please provide details for each establishment/branch, then go to Qn.1.6

Name of branch	Main activity	Physical Location (District, Region)
1		
2		
3		



1.5.3 If Qn 1.5 is coded 3, please provide name, telephone and mobile number of the Head Office

1.5.3.1 Name of the Head Office:

1.5.3.2 Telephone:..... 1.5.3.3 Mobile:

1.5.3.4 Region:.....

1.6 Activities of the establishment:

(For office use only) **CAPI**

(For office use only) **ISIC Code**

1.6.1 Main activity.....

--	--	--	--	--

.....

1.6.2 Other activity(s).....

--	--	--	--	--

.....

--	--	--	--	--

1.7 Product(s) manufactured:

(For office use only) **CPC Code**

1.7.1 Main product

--	--	--	--	--

1.7.2 Other product (s) 1

--	--	--	--	--

2

--	--	--	--	--

3

--	--	--	--	--

1.8 Form of Ownership of the Establishment (Please fill the appropriate code in the provided box)

Public 1

Private (Institutions) 2

If coded "1" go to Qn. 1.10

Private (Individuals) 3

If coded "2", go to Qn. 1.9

Mixed..... 4

If coded "3", go to Qn. 1.8.2

1.8.1 If Qn 1.8 marked "4", please indicate % capital share of Public

1.8.2 If Qn 1.8 is marked 3 or 4, please provide number of the private owners by gender

Male

Female

1.9 Origin of Ownership (Please fill the appropriate code in the provided box)

National 1

Foreign 2

Diaspora 3

Joint (Nationals, Foreign and Diaspora) 4

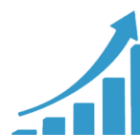
If coded "1, 2 or 3" go to Qn. 1.10

1.9.1 If Qn 1.9 marked "4", please indicate percentage share of;

National(s)

Foreign

Diaspora



1.10 Type of Legal Organization (Please fill the appropriate code in the provided box)

- Sole proprietorship 1
- Partnership 2
- Public 3
- Parastatal 4
- Cooperative 5
- Private company limited by guarantee 6
- Private company limited by shares 7
- Other (specify) 8

☐

1.11 Source of financing (Total investments and working capital during commencement):

	Amount (TZS)
1.11.1 Personal and relatives	
1.11.2 Loans from domestic banks and other financial institutions	
1.11.3 Loans from foreign banks and other financial institutions	
1.11.4 Government	
1.11.5 Other (Specify)	
1.11.6 Total	

1.12 Year of commencement (started) of operations:

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1.13 Period to which data in this questionnaire refers

From: Month..... Year To: Month Year



SECTION II: INDUSTRIAL EMPLOYMENT

2.1 Number of persons engaged including temporary and casual labour

Number of persons engaged as at	Item	Tanzanian	Foreigner	Sex
30th June, 2023	2.1.1			Male
	2.1.2			Female
31 st December, 2023	2.1.3			Male
	2.1.4			Female

2.2 Average number of persons engaged

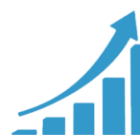
Category	Item	Tanzanian	Foreigner	Sex
Working proprietors and partners (<i>Active owners of the legal entity</i>)	2.2.1			Male
	2.2.2			Female
Unpaid workers (<i>Members of religious institutions, family members, prisoners, J.K.T/J.K.U and the like</i>)	2.2.3			Male
	2.2.4			Female
Employees:				
Managerial and professional staff (<i>Managerial, technical, clerical, other office workers, etc.</i>)	2.2.5			Male
	2.2.6			Female
Operatives -skilled (<i>Foremen, machine operators, fitters, casual and manual workers</i>)	2.2.7			Male
	2.2.8			Female
Operatives -non skilled (<i>Foremen, machine operators, fitters, casual and manual workers</i>)	2.2.9			Male
	2.2.10			Female
Other (specify)	2.2.11			Male
	2.2.12			Female
Total Persons Engaged	(2.2.1+2.2.3+2.2.5+2.2.7+2.2.9+2.2.11)	2.2.13		Male
	(2.2.2+2.2.4+2.2.6+2.2.8+2.2.10+2.2.12)	2.2.14		Female
Number of out-sourced workers paid by sub-contractors as at 31 st December 2023	2.2.15			Male
	2.2.16			Female

2.3 Average number of persons engaged by category and citizenship

Total Persons Engaged	Items	Tanzanian		Foreigner		Sex
		Permanent	Temporary	Permanent	Temporary	
	2.3.1					Male
	2.3.2					Female

2.4 Average weekly work hours per categories of employee and number of months worked per year

Category	Item	Average Weekly Work Hours per Employee	Number of Months Worked in a Year
Working Proprietors and Partners	2.4.1		
Unpaid workers	2.4.2		
Managerial and Professional Staff	2.4.3		
Operatives - Skilled	2.4.4		
Operatives - non Skilled	2.4.5		
Others	2.4.6		



SECTION III: LABOUR COSTS DURING THE REFERENCE PERIOD

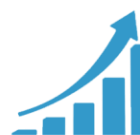
3.1 Labour Costs

Category	Item	Amount (TZS)
Gross wages and salaries paid to employees in cash (including bonus and gratuities)	3.1.1	
Overtime payments	3.1.2	
Reimbursement of travel expenses	3.1.3	
Payments in kind (Medical, food, transport, housing cost, fuel etc.)	3.1.4	
Employer's contribution to Social Security Schemes (NSSF, WCF, ZSSF and PSSSF)	3.1.5	
Employer's Contribution to Health Insurance Fund (e.g NHIF, ZHSF, Jubilee, Strategis etc)	3.1.6	
Training expenses	3.1.7	
Other labour costs (Specify).....	3.1.8	
Total Labour Costs	3.1.9	

SECTION IV: PURCHASES COSTS DURING THE REFERENCE PERIOD *(Please exclude VAT)*

4.1 Energy and water purchased

Description	Item	Unit measure	Quantity	Value (TZS)
Electricity	4.1.1	Kwh		
Water	4.1.2	M ³		
Gas (LPG)	4.1.3	Kg		
Fuel for machines				
Diesel	4.1.4	Litres		
Heavy Furnace Oil (HFO)	4.1.5	Litres		
Lubricating oil	4.1.6	Litres		
Motor gasoline (Petrol)	4.1.7	Litres		
Grease	4.1.8	Kg		
Natural Gas	4.1.8_1	Kg		
Fuel for vehicles				
Diesel	4.1.9	Litres		
Heavy Furnace Oil (HFO)	4.1.10	Litres		
Lubricating oil	4.1.11	Litres		
Motor gasoline (Petrol)	4.1.12	Litres		
Grease	4.1.13	Kg		
Gas (CNG)	4.1.14	Kg		
Wood, coal and peat				
Wood	4.1.15	Kg		
Coal	4.1.16	Kg		
Peat	4.1.17	Kg		
Charcoal	4.1.18	Kg		
Other fuels (specify).....	4.1.19			
Total	4.1.20			



4.2 Goods purchased

Description	Item	Value (TZS)
Goods purchased for resale (trade goods)	4.2.1	

4.3 Raw materials and supplies purchased

CPC Code (for office use only)	Description	Unit Measure	Local		Imported	
			Quantity	Value (TZS)	Quantity	Value (TZS)
	Other (including stationery and spare parts)					
	Total					

If no material imported in Qn. 4.3, go to sub section 4.4

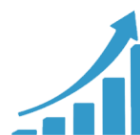
4.3.1 Reasons for importation (Please circle appropriate code, multiple answers are allowed)

- Transport A
 Accessibility B
 Availability C
 Quality D
 Price E
 Supplier reliability (time, quantity of supply) F
 Existing relationship/agreement with supplier G
 Other (Specify)..... H

4.4 Services consumed

4.4.1 Industrial services

Description	Item	Amount (TZS)
Contract and commission work	4.4.1.1	
Cost of repairs, maintenance and installation works (machinery)	4.4.1.2	
Waste treatment costs	4.4.1.3	
Cost of sewerage service	4.4.1.4	
Engineering and technical services (Piloting, testing, product development, technology consultancy etc.)	4.4.1.5	
Product certification	4.4.1.6	
Market research	4.4.1.7	
Other (Specify).....	4.4.1.8	
Total	4.4.1.9	

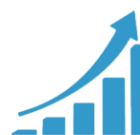


4.4.2 Non-industrial services

Description	Item	Amount (TZS)
Telephone, internet postage and other communication costs	4.4.2.1	
Cost of repairs and maintenance of buildings and structure	4.4.2.2	
Rental of buildings, machinery, plant and equipment	4.4.2.3	
Storage and hire transport	4.4.2.4	
Bank charges	4.4.2.5	
Consultancy and other professional fees (legal, fiscal, accountancy, etc.)	4.4.2.6	
Security Services	4.4.2.7	
Marketing and publicity	4.4.2.8	
Cleaning Services	4.4.2.9	
Other (Specify).....	4.4.2.10	
Total	4.4.2.11	

4.4.3 Other expenses

Description	Item	Amount (TZS)
Patents, royalties and copyrights	4.4.3.1	
Interests paid excluding bank charges	4.4.3.2	
Dividends paid	4.4.3.3	
Insurance paid	4.4.3.4	
Income tax	4.4.3.5	
Net value-added tax paid	4.4.3.6	
Licenses	4.4.3.7	
Other taxes on production (e.g., rates, road tax e.t.c)	4.4.3.8	
Public relation and donation	4.4.3.9	
Other (Specify).....	4.4.3.10	
Total	4.4.3.11	



SECTION V: OUTPUT (Please exclude VAT and Excise Duty)**5.1 Sales from own production** (including transfer to other establishment of the same enterprises and own use)

CPC Code (for office use only)	Product(s)	Unit Measure	Local		Exported	
			Quantity	Value (TZS)	Quantity	Value (TZS)
	Other (Specify)					
						
	Total					

If no goods were exported in Qn. 5.1, go to Qn. 5.2

5.1.1 What are major countries of export?

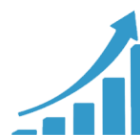
Items	Country	Country Code	Percentage (%)
5.1.1.1			
5.1.1.2			
5.1.1.3			
5.1.1.4			

5.2 Income from services**5.2.1 Industrial services**

Description	Item	Amount (TZS)
Receipts from contracts done for others on their materials	5.2.1.1	
Receipts from repair and installation work done for others	5.2.1.2	
Other (specify).....	5.2.1.3	
Total	5.2.1.4	

5.2.2 Non-industrial services

Description	Item	Amount (TZS)
Sales of goods sold as purchased (trade goods)	5.2.2.1	
Rental received	5.2.2.2	
Receipts from transport services rendered to others	5.2.2.3	
Value of fixed assets sold	5.2.2.4	
Receipts from warehousing services	5.2.2.5	
Other (specify).....	5.2.2.6	
Total	5.2.2.7	



5.2.3 Other receipts

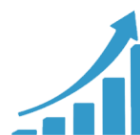
Description	Item	Amount (TZS)
Interests and dividends received	5.2.3.1	
Insurance premiums received	5.2.3.2	
Subsidies received	5.2.3.3	
Other (specify).....	5.2.3.4	
Total	5.2.3.5	

5.3 What is your utilization of production capacity?

CPC Code (for office use only)	Product(s)	Unit	Installed Capacity	Actual Production	Capacity Utilization (%)

5.3.1 If you are experiencing capacity under-utilization (below 75%), what might be the reasons among the following:
(Rank the most important reason for under-utilization of capacity using scale 1 – 3. Where: 1 – High, 2- Moderate, 3 – Low and 9– Not Applicable)

Reasons	Item	Ranking
Insufficient demand	5.3.1.1	
Shortage of domestic inputs	5.3.1.2	
Shortage of imported inputs	5.3.1.3	
Old (Obsolete) plant/machinery and equipment	5.3.1.4	
Plant maintenance problems due to lack of spare parts	5.3.1.5	
Plant maintenance problems due to shortage of skilled labour	5.3.1.6	
High cost of credits	5.3.1.7	
Limited access to financial services	5.3.1.8	
Insufficient power supply (blackouts) or frequent power outages	5.3.1.9	
Insufficient power supply (low voltage)	5.3.1.10	
Insufficient water supply	5.3.1.11	
Price Competition from imports	5.3.1.12	
Strikes or stoppages of workers	5.3.1.13	
Un-competitiveness of exports	5.3.1.14	
Poor transport facilities	5.3.1.15	
High transport cost	5.3.1.16	
Inability to grant credits to customers	5.3.1.17	
Counterfeits	5.3.1.18	
Climatic change impact	5.3.1.19	
Others (specify).....	5.3.1.20	



- 5.3.2 If reason for capacity under utilization is due to un-competitiveness in exports in Qn. 5.3.1 item 5.3.1.14 coded "1" or "2" or "3", please specify the reasons. *(Rank the most important reason for un-competitiveness in exports using scale 1 – 3. Where: 1 – High, 2- Moderate, 3 – Low and 9 – Not Applicable)*

Reasons	Item	Ranking
High cost of raw materials	5.3.2.1	
Exchange rate volatility	5.3.2.2	
High cost of fuel	5.3.2.3	
High cost of electricity	5.3.2.4	
High cost of labour	5.3.2.5	
Poor quality of products	5.3.2.6	
Poor quality of packaging materials	5.3.2.7	
Others (specify).....	5.3.2.8	

- 5.3.3 If you graded 'Insufficient power supply (blackouts) or frequent power outages' in Qn.5.3.1 item 5.3.1.9 as a High or Moderate reason for underutilization of production capacity, how many electricity blackouts has your establishment encountered on average each month? *(Please write the appropriate code in the provided box)*

- Between 1 – 3 blackouts on average per month 1
- Between 4 – 7 blackouts on average per month 2
- Between 8 – 10 blackouts on average per month 3
- Above 10 blackouts on average per month 4

- 5.3.4 If you graded 'Price competition from imports' in Qn. 5.3.1 item 5.3.1.12 as a High or Moderate reason for underutilization of production capacity, what is the market price difference between your 5 main selling products and the imported ones?

CPC Code (for office use only)	Product(s)	Unit	Price in the domestic market (TZS)	Price of imported products (TZS)



SECTION VI: INVENTORIES**6.1 Value of Inventories**

Description	Item	Value in (TZS)	
		Opening balance	Closing balance
Materials and supplies (raw materials, chemicals, etc.)	6.1.1		
Fuel/energy	6.1.2		
Work in progress (semi-finished products)	6.1.3		
Finished products	6.1.4		
Goods purchased for resale	6.1.5		
Other (specify)	6.1.6		
Total	6.1.7		

SECTION VII: VALUE OF FIXED ASSETS**7.1 Value of Fixed Assets (TZS)**

Type	Item	Value at the beginning of the year	Additions		Disposals	Depreciation charge during the year	Net value at the end of the year
			Purchased	Own production			
		1	2	3	4	5	6
Land	7.1.1						
Buildings and other construction works	7.1.2						
Transport equipment	7.1.3						
Machinery and other equipment	7.1.4						
Computer and other data processing equipment	7.1.5						
Furniture and Fittings	7.1.6						
Mineral exploration	7.1.7						
Other(Specify).....	7.1.8						
Total	7.1.9						



SECTION VIII: OTHER INFORMATION**8.1 Membership****8.1.1 Is the establishment a member of any association?** *(Please fill the appropriate code in the provided box)*

Yes..... 1

☐

No..... 2

If coded "2", go to Qn. 8.1.3**8.1.2 Please indicate the type of association** *(Please circle appropriate code, multiple answers are allowed)*

Confederation of Tanzania Industries (CTI) A

Tanzania Chamber of Commerce, Industry and Agriculture (TCCIA)..... B

Zanzibar National Chamber of Commerce (ZNCC)..... C

Manufacturing Council of Zanzibar (MCZ)..... D

Association for Small Scale Producer (ASSP) E

Association of Tanzania Employers (ATE) F

Zanzibar Employer Association (ZANEMA) G

Tanzania Chamber of Minerals and Energy (TCME) H

Tanzania Private Sector Foundation (TPSF) I

Other (specify)..... J

8.1.3 Are you aware of services/functions provided by associations listed below? *(Please circle appropriate code, multiple answers are allowed)*

Confederation of Tanzania Industries (CTI) A

Tanzania Chamber of Commerce, Industry and Agriculture (TCCIA)..... B

Zanzibar National Chamber of Commerce (ZNCC)..... C

Manufacturing Council of Zanzibar (MCZ)..... D

Association for Small Scale Producer (ASSP) E

Association of Tanzania Employers (ATE) F

Zanzibar Employer Association (ZANEMA) G

Tanzania Chamber of Minerals and Energy (TCME) H

Tanzania Private Sector Foundation (TPSF) I

Other (specify)..... J

Not aware..... K

8.2 Registration**8.2.1 Does the establishment have any license or certificate of registration?** *(Please fill the appropriate code in the provided box)*

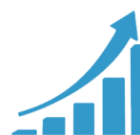
Yes..... 1

☐**If coded "1", fill Qn. 8.2.2 then go to Qn. 8.3.1**

No..... 2

If coded "2", go to Qn. 8.2.3**8.2.2 Please, fill the license, issuing authority and the type of license in the table below**

Type of license/certificate	Date issued	License / Certificate of Registration number	Issuing Authority
Bussiness Licence	E.g 02/08/2005	41527893	BRELA/BPRA



8.2.3 Please, provide reasons for not having any license or certificate of registration *(Please circle appropriate code, multiple answers are allowed)*

- Financial problems..... A
 Bureaucratic procedures..... B
 Very small business..... C
 Does not see the need..... D
 Other (specify)..... E

8.3 Tenure

8.3.1 Tenure of buildings occupied by establishment *(Please fill the appropriate code in the provided box)*

- Wholly owned 1
 Wholly rented..... 2 ☐
 Partly rented..... 3
 Others (specify)..... 4

8.3.2 Total area occupied for establishment buildings and surroundings excluding plantations like farms

Land M² Floor M²

8.4 Quality management

8.4.1 Are your products certified by any of the following authority? *(Please circle appropriate code, multiple answers are allowed)*

- Tanzania Medicines and Medical Devices Authority (TMDA)..... A
 International Organization for Standardization (ISO)..... B
 Tanzania Bureau of Standards (TBS) C
 Zanzibar Bureau of Standards (ZBS)..... D
 Zanzibar Food and Drugs Agency (ZFDA)..... E
 Chief Government Chemist Laboratory Agency (CGCLA)..... F
 Tanzania Mining Commission G
 Centre of Agricultural Mechanization and Rural Technologies (CAMARTEC)..... H
 Other (specify) I
 Not applicable..... Z

8.4.2 Is the quality of raw materials purchased controlled? *(Please fill the appropriate code in the provided box)*

- Yes..... 1 ☐
 No..... 2

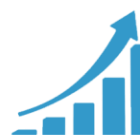
8.4.3 Does the establishment have a laboratory for quality control or testing facilities? *(Please fill the appropriate code in the provided box)*

- Laboratory with testing facilities..... 1 ☐
 Testing facilities only..... 2 ☐ **If coded "2" or "3", go to Qn. 8.4.5**
 None 3

8.4.4 Total number of quality control staff

8.4.5 Does the establishment have Standards Operating procedures (SOP)? *(Please fill the appropriate code in the provided box)*

- Yes..... 1 ☐
 No..... 2



8.5 Research and Development

8.5.1 Does the establishment engaged in any research and development (R&D) activities?

Yes..... 1

☐

No..... 2

If coded "2", go to Qn. 8.5.3

8.5.2 Please fill the total number of employees engaged on research and development activities

Male	Female	Total

8.5.3 Does the establishment perform any of the following research and development activities? (Please circle appropriate code, multiple answers are allowed)

Research and development in technology innovation

Basic technology research..... A

Technology validation in laboratory B

Technology demonstration..... C

Technology prototype and scale up..... D

Technology system development..... E

Technology system test and demonstration..... F

Technology commercialization & market development G

Research and development in production

Reverse engineering..... H

Product components redesign & reengineering..... I

Product functions redesign & reengineering..... J

Product standards quality improvement..... K

Re-engineering..... L

Interchangeable parts redesign M

Maintenance, repair and operations (MRO)..... N

Machines software re-programming..... O

Other specify..... P

Not Applicable..... Z

8.5.4 Does your establishment have a linkage with University, Technical College or Research and Development (R&D) Institute?

Yes..... 1

☐

No..... 2

If coded "2", go to Qn. 8.6

8.5.5 Please, mention the name of the Institutions

Name of Institution(s) 1.....

2.....

3.....

8.5.6 The linkage area with University, Technical College or Research and Development (R&D) Institute was for (Please circle appropriate code, multiple answers are allowed)

Product development..... A

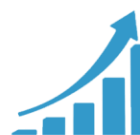
Field or practice training for students..... B

Consultancy services..... C

Mechanical and management skills assistance..... D

Machinery and equipment..... E

Other (specify)..... F



8.6 Marketing

8.6.1 Market for the produced products *(Please fill the appropriate code in the provided box)*

Domestic only 1

International only 2

Both Domestic and International..... 3

If coded "1", go to Qn. 8.7.18.6.2 Major channel for Export *(For exporting establishments only) (Please fill the appropriate code in the provided box)*

Directly 1

Through parent enterprise 2

Through other intermediaries 3

Other (specify)..... 4

8.7 Trade agreements

8.7.1 Are Regional trade agreements important for the establishment's operations? (e.g. AfCFTA, EAC, SADC, AGOA etc)? *(Please fill the appropriate code in the provided box)*

Very important 1

Important 2

Not important 3

Not aware 4

8.7.2 Are international trade agreements important for the establishment's operations (e.g. W.T.O) ? *(Please fill the appropriate code in the provided box)*

Very important 1

Important 2

Not important 3

Not aware 4

8.7.3 What do you consider to be the main three barriers for starting or expanding your exports? *(Please circle three appropriate codes in the provided box)*

Insufficient supply capacity..... A

Sanitary and Phytosanitary (SPS) Rules..... B

Low compliance to the market standards..... C

Inability to meet quality standards..... D

Inadequate capacity to exploit preferential trade agreements E

Inability to meet delivery time..... F

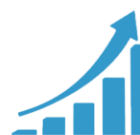
Limited promotion G

Inadequate trade negotiation skills and market access..... H

Technical Barriers to Trade (TBT)..... I

Other, (specify)..... J

Not applicable..... Z



8.8 What is the main source of water used within the establishment? *(Please fill the appropriate code in the provided box)*

Water Supply Authority (eg DAWASA, ZAWA, etc) 1

River/lake/spring 2

Underground water 3

Other (specify) 4

Not applicable 9

8.9 Environmental Management

8.9.1 Does the establishment has any of the following certificate listed below? *(Please circle appropriate code, multiple answers are allowed)*

Environmental Impact Assessment (EIA) A

Environmental and Social Impact Assessment (ESIA) B

Environmental Audit (EA) C

None D

8.9.2 Does the establishment has any of the following plan listed below? *(Please circle appropriate code, multiple answers are allowed)*

Environmental Management Plan (EMP) A

Environmental and Social Management Plan (ESMP) B

None C

8.9.3 Does the establishment have waste treatment or disposal facilities? *(Please fill the appropriate code in the provided box)*

Yes 1

No 2

If coded "2", go to Qn. 8.10

8.9.4 What are the method(s) of waste treatment or disposal used by the establishment *(Please circle appropriate code, multiple answers are allowed)*

Recycling A

Incineration B

Landfill C

Composting D

Municipal facilities E

Waste treatment ponds F

Other (Specify) G

8.10 Plant Technology

8.10.1 What is the major current plant technology status?

Type of Plant Technology	Code	Country of origin	Expected lifespan of the plant/machinery	Average age used
Manual	1			
Semi-automatic	2			
Fully-automatic	3			



8.11 Investment Plan

8.11.1 Does the establishment have any Investment plan? (Please write the appropriate code in the provided box)

Yes..... 1

No..... 2

If coded "2", go to Qn. 8.11.3

8.11.2 Please, indicate whether the investment plan was for: (Please circle appropriate code, multiple answers are allowed)

Replacement of old machinery A

Expanding production capacity..... B

Technology upgrading..... C

Other (specify) D

8.11.3 Did the establishment received any loan or credit to finance its operations or capital investment expansion? (Please fill the appropriate code in the provided box)

Yes..... 1

No..... 2

If coded "2", go to Qn. 8.11.5

8.11.4 What is the source of loan or credit used to finance its operations or capital investment expansion? (Please circle appropriate code, multiple answers are allowed)

Government..... A

Development banks (TIB, TADB)..... B

Commercial bank (eg CRDB, NMB, PBZ, NBC, etc)..... C

Other credit institutions..... D

Credit or loan from foreign countries..... E

Saving and Credit Cooperative Societies SACCOS..... F

Relatives or friends..... G

Other (specify) H

8.11.5 Is your establishment located in Industrial designated area? (e.g EPZ, SEZ, Municipal industrial area, park, mining sites, water catchment areas) (Please fill the appropriate code in the provided box)

Yes..... 1

No..... 2

If coded "2", go to Qn. 8.12.1

8.11.6 Please, mention the designated area

.....

8.12 HIV/AIDS Control at Workplace

8.12.1 Does your establishment have HIV/AIDS support and control programs? (Please fill the appropriate code in the provided box)

Yes..... 1

No..... 2

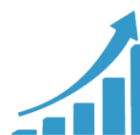
8.12.2 What are the methods that you think will reduce industrial sector vulnerability to HIV/AIDS? (Please circle appropriate code, multiple answers are allowed)

HIV/AIDS workplace education and prevention..... A

Viral load suppression (treatment)..... B

Counseling..... C

Other (Specify) D



8.13 Information Technology Infrastructure and Related Services

8.13.1 Does your establishment use the following technology infrastructure? (Please circle appropriate code, multiple answers are allowed)

- Computer..... A
 Server..... B
 Landline telephone..... C
 Mobile phones..... D
 Website..... E
 Local Area Network..... F
 Intranet..... G
 Extranet..... H
 Internet..... I
 Biometric scanner..... J
 Radio call..... K
 CCTV camera..... L
 Other (specify) M

If coded "I" for internet go to Qn 8.13.2

8.13.2 What type of internet connectivity does your establishment use? (Please circle appropriate code, multiple answers are allowed)

- Fixed line..... A
 Wireless B
 Satellite C
 Mobile Modem..... D
 Fibre connection..... E
 Router..... F
 Other, (specify) G

8.13.3 How is the use of Modern Technology and ICT affected the following? (Please write the appropriate code in the provided table)

Description	Item	Positive	Negative	Neutral	Response
Employment	8.13.3.1	1	2	3	
Production	8.13.3.2	1	2	3	
Sales and marketing	8.13.3.3	1	2	3	
Communication	8.13.3.4	1	2	3	
Record management	8.13.3.5	1	2	3	
Transaction time	8.13.3.6	1	2	3	
Business cost	8.13.3.7	1	2	3	
Keeping pace with competitors	8.13.3.8	1	2	3	
Revenue collection	8.13.3.9	1	2	3	
Services provision	8.13.3.10	1	2	3	
Other, (specify)	8.13.3.11	1	2	3	



8.13.4 Does the Establishment use electronic system (e – business) in the following? (Please circle appropriate code, multiple answers are allowed)

- Place orders for goods and services..... A
- Receiving orders for goods and services..... B
- Purchase of goods and services..... C
- Selling of goods and services..... D
- Delivery services..... E
- Pay taxes..... F
- Statutory deduction (e.g. NHIF, NSSF, ZSSF, ZHSF, PSSSF etc.) G
- Salaries..... H
- Issuing and management of bills..... I
- Other (specify)..... J
- Not applicable..... Z

8.14 Corporate Social Responsibility

8.14.1 Does your establishment provide corporate social responsibility?

Yes..... 1

☐

No..... 2

If coded "2", go to Qn. 8.15.1

8.14.2 Please indicate the amount your establishment spent on the following activities in 2023.

Activities	Items	Amount (TZS)
Education	8.14.2.1	
Health	8.14.2.2	
Security	8.14.2.3	
Sports	8.14.2.4	
Environment	8.14.2.5	
Water	8.14.2.6	
Roads	8.14.2.7	
Social Welfare	8.14.2.8	
Other, (specify)	8.14.2.9	
Total	8.14.2.10	



8.15 Challenges

8.15.1 What are the challenges facing the establishment *(Please circle appropriate code, multiple answers are allowed)*

- High cost of production..... A
- Inadequate technology..... B
- Unreliable physical infrastructure (roads, water, etc C
- Bureaucracy (administrative procedures)..... D
- Shortage of skilled labour E
- Foreign currency fluctuations..... F
- Insufficient production capacity..... G
- Shortage of raw materials..... H
- Tax administration procedures..... I
- High tax rates..... J
- Multiple taxes K
- Multiple regulatory bodies..... L
- Insufficient demand M
- Unfair competition..... N
- Infant private sector with weak support..... O
- Environmental challenges..... P
- HIV/AIDS Q
- Uncertain economic environment..... R
- Limited access to financial services..... S
- High interest rates..... T
- Illegal imports..... U
- Unreliable power supply..... V
- Counterfeit products..... W
- Other, (specify) X

8.15.2 If coded "E" for shortage of skilled labour in Qn 8.15.1, mention the exact skills which are lacking in your establishment?

- 1
- 2
- 3
- 4
- 5



SECTION IX: DECLARATION AND SIGNATURE

I HEREBY DECLARE that, the information filled in this return is complete and correct to the best of my knowledge.

Name: Signature:

Designation: Mobile number:

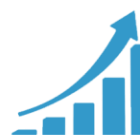
Official Stamp: Date:

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Name of Enumerator: Signature:

Number of visits made: Date:

Name of Supervisor: Signature: Date:



Annex 3: List of Participants Involved in Implementation of CIP 2023

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	Project Directors	
3	Daniel Masolwa	NBS
4	Fadhil Hassan	OCGS
	Project Managers	
5	Veronica Mwangoka	NBS
6	Nuru Masoud	OCGS
	Desk Officers	
7	Ramadhan Suleiman	NBS
8	Haji A Haji	OCGS
9	Dr. Vedastus Timothy	UNIDO
10	Dr. Yuda Lyangalyo	MIT
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14	Anthony Mgogo	NBS
15	Elide Mwanri	NBS
16	Kalisto Lugome	NBS
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31	Happiness Kapanda	CTI
32	Elvin Kisiraga	MoE
33	Charles Ruge	TANESCO
34	Philemon Mahimbo	Former NBS Staff
35	Fadhili Khalfan	Former NBS Staff
36	George Mockrey	Former NBS Staff
37	Bakari Omary	NBS
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List of Enumerators Involved in Data Collection of CIP 2023

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List of Enumerators Involved in Data Collection of CIP 2023

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Annex 4: Notice of Errata

The National Bureau of Statistics (NBS) and the Office of the chief Government Statistician wishes to inform users that an error has been identified in the Fixed Assets section specifically on Net Value of Fixed Assets at the End in Table 6.4 and Table 6.5 (Pg 63 – 66) of the published *Census of Industrial Production (CIP) 2023 Report*. The affected figures have been reviewed and corrected.

Users are kindly requested to take note of the following correction:

No.	Previous Table	Current table	Correction
1	Table 6.4: Value of Fixed Assets at the End by Industrial Sector and Type of Asset, CIP-2023	Table 6.4: Value of Fixed Assets at the End by Industrial Sector and Type of Asset, CIP-2023	The entire table has been revised. The previous results on the value of fixed assets at the end of 2023 have been replaced with revised figures following a review and reconciliation of the underlying fixed-asset results. All related interpretations and narrative referring to the previous figures has been updated accordingly.
2	Table 6.5: Percentage Distribution of Expenditure on Fixed Assets by Industrial Sector for Large Establishments, Tanzania, CIP-2023	Table 6.5: Net Value of Fixed Assets at the End by Industrial Sector for Large Establishments, Tanzania, CIP-2023	The entire table has been revised. The revised table presents the reconciled values of fixed assets at the beginning and end of the year, together with additions, disposals and depreciation. Previously, it was representing percentage distribution. The previous version should be replaced in its entirety, and all related narrative should be aligned with the revised results.

The corrected figures should replace the corresponding figures previously published in the CIP 2023 Report. All other information contained in the report remains unchanged.

NBS regrets any inconvenience that may have been caused by this error and appreciates users' understanding and continued use of official statistics.





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