TANZANIA COTTON BOARD

THE COTTON INDUSTRY IMPLEMENTATION PLAN, CIIP: 2010-2015

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ACRONYMS

AGOA	African Growth and Opportunity Act
AIDS	Acquired Immune Deficiency Syndrome
CIIP	Cotton Industry Implementation Plan
CSDS	Cotton Sector Development Strategy
CSP	Corporate Strategic Plan
CMT	Cotton Monitoring Team
DADP	District Cotton Production Programme
DCPP	District Cotton Production Programme
EBA	Everything But Arms
ECGA	Eastern Cotton Growing Area
EU	European Union
FAO	Food and Agricultural Organisation
FBG	Farmers Business Group
FEO	Field Extension Officer
GDP	Gross Domestic Product
HIV	Human Immune Virus
IARI	Ilonga Agricultural Research Institute
ICA	International Cotton Association
LGA	Local Government Authority
LZARDI	Lake Zone Agricultural Research Development Institute
MDG	Millenium Development Goal
MKUKUTA	Mkakati wa Kukuza Uchumi na Kupunguza Umaskini Tanzania
NEMC	National Environment Council
NSGRD	National Strategy for Growth and Reduction of Poverty
PPP	Public Private Partnership
TACRA	Tanzania Cotton Research Association
TAGEA	Tanzania Ginners and Exporters Association
TBS	Tanzania Bureau of Standards
TCA	Tanzania Cotton Association
TCB	Tanzania Cotton Board
TACOGA	Tanzania Cotton Growers Association
TEXTMAT	Textiles Manufacturers Association of Tanzania
TOSCI	Tanzania Official Seed Certification Institute
TPRI	Tropical Pesticides Research Institute
TSDU	Textile Sector Development Unit
TOMA	Tanzania Oil Millers Association
UN	United Nations
URT	United Republic of Tanzania
USA	United States of America
WCGA	Western Cotton Growing Area

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FOREWORD

The cotton sector is one of the key cash crops in the economy. It is a crop on which about 40 percent of the national population; that is, upwards of 15 million people; depend for their daily livelihoods; be they farmers, cotton ginners and merchants, inputs suppliers, researchers, other cotton processors and service providers, clothes wholesalers and retailers; and their dependents. It is a sub- sector in which special policy intervention is put in efforts to eradicate poverty and bring about broad- based people's welfare.

In recent years, the cotton sub- sector has played a leading, proactive role in coming up with innovations to address its challenges. It was the first among the major agricultural sub- sectors to come up with a specific medium- term Sector Strategy in 1999/00 which dwelt at great length on the problems besetting the sector; and clearly articulated the strategies of how to address them. The cotton sub- sector was fore- runner in establishing a Cotton Development Trust Fund, CDTF; a stakeholder jointly- financed scheme to fund shared functions. CDTF has become a reference scheme not only for the other agricultural sub- sectors, but also for our neighbouring cotton regulatory institutions: Uganda's Cotton Development Organisation and Cotton Development Authority of Kenya. Again, it was the first sub- sector to establish a forum on which stakeholders regularly come together to discuss issues of common interest. These include the Annual Meetings; and the famous Pamba Day on which stakeholders reverently assemble each year to recognize the best achievers in the cotton industry with various awards. These efforts were followed by the formulation of the Tanzania Cotton Board's first Corporate Strategic Plan, 2007/08- 2009/10; and the recently prepared Second Cotton Sector Development Strategy, CSDS II, 2010/11- 2014/15. It is no wonder that cotton production rose dramatically from 196,000 bales in 1999/00 to nearly 700, 000 bales in 2005/06. And, had it not been for the conspiracy of the elements, especially the increasingly rampant droughts, cotton production output volumes would, by now, have easily exceeded one million bales.

A new initiative which makes the cotton sector an industry leader in pioneering agricultural sector innovations is PAMBANET, a hand- set instant messaging of seed cotton market price movements, from TCB to the farmers. This instant price messaging helps stakeholders make more informed decisions on cotton activities.

These initiatives have not gone unnoticed- not by the industry watchers; not by the people; and certainly not by the Government.

In coming up with this Cotton Industry Implementation Plan, CIIP, to successfully operationalise the goals, objectives and targets of CSDS II; with specific plans to be implemented by the stakeholders themselves, and using their own resources; the cotton sub- sector has indeed surpassed itself in being creative.

The Government will continue to support the cotton sub- sector in these initiatives. In particular, it will fully backstop the stakeholders as they embark on the implementation of the new technologies of cotton irrigation and contract farming programmes; as well as in their quest to add value to cotton through increased domestic textile manufacturing.

Hon. Steven M. Wassira (MP)
Minister for Agriculture Food Security and Cooperatives

PREFACE

Cotton has been grown in Tanzania for more than 120 years. In recent years, the cotton sector progressively faced a number of challenges. The manifestations of these challenges are low and stagnant productivity and output levels; poor fibre quality; resulting in persistent low incomes of this smallholder farmer- dominated sector. The challenges threaten the existence of the sector as a viable socio- economic mainstay for about 40 per cent of the national population.

At the end of the 1990s, and as a positive way of anticipating the new 21st Century, the cotton stakeholders began to take a series of initiatives to stem the tide of decline. The initiatives began with the formulation of the first Cotton Sector Development Strategy, CSDS I: 2000/01- 2005/6. CSDS I was swiftly complemented by the 2000 Mwanza Resolution. These have been followed by the second Cotton Sector Development Strategy, CSDS II: 2010/11- 2014/15. These Documents clearly articulate the problems of the sector, and define the strategic measures to be taken to address them. The centrepiece of these initiatives is improving the operational efficiency of the cotton sector in order to compete in markets. A major weakness of CSDS I and Mwanza Resolution, however, was the lack of an elaborate operational Plan detailing the stakeholders’ responsibilities and obligations towards such implementation. It was a lesson well taken.

Following the formulation and adoption of CSDS II, the preparation of its operational Plan became an imperative. This Cotton Industry Implementation Plan, CIIP: 2010/11- 2014/15, therefore, serves that purpose. CIIP is the cotton sector stakeholders’ Joint Plan of Action in the implementation of CSDS II. According to each and every stakeholder, CIIP interprets the goals, objectives and targets of CSDS II into quantifiable programmes, projects and activities, and their related cost estimates. Thus, all stakeholders are duty bound to implement their respective plans, individually, or in groups as indicated; using their own resources.

As with CSDS II, the preparation of CIIP has been participatory, embracing all stakeholders. CIIP has been more so because it involves the commitment of unrequited private financial and other resources towards its successful implementation.

Since stakeholders agree that CSDS II is the **Roadmap for Increased Production, Productivity and Profitability,** and since they have committed themselves towards its implementation, a new era is indeed dawning of making the cotton sector a hub for poverty eradication and improving people’s welfare.

Hon. Dr. Festus Bulugu Limbu (MP)
Chairman
TANZANIA COTTON BOARD

EXECUTIVE SUMMARY

0.1 Introduction

The Cotton Industry Implementation Plan, CIIP, is the stakeholders' joint plan of action to implement the Second Cotton Sector Development Strategy, CSDS II. CIIP interprets the goals, objectivities and targets of CSDS II into quantifiable programmes, projects and activities; and their related estimated costs; to be implemented over the five year period of CSDS II.

CIIP fills the vacuum which existed during CSDS I implementation, which did not have an operational tool.

0.2 SWOC Analysis

An evaluation of the operational environment of the cotton sector shows that its capacity to achieve the goals, objectives and targets of CIIP will largely depend on the extent to which obtaining opportunities can be maximised in addressing pertinent challenges.

Opportunities:

- Prevailing favourable political dispensation for sustained investment mobilization in cotton development and textile manufacturing;
- Launch of Kilimo Kwanza as a strategy to revamp agriculture and bring about a green revolution;
- Implementation of donor- supported US $ 1.2b Cotton and Textiles Development Programme;
- Enduring demand for cotton fabrics and textiles due to rising populations, increasing incomes; and changing consumer patterns in preference for cotton textiles and apparel;
- Formalisation of regional market arrangements will reduce cotton smuggling across borders and boost normal trading patterns;
- Ushering in of new technologies in cotton production and processing; e.g. contract farming, cotton irrigation farming and systematic breeding of better quality hybrid seeds for higher crop yields and output volumes;
- Rising investments in textiles manufacturing will enhance skills development, boost incomes and jobs, and underpin a more sustainable domestic industrialisation strategy.

Challenges:

- Emergence of alternative cash crops, especially green gram, which are cheaper to grow but fetch higher returns than cotton in the major cotton growing areas of WCGA;
- Persistent droughts;

- Expanding acreage, increasing yields and falling production costs in major producing and consuming countries reduce prices and markets for Tanzania cotton;
- Production and export subsidies in developed cotton producing countries lead to overproduction, unfair competition and lower cotton prices;
- Competition from man-made fibres reduces the market share for cotton;
- High commodity taxes and utility tariffs impinge on the operations of the cotton sector.

0.3 Vision, Mission, Goals, Objectives and Targets

On the basis of these opportunities and challenges, CIIP's vision, mission, goals, objectives and targets are as follows;

0.3.1 Vision

To increase the efficiency of the cotton sector through improved quality, better yields, higher outputs, and increased processing.

0.3.2 Mission

To promote high cotton production, productivity and profitability through improved farm management practices; application of appropriate and effective production technologies; domestic maximization of value addition throughout the cotton value chain; effective and sustainable stakeholder organizations; and enhanced self- regulation.

0.3.3 Goals

- **Quality**: raising the quality of cotton to international standards;
- **Productivity:** doubling from 750 kg/ ha of seed cotton (260 kg/ha of lint) in 2008/09 to 1500 kg/ha (520 kg/ha of lint) in 2014/15;
- **Production:** doubling from 685,000 bales of seed cotton (126,000 MT of lint cotton) in 2008/09 to 1,500,000 bales (260,000 MT of lint cotton) in 2014/15;
- **Acreage:** total planned acreage: 500,000 ha; o/w;
  - improved cotton farming in existing areas: 450,000 ha; and
  - expansion into new areas: 50,000 ha;
- **Domestic Cotton Processing:** increasing the proportion of cotton lint consumed by the domestic textiles industry from 30% in 2008/09 to 90% in 2014/15; and
- **Tanzania's Share in African Cotton Production:** to make Tanzania the leading African cotton producer by 2015.

0.4 CIIP's Strategic Objectives

CIIP's vision and goals will be achieved through sustained implementation of the following set of strategic objectives;

- Improving the quality of cotton by strengthening policies, strategies and regulatory framework in the cotton industry;
- Enhancing sustainable production and productivity in the cotton industry;
- Increasing domestic spinning, weaving and textile milling;
- Empowering stakeholders' organisations; and
- Linking and internalizing cross- cutting issues.

0.5 CIIP Budget

Successful implementation of CIIP by the various stakeholders over the 2010/11- 2014/15 period is estimated to cost sh……b.

0.6 Anchoring CIIP Implementation

The implementation of CIIP will be anchored on a strong institutional foundation in order to be successful amid global competitive socio- economic challenges. This will involve proper organization and situating of cotton stakeholders as follows;

- Reconstituting the Tanzania Cotton Association to become a truly umbrella organization for stakeholders;
- Formation and strengthening of other stakeholder associations to be play effective roles in promoting the cotton industry;
- Enhancing the role of District Council Authorities as the frontline institutions in the implementation of grass- roots programmes, including CIIP, to eradicate poverty and improve people's welfare;
- Strengthening the Tanzania Cotton Board to successfully coordinate and monitor the implementation of new initiatives entailed in CSDS II; e.g. cotton irrigation and contract farming, and textile manufacturing programmes; cotton promotional innovations, such as establishment of monthly **MKULIMA** Newspaper; annual staging of **Textiles Week** and awards for best performers in the industry.

0.7 Implementation, Monitoring and Evaluation

The implementation of CIIP will be coordinated by the TCA Secretariat with TCB backs topping. Towards this end, the Secretariat will regularly liaise with stakeholders on activity programming, resource disbursements, implementation and reporting; using agreed performance indicators.

1.0 INTRODUCTION

1.1 Meaning of CIIP

The Cotton Industry Implementation Plan (CIIP) is the tool for operationalising the Second Cotton Sector Development Strategy: 2010- 15. In recognition of the roles and responsibilities of the various cotton stakeholders in the development of the sector, CIIP interprets these goals, objectives and targets into quantifiable programmes, projects and activities and their related estimated costs, to be implemented over the five- year period of CSDS II. Thus, CIIP is the cotton sector Stakeholders' Joint Plan of Action to implement CSDS II. It will be implemented under the overall coordination of TCA. By extension, stakeholders will formulate respective implementation plans related to their specific objectives and targets. The Tanzania Cotton Board has prepared its second Corporate Strategic Plan: 2010/11- 2012/13 to implement CSDS II in the Board's capacity of regulation, promotion and development of the cotton sector.

1.2 Background

Following the adoption of the Second Cotton Sector Development Strategy in May 2010, the cotton stakeholders resolved that an implementation plan for CSDS II be prepared under the support and coordination of the Tanzania Cotton Board. On its part, TCB asked the Consultants who had successfully revised the Second Cotton Sector Development Strategy Report, to also prepare CIIP. The Consultants, M/s. George B. Wasira and Raphael N. Mlolwa, co- opted M/s. Emmanuel Mwangulumba, a Regulatory Officer with the Department of Regulatory Services at TCB, and Shauri R. Lyaku, who works with Ingenious Investment Management Consultants as an Administrative Officer, as back- up support staff. The back- up support staff were recruited in replacement of Mr. Marco Mtunga, the TCB Director of Regulatory Services, who was originally part of the Team of Consultants, but had now become Ag. TCB's Director General, following the retirement of the incumbent to the post at the end of April, 2010.

In coming up with the Zero CIIP Draft, the Consultants resorted to relevant literature to the exercise; undertook field visits both in WCGA and ECGA to gather views and opinions; as well as seek to build initial consensus on CIIP, particularly on the stakeholders' roles and responsibilities in its implementation.

1.3 Rationale for CIIP Preparation

The Cotton Industry Implementation Plan as the tool to operationalise CSDS II fills the vacuum which existed during the implementation of CSDS I. CSDS I was not accompanied by a plan of actions and their financing. It was merely a statement of intentions. Of the three key cotton sector stakeholders, namely; the Farmers, Government and Private Sector, neither the Farmers nor the Private Sector came up with a comprehensive plan detailing the sort of activities to be performed in implementing the goals and objectives of CSDS I pertaining to their respective roles and obligations in the cotton sector. Only the Government, through the Tanzania Cotton Board, did attempt to operationalise CSDS I through TCB's Corporate Strategic Plan, CSP: 2007/08- 2009/10. Even with TCB's CSP, the impact towards CSDS I implementation was small. By the nature of TCB's mandate, which focuses on regulatory, developmental and promotional functions in the sector, the implementation of CSDS I by the Board was indirect. Moreover, CSP was formulated and implemented starting in 2007/08 when the five year time-frame for CSDS I had already elapsed in 2006/07. Due to the absence of such an elaborate plan, the implementation of CSDS I fell short of objectives. To overcome that shortcoming, therefore, CIIP is being prepared as the operational plan of CSDS II. It details a set of specific activities which the respective stakeholders will be duty- bound to undertake in order to successfully implement the various components of CSDS II relating to them.

2.0 SITUATION ANALYSIS OF THE COTTON SECTOR IN TANZANIA[2]

2.1 Socio - economic Context of Cotton

Cotton has been grown in Tanzania for more than 120 years, having been introduced by German colonialists in the late 19th century. It is one of the major traditional crops. Others are coffee, tea, tobacco, cashew nuts, and sisal. Its contribution to agricultural growth and earnings is noteworthy. Cotton is a source of employment and livelihood to about 40% of the population, i.e. about 16 million people. Over the years it has been a basis for considerable national fixed capital formation.

Over the five years, 2005- 2009, among the traditional cash crops, cotton generated the highest foreign exchange earnings, averaging US$ 92.0m per annum, compared with US$ 89.7m (tobacco), US$ 88.6m (coffee), US$ 42.2m (cashew nuts) and US$ 32.m (tea)[3].

Overall, cotton can be a hub for forward and backward linkages in agro-processing industrialization; further employment creation and value addition; and, generally in creating a sustainable manufacturing industrial base.

2.1.1 Cotton Production and Productivity

Cotton is grown in 42 districts of 13 regions, respectively out of 127 districts and 21 regions of Mainland Tanzania. More than 99 percent of the crop is produced in WCGA, around Lake Victoria, covering Shinyanga Mwanza, Mara, Tabora, Kigoma, Kagera and Singida regions. The rest is grown in ECGA.

ECGA comprises of Iringa, Kilimanjaro, Morogoro, Tanga, Manyara and Coast regions. Though this area currently produces less than 1 percent

[2] The Contact Group**: Challenges of the Cotton Sector in Tanzania: Strategic Agenda for Action;** Mwanza, January 2007; and Tanzania Cotton Board**: Cotton Sector Development Strategy II (2010/11- 2014/15)**; Dar es Salaam, July 2010.
[3] URT**: 2009 Economic Survey;** Dar es Salaam; June 2009.

of the entire crop, it has greater potential for increased cotton production than WCGA which, due to continued cultivation, coupled with inadequate use of fertilizers, has generally become exhausted to support a more productive crop.

Table 2.1 below shows the regional cotton production trends over the 1999/00 - 2008/09 period.

Table 2.1: Regional Cotton Production Trends: 1999/00- 2008/09 (Tons)

		Season									
Zones	**Regions**	**1999/00**	**2000/01**	**2001/02**	**2002/03**	**2003/04**	**2004/05**	**2005/06**	**2006/07**	**2007/08**	**2008/09**
	Shinyanga	50,733	69913	80,030	119,107	88,352	204,626	233,721	82,740	128,285	220,808
Western	Mwanza	35,794	41376	46,685	43,681	31,296	90,974	90,868	29,087	41,814	74,744
	Mara	6,136	4286	13,091	11,361	11,296	24,128	28,281	4,734	13,081	53,282
	Kagera	3,390	2087	3,117	1,613	3,476	7,091	4,639	1,992	4,257	2,559
	Tabora	3,567	5725	4,613	11,409	4,332	10,560	14,197	9,997	11,698	13,451
	Kigoma	55	4	18	28	62	542	484	208	238	412
	Singida	386	27	21	8	39	481	697	507	581	1,641
Total Western		**99,961**	**123,291**	**147,575**	**187,147**	**138,904**	**338,402**	**372,885**	**129,265**	**199,954**	**366,897**
	Percentage	**94**	**99.8**	**99.6**	**99.6**	**99.3**	**98.1**	**99. 5**	**99**	**99.9**	99.5
Eastern	Manyara	248	6	130	120	224	829	781	404	540	898
	Morogoro	334	35	242	347	523	1,948	875	845	98	299
	Mbeya	5062	0	0	0	0	0				
	Kilimanjaro	15	4	21	20	29	26	6	11	23	84
	Pwani	48	8	9	86	83	190	45	19	48	83
	Tanga	93	89	15	61	49	140	58	42		307
	Iringa	92	29	150	102	17	54	7		1	23
Total Eastern		**5,892**	**171**	**567**	**736**	**929**	**3,187**	**1,772**	**1,325**	**710**	1,694
	Percentage	**6**	**0.2**	**0.4**	**0.4**	**0.7**	**1.9**	**0.5**	**1**	**0.1**	0.5
Grand Total		**105,853**	**123,589**	**148,142**	**187,883**	**139,829**	**341,789**	**374,657**	**130,585**	**200,664**	**368,697**

Source: Tanzania Cotton Board

Table 2.1 shows that over the ten year, 1999/00- 2008/09, period, WCGA generated 99% of total cotton output per year, on average; and only 1% was produced in ECGA.

Current domestic cotton production averages 700,000 bales per annum, equivalent to 126,000 MT of cotton lint; with yields at around 760kg/ha of seed cotton, or 260 kg/ha of lint cotton. See Table 2.2 below.

Table 2.2: Cotton Production and Yield Trends: 2001/02- 2008/09

Period	Acreage ('000 Hectares)	Yield Kg/ Ha	Production ('000 MT)
2001/02	392	161	63
2002/03	291	172	50
2003/04	459	257	117
2004/05	471	212	100
2005/06	450	214	96
2006/07	459	215	99
2007/08	410	163	67
2008/09	485	256	124

Source: Tanzania Cotton Board; **Cotton World Statistics** in: Bulletin of the International Cotton Advisory Committee; September, 2009.

2.1.2 Export of Textiles and Apparel

Tanzania leads the East African countries in the export of textiles and apparel to the European Union, with annual average exports worth €14m over the nine year period, 2000- 08. However, the leading Eastern and Southern African country exporters of textiles and apparel to the EU market are respectively Mauritius, Madagascar and South Africa, with exports worth respectively €456m, €229m, and €170m in 2008. See Table 2.3 below.

Table 2.3: Export of Textiles and Apparel From Selected Eastern and Southern African Countries to the European Market: 2000- 2008 (in €)

	2000	2001	2002	2003	2004	2005	2006	2007	2008
Tanzania	15 837 824	20 389 977	14 372 195	12 575 150	15 393 091	11 828 534	13 042 028	10 865 295	11 922 604
Kenya	9 285 750	7 033 065	7 437 963	8 406 853	11 089 943	9 769 837	9 847 260	8 162 027	7 082 525
Uganda	8 011 989	8 493 329	8 582 846	8 177 153	4 830 176	5 842 470	3 001 856	3 911 585	3 757 077
Ethiopia	5 200 958	3 037 972	5 423 301	5 813 279	6 954 736	8 134 735	7 951 894	9 103 254	8 107 986
Rwanda	10 732	28 994	340 148	273 139	8 100	8 877	24 390	27 414	439
Burundi	49 425	124 107	11 904	697 967	285 161	92 299	184 315	21 620	249 642
Madagascar	277 278 368	281 806 628	152 968 175	137 597 379	170 569 780	191 403 597	240 054 529	257 286 645	229 166 979
Mauritius	690 648 656	682 526 812	629 745 913	561 770 994	524 339 651	450 945 847	498 273 646	491 622 042	435 989 949
Botswana	18 252 364	19 801 175	8 048 507	5 573 359	10 205 463	4 802 997	5 457 380	7 836 698	7 102 771
Lesotho	1 802 746	3 768 621	2 024 867	1 324 028	1 441 466	652 387	857 391	1 698 213	1 855 043
Namibia	319 701	532 761	924 203	622 361	888 632	705 968	578 969	707 852	780 214
Swaziland	10 196 567	9 362 008	7 590 789	7 567 825	4 679 003	1 910 736	2 509 641	2 529 466	1 443 258
South Africa	283 076 688	280 109 456	292 144 293	307 496 150	295 747 990	248 183 148	227 454 727	212 911 190	170 074 402

Source: Prepared by Tanzania Cotton Board's Textile Sector Development Unit (TSDU)], European Union EUROSTAT: http://epp.eurostat.ec.europa.eu

With respect to textiles and apparels exports to the USA market, according to the following Table 2.4, Tanzania has so far not fully exploited the AGOA market; unlike Kenya which, because of its deliberatively developed textiles exports strategy, has been able to capture a strategic niche in the USA market. Kenya is the third largest Eastern and Southern African country exporter of textiles and apparel to the USA market after Lesotho and Madagascar which, in 2008 exported textile goods worth respectively US$ 340m and US$ 279m. Kenya's exports were valued at US$ 247m. Tanzania's textiles and apparel exports to the USA market amounted to a paltry US$ 2m.

Table 2.4: Textiles and Apparel Exports to the United States From Selected African Countries: 2000- 2008 (in US$)

	2000	2001	2002	2003	2004	2005	2006	2007	2008
Tanzania	23 9612	432 392	328 163	1 927 159	3 352 998	4 099 620	3 717 745	3 281 447	1 872 475
Kenya	44 016 850	64 717 064	125 998 610	188 011 797	277 287 261	270 861 323	263 822 651	249 143 889	246 918 266
Uganda	3 663	13 481	1 025	1 630 653	4 008 691	4 843 622	1 257 577	1 205 448	412 262
Ethiopia	28 373	730 987	1 324 154	1 764 123	3 380 143	3 613 980	6 000 500	4 902 643	9 597 546
Rwanda	22 806	0	2 437	3 066	892	1 400	640	5 364	24 360
Burundi	8 462	360	7 893	851	0	0	548	0	0
Madagascar	109 655 747	178 059 323	89 363 433	196 144 990	323 204 361	277 182 403	238 489 195	289 813 729	279 417 256
Mauritius	244 934 658	238 307 019	254 674 553	269 152 148	227 568 221	166 912 531	118 943 682	114 679 893	101 561 935
Botswana	8 372 482	2 463 434	6 352 586	7 160 058	20 234 911	30 046 649	28 676 816	31 666 199	15 964 030
Lesotho	140 220 881	214 822 049	320 690 388	392 743 700	455 834 594	390 818 053	387 225 876	383 578 181	339 736 117
Namibia	187 292	115 305	6 695 692	41 965 759	78 855 017	53 223 668	33 240 490	28 624 052	70 103
Swaziland	31 897 695	47 969 438	89 081 098	140 667 499	178 683 871	160 975 953	135 254 207	135 282 883	124 882 680
South Africa	175 621 562	209 750 558	212 821 950	268 111 319	180 140 417	102 247 732	87 123 013	58 175 555	46 657 512

Source: US Government's Office of Textiles & Apparel (OTEXA) http://otexa.ita.doc.gov/; and the US International Trade Administration Commission (USITC) www.usitc.gov

Clearly, Tanzania has not utilized its comparative advantage of producing more raw cotton to process more textiles exports to the USA AGOA market. On the contrary, Kenya, because of its proximity to readily available lint imports, including from Tanzania, has used an aggressive export textile production strategy for AGOA.

The message coming from Tables 2.3 and 2.4 is that those countries which have embarked on a deliberate domestic textiles manufacturing industry strategy, e.g. Mauritius, Madagascar, Lesotho and Kenya have succeeded to use to greater advantage the market access progamme opportunities offered by the European Union- Everything But Arms (EBA); and the USA’ s AGOA- African Growth Opportunities Access. It should also be noted that these countries produce insignificant volumes of cotton. Their textile mills largely depend on imported grey cloth, fabrics and yarn.

There is, therefore, greater opportunity for Tanzania to establish a more robust and enduring textile industry by using the locally available abundant cotton, as well as imported fabrics, where appropriate.

Prospects for establishing textile industries, as well as textiles exports to the European and American markets under the currently existing specific trading windows are, however, tampered by the footloose, transient character of textile manufacturing industries, particularly in Africa; and the temporary and unpredictability nature of the trading opportunities entailed in both AGOA and EBA.[6] These challenges will be borne in mind in establishing a more sustainable textile industry in Tanzania.

2.1.3 Characteristics of Tanzania Cotton

The cultivated cotton is of the American Upland type (***Gossypium hirsutum L).*** Tanzania cotton is sold on the basis of Grade, together with the corresponding staple length known as Type. Accordingly, there are seven (7) grades of cotton out of which five (5) are physical and two (2) are descriptive. The basic selling grade is Gany**,** as adopted by the International Cotton Association (ICA).

[6] Melber, Henning; **Global Trade Regimes and Multi- Polarity: The US and Chinese Scramble for African Resources and Markets;** in: **A New Scramble for AFRICA? Imperialism, Investment and Development; University of KwaZulu-Natal Press; Interpak Books, Pietermaritzburg; 2009**; as well as Lee, Margaret C; **Trade Relations between the European Union and Sub- Saharan Africa under the Cotonou Agreement: Repartitioning and Economically Recolonising the Continent?** Ibid.

The cotton grades are indicated in Table 2.5 below.

Table 2.5: Tanzania Cotton Grades

Tanzania Grade	Universal grades	% of total crop	Remarks
Tang	Good middling	1.4	Physical
Gany	Strict middling	41.63	Physical
Gany	Middling	39.73	Physical
Gany	Strict low middling	13.81	Descriptive
Gany	Low middling	1.80	Physical
Gany	Strict Good Ordinary	0.40	Descriptive
Yika	Good ordinary	0.32	Physical
Under grade (UG)	Below grade (BG)	0.91	No grade

There are three types of cotton as shown in Table2.6 below.

Table 2.6: Tanzania Cotton Types

Type	Millimetre	Code	% of the total
Type 1 – staple length $1^{1}/_{18}$"	28.2 - 28.7	36	36.17
Type 2 – staple length $1^{3}/_{32}$"	27.4 - 27.9	35	50.56
Type 3 – staple length $1^{1}/_{16}$"	26.7 - 27.2	34	13.27

Generally, Tanzania's cotton is characterized as follows;

- Staple length ranges between $1^{1}/_{16}$" and $1^{1}/_{8}$";
- Over 82% of the grade is middling and above;
- More than 50% is roller ginned with low nep and short fibre content;
- Over 95% is within the prime micronaire range of 3.5 – 4.9;
- High uniformity ratio of 81 – 85% which is ideal for high speed spinning technology; and
- Fibre strength ranges between 25 and 29 gms/tex which is also ideal for high speed spinning technology.

2.1.4 Organic Cotton Production

Organic cotton farming is practiced in certain areas of WCGA especially in Meatu District. In this type of project- like cotton cultivation (BioRe Tanzania Ltd), extension services are more frequent; better crop and farm management practices are applied. Yields are, however, comparatively lower than on non-organic cotton farms. Being a unique niche market product, organic cotton fetches, on average, sh. 200/kg higher than traditional strains in the market for seed cotton. Notwithstanding, this premium price does not fully compensate for the resulting low yields. Another recurring challenge in organic cotton farming is that it has few players; it tends to be monopolistic; and, is essentially a buyers market.

2.2 Stakeholder Analysis

The cotton sector comprises of various stakeholders as analysed below.

2.2.1 The Cotton Farmers

Cotton is grown by 350,000 – 500,000 mostly small – scale farmers located in 42 districts of 13 regions. The number of farmers varies depending on weather conditions and cotton market price trends. Droughts and downward shifts in cotton prices in the international market place compel some of the farmers to switch to alternative crops. The two events may not occur simultaneously but, depending on the severity of either, the impact is the same; adversely affecting production volumes of both seed and lint cotton.

2.2.2 Tanzania Cotton Board

The Tanzania Cotton Board was established on July 1, 2004 following the coming into effect of the Cotton Industry Act No. 2 of 2001 to replace the Tanzania Cotton Lint and Seed Board as set out by Act No. 19 of 1984 and as amended in 1993. The 2001 Cotton Industry Act was amended by Miscellaneous Act No. 20 of 2009. TCB's major roles are regulation, promotion, monitoring, advisory, facilitation, coordination, protection and representation in the cotton sector.

2.2.3 Cotton Research Institutes

Currently, there are two institutes which directly deal with cotton research - the Lake Zone Agricultural Research Development Institute (LZARDI); and the Ilonga Agricultural Research Institute (IARI). Both are government owned. LZARDI is in WCGA; while IARI is in ECGA.

These institutes are constrained by limited funding for research and training; poor research infrastructure and other facilities; a staff ageing problem which is accentuated by difficulties in recruitment and retention of Researchers due to poor remuneration and inadequate other incentive packages.

2.2.4 Tanzania Cotton Association

While TCA was formed in 1997 as an apex association of cotton stakeholders to articulate and promote the interests of the sector in a unified approach, in practice it has remained largely an association of ginners, traders, exporters; and Tanzania Cotton Growers Association – TACOGA. Currently TCA has 50 members, of which 35 are ginners; 1 exporter; 4 cooperative unions; 1 growers association; and 2 farmers.

Some of the ginners, also double as oil millers because they run oil mills; e.g. Birchand Oil Mill, Kahama Oil Mill, S & C Ginning etc

TCA has played a crucial role in promoting self regulation amongst its members; as well as in spearheading increased cotton output volumes and yields through availing farmers with inputs and tractor hire services.

In WCGA there are a total of 62 ginneries equipped with 1,193 roller gins, and 85 saw gins. 21 of the ginneries are owned and operated by cooperatives. The remaining 41 are owned by private companies. All ginneries belonging to cooperatives are old – installed before 1970. The oldest are Ukerewe (1923) and Nassa (1924); and the newest are Chato and Ngasamo (1966) and Kahama (1967). Most of the private ginneries, with the exception of Manonga (1958), were constructed after 1995; and 17 of them were constructed after 2000. In ECGA there are 8 ginneries; 7 out of which are old and 1 is new.

2.2.5 Cooperatives

Currently, there are four cooperative unions, all of them are administrative – area based. The cooperatives have faced problems which make them unable to compete effectively in the liberalized procurement, processing and marketing of cotton. Their market share which was 100% before liberalization in the early 1990s has progressively declined to less than 3.0%.

2.2.6 Cotton Oil Millers

With the exception of a few firms, most ginners have oil mills as important integral components of their cotton business operations. Currently 32 ginners have installed oil mills at their business premises, capable of processing 16,121MT of cotton oil; representing only 14% of installed capacity which stands at 115,150MT p.a. These oil mills also produce around 52,000MT, in total, of cotton cake annually

Cotton seed is the main and most valuable by- product of seed cotton. It constitutes, on average 64 - 66% of seed cotton; but contributes 2.7% of the national edible oil production, although it has the potential to meet upwards of 60% of the total domestic edible oil demand.

Nationally, the demand for edible oil is presently estimated at around 170,000MT. The UNFAO recommends a minimum oil per capita consumption of 5kg. With a population of around 40 million people, national demand for edible oil is around 200,000MT pa; compared to an estimated national production of around 60,000MT. This leaves a gap of about 70% which is filled through imported semi-refined and refined palm oil.

2.2.7 Cotton Spinners, Weavers and Textile Millers

Cotton spinners, weavers and textile millers comprise of 21 mills- both old and new. All are privately owned; annually producing 110m sqm of exclusively fabrics- khanga and vitenge; dyed drill; linen and bed sheets. They utilize only about 20% of domestic lint, preferring to import the rest due to unfavorable prices and unacceptable quality levels of local fibres. They operate at 40 -50% of installed capacity; and employ around 18,000 workers.

Industrial cohesion lacks among domestic textile manufacturers. Members tend to fight against each other; instead of uniting to maximize on the prevailing dispensation on textiles industrialization to effectively interface with the Government on (a) hammering out a comprehensive, conducive textiles and apparel policy; (b) determining the fate of secondhand clothes imports which discourage the establishment of large scale garment factories. Except for khanga and vitenge, there is no effective demand for domestically manufactured textile garments such as women dress wear, shirts and trousers for men, because the market is virtually saturated by secondhand imports.

2.2.8 The Government

The cotton sub- sector is under the Ministry of Agriculture Food Security and Cooperatives. This is the parent body that has the ultimate responsibility of ensuring the cotton sub- sector is a success and contributes well to GDP. The Government provides subsidies for procuring cotton inputs and for funding the promotional and regulatory functions of TCB. Together with the

Farmers and Private Cotton Processors, it co- finances the operations of the Cotton Development Trust Fund.

There are many other ministries whose work contributes to the cotton sub sector through cross- cutting issues. Cross – cutting issues are crucial as they link the cotton sub sector with other sectors and other parts of the economy, and they link the cotton sub- sector with other essential aspects of farmers' daily lives.

These include the Prime Ministers' Office, Ministry of Water and Irrigation, Ministry of Finance, Ministry of Infrastructure Development, Ministry of Lands and Human Settlements, President's Office- Planning Commission, Ministry of Industries, Trade and Marketing and Ministry of Internal Affairs. The list also includes Ministry of Regional Administration and Local Government with Local Government Authorities (LGAs) playing a critical role in development programmes during the implementation stage at the district and grassroots levels.

2.2.9 Government Institutions

A number of government institutions in the agricultural sector which play a critical public role in the cotton sub- sector include the Tanzania Official Seed Certification Institute (TOSCI) and Tropical Pesticides Research Institute (TPRI). Others are the National Environment Management Council (NEMC) and Tanzania Bureau of Standards (TBS).

2.2.10 Development Partners

The development partners include multilateral and bilateral organizations and agencies that support Government and community in the agricultural sector, in general, and cotton sub-sector, in particular, through grants and soft loans. Development partners also provide technical support in the implementation of agreed programmes. Most financial and technical assistance is now provided through basket funding, a framework for coordinating and managing external resources and for forging closer partnership between the Government and Development Partners.

2.3 Policy, Strategy and Programme Context

CSP II has taken account of policy, strategy and programme components of ongoing programmes for macroeconomic and structural reforms being implemented by the Government; including the following;

2.3.1 The Tanzania Development Vision (Vision 2025)

Focuses on improving crop production and productivity levels; promoting wealth creation for the benefit of all stakeholders; and spearheading increased domestic processing of goods to enhance value addition and manufacturing industrialization;

2.3.2 The Agricultural and Livestock Policy and Cooperative Development Policy

These policies delineate the roles of various institutions in dealing with crops; as well as advocate for enhancing stakeholder organizations.

2.3.3 The National Strategy for Growth and Reduction of Poverty - NSGRP (MKUKUTA)

It seeks to address constraints to rural growth, improving productivity on the farm and enhancing human capacities and efficiency.

2.3.4 The Agricultural Sector Development Strategy and Programme

The Agricultural Sector Development Strategy and Agricultural Sector Development Programme laid down the framework for sustainable agricultural production by defining obtaining opportunities and advocating for enhanced incremental key programmes financing.

2.3.5 Millennium Development Goals

The Millennium Development Goals, MDGs, focus on eradication of poverty and hunger; achieving universal primary education; promoting gender equality and women empowerment; improving child and maternal health; and promoting global partnerships for development.

2.3.6 Kilimo Kwanza

Kilimo Kwanza spearheads agricultural infrastructural development; application of new technologies; promotion of higher yields and larger crop production volumes, commercial farming, as well as contract farming; and establishment of forward and backward agro- processing industries.

2.4 Challenges of the Cotton Sector

The cotton sector is facing deep-rooted challenges which need to be addressed meaningfully and consistently in order to realise its potential. The challenges of cotton whose ultimate manifestation is persistent poverty, particularly amongst its primary producers, i.e. the smallholder cotton growers, can be put into two groups, domestic and external.

2.4.1 Domestic Challenges

Domestic challenges include poor farm and crop management practices; poor infrastructure, as well as high taxes and utility tariffs which escalate production costs; limited domestic processing for maximum value addition in the total production and processing chain; rampant contamination with deleterious effects on farm gate prices and fibre competitiveness; limited extension services and research services; budgetary constraints; and droughts.

2.4.2 External Challenges

These include the following;

- expanding acreage, increasing yields and falling production costs in major producing and consuming countries, inducing a fall in prices for small producers and exporters in developing countries;
- imposition of production and marketing subsidies in developed cotton producing countries**,** which lead to artificial over- production and a decline in market prices for cotton;
- competition from man-made fibres such as polyester, viscose, acrylic and polyamide (nylon); is another real threat to cotton use. Made from chemicals, their production technology results in lower costs than cotton fibres; have generally superior quality on length, denier, tenacity, elongation, and crimp;
- durable tendency towards a decline in the price of cotton from about US ⊄400 in 1950 to around US ⊄ 70 in 2010/11.

2.5 SWOC Analysis

A general evaluation of the operational environment of the cotton sector, also as given by stakeholders, is that its capacity to achieve the goals, objectives and targets of CIIP will largely depend on the following set of strengths, weaknesses, opportunities and challenges/threats.

STRENGTHS	WEAKNESSES
1. Most stakeholders are sensitized on the cotton industry which has been a socio- economic mainstay to a significant partition of the population for more than a century	1 The sector is dominated by smallholder producers with limited knowledge on crop and farm management practices; price and market trends; input procurement and supply trends
2. The primary producers are dedicated to cotton 3. Existence of large tracts of fertile soils; numerous and large	2 Prevalence of footloose dealers and agents give wrong signals to the proper functioning of cotton production, processing and

permanent water bodies suitable for increased acreage and irrigation cotton farming 4. Proximity to largest global cotton markets in Far East Asian	marketing system 3 Poor infrastructure for inputs distribution and crop procurement 4 Collapse of cooperatives 5 Disorganised stakeholders in spinning, weaving and textile manufacturing 6 Local governments not playing effective role in supervising operations of agriculture, including cotton

OPPORTUNITIES	CHALLENGES/THREATS
1. Prevailing favourable political dispensation for sustained investment mobilization in cotton development and textile manufacturing 2. Launch of Kilimo Kwanza as a strategy to revamp agriculture and bring about green revolution 3. Implementation of donor-supported US $ 1.2b Cotton and Textiles Development Programme 4. Enduring demand for cotton fabrics and textiles due to rising populations, increasing incomes; and changing consumer patterns in preference for cotton textiles and apparel 5. Formalisation of regional market arrangements will reduce cotton smuggling across borders and boost normal trading patterns 6. Ushering in new technologies in cotton production and processing; e.g. contract and irrigation cotton farming, and systematic breeding of better quality hybrid seeds for higher crop yields and output volumes 7. Rising investments in textiles manufacturing will enhance skills development, boost incomes and jobs, and underpin a more sustainable domestic industrialisation strategy.	1. Emergence of alternative cash crops, especially green gram, which are cheaper to grow but fetch higher returns than cotton in the major cotton growing areas of WCGA 2. Persistent droughts 3. Expanding acreage, increasing yields and falling production costs in major producing and consuming countries reduce prices and markets for Tanzania cotton 4. Production and export subsidies in developed cotton producing countries lead to overproduction, unfair competition and lower cotton prices 5. Competition from man-made fibres reduces the market share for cotton 6. High commodity taxes and utility tariffs impinge on the operations of the cotton sector

3.0 CIIP'S VISION, MISSION, GOALS, OBJECTIVES AND TARGETS[7]

3.1 Vision

To increase the efficiency of the cotton sector through improved quality, better yields, higher outputs, and increased processing.

3.2 Mission

To promote high cotton production, productivity and profitability through improved farm management practices; application of appropriate and effective production technologies; domestic maximization of value addition throughout the cotton value chain; effective and sustainable stakeholder organizations; and enhanced self- regulation.

3.3 Goals

(i) **Quality**: raising the quality of cotton to international standards;

(ii) **Productivity:** doubling from 750 kg/ ha of seed cotton (260 kg/ha of lint) in 2008/09 to 1500 kg/ha (520 kg/ha of lint) in 2014/15;

(iii) **Production:** doubling from 685,000 bales of seed cotton (126,000 MT of lint cotton) in 2008/09 to 1,500,000 bales (260,000 MT of lint cotton) in 2014/15;

(iv) **Acreage:** total planned acreage: 500,000 ha; o/w;
- improved cotton farming in existing areas: 450,000 ha; and
- expansion into new areas: 50,000 ha;

(v) **Domestic Cotton Processing:** increasing the proportion of cotton lint consumed by the domestic textiles industry from 30% in 2008/09 to 90% in 2014/15; and

(vi) **Tanzania's Share in African Cotton Production:** to make Tanzania the leading African cotton producer by 2015;

3.4 Objectives and Targets

Being the implementation instrument for CSDS II, CIIP objectives and targets are consistent with the CSDS II objectives and targets as described below.

3.4.1 Improving the quality of cotton by strengthening policies, strategies and regulatory framework in the cotton industry

3.4.1.1 Rationale

The quality of cotton drastically declined in recent years due to the liberalization of traditional crop procurement, processing and marketing in the early 1990s. Key players multiplied several- fold, mostly with little inclination

[7] This Section draws from the Document **"The Cotton Sector Development Strategy II: 2010/11-2014/15"**; Dar es Salaam; 2010.

towards the maintenance of cotton quality etiquettes; in preference for procuring maximum crop volumes to meet orders. Coming from various backgrounds and different orientations, these players will be properly guided and facilitated in order to fully maximise on the availing opportunities of a private sector-led economy. In particular, stakeholders will be properly oriented to enhance the quality standards of cotton and its by-products; and to adhere to the required legal procedures, rules and regulations; in order to maximize on trading opportunities in global markets. Specifically, under this Objective, the Stakeholders will do the following;

3.4.1.2 Strategies

- Carry out sustained systematic, rigorous strategies for raising and maintaining required cotton quality standards; e.g.;
    - strict application of insecticides to ensure cotton is not attacked and stained by pests;
    - ensure proper harvesting and storage of seed cotton;
    - ensure grading of seed cotton;
    - maintain quality standards in cotton packaging for procurement and marketing;
    - maintain clean surroundings at buying posts, ginneries, spinning and weaving plants to ensure cotton quality maintenance.
- Comply with the 2001 Cotton Industry Act, as amended by Miscellaneous Act No. 20 of 2009; and the 2010 Cotton Regulations;
- Strengthen institutional capacities for development, promotion and monitoring of the cotton sector;
- Rehabilitate and modernize ginneries;
- Keep abreast of quality enhancement development trends in the cotton world;
- Enhance self- regulation in the cotton industry;
- Design an award system in recognition of stakeholders who promote cotton quality standards, at all levels, from the farm all the way to the textile mill; the highest being the **Cotton Quality Standard Award.**

3.4.1.3 Targets

- Ensure the total area under cotton receives at least 2 insecticides sprays per growing season by 2015;

- Ensure all cotton is harvested using 100% cotton bags by 2015;
- Ensure standard packaging materials are used in cotton procurement and marketing by 2015;
- Restore mandatory grading of seed cotton by 2015;
- Attain international cotton quality standards by 2015;
- Start award system for cotton quality standards promotion by 2011;
- Enhance the cotton research capacities by 2015;
- Local Government Authorities mainstream cotton development, promotion and monitoring in their activities by 2015;
- Enhance awareness on world cotton production and trade by 2015.

3.4.1.4 Key Performance Indicators

- Percentage of acreage which receives at least 2 sprays per growing season;
- Percentage of the cotton crop which is harvested using 100% cotton material bags;
- Proportion of cotton sold as Grade A and Grade B;
- Number of cotton quality standards awards issued;
- Rising proportion of good quality cotton in all its ramifications;
- Number of workshops conducted to enlighten stakeholders;
- Degree of Local Government Authorities' involvement in cotton development, promotion and monitoring;
- Recruited requisite research staff levels, provision of necessary material and logistical support to research institutes;

3.4.2 Enhancing sustainable production and productivity in the cotton industry

3.4.2.1 Rationale

Between 2001/02 and 2008/09 several initiatives were taken to improve the operations of the cotton sub- sector; resulting into doubling of cotton production levels; from 348,000 bales (63,000MT) to 685,000 bales (124,000MT). Productivity also rose by 60% from 161 kg/ha (2001/02) to 256 kg/ha (2008/09). In studies carried out by LZARDI, it has been established that through application of better technologies and improved farm and crop management practices, yields can rise to 530- 750 kg/ha. Considerable scope, therefore, exists for further raising cotton productivity and production; by addressing a number of the challenges in the sector, and maximizing on obtaining opportunities. In view of these facts, the Stakeholders will undertake the following strategies to enhance sustainable production and productivity in the cotton industry;

3.4.2.2 Strategies

- Through public- private partnership (PPP) arrangements, furnish ward resource centres, where farmers and cotton dealers can converge to acquire more skills on cotton;
- Start a monthly Tabloid on cotton and agricultural sector- related issues. Under the name of **MKULIMA**, the Tabloid will;
  - report regularly on cotton price trends; on agro-chemicals and other inputs; on cotton production trends and other major developments in the cotton sector;
  - sensitise communities on the HIV/AIDS pandemic, particularly during the crop marketing season;
  - sensitise communities on the need for fair distribution of the proceeds from cotton sales between husband and wife, and between man and woman;
  - carry commercial advertisements on agricultural-related activities;
  - **MKULIMA** will be the voice of the cotton sector; in particular, the voice of Farmers;
  - **MKULIMA** will be managed by the reconstituted TCA Secretariat.
- Empower farmers with knowledge on better crop and farm management practices;
- Empower ginners and other potential cotton exporters with knowledge on direct cotton sales in foreign markets;
- Access farmers with better farm machinery;
- Embark on irrigation cotton production programmes;
- Embark on contract cotton farming programmes;
- Review the Voucher Input System in order to revert to a thoroughly revised Passbook Scheme of CDTF, as resolved by the 2010 Annual Stakeholders Meeting;
- Mobilise investment for medium and large- scale modern cotton farming;

- Mobilise Local Government Authorities to internalize cotton development programmes and activities in their DADPs; e.g.;

  - Forming Cotton Monitoring Teams, CMTs, at village, ward and district levels;
  - Coordinating the preparation and supervising the implementation of District Cotton Production Programmes, DCPPs; such as cotton irrigation and contract farming programmes;
- Enhance research capacities;
- Develop new crop varieties/hybrids;
- Recruit missing competencies at the Cotton Research Institutes;
- Enhance the pace of developing new cotton technologies; e.g. new hybrids, Bt cotton;
- Establish sustainable cotton marketing system;
- Implement sustainable environmental management strategies in the cotton sector;

3.4.2.3 Targets

- Furnish at least 1 resource centre in each Ward by 2015;
- Start **MKULIMA,** the monthly newspaper on cotton by 2012;
- Form Cotton Monitoring Teams by 2012;
- Prepare District Cotton Production Programmes by 2012;
- Increase cotton production from 685,000 bales to 1,500,000 bales by 2015;
- Increase cotton yields from 260kg/ ha to 520kg/ha by 2015 of lint cotton;
- Review the Passbook Inputs Scheme with a view to improve its operations by 2011;
- Implement at least 42 irrigation cotton farming programmes by 2015;
- Based on trials in Mara region, expand cotton contract farming programmes to all relevant regions by 2015;
- Invest in at least 10 medium to large- scale modern cotton farms by 2015;
- Avail 50 per cent of farmers with improved technologies on the farm; e.g. ox- drawn ploughs, planters and tractors; from the current levels of 60%- by hand hoe, 35%- by animal traction, and 5% by motor traction by 2015;

- Design a special programme to mentor ginners and other potential cotton exporters to engage in direct cotton export sales to foreign markets by 2011;
- Improve the operation of the Input Voucher Scheme by 2011;
- Ensure that 3 improved cotton seed varieties are developed, multiplied, processed and distributed to farmers by 2015;
- Tanzania cotton to meet international quality standards by 2015;
- Ensure the cotton marketing system is improved by 2015.

3.4.2.4 Key Performance Indicators

- Number of resource centres furnished;
- **MKULIMA** newspaper on cotton is launched;
- Increasing number of cotton bales being produced;
- Rising yield levels in cotton production;
- Number of irrigation schemes put under cotton cultivation ;
- Number of cotton contract farming programmes established;
- Number of medium to large- scale modern cotton farms started;
- Rising proportion of farmlands which are prepared using ox- drawn ploughs and tractors;
- Number of new cotton seed varieties released;
- Rising cotton quality levels.

3.4.3 Increasing domestic spinning, weaving and textile milling

3.4.3.1 Rationale

Currently, more than 70% of cotton is exported in the form of lint, with domestic value retention at around 5% only. Given that domestic spinning into yarn adds another minimal 5% value, the remainder of the value in the textile and apparel supply chain occurs in garmenting, branding and retailing. This means that more than 90% of the value of cotton, plus the accompanying jobs, are generated and created abroad when most of the cotton is exported as lint only.

Therefore, increased domestic cotton processing into garments and textile products in order to maximize value addition and employment generation is essential. This will lead to the creation of effective demand for local fibres, as well as creation of relative price stability for Tanzania cotton.

The shift away from exporting raw cotton in the form of lint and yarn will be in line with the pattern of demand in global trade which is dominated by manufactures and services. However, the locally produced garments and textile materials will have the necessary quality to compete in the global markets.

3.4.3.2 Strategies

- Resolve the existing frictions and conflicts among spinners, weavers and textile millers to form a strong TEXMAT as the nucleus of the reviving textiles manufacturing industry;
- Rehabilitate existing spinning, weaving and textile plants;
- Modernise spinning, knitting and weaving industries;
- Develop specialized skills in spinning, weaving and textile milling;
- Improve the infrastructure to ensure reliable transportation and logistics; power and water supply at Export Processing Zones;

- Rationalise cotton levies, taxes and tariffs;
- Hammer out a comprehensive textiles and apparel policy, including;
  - promoting vertical integration in the textiles sector through appropriate taxes and other fiscal measures;
  - improving export incentives by reducing the existing anti- export bias of textiles in the common external tariff;
  - resolving the challenge of second-hand clothes imports;
  - review the importation of low-grade grey cloth or semi-finished materials.
- Design and carry out systematic promotional campaigns of Tanzania, its social and economic comparative advantages, to potential investors in the cotton sector;
- Start and carry out an annual weekly event on Tanzania textiles to be known as **Textiles Week**, which would draw participation from domestic and international spinners, weavers, garments and textile

manufacturers and merchants; academics, textile engineers and technologists; textile designers. During the week the following activities, among others, would be showcased and celebrated;

- conferences/workshops on textiles- technology developments, textile trends, skills development in the textiles industry; etc.;
- fashion shows of cotton textiles;
- business exchanges on cotton, textiles;
- cotton textile designs and crafts.

3.4.3.3 Targets

- A vibrant TEXMAT is revived and fully operational by 2015;
- Establish modern spinning , weaving and textile mills established by 2015;
- 50% of skilled personnel in spinning, knitting, weaving textile milling is trained by 2015 ;
- The percentage of cotton which is exported as lint or yarn declines to 40% by 2015;
- Increase earnings on garments, textiles and clothing to US$ 3.5b. by 2015;
- Create 116,000 new jobs in the textiles industry by 2015;
- Start the annual Tanzania **Textiles Week** in 2012;
- Create a comprehensive textiles and apparel policy by 2012.

3.4.3.4 Key Performance Indicators

- A revived TEXMAT is fully functional;
- Number of modern spinning, knitting, weaving, and textile mills established;
- Number of skilled personnel in spinning, knitting, weaving and textile milling trained;
- Number of new jobs created in the cotton industry;
- Declining proportion of cotton exported as lint and yarn;
- Tanzania **Textiles Week** event is held annually;
- A new textiles and apparel policy is enacted.

3.4.4 Empowering stakeholder organizations

3.4.4.1 Rationale

The liberalization of the procurement and marketing of traditional crops in 1993 was meant to put the private sector in the driver's seat in developing the economy, including the cotton industry. This was also meant to lead to effective competition in global trading operations. The imperative to have strong private stakeholder organizations is premised on their capacity to mount sustained effort against these challenges. The existing cotton sector organizations do not have sufficient strength and capacity to play such roles. In this context, institutional restructuring will be carried out; and stakeholder collaborative arrangements will be strengthened.

3.4.4.2 Strategies

- Establish the cotton sub-sector audit and needs assessment
- Reconstitute TCA into the apex cotton stakeholder coordination organ;
- Seek material support to strengthen the capacity of the reconstituted TCA Secretariat;
- Form new and strengthen existing Farmer organizations; e.g. genuine primary cooperative societies, associations; Ginners/Oil Millers Association[8]; Tanzania Cotton Researchers Association[9]; association of Spinners, Weavers and Textile Millers- TEXTMAT;
- Enhance the capacity of some of the above associations, especially the Farmer Associations;
- Mobilise relevant District Councils to become active, vital partners in CIIP and CSDS II successful implementation.

3.4.4.3 Targets

- To conduct the cotton sub-sector audit and needs assessment by 2011;
- Reconstituted TCA rolled- out by 2011;
- Form and strengthen other stakeholder organizations by 2011;
- Relevant Local Government Authorities ensure they play their critical role in successful CIIP and CSDS II implementation by 2011.

3.4.4.4 Key Performance Indicators

- Number of cotton sector stakeholder groups/associations properly formed;

[8] It may be called, Tanzania Ginners and Exporters Association, (TAGEA).
[9] It may be known as Tanzania Cotton Research Association, (TACRA).

- Degree of District Councils' involvement in successful CSDS II implementation;
- TCA reconstituted.

3.4.5 Linking and internalizing cross- cutting issues

3.4.5.1 Rationale

Cross-cutting issues such as infrastructure, gender, HIV/AIDS, and environment are important for sustainable cotton production. Improved infrastructure has a direct bearing on the cost of cotton production as well as on cotton producer prices. The place of women in having a fair share of the benefits from cotton, particularly at the farm level, is an important factor in sustaining the cotton sector while, at the same time, upholding fundamental human rights. With regard to environment, cotton production is synonymous with the application of various pesticides which, without rational utilization, can impact negatively on the environment. HIV/AIDS is a world disaster affecting the active labour force which is important for cotton production.

Cross-cutting issues, therefore, will be taken on board in the implementation of CIIP.

3.4.5.2 Strategies

- District Councils to implement agreed arrangements to allow the Tanzania Cotton Board to collect on their behalf the cotton cess, and set aside 10% of such cess for cotton- related development activities;
- Mobilise private sector resources for improving the infrastructure;
- Carry out sustainable strategies in communities and households on the importance of sharing fairly proceeds from cotton sales between husband and wife and between man and woman;
- Carry out sustainable campaigns to educate communities, in villages and offices, on the dangers of HIV/AIDS, especially during the cotton marketing season and during the magulio (market) days;
- Implement sustainable environmental management measures in cotton sector operations.

3.4.5.3 Targets

- Relevant District Councils allow TCB to collect, on their behalf, the cotton cess; and utilize 10% of such cess for

repairing and constructing rural cotton roads, and other cotton- related development activities by 2015;
- Enter into PPPs in developing the infrastructure for cotton by 2012;
- By 2015 all communities in cotton growing areas to have been sensitized on gender fairness in the distribution of cotton sales receipts;
- By 2012 a sustainable system of sensitising communities on HIV/AIDS will have been put in place;
- By 2012 all premises used for cotton operations will have met the standard environmental requirements;

3.4.5.4 Key Performance Indicators

- Number of rural roads for cotton production and procurement repaired and constructed;
- Number of infrastructure facilities constructed;
- Degree of family and social cohesion built in cotton farming communities;
- Reduction in HIV/AIDS infection rates.

4.0 STAKEHOLDERS' PLANNED ACTIVITIES AND THEIR FINANCING

The detailed financial outlays for the various stakeholders' objectives, targets and activities are as indicated below:-

Objective 1: Improving the quality of cotton by strengthening policies, strategies and regulatory framework in the cotton industry

S/N	Stakeholder(s)	Plan/Activity	Estimated Financing ('000' Sh.)				
			2010/11	2011/12	2012/13	2013/14	2014/15
1	TACOGA/ FBG	1. Strengthen TACOGA 2. Sensitise farmers on good cotton quality					
2.	TACOGA/ FBG/TAGEA	1 Procure cotton weighing scales 2 Construct ware-houses/ godowns					
3.	TAGEA	1. Recruit Field Extension Officers-FEOs 2. Procure cotton harvesting bags for Farmers 3. Rehabilitate and modernize ginneries					
4.	TACRA	Carry out needs					

		analysis to assess research capacities and needs					
5.	TCA/TCB	1. Coordinate seed production and multiplication according to production zones 2. Design and coordinate implementation of **Cotton Quality Standards Award** as highest award for best performers in cotton industry					

Objective 2: Enhancing sustainable production and productivity in the cotton industry

S/N	Stakeholder(s)	Plan/Activity	Estimated Financing ('000' Sh.)				
			2010/11	2011/12	2012/13	2013/14	2014/15
1.	TACOGA/ FBGs	1. Organise Farmers in FBGs 2. Educate farmers through FFS 3. Internalise the 2010 Cotton Regulations					
2.	TACOGA/ FBG/TAGEA/ TCA/TCB/ LGAs	1. Furnish Ward Resource Centres 2. Embark on cotton contract farming programme 3. Embark on cotton irrigation farming programme					
3.	LGAs	1. Form Cotton Monitoring Teams-CMTs- at village, ward and district levels 2. Supervise preparation of cotton production targets through District Cotton Production Programmes-DCPPs 3. Internalise cotton development pro-grammes in DADPs 4. Internalise the 2010					

		Cotton Regulations 5. Monitor implementation of DCPPs 6. Monitor and supervise operations of cotton irrigation and contract farming programmes					
4.	TAGEA	1. Provide inputs to Farmers 2. Recruit Field Extension Officers to train Farmers on better crop and farm management practices 3. Access Farmers with better farm machinery					
5.	TACRA	Develop new cotton technologies					
6.	TCA/TCB	Establish monthly **MKULIMA** news tabloid					
7.	TCA/TAGEA/ TCB	Mobilise medium and large- scale modern cotton farming					

Objective 3: Increasing domestic spinning, weaving and textile milling

S/N	Stakeholder(s)	Plan/Activity	Estimated Financing ('000' Sh.)				
			2010/11	2011/12	2012/13	2013/14	2014/15
1.	TEXTMAT	1. Resolve internal conflicts to form strong, unified association of spinners, knitters, weavers and textiles manufacturers- TEXTMAT 2. Rehabilitate existing spinning, weaving and textiles plants 3. Modernise spinning, knitting, weaving and textiles industries					
2.	TEXTMAT/T CA/TCB	1. Rationalise cotton levies, taxes and tariffs 2. Hammer out					

		comprehensive Textiles Policy 3. Develop specialized skills in spinning, knitting, weaving and textiles industries 4. Promote small- scale textile mills and handlooms 5. Coordinate preparation and staging of **Textiles Week** annually					

Objective 4: Empower stakeholder organizations

S/N	Stakeholder(s)	Plan/Activity	Estimated Financing ('000' Sh.)				
			2010/11	2011/12	2012/13	2013/14	2014/15
1.	TCA/TCB	1. Reconstitute TCA 2. Coordinate formation and strengthening of stakeholder associations 3. Carry out sector audit to establish needs of stakeholders 4. Develop stakeholders binding code of conduct to guide their operations 5. Mobilise material support to strengthen capacity of stakeholder associations					

Objective 5: Link and internalize cross- cutting issues

S/N	Stakeholder(s)	Plan/Activity	Estimated Financing ('000' Sh.)				
			2010/11	2011/12	2012/13	2013/14	2014/15
1.	TCA/TCB/ LGAs	1. Allow TCB to collect cotton cess on behalf of LGAs 2. Sensitise communities for sharing fairly proceeds from cotton sales between husband and wife, and between man and woman					

		3. Carry out systematic campaigns to educate farmers and communities on HIV/AIDS pandemic 4. Mobilise financial resources for development of infrastructure for cotton irrigation, storage and transportation					

5.0 ANCHORING CIIP IMPLEMENTATION

The implementation of CIIP must be anchored on a strong institutional foundation in order to be successful. To succeed amid the global competitive socio- economic challenges, the cotton stakeholders must be properly organized because, “the future belongs to the organized”. Therefore, to achieve the objectives and targets of CIIP, among other issues, the following institutional framework will be put in place on a priority basis.

5.1 Reconstitution of the Tanzania Cotton Association

The Tanzania Cotton Association will be reconstituted to become the umbrella, coordinating body in implementing CIIP and CSDS II. The TCA’s Secretariat will be the overall coordinator of the cotton sector and its stakeholders.

5.2 Formation of Other Strong Stakeholder Associations

Other cotton stakeholder associations will be formed and strengthened; e.g. strengthening the association for primary producers/farmers- (Tanzania Cotton Farmers Association- TACOGA); forming associations for cotton researchers- (Tanzania Cotton Researchers Association- TACRA); for ginners and exporters- (Tanzania Ginners and Exporters Association- TAGEA); for Oil Millers- (Tanzania Oil Millers Association- TOMA); and reviving the association for Spinners, Weavers and Textile Manufacturers (Textiles Manufacturers of Tanzania- TEXTMAT).

5.3 Enhancing the Role of District Council Authorities

In monitoring and supervising the operations of the cotton sector, District Councils will undertake the following key functions;

(a) Formation of Village, Ward and District Cotton Monitoring Teams (CMTs) whose main tasks will be the following at each level;

- supervision of the preparation of cotton production targets through District Cotton Production Programmes;
- monitoring the implementation of District Cotton Production Programmes- DCPPs;

- monitoring and supervision of the operation of cotton irrigation and contract farming programmes;
- supervision of the procurement and distribution of inputs;
- monitoring the procurement and marketing of seed cotton.

(b) Preparation of District Cotton Production Programmes - DCPPs, with the following key parameters;
- number of farmers per village, ward, district;
- total estimated hectorage;
- total estimated output in bales/ tons/ kg of seed cotton;
- estimated inputs requirements.

See Appendixes A and B which provide Regional and District seed cotton indicative production targets; as well as inputs requirements and their respective estimated costs.

(c) Each District Council will set aside 10% of cotton cess annually for financing the above activities.

Refer to Appendixes C and E.

5.4 Strengthening the Tanzania Cotton Board

The regulatory, developmental, promotional and monitoring role of TCB will need to be strengthened further. Thus, in addition to its routine functions, TCB will implement the following tasks;

- Create a Department of Textiles Development to spearhead the revival of cotton textiles manufacturing industrialization;
- Recruit the staff of the Cotton Promotion and Development Department
- Establish the Zonal Office for ECGA to spearhead the expansion of cotton production in this Zone ;
- Rehabilitate the re-acquired fixed assets of the sector, i.e. the Kurasini Godowns and some of the regional Pamba House office buildings, as vital sources for sustainable financing of TCB activities;
- Transform Pamba House into a beacon of hope and inspiration for the cotton industry in Tanzania through a redesign and construction of the existing building;
- Oversee the implementation of the three (3) key CSDS II Programmes, viz.;
  - Irrigation cotton programme;
  - Integrated cotton cultivation programme; and
  - Textiles manufacturing programme.
- Coordinate the dissemination of the 2010 Cotton Regulations to stakeholders.
- Monitor and supervise the implementation of new initiatives entailed in the Second Cotton Sector Development Strategy, 2010/11- 2014/15; e.g. establishment of **MKULIMA**, a monthly tabloid on cotton and

agriculture; staging **Textiles Week**, an annual national event to celebrate and advertise Tanzania cotton and textiles; implementation of **Cotton Quality Standards Award** and other awards for the best performers in the cotton industry each year.

6.0 IMPLEMENTATION, MONITORING AND EVALUATION

6.1 Implementation Approach

Overall, the implementation of CIIP will be coordinated by the TCA Secretariat, with backstopping from TCB. To this end, The TCA Secretariat will perform the following functions;

- Liaise with the stakeholders on activity programming and resource disbursements, with a view to prepare work plans for all the activities comprised in CIIP. These work plans will be submitted and discussed by the TCA Executive Committee;
- Again liaise with the stakeholders on programme implementation and reporting with a view to prepare and submit periodic CIIP implementation reports to the quarterly meetings of the TCA Executive Committee;
- Coordinate plan assessment and evaluation to ensure all the stakeholders are actively involved in the planning and implementation of respective activities in CIIP;
- Submit Annual CIIP Implementation Reports to the Annual Stakeholders Meetings;
- Establish appropriate networking arrangements with the stakeholders on data and other information sharing.

6.2 Performance Indicators

Both CSDS II and CIIP have specific key performance indicators to measure the implementation of specific targets over a given specific time frame. In this regard, CIIP implementation, monitoring and evaluation processes will be streamlined to ensure that for every planned activity there will be a yardstick to gauge the extent of its execution over a certain time period and by a clearly identified stakeholder, individually or as a group. The overall key performance indicators which will be monitored closely are those pertaining to;

- Improving cotton quality;
- Increasing cotton yields;
- Rising cotton production volumes;
- Increasing proportion of cotton which is spinned, weaved and milled into textiles materials locally;
- Rising jobs;
- Increasing incomes.

6.3 Monitoring

Implementation of the various planned activities will be monitored on a continuous basis to identify possible problems and provide remedial actions to improve performance. Monitoring activities will include routine data collection, analysis, supervision, field visits; and preparation and submission of regular implementation reports to relevant stakeholder meetings.

6.4 Evaluation

CIIP will be evaluated before, during and after implementation to ensure that it is feasible and likely to produce the intended results. The evaluation will use standard relevance, efficiency, effectiveness, sustainability and impact criteria.

Appendix A: Regional Indicative Cotton Production Targets: 2010/11- 2014/15 (Kg of Seed Cotton)

REGIONS	PERCENTAGE	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Shinyanga	61.2	264,384,000	304,922,880	345,461,760	426,539,520	475,891,200
Mwanza	24.3	104,976,000	121,072,320	137,168,640	169,361,280	188,956,800
Mara	7.0	30,240,000	34,876,800	39,513,600	48,787,200	54,432,000
Tabora	4.0	17,280,000	19,929,600	22,579,200	27,878,400	31,104,000
Singida	1.4	6,048,000	6,975,360	7,902,720	9,757,440	10,886,400
Kagera	1.1	4,752,000	5,480,640	6,209,280	7,666,560	8,553,600
Kigoma	1.0	4,320,000	4,982,400	5,644,800	6,969,600	7,776,000
Sub total	**100.0**	**432,000,000**	**498,240,000**	**564,480,000**	**696,960,000**	**777,600,000**
Morogoro	53.7	9,666,000	11,148,120	12,630,240	15,594,480	17,398,800
Manyara	33.6	6,048,000	6,975,360	7,902,720	9,757,440	10,886,400
Pwani	5.0	900,000	1,038,000	1,176,000	1,452,000	1,620,000
Tanga	4.0	720,000	830,400	940,800	1,161,600	1,296,000
Kilimanjaro	3.6	648,000	747,360	846,720	1,045,440	1,166,400
Iringa	0.1	18,000	20,760	23,520	29,040	32,400
Sub total	**100.0**	**18,000,000**	**20,760,000**	**23,520,000**	**29,040,000**	**32,400,000**
GRAND TOTAL		**450,000,000**	**519,000,000**	**588,000,000**	**726,000,000**	**810,000,000**

Appendix B: District Indicative Cotton Production Targets: Output Volumes, Inputs Requirements and Costs: 2010/11- 2014/15

REGION	DISTRICT	2010/2011 AREA (HA)	2010/2011 OUTPUT (KG)	2010/2011 INSECTI-CIDES (ACRE-) (PACKS)	2010/2011 FERTI-LIZERS (TONS)	2011/2012 AREA (HA)	2011/2012 OUTPUT (KG)	2011/2012 INSECTI-CIDES (ACRE-) (PACKS)	2011/2012 FERTI-LIZERS (TONS)	2012/2013 AREA (HA)	2012/2013 OUTPUT (KG)	2012/2013 INSECTI-CIDES (ACRE-) (PACKS)	2012/2013 FERTI-LIZERS (TONS)	2013/2014 AREA (HA)	2013/2014 OUTPUT (KG)	2013/2014 INSECTI-CIDES (ACRE-) (PACKS)	2013/2014 FERTI-LIZERS (TONS)	2014/2015 AREA (HA)	2014/2015 OUTPUT (KG)	2014/2015 INSECTI-CIDES (ACRE-) (PACKS)	2014/2015 FERTI-LIZERS (TONS)
Shinyanga	Bariadi	79,315	79,315,200	594,864	3,966	79,545	91,476,864	596,588	3,977	86,365	103,638,528	647,741	4,318	87,645	127,961,856	657,338	4,382	88,128	142,767,360	660,960	4,406
	Maswa	50,233	50,232,960	376,747	2,512	50,379	57,935,347	377,839	2,519	54,698	65,637,734	410,236	2,735	55,509	81,042,509	416,314	2,775	55,814	90,419,328	418,608	2,791
	Meatu	44,945	44,945,280	337,090	2,247	45,076	51,836,890	338,067	2,254	48,940	58,728,499	367,053	2,447	49,666	72,511,718	372,492	2,483	49,939	80,901,504	374,544	2,497
	Bukombe	34,370	34,369,920	257,774	1,718	34,470	39,639,974	258,522	1,723	37,425	44,910,029	280,688	1,871	37,980	55,450,138	284,847	1,899	38,189	61,865,856	286,416	1,909
	Kishapu	31,726	31,726,080	237,946	1,586	31,818	36,590,746	238,635	1,591	34,546	41,455,411	259,096	1,727	35,058	51,184,742	262,935	1,753	35,251	57,106,944	264,384	1,763
	Kahama	21,151	21,150,720	158,630	1,058	21,212	24,393,830	159,090	1,061	23,031	27,636,941	172,731	1,152	23,372	34,123,162	175,290	1,169	23,501	38,071,296	176,256	1,175
	Shinyanga	2,644	2,643,840	19,829	132	2,652	3,049,229	19,886	133	2,879	3,454,618	21,591	144	2,922	4,265,395	21,911	146	2,938	4,758,912	22,032	147
	Sub total	**264,384**	**264,384,000**	**1,982,880**	**13,219**	**265,150**	**304,922,880**	**1,988,627**	**13,258**	**287,885**	**345,461,760**	**2,159,136**	**14,394**	**292,150**	**426,539,520**	**2,191,128**	**14,608**	**293,760**	**475,891,200**	**2,203,200**	**14,688**
Mwanza	Magu	36,742	36,741,600	275,562	1,837	36,848	42,375,312	276,361	1,842	40,008	48,009,024	300,056	2,000	40,600	59,276,448	304,502	2,030	40,824	66,134,880	306,180	2,041
	Geita	32,543	32,542,560	244,069	1,627	32,637	37,532,419	244,777	1,632	35,435	42,522,278	265,764	1,772	35,960	52,501,997	269,702	1,798	36,158	58,576,608	271,188	1,808
	Kwimba	18,896	18,895,680	141,718	945	18,950	21,793,018	142,128	948	20,575	24,690,355	154,315	1,029	20,880	30,485,030	156,601	1,044	20,995	34,012,224	157,464	1,050
	Sengerema	8,398	8,398,080	62,986	420	8,422	9,685,786	63,168	421	9,145	10,973,491	68,584	457	9,280	13,548,902	69,601	464	9,331	15,116,544	69,984	467
	Misungwi	7,348	7,348,320	55,112	367	7,370	8,475,062	55,272	368	8,002	9,601,805	60,011	400	8,120	11,855,290	60,900	406	8,165	13,226,976	61,236	408
	ukerewe	840	839,808	6,299	42	842	968,579	6,317	42	914	1,097,349	6,858	46	928	1,354,890	6,960	46	933	1,511,654	6,998	47
	Nyamagana	105	104,976	787	5	105	121,072	790	5	114	137,169	857	6	116	169,361	870	6	11,6.64	188,957	875	6
	Ilemela	105	104,976	787	5	105	121,072	790	5	114	137,169	857	6	116	169,361	870	6	11,6.64	188,957	875	6
	Sub total	**104,976**	**104,976,000**	**787,320**	**5,249**	**105,280**	**121,072,320**	**789,602**	**5,264**	**114,307**	**137,168,640**	**857,304**	**5,715**	**116,001**	**169,361,280**	**870,007**	**5,800**	**116,640**	**188,956,800**	**874,800**	**5,832**
Mara	Bunda	19,656	19,656,000	147,420	983	19,713	22,669,920	147,847	986	21,403	25,683,840	71,850	479	21,720	31,711,600	103,853	692	21,840	35,380,800	163,800	1,092
	Musoma	5,443	5,443,200	40,824	272	5,459	6,277,824	40,942	273	5,927	7,112,448	47,335	316	6,015	8,781,696	79,350	529	6,048	9,797,760	45,360	302
	Serengeti	5,141	5,140,800	38,556	257	5,156	5,929,056	38,668	258	5,598	6,717,312	46,095	309	5,681	8,293,824	78,398	523	5,712	9,253,440	42,840	286
	Sub total	**30,240**	**30,240,000**	**226,800**	**1,512**	**30,328**	**34,876,800**	**227,457**	**1,516**	**32,928**	**39,513,600**	**165,280**	**1,104**	**33,416**	**48,787,120**	**261,601**	**1,744**	**33,600**	**54,432,000**	**252,000**	**1,680**
Tabora	Igunga	14,342	14,342,400	107,568	717	14,384	16,541,568	107,880	719	15,617	18,740,570	117,129	781	15,849	23,139,072	118,865	792	15,936	25,816,320	119,520	797
	Urambo	1,382	1,382,400	10,368	69	1,386	1,594,368	10,398	69	1,505	1,806,320	11,290	75	1,528	2,230,272	11,457	76	1,536	2,488,320	11,520	77
	Nzega	1,037	1,036,800	7,776	52	1,040	1,195,776	7,799	52	1,129	1,354,740	8,467	56	1,146	1,672,704	8,593	57	1,152	1,866,240	8,640	58
	Uyui	518	518,400	3,888	26	520	597,888	3,899	26	564	677,370	4,234	28	573	836,352	4,296	29	576	933,120	4,320	29
	Sub total	**17,280**	**17,280,000**	**129,600**	**864**	**17,330**	**19,929,600**	**129,976**	**867**	**18,816**	**22,579,000**	**141,119**	**941**	**19,095**	**27,878,400**	**143,211**	**955**	**19,200**	**31,104,000**	**144,000**	**960**

Singida	Iramba	3,447	3,447,360	25,855	172	3,457	3,975,955	25,930	173	3,754	4,504,550	28,153	188	3,809	5,561,741	28,571	190	3,830	6,205,248	28,728	192
	Manyoni	1,331	1,330,560	9,979	67	1,334	1,534,579	10,008	67	1,449	1,738,598	10,866	72	1,470	2,146,637	11,027	74	1,478	2,395,008	11,088	74
	Singida	1,270	1,270,080	9,526	64	1,274	1,464,826	9,553	64	1,383	1,659,571	10,372	69	1,403	2,049,062	10,526	70	1,411	2,286,144	10,584	71
	Sub total	**6,048**	**6,048,000**	**45,360**	**302**	**6,066**	**6,975,360**	**45,491**	**303**	**6,586**	**7,902,720**	**49,392**	**329**	**6,683**	**9,757,440**	**50,124**	**334**	**6,720**	**10,886,400**	**50,400**	**336**
Kagera	Chato	3,136	3,136,320	23,522	157	3,145	3,617,222	23,591	157	3,415	4,098,125	25,613	171	3,466	5,059,930	25,993	173	3,485	5,645,376	26,136	174
	Biharamulo	1,616	1,615,680	12,118	81	1,620	1,863,418	12,153	81	1,759	2,111,155	13,195	88	1,785	2,606,630	13,390	89	1,795	2,908,224	13,464	90
	Sub total	**4,752**	**4,752,000**	**35,640**	**238**	**4,766**	**5,480,640**	**35,743**	**238**	**5,174**	**6,209,280**	**38,808**	**259**	**5,251**	**7,666,560**	**39,383**	**263**	**5,280**	**8,553,600**	**39,600**	**264**
Kigoma	Kibondo	4,320	4,320,000	32,400	216	4,333	4,982,400	32,494	217	4,704	5,644,800	35,280	235	4,774	6,969,600	35,803	239	4,800	7,776,000	36,000	240
	Sub total	**4,320**	**4,320,000**	**32,400**	**216**	**4,333**	**4,982,400**	**32,494**	**217**	**4,704**	**5,644,800**	**35,280**	**235**	**4,74**	**6,969,600**	**35,803**	**239**	**4,800**	**7,776,000**	**36,000**	**240**
Sub total - WCGA		**432,000**	**432,000,000**	**3,240,000**	**21,600**	**433,252**	**498,240,000**	**3,249,391**	**21,663**	**470,400**	**564,479,800**	**3,446,319**	**22,978**	**477,370**	**696,959,920**	**3,591,256**	**23,942**	**480,000**	**777,600,000**	**3,600,000**	**24,000**

		2010/2011				2011/2012				2012/2013				2013/2014				2014/2015			
REGION	DISTRICT	AREA (HA)	OUTPUT (KG)	INSECTI-CIDES (ACRE-) (PACKS)	FERTI-LIZERS (TONS)	AREA (HA)	OUTPUT (KG)	INSECTI-CIDES (ACRE-) (PACKS)	FERTI-LIZERS (TONS)	AREA (HA)	OUTPUT (KG)	INSECTI-CIDES (ACRE-) (PACKS)	FERTI-LIZERS TONS)	AREA (HA)	OUTPUT (KG)	INSECTI-CIDES (ACRE-) (PACKS)	FERTI-LIZERS (TONS)	AREA (HA)	OUTPUT (KG)	INSECTI-CIDES (ACRE-) (PACKS)	FERTI-LIZERS (TONS)
Morogoro	Kilosa	4,253	4,253,040	31,898	213	4,265	4,905,173	31,990	213	4,631	5,557,306	34,733	232	4,700	6,861,571	35,248	235	4,726	7,655,472	35,442	236
	Ulanga	3,286	3,286,440	24,648	164	3,296	3,790,361	24,720	165	3,579	4,294,282	26,839	179	3,632	5,302,123	27,237	182	3,652	5,915,592	27,387	183
	Mvomero	1,837	1,836,540	13,774	92	1,842	2,118,143	13,814	92	2,000	2,399,746	14,998	100	2,029	2,962,951	15,221	101	2,041	3,305,772	15,305	102
	Morogoro	290	289,980	2,175	14	291	334,444	2,181	15	316	378,907	2,368	16	320	467,834	2,403	16	322	521,964	2,417	16
	Sub total	**9,666**	**9,666,000**	**72,495**	**483**	**9,694**	**11,148,120**	**72,705**	**485**	**10,525**	**12,630,240**	**78,939**	**526**	**10,681**	**15,594,480**	**80,109**	**534**	**10,740**	**17,398,800**	**80,550**	**537**
Manyara	Babati	6,048	6,048,000	45,360	302	6,066	6,975,360	45,491	303	6,586	7,902,720	49,392	329	6,683	9,757,440	50,124	334	6,720	10,886,400	50,400	336
	Sub total	**6,048**	**6,048,000**	**45,360**	**302**	**6,066**	**6,975,360**	**45,491**	**303**	**6,586**	**7,902,720**	**49,392**	**329**	**6,683**	**9,757,440**	**50,124**	**334**	**6,720**	**10,886,400**	**50,400**	**336**
Pwani	Bagamoyo	738	738,000	1,737	37	740	851,160	5,551	37	804	964,320	6,027	40	816	1,190,640	6,116	41	820	1,328,400	6,150	41
	Rufiji	162	162,000	1,342	8	162	186,840	1,219	8	176	211,680	1,323	9	179	261,680	1,344	9	180	291,600	1,350	9
	Sub total	**900**	**900,000**	**3,079**	**45**	**903**	**1,038,000**	**6,770**	**45**	**980**	**1,176,000**	**7,350**	**49**	**995**	**1,452,320**	**7,461**	**50**	**1,000**	**1,620,000**	**7,500**	**50**
Tanga	Lushoto	360	360,000	2,700	18	361	415,200	2,708	18	392	470,400	2,940	20	397	580,300	2,981	20	400	648,000	3,000	20
	Handeni	360	360,000	2,700	18	361	415,200	2,708	18	392	470,400	2,940	20	397	580,300	2,981	20	400	648,000	3,000	20
	Sub total	**720**	**720,000**	**5,400**	**36**	**722**	**830,400**	**5,416**	**36**	**784**	**940,800**	**5,880**	**39**	**795**	**1,160,600**	**5,962**	**40**	**800**	**1,296,000**	**6,000**	**40**
Kilimanjaro	Same	441	440,640	3,305	22	442	508,205	3,314	22	480	575,770	3,599	24	487	710,899	3,652	24	484	793,152	3,627	24
	Moshi	123	123,120	923	6	123	141,998	926	6	134	160,877	1,005	7	136	198,633	1,020	7	135	221,616	1,013	7
	Mwanga	84	84,240	632	4	84	97,157	634	4	92	110,074	688	5	93	135,907	698	5	92	151,632	693	5
	Sub total	**648**	**648,000**	**4,860**	**32**	**650**	**747,360**	**4,874**	**32**	**706**	**846,720**	**5,292**	**35**	**716**	**1,045,440**	**5,370**	**36**	**711**	**1,166,400**	**5,334**	**36**
Iringa	Iringa	18	18,000	135	1	18	20,760	135	1	20	23,520	147	1	20	29,040	149	1	20	32,400	150	1
	Sub total	**18**	**18,000**	**135**	**1**	**18**	**20,760**	**135**	**1**	**20**	**23,520**	**147**	**1**	**20**	**29,040**	**149**	**1**	**20**	**32,400**	**150**	**1**
Sub total - ECGA		**18,000**	**18,000,000**	**131,329**	**900**	**18,052**	**20,760,000**	**135,391**	**903**	**19,600**	**23,520,000**	**147,000**	**980**	**19,890**	**29,039,320**	**149,175**	**994**	**19,991**	**32,400,000**	**149,934**	**1,000**
	Grand total	**450,000**	**450,000,000**	**3,371,329**	**22,500**	**451,304**	**519,000,000**	**3,384,783**	**22,565**	**490,000**	**587,999,800**	**3,593,319**	**23,958**	**497,260**	**725,999,240**	**3,740,430**	**24,936**	**499,991**	**810,000,000**	**3,749,934**	**25,000**

Appendix C: Projected Cotton Cess Collections: 2010/11- 2014/15

REGION	DISTRICT	2010/2011		2011/2012		2012/2013		2013/2014		2014/2015	
		COTTON	DISTRICT	COTTON	DISTRICT	COTTON	DISTRICT	COTTON	DISTRICT	COTTON	DISTRICT
		OUTPUT	CESS	OUTPUT	CESS	OUTPUT	CESS	OUTPUT	CESS	OUTPUT	CESS
		(KG)	(30 Tsh/Kg)	(KG)	(32.5 Tsh/Kg)	(KG)	(35 Tsh/Kg)	(KG)	(37.5 Tsh/Kg)	(KG)	(40 Tsh/Kg)
Shinyanga	Bariadi	79,315,200	2,379,456,000	91,476,864	2,972,998,080	103,638,528	3,627,348,480	127,961,856	4,798,569,600	142,767,360	5,710,694,400
	Maswa	50,232,960	1,506,988,800	57,935,347	1,882,898,784	65,637,734	2,297,320,704	81,042,509	3,039,094,080	90,419,328	3,616,773,120
	Meatu	44,945,280	1,348,358,400	51,836,890	1,684,698,912	58,728,499	2,055,497,472	72,511,718	2,719,189,440	80,901,504	3,236,060,160
	Bukombe	34,369,920	1,031,097,600	39,639,974	1,288,299,168	44,910,029	1,571,851,008	55,450,138	2,079,380,160	61,865,856	2,474,634,240
	Kishapu	31,726,080	951,782,400	36,590,746	1,189,199,232	41,455,411	1,450,939,392	51,184,742	1,919,427,840	57,106,944	2,284,277,760
	Kahama	21,150,720	634,521,600	24,393,830	792,799,488	27,636,941	967,292,928	34,123,162	1,279,618,560	38,071,296	1,522,851,840
	Shinyanga	2,643,840	79,315,200	3,049,229	99,099,936	3,454,618	120,911,616	4,265,395	159,952,320	4,758,912	190,356,480
	Sub total	**264,384,000**	**7,931,520,000**	**304,922,880**	**9,909,993,600**	**345,461,760**	**12,091,161,600**	**426,539,520**	**15,995,232,000**	**475,891,200**	**19,035,648,000**
Mwanza	Magu	36,741,600	1,102,248,000	42,375,312	1,377,197,640	48,009,024	1,680,315,840	59,276,448	2,222,866,800	66,134,880	2,645,395,200
	Geita	32,542,560	976,276,800	37,532,419	1,219,803,624	42,522,278	1,488,279,744	52,501,997	1,968,824,873	58,576,608	2,343,064,320
	Kwimba	18,895,680	566,870,400	21,793,018	708,273,072	24,690,355	864,162,432	30,485,030	1,143,188,640	34,012,224	1,360,488,960
	Sengerema	8,398,080	251,942,400	9,685,786	314,788,032	10,973,491	384,072,192	13,548,902	508,083,840	15,116,544	604,661,760
	Misungwi	7,348,320	220,449,600	8,475,062	275,439,528	9,601,805	336,063,168	11,855,290	444,573,360	13,226,976	529,079,040
	Ukerewe	839,808	25,194,240	968,579	31,478,803	1,097,349	38,407,219	1,354,890	50,808,384	1,511,654	60,466,176
	Nyamagana	104,976	3,149,280	121,072	3,934,850	137,169	4,800,902	169,361	6,351,048	188,957	7,558,272
	Ilemela	104,976	3,149,280	121,072	3,934,850	137,169	4,800,902	169,361	6,351,048	188,957	7,558,272
	Sub total	**104,976,000**	**3,149,280,000**	**121,072,320**	**3,934,850,400**	**137,168,640**	**4,800,902,400**	**169,361,280**	**6,351,047,993**	**188,956,800**	**7,558,272,000**
Mara	Bunda	19,656,000	589,680,000	22,669,920	736,772,400	25,683,840	898,934,400	31,711,600	1,189,185,000	35,380,800	1,415,232,000
	Musoma	5,443,200	163,296,000	6,277,824	204,029,280	7,112,448	248,935,680	8,781,696	329,313,600	9,797,760	391,910,400
	Serengeti	5,140,800	154,224,000	5,929,056	192,694,320	6,717,312	235,105,920	8,293,824	311,018,400	9,253,440	370,137,600
	Sub total	**30,240,000**	**907,200,000**	**34,876,800**	**1,133,496,000**	**39,513,600**	**1,382,976,000**	**48,787,120**	**1,829,517,000**	**54,432,000**	**2,177,280,000**
Tabora	Igunga	14,342,400	430,272,000	16,541,568	537,600,960	18,740,570	655,919,950	23,139,072	867,715,200	25,816,320	1,032,652,800
	Urambo	1,382,400	41,472,000	1,594,368	51,816,960	1,806,320	63,221,200	2,230,272	83,635,200	2,488,320	99,532,800
	Nzega	1,036,800	31,104,000	1,195,776	38,862,720	1,354,740	47,415,900	1,672,704	62,726,400	1,866,240	74,649,600

	Uyui	518,400	15,552,000	597,888	19,431,360	677,370	23,707,950	836,352	31,363,200	933,120	37,324,800
	Sub total	**17,280,000**	**518,400,000**	**19,929,600**	**647,712,000**	**22,579,000**	**790,265,000**	**27,878,400**	**1,045,440,000**	**31,104,000**	**1,244,160,000**
Singida	Iramba	3,447,360	103,420,800	3,975,955	129,218,544	4,504,550	157,659,264	5,561,741	208,565,280	6,205,248	248,209,920
	Manyoni	1,330,560	39,916,800	1,534,579	49,873,824	1,738,598	60,850,944	2,146,637	80,498,880	2,395,008	95,800,320
	Singida	1,270,080	38,102,400	1,464,826	47,606,832	1,659,571	58,084,992	2,049,062	76,839,840	2,286,144	91,445,760
	Sub total	**6,048,000**	**181,440,000**	**6,975,360**	**226,699,200**	**7,902,720**	**276,595,200**	**9,757,440**	**365,904,000**	**10,886,400**	**435,456,000**
Kagera	Chato	3,136,320	94,089,600	3,617,222	117,559,728	4,098,125	143,434,368	5,059,930	189,747,360	5,645,376	225,815,040
	Biharamulo	1,615,680	48,470,400	1,863,418	60,561,072	2,111,155	73,890,432	2,606,630	97,748,640	2,908,224	116,328,960
	Sub total	**4,752,000**	**142,560,000**	**5,480,640**	**178,120,800**	**6,209,280**	**217,324,800**	**7,666,560**	**287,496,000**	**8,553,600**	**342,144,000**
Kigoma	Kibondo	4,320,000	129,600,000	4,982,400	161,928,000	5,644,800	197,568,000	6,969,600	261,360,000	7,776,000	311,040,000
	Sub total	**4,320,000**	**129,600,000**	**4,982,400**	**161,928,000**	**5,644,800**	**197,568,000**	**6,969,600**	**261,360,000**	**7,776,000**	**311,040,000**
Sub total - WCGA		**432,000,000**	**12,960,000,000**	**498,240,000**	**16,192,800,000**	**564,479,800**	**19,756,793,000**	**696,959,920**	**26,135,996,993**	**777,600,000**	**31,104,000,000**

		COTTON	DISTRICT	COTTON	DISTRICT	COTTON	DISTRICT	COTTON	DISTRICT	COTTON	DISTRICT
REGION	DISTRICT	OUTPUT	CESS	OUTPUT	CESS	OUTPUT	CESS	OUTPUT	CESS	OUTPUT	CESS
		(KG)	(30 Tsh/Kg)	(KG)	(32.5 Tsh/Kg)	(KG)	(35 Tsh/Kg)	(KG)	(37.5 Tsh/Kg)	(KG)	(40 Tsh/Kg)
Morogoro	Kilosa	4,253,040	127,591,200	4,905,173	159,418,116	5,557,306	194,505,696	6,861,571	257,308,920	7,655,472	306,218,880
	Ulanga	3,286,440	98,593,200	3,790,361	123,186,726	4,294,282	150,299,856	5,302,123	198,829,620	5,915,592	236,623,680
	Mvomero	1,836,540	55,096,200	2,118,143	68,839,641	2,399,746	83,991,096	2,962,951	111,110,670	3,305,772	132,230,880
	Morogoro	289,980	8,699,400	334,444	10,869,417	378,907	13,261,752	467,834	17,543,790	521,964	20,878,560
	Sub total	**9,666,000**	**289,980,000**	**11,148,120**	**362,313,900**	**12,630,240**	**442,058,400**	**15,594,480**	**584,793,000**	**17,398,800**	**695,952,000**
Manyara	Babati	6,048,000	181,440,000	6,975,360	226,699,200	7,902,720	276,595,200	9,757,440	365,904,000	10,886,400	435,456,000
	Sub total	**6,048,000**	**181,440,000**	**6,975,360**	**226,699,200**	**7,902,720**	**276,595,200**	**9,757,440**	**365,904,000**	**10,886,400**	**435,456,000**
Pwani	Bagamoyo	738,000	22,140,000	851,160	27,662,700	964,320	33,751,200	1,190,640	44,649,000	1,328,400	53,136,000
	Rufiji	162,000	4,860,000	186,840	6,072,300	211,680	7,408,800	261,680	9,813,000	291,600	11,664,000
	Sub total	**900,000**	**27,000,000**	**1,038,000**	**33,735,000**	**1,176,000**	**41,160,000**	**1,452,320**	**54,462,000**	**1,620,000**	**64,800,000**
Tanga	Lushoto	360,000	10,800,000	415,200	13,494,000	470,400	16,464,000	580,300	21,761,250	648,000	25,920,000
	Handeni	360,000	10,800,000	415,200	13,494,000	470,400	16,464,000	580,300	21,761,250	648,000	25,920,000
	Sub total	**720,000**	**21,600,000**	**830,400**	**26,988,000**	**940,800**	**32,928,000**	**1,160,600**	**43,522,500**	**1,296,000**	**51,840,000**
Kilimanjaro	Same	440,640	13,219,200	508,205	16,516,656	575,770	20,151,936	710,899	26,658,720	793,152	31,726,080
	Moshi	123,120	3,693,600	141,998	4,614,948	160,877	5,630,688	198,633	7,448,749	221,616	8,864,640
	Mwanga	84,240	2,527,200	97,157	3,157,596	110,074	3,852,576	135,907	5,096,520	151,632	6,065,280
	Sub total	**648,000**	**19,440,000**	**747,360**	**24,289,200**	**846,720**	**29,635,200**	**1,045,440**	**39,203,989**	**1,166,400**	**46,656,000**
Iringa	Iringa	18,000	540,000	20,760	674,700	23,520	823,200	29,040	1,089,000	32,400	1,296,000
	Sub total	**18,000**	**540,000**	**20,760**	**674,700**	**23,520**	**823,200**	**29,040**	**1,089,000**	**32,400**	**1,296,000**
Sub total - ECGA		**18,000,000**	**540,000,000**	**20,760,000**	**674,700,000**	**23,520,000**	**823,200,000**	**29,039,320**	**1,088,974,489**	**32,400,000**	**1,296,000,000**
Grand total		**450,000,000**	**13,500,000,000**	**519,000,000**	**16,867,500,000**	**587,999,800**	**20,579,993,000**	**725,999,240**	**27,224,971,481**	**810,000,000**	**32,400,000,000**

Appendix D: Estimated 10% of Cotton Cess Collections: 2010/11- 2014/15

		2010/2011			2011/2012			2012/2013			2013/2014			2014/2015		
REGION	DISTRICT	COTTON OUTPUT (KG)	DISTRICT CESS (30 Tsh/Kg)	10% OF DISTRICT CESS (TSH)	COTTON OUTPUT (KG)	DISTRICT CESS (32.5 Tsh/Kg)	10% OF DISTRICT CESS (TSH)	COTTON OUTPUT (KG)	DISTRICT CESS (35 Tsh/Kg)	10% OF DISTRICT CESS (TSH)	COTTON OUTPUT (KG)	DISTRICT CESS (37.5 Tsh/Kg)	10% OF DISTRICT CESS (TSH)	COTTON OUTPUT (KG)	DISTRICT CESS (40 Tsh/Kg)	10% OF DISTRICT CESS (TSH)
Shinyanga	Bariadi	79,315,200	2,379,456,000	237,945,600	91,476,864	2,972,998,080	297,299,808	103,638,528	3,627,348,480	362,734,848	127,961,856	4,798,569,600	479,856,960	142,767,360	5,710,694,400	571,069,440
	Maswa	50,232,960	1,506,988,800	150,698,880	57,935,347	1,882,898,784	188,289,878	65,637,734	2,297,320,704	229,732,070	81,042,509	3,039,094,080	303,909,408	90,419,328	3,616,773,120	361,677,312
	Meatu	44,945,280	1,348,358,400	134,835,840	51,836,890	1,684,698,912	168,469,891	58,728,499	2,055,497,472	205,549,747	72,511,718	2,719,189,440	271,918,944	80,901,504	3,236,060,160	323,606,016
	Bukombe	34,369,920	1,031,097,600	103,109,760	39,639,974	1,288,299,168	128,829,917	44,910,029	1,571,851,008	157,185,101	55,450,138	2,079,380,160	207,938,016	61,865,856	2,474,634,240	247,463,424
	Kishapu	31,726,080	951,782,400	95,178,240	36,590,746	1,189,199,232	118,919,923	41,455,411	1,450,939,392	145,093,939	51,184,742	1,919,427,840	191,942,784	57,106,944	2,284,277,760	228,427,776
	Kahama	21,150,720	634,521,600	63,452,160	24,393,830	792,799,488	79,279,949	27,636,941	967,292,928	96,729,293	34,123,162	1,279,618,560	127,961,856	38,071,296	1,522,851,840	152,285,184
	Shinyanga	2,643,840	79,315,200	7,931,520	3,049,229	99,099,936	9,909,994	3,454,618	120,911,616	12,091,162	4,265,395	159,952,320	15,995,232	4,758,912	190,356,480	19,035,648
	Sub total	**264,384,000**	**7,931,520,000**	**793,152,000**	**304,922,880**	**9,909,993,600**	**990,999,360**	**345,461,760**	**12,091,161,600**	**1,209,116,160**	**426,539,520**	**15,995,232,000**	**1,599,523,200**	**475,891,200**	**19,035,648,000**	**1,903,564,800**
Mwanza	Magu	36,741,600	1,102,248,000	110,224,800	42,375,312	1,377,197,640	137,719,764	48,009,024	1,680,315,840	168,031,584	59,276,448	2,222,866,800	222,286,680	66,134,880	2,645,395,200	264,539,520
	Geita	32,542,560	976,276,800	97,627,680	37,532,419	1,219,803,624	121,980,362	42,522,278	1,488,279,744	148,827,974	52,501,997	1,968,824,873	196,882,487	58,576,608	2,343,064,320	234,306,432
	Kwimba	18,895,680	566,870,400	56,687,040	21,793,018	708,273,072	70,827,307	24,690,355	864,162,432	86,416,243	30,485,030	1,143,188,640	114,318,864	34,012,224	1,360,488,960	136,048,896
	Sengerema	8,398,080	251,942,400	25,194,240	9,685,786	314,788,032	31,478,803	10,973,491	384,072,192	38,407,219	13,548,902	508,083,840	50,808,384	15,116,544	604,661,760	60,466,176
	Misungwi	7,348,320	220,449,600	22,044,960	8,475,062	275,439,528	27,543,953	9,601,805	336,063,168	33,606,317	11,855,290	444,573,360	44,457,336	13,226,976	529,079,040	52,907,904
	ukerewe	839,808	25,194,240	2,519,424	968,579	31,478,803	3,147,880	1,097,349	38,407,219	3,840,722	1,354,890	50,808,384	5,080,838	1,511,654	60,466,176	6,046,618
	Nyamagana	104,976	3,149,280	314,928	121,072	3,934,850	393,485	137,169	4,800,902	480,090	169,361	6,351,048	635,105	188,957	7,558,272	755,827
	Ilemela	104,976	3,149,280	314,928	121,072	3,934,850	393,485	137,169	4,800,902	480,090	169,361	6,351,048	635,105	188,957	7,558,272	755,827
	Sub total	**104,976,000**	**3,149,280,000**	**314,928,000**	**121,072,320**	**3,934,850,400**	**393,485,040**	**137,168,640**	**4,800,902,400**	**480,090,240**	**169,361,280**	**6,351,047,993**	**635,104,799**	**188,956,800**	**7,558,272,000**	**755,827,200**
Mara	Bunda	19,656,000	589,680,000	58,968,000	22,669,920	736,772,400	73,677,240	25,683,840	898,934,400	89,893,440	31,711,600	1,189,185,000	118,918,500	35,380,800	1,415,232,000	141,523,200
	Musoma	5,443,200	163,296,000	16,329,600	6,277,824	204,029,280	20,402,928	7,112,448	248,935,680	24,893,568	8,781,696	329,313,600	32,931,360	9,797,760	391,910,400	39,191,040
	Serengeti	5,140,800	154,224,000	15,422,400	5,929,056	192,694,320	19,269,432	6,717,312	235,105,920	23,510,592	8,293,824	311,018,400	31,101,840	9,253,440	370,137,600	37,013,760
	Sub total	**30,240,000**	**907,200,000**	**90,720,000**	**34,876,800**	**1,133,496,000**	**113,349,600**	**39,513,600**	**1,382,976,000**	**138,297,600**	**48,787,120**	**1,829,517,000**	**182,951,700**	**54,432,000**	**2,177,280,000**	**217,728,000**
Tabora	Igunga	14,342,400	430,272,000	43,027,200	16,541,568	537,600,960	53,760,096	18,740,570	655,919,950	65,591,995	23,139,072	867,715,200	86,771,520	25,816,320	1,032,652,800	103,265,280
	Urambo	1,382,400	41,472,000	4,147,200	1,594,368	51,816,960	5,181,696	1,806,320	63,221,200	6,322,120	2,230,272	83,635,200	8,363,520	2,488,320	99,532,800	9,953,280
	Nzega	1,036,800	31,104,000	3,110,400	1,195,776	38,862,720	3,886,272	1,354,740	47,415,900	4,741,590	1,672,704	62,726,400	6,272,640	1,866,240	74,649,600	7,464,960

	Uyui	518,400	15,552,000	1,555,200	597,888	19,431,360	1,943,136	677,370	23,707,950	2,370,795	836,352	31,363,200	3,136,320	933,120	37,324,800	3,732,480
	Sub total	**17,280,000**	**518,400,000**	**51,840,000**	**19,929,600**	**647,712,000**	**64,771,200**	**22,579,000**	**790,265,000**	**79,026,500**	**27,878,400**	**1,045,440,000**	**104,544,000**	**31,104,000**	**1,244,160,000**	**124,416,000**
Singida	Iramba	3,447,360	103,420,800	10,342,080	3,975,955	129,218,544	12,921,854	4,504,550	157,659,264	15,765,926	5,561,741	208,565,280	20,856,528	6,205,248	248,209,920	24,820,992
	Manyoni	1,330,560	39,916,800	3,991,680	1,534,579	49,873,824	4,987,382	1,738,598	60,850,944	6,085,094	2,146,637	80,498,880	8,049,888	2,395,008	95,800,320	9,580,032
	Singida	1,270,080	38,102,400	3,810,240	1,464,826	47,606,832	4,760,683	1,659,571	58,084,992	5,808,499	2,049,062	76,839,840	7,683,984	2,286,144	91,445,760	9,144,576
	Sub total	**6,048,000**	**181,440,000**	**18,144,000**	**6,975,360**	**226,699,200**	**22,669,920**	**7,902,720**	**276,595,200**	**27,659,520**	**9,757,440**	**365,904,000**	**36,590,400**	**10,886,400**	**435,456,000**	**43,545,600**
Kagera	Chato	3,136,320	94,089,600	9,408,960	3,617,222	117,559,728	11,755,973	4,098,125	143,434,368	14,343,437	5,059,930	189,747,360	18,974,736	5,645,376	225,815,040	22,581,504
	Biharamulo	1,615,680	48,470,400	4,847,040	1,863,418	60,561,072	6,056,107	2,111,155	73,890,432	7,389,043	2,606,630	97,748,640	9,774,864	2,908,224	116,328,960	11,632,896
	Sub total	**4,752,000**	**142,560,000**	**14,256,000**	**5,480,640**	**178,120,800**	**17,812,080**	**6,209,280**	**217,324,800**	**21,732,480**	**7,666,560**	**287,496,000**	**28,749,600**	**8,553,600**	**342,144,000**	**34,214,400**
Kigoma	Kibondo	4,320,000	129,600,000	12,960,000	4,982,400	161,928,000	16,192,800	5,644,800	197,568,000	19,756,800	6,969,600	261,360,000	26,136,000	7,776,000	311,040,000	31,104,000
	Sub total	**4,320,000**	**129,600,000**	**12,960,000**	**4,982,400**	**161,928,000**	**16,192,800**	**5,644,800**	**197,568,000**	**19,756,800**	**6,969,600**	**261,360,000**	**26,136,000**	**7,776,000**	**311,040,000**	**31,104,000**
						-										
Sub total - WCGA		**432,000,000**	**12,960,000,000**	**1,296,000,000**	**498,240,000**	**16,192,800,000**	**1,619,280,000**	**564,479,800**	**19,756,793,000**	**1,975,679,300**	**696,959,920**	**26,135,996,993**	**2,613,599,699**	**777,600,000**	**31,104,000,000**	**3,110,400,000**

REGION	DISTRICT	COTTON OUTPUT (KG)	DISTRICT CESS (30 Tsh/Kg)	10% OF DISTRICT CESS (TSH)	COTTON OUTPUT (KG)	DISTRICT CESS (32.5 Tsh/Kg)	10% OF DISTRICT CESS (TSH)	COTTON OUTPUT (KG)	DISTRICT CESS (35 Tsh/Kg)	10% OF DISTRICT CESS (TSH)	COTTON OUTPUT (KG)	DISTRICT CESS (37.5 Tsh/Kg)	10% OF DISTRICT CESS (TSH)	COTTON OUTPUT (KG)	DISTRICT CESS (40 Tsh/Kg)	10% OF DISTRICT CESS (TSH)
Morogoro	Kilosa	4,253,040	127,591,200	12,759,120	4,905,173	159,418,116	15,941,812	5,557,306	194,505,696	19,450,570	6,861,571	257,308,920	25,730,892	7,655,472	306,218,880	30,621,888
	Ulanga	3,286,440	98,593,200	9,859,320	3,790,361	123,186,726	12,318,673	4,294,282	150,299,856	15,029,986	5,302,123	198,829,620	19,882,962	5,915,592	236,623,680	23,662,368
	Mvomero	1,836,540	55,096,200	5,509,620	2,118,143	68,839,641	6,883,964	2,399,746	83,991,096	8,399,110	2,962,951	111,110,670	11,111,067	3,305,772	132,230,880	13,223,088
	Morogoro	289,980	8,699,400	869,940	334,444	10,869,417	1,086,942	378,907	13,261,752	1,326,175	467,834	17,543,790	1,754,379	521,964	20,878,560	2,087,856
	Sub total	**9,666,000**	**289,980,000**	**28,998,000**	**11,148,120**	**362,313,900**	**36,231,390**	**12,630,240**	**442,058,400**	**44,205,840**	**15,594,480**	**584,793,000**	**58,479,300**	**17,398,800**	**695,952,000**	**69,595,200**
Manyara	Babati	6,048,000	181,440,000	18,144,000	6,975,360	226,699,200	22,669,920	7,902,720	276,595,200	27,659,520	9,757,440	365,904,000	36,590,400	10,886,400	435,456,000	43,545,600
	Sub total	**6,048,000**	**181,440,000**	**18,144,000**	**6,975,360**	**226,699,200**	**22,669,920**	**7,902,720**	**276,595,200**	**27,659,520**	**9,757,440**	**365,904,000**	**36,590,400**	**10,886,400**	**435,456,000**	**43,545,600**
Pwani	Bagamoyo	738,000	22,140,000	2,214,000	851,160	27,662,700	2,766,270	964,320	33,751,200	3,375,120	1,190,640	44,649,000	4,464,900	1,328,400	53,136,000	5,313,600
	Rufiji	162,000	4,860,000	486,000	186,840	6,072,300	607,230	211,680	7,408,800	740,880	261,680	9,813,000	981,300	291,600	11,664,000	1,166,400
	Sub total	**900,000**	**27,000,000**	**2,700,000**	**1,038,000**	**33,735,000**	**3,373,500**	**1,176,000**	**41,160,000**	**4,116,000**	**1,452,320**	**54,462,000**	**5,446,200**	**1,620,000**	**64,800,000**	**6,480,000**
Tanga	Lushoto	360,000	10,800,000	1,080,000	415,200	13,494,000	1,349,400	470,400	16,464,000	1,646,400	580,300	21,761,250	2,176,125	648,000	25,920,000	2,592,000
	Handeni	360,000	10,800,000	1,080,000	415,200	13,494,000	1,349,400	470,400	16,464,000	1,646,400	580,300	21,761,250	2,176,125	648,000	25,920,000	2,592,000
	Sub total	**720,000**	**21,600,000**	**2,160,000**	**830,400**	**26,988,000**	**2,698,800**	**940,800**	**32,928,000**	**3,292,800**	**1,160,600**	**43,522,500**	**4,352,250**	**1,296,000**	**51,840,000**	**5,184,000**
Kilimanjaro	Same	440,640	13,219,200	1,321,920	508,205	16,516,656	1,651,666	575,770	20,151,936	2,015,194	710,899	26,658,720	2,665,872	793,152	31,726,080	3,172,608
	Moshi	123,120	3,693,600	369,360	141,998	4,614,948	461,495	160,877	5,630,688	563,069	198,633	7,448,749	744,875	221,616	8,864,640	886,464
	Mwanga	84,240	2,527,200	252,720	97,157	3,157,596	315,760	110,074	3,852,576	385,258	135,907	5,096,520	509,652	151,632	6,065,280	606,528
	Sub total	**648,000**	**19,440,000**	**1,944,000**	**747,360**	**24,289,200**	**2,428,920**	**846,720**	**29,635,200**	**2,963,520**	**1,045,440**	**39,203,989**	**3,920,399**	**1,166,400**	**46,656,000**	**4,665,600**
Iringa	Iringa	18,000	540,000	54,000	20,760	674,700	67,470	23,520	823,200	82,320	29,040	1,089,000	108,900	32,400	1,296,000	129,600
	Sub total	**18,000**	**540,000**	**54,000**	**20,760**	**674,700**	**67,470**	**23,520**	**823,200**	**82,320**	**29,040**	**1,089,000**	**108,900**	**32,400**	**1,296,000**	**129,600**
Sub total - ECGA		**18,000,000**	**540,000,000**	**54,000,000**	**20,760,000**	**674,700,000**	**67,470,000**	**23,520,000**	**823,200,000**	**82,320,000**	**29,039,320**	**1,088,974,489**	**108,897,449**	**32,400,000**	**1,296,000,000**	**129,600,000**
Grand total		**450,000,000**	**13,500,000,000**	**1,350,000,000**	**519,000,000**	**16,867,500,000**	**1,686,750,000**	**587,999,800**	**20,579,993,000**	**2,057,999,300**	**725,999,240**	**27,224,971,481**	**2,722,497,148**	**810,000,000**	**32,400,000,000**	**3,240,000,000**