



FERTILIZER STATISTICS OVERVIEW TANZANIA 2018 - 2022

2023 Edition

Tanzania

Outline

1. Production
2. Import
3. Origins
4. NPK import analysis
5. Export & Destinations
6. Consumption (app)
7. Summary

Background Information

- Overview of fertilizer statistics in Tanzania from 2018 – 2022 and with 2023 Jan – May data.
- Emphasis on 2022, and each analysis is based on the products with higher quantities.
- Official trade data obtained from Tanzania Revenue Authority (TRA) and Tanzania Fertilizer Regulatory Authority (TFRA) and validated by Fertilizer Technical Working Group – Tanzania (FTWG-TAN).
- 2022 data validated from 19th – 20th July, 2023.

Fertilizer Production

TANZANIA

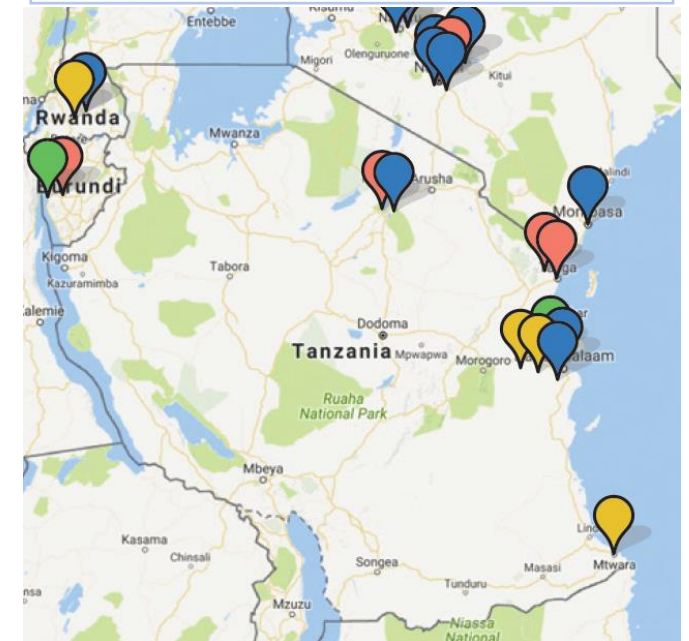
Product	2018	2019	2020	2021	2022
Minjingu organic hyper phosphate	2,375	13,487	22,982	30,253	3,928
NPS/NPK	7,733	14,657	6,572	14,139	35,436
Total (mt)	10,108	28,144	29,554	44,392	39,364

Source: Minjingu Mines & Fertilizers Co. Ltd.

Comments

- Minjingu Mines and Fertilizers Limited produces Hyper Phosphate which is Organic Rock Phosphates mixed with other micronutrients, granulates and blends NPK and NP compounds in Arusha. In Tanga, both ABM Equipment Services Limited and APP Lime Products Company Limited produce lime supplements.
- Guavay Company Limited produces organic compost in the country whiles Yara Tanzania and ETC Cargo Limited (ETG), have also invested in blending plants to blend different formulations of NPKs tailored for Tanzanian farmers. Moreover, three additional companies are in the process of establishing blending plants within the country.
- There was a 11% decrease in fertilizer production from 44,329MT in 2021 to 39,364MT in 2022.

Fertilizer Plants in Tanzania



Fertilizer Import

TANZANIA

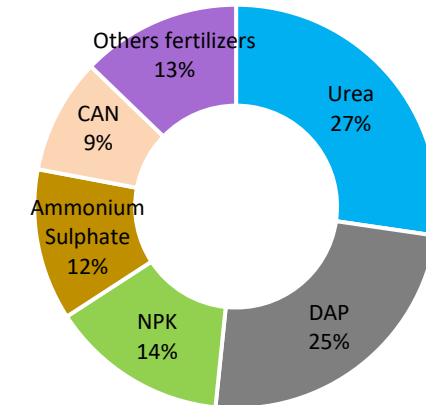
HS Code	Fertilizer Name	2018	2019	2020	2021	2022	2023*
3102100000	Urea	176,562	78,090	259,269	97,523	171,366	86,035
3105300000	DAP	109,706	66,101	128,474	57,858	152,653	53,047
3105200000	NPK	85,701	81,760	115,159	75,008	89,076	32,756
3102210000	Ammonium Sulphate	43,210	53,647	77,134	50,949	76,195	12,212
3102400000	CAN	78,150	68,228	62,673	62,276	58,026	27,013
	Other fertilizers	18,182	17,983	20,159	51,421	80,220	66,320
Total (mt)		511,510	365,808	662,868	395,033	627,537	277,383

*2023 – Data till May

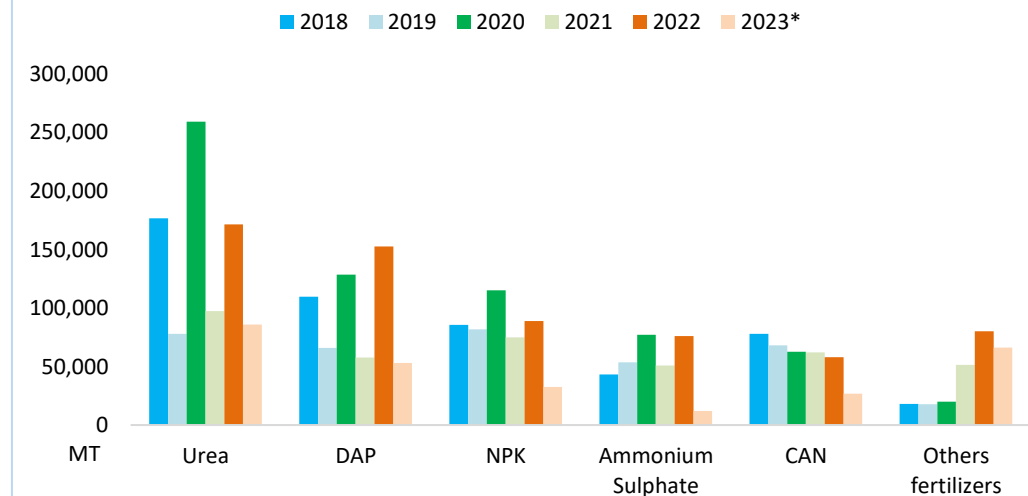
Comments

- Urea, DAP and NPK have consistently been the most imported fertilizers in Tanzania over the years.
- There was a substantial increase from 395,033MT in 2021 to 627,537MT in 2022 (59% increase). This increase can be attributed to an enhanced digitized fertilizer subsidy program, leading to improved data collection from farmers.
- Consequently, this stimulated fertilizer companies to increase their fertilizer importation and blending. The subsidy component added onto the Bulk Procurement System (BPS), incentivized uptake along the entire value chain and acted to cushion farmers and importers alike for the high global prices experienced as from the latter half of 2021. *(see more on page 10)*

TOP 5 IMPORTED FERTILIZERS 2022



TOP FERTILIZER IMPORTS PER YEAR



Fertilizer Monthly Import

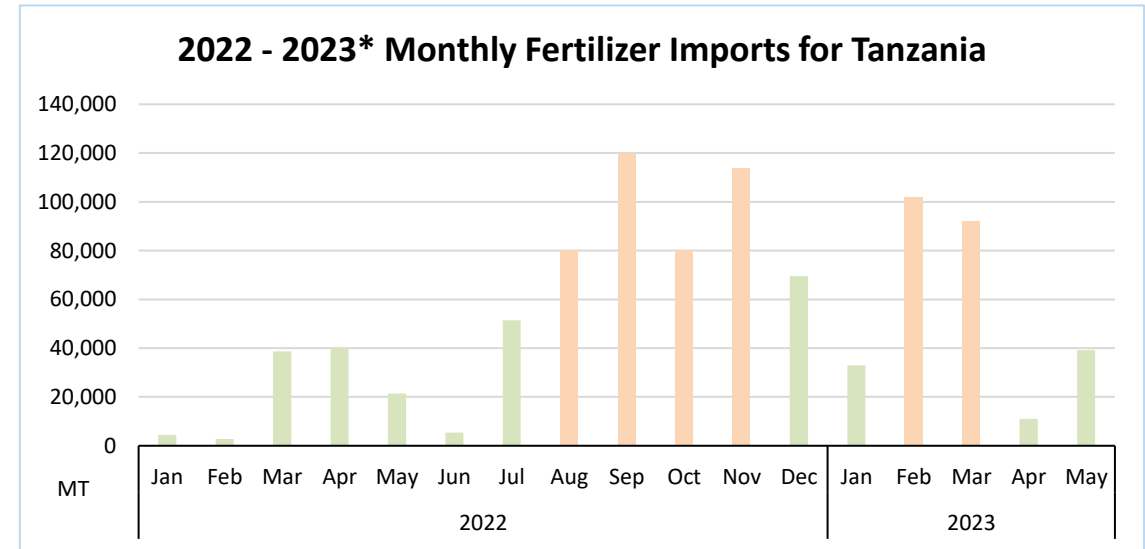
TANZANIA

Quarter	2018	2019	2020	2021	2022	2023*
Q1	104,195	36,892	222,918	76,215	45,892	227,197
Q2	53,500	106,484	91,157	67,194	66,845	50,185
Q3	185,317	132,962	206,813	180,655	251,413	-
Q4	168,499	89,470	141,980	70,969	263,387	-
Total (mt)	511,510	365,808	662,868	395,033	627,537	277,383

*2023 – Data till May

Comments

- In Tanzania, the main food-growing season begins in October/November, with fertilizer need peaking from October through to April.
- As a result of this seasonal pattern, the usual timeline for importing fertilizers spans from Q3 of one year to Q1 of the subsequent year.
- Notably, there was a considerable rise in imports observed from Q3 of 2022 to Q1 of 2023.
- During the year 2022, the peak import occurred in September, totaling 120,043MT.



Crop Calendar

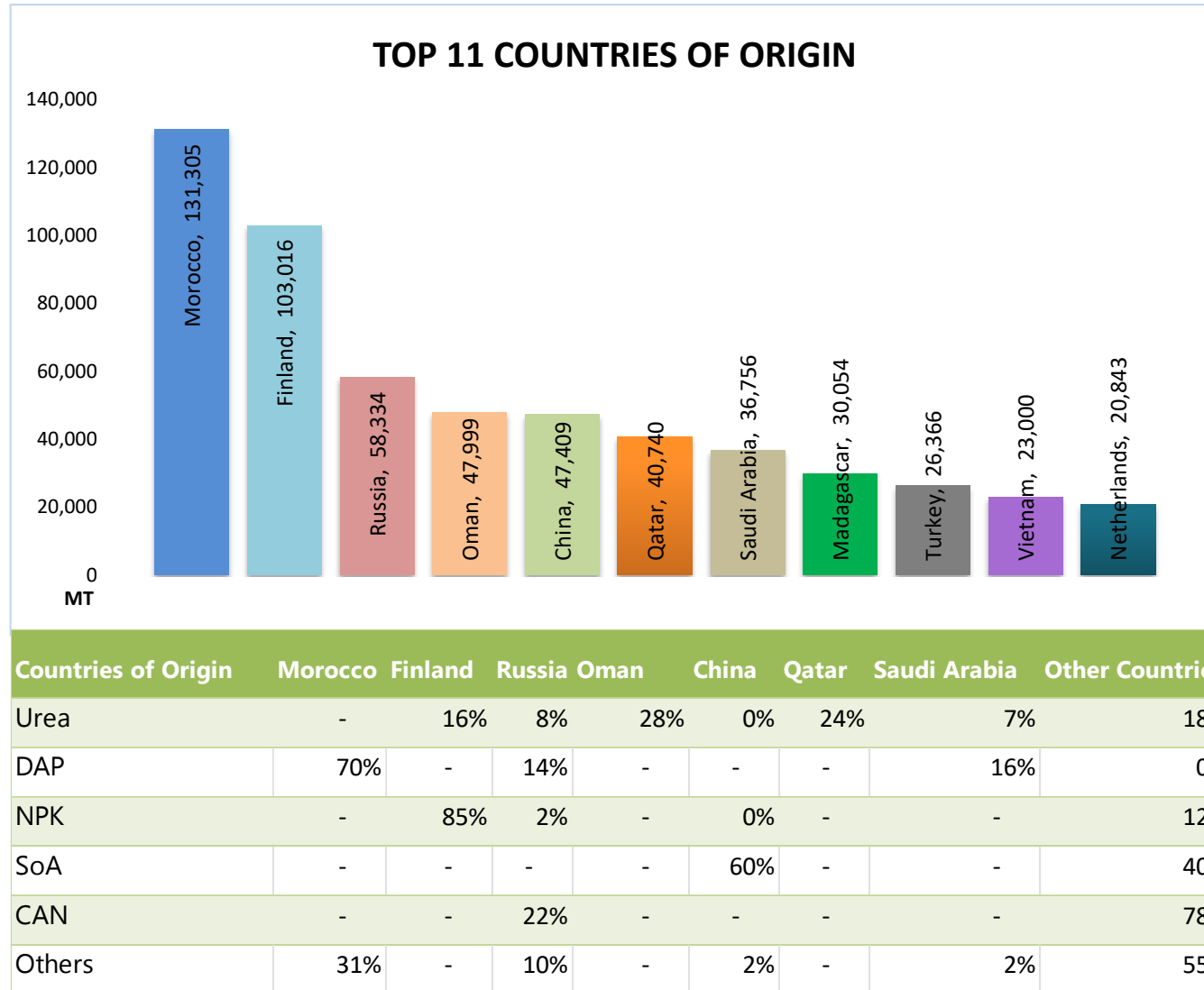
SEASON	CROPS	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Major Season (Long Rains)	Maize	◆	◆								◆	◆	◆
	Sorghum			◆	◆								
	Millet	◆	◆										◆
	Rice	◆	◆	◆									
	Wheat		◆	◆	◆								
	Bean			◆	◆								
Minor Season (Short Rains)	Maize, Millet, Sorghum, Beans, Rice, Wheat	◆	◆									◆	◆

Key: ◆ Fertilizer Peak Demand Sowing Growing Harvesting

Source : FAO/GIEWS,
Fertilizer Demand: AfricaFertilizer

2022 Fertilizer Origins

TANZANIA



*8,000MT of MOP from Russia, 30,000MT of SoA from Madagascar

NPK Import Analysis

TANZANIA

HS Code	Fertilizer Name	2018	2019	2020	2021	2022
3105200000	Total NPK	85,701	76,316	115,159	75,008	89,076
3105510000	Total NP	-	10,000		8,048	24,940
3105700000	Total NK	6	3	9	12,634	334
3105600000	Total PK	186	268	18	154	7,954
Total (mt)		85,893	86,587	115,186	95,843	122,304

Fertilizer	2022 NPK Imports	Crops
NPK 10-18-24	41,495	Tobacco
NPK 17-17-17	19,826	Coffee, Maize, Potatoes, etc
NP 12-45-0 +5S +1Zn	15,841	
NPK 22-6-12	9,709	Tea
NP 19-36.4-0 + 6.24S + 0.1	9,050	Alternative for DAP, especially on potatoes
NPK 15-9-20	8,114	Cereals
PK 0-44-7.5	7,829	
NPK 23-10-5	5,461	Cereals
NPK 12-24-12	3,536	
Others	1,444	
Total (mt)	122,304	

Comments

- Major fertilizer companies import finished NPK with various grades to sell directly to farmers.
- Above table represents the breakdown of NPK, NP, NP and PK compounds that was imported to Tanzania in 2022.
- Additionally, NPKs granulated and blended in the country in 2022 totaled about 60,000MT.



NPK Blend

Fertilizer Re-Exports & Destinations

TANZANIA

HS Code	Fertilizer Name	2018	2019	2020	2021	2022	2023*
2510000000	Minjingu organic hyper phosphate	1,949	21,112	22,600	27,945	26,160	7,132
3105200000	NPK	26,763	52,869	31,983	29,720	25,960	14,057
3102100000	Urea	15,014	20,608	42,541	22,256	21,013	26,560
3105300000	DAP	34,792	39,363	52,556	14,923	10,983	11,700
3105510000	NP compounds	355	3,500	2,004	1,650	2,500	160
	Other fertilizers	5,356	4,375	9,905	15,988	20,775	6,763
Total (mt)		84,228	141,827	161,589	112,482	107,391	66,372

*2023 – Data till May

Comments

- Tanzania's fertilizers are mostly exported or re-exported to Burundi and Rwanda. Other countries includes Kenya, Zambia, Democratic Republic of the Congo (DRC), Malawi, etc.
- Official fertilizer (re)exports decreased from 112,482MT in 2021 to 107,295MT in 2022 (5% decrease).
- The organic hyper phosphate exported to Kenya is used on coffee.
- In 2021, to make fertilizers available in Tanzania's local market, fertilizer (re)exports were reduced.

COUNTRIES OF DESTINATION (EXPORTS)

50,000
45,000
40,000
35,000
30,000
25,000
20,000
15,000
10,000
5,000
0
MT

Burundi, 46,493

Rwanda, 37,287

Kenya, 12,430

Others, 11,181

Countries of Destination	Burundi	Rwanda	Other Countries
Hyper phosphate	80%	-	20%
NPK	-	0.76	24%
Urea	47%	45%	8%
DAP	48%	49%	2%
Others	45%	11%	44%

Fertilizer Apparent Consumption

TANZANIA

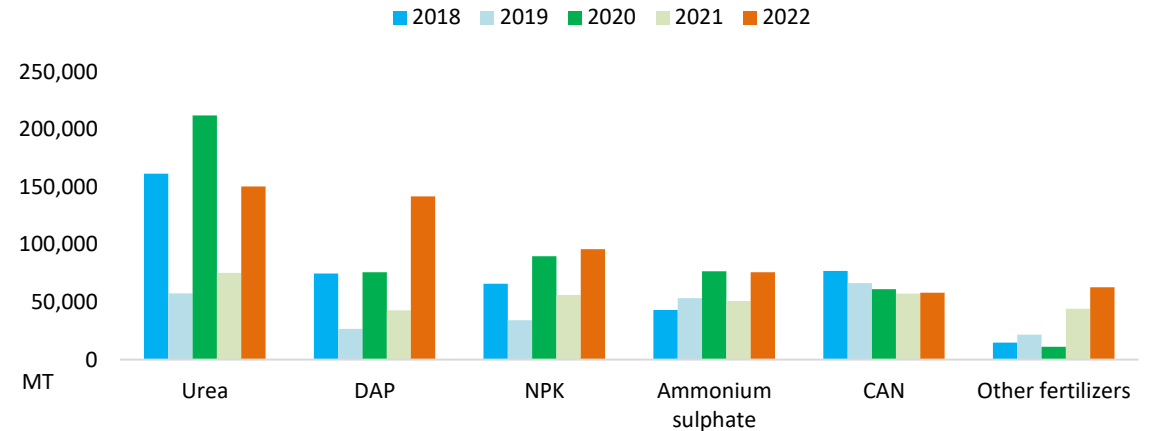
HS Code	Fertilizer Name	2018	2019	2020	2021	2022
3102100000	Urea	161,548	57,482	211,986	75,267	150,353
3105300000	DAP	74,914	26,738	75,918	42,935	141,670
3105200000	NPK	65,905	34,126	89,749	56,285	95,769
3102210000	Ammonium sulphate	43,210	53,417	76,634	50,949	75,813
3102400000	CAN	77,020	66,328	61,263	57,276	57,996
	Other fertilizers	14,793	21,659	11,215	44,232	62,711
Total (mt)		437,390	259,750	526,765	326,943	584,313

Comments

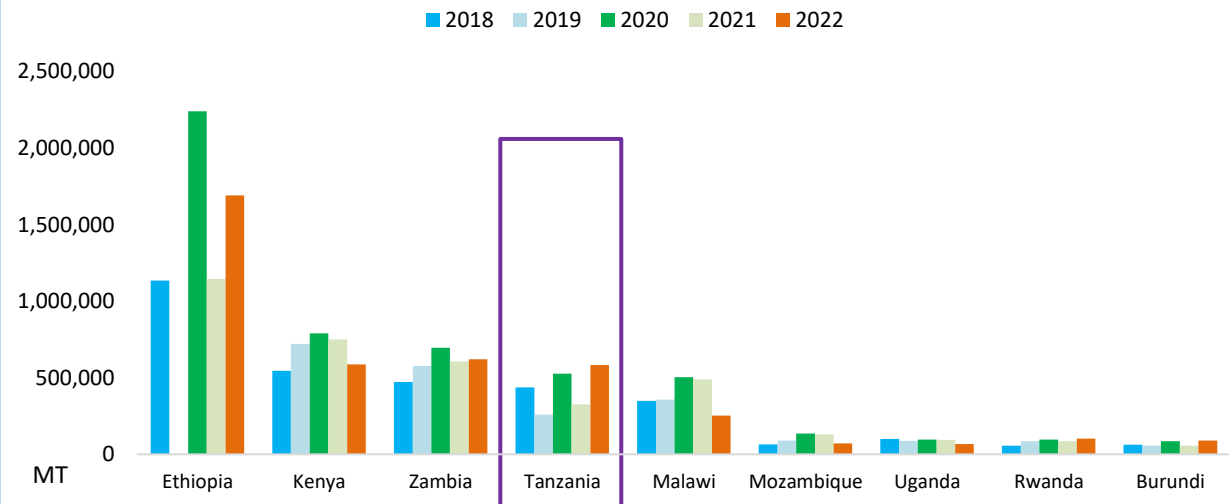
- Fertilizer apparent consumption increased from 326,943MT in 2021 to 584,313MT in 2022 (79% increase).
- Considering that, approximately 263,000MT of fertilizers were brought in during the Q4 of 2022, it was estimated that around 300,000MT of fertilizers remained in stock from the close of 2022 to January 2023.

NB: Apparent consumption = Production + Imports – (Re)Exports – Non Fertilizer Use

TANZANIA FERTILIZER APPARENT CONSUMPTION PER YEAR



ESA FERTILIZER APPARENT CONSUMPTION



- Increase in fertilizer imports were attributed to an enhanced digitized fertilizer subsidy program, leading to improved data collection from farmers. Consequently, this stimulated fertilizer companies to increase their fertilizer importation and blending. The subsidy component added onto the BPS, incentivized uptake along the entire value chain and acted to cushion farmers and importers alike for the high global prices experienced as from the latter half of 2021.

Other reasons for the increase in fertilizer importation include:

- Importers and manufacturers were assured of a stable market for their fertilizers.
- Favourable crop export prices, incentivizing farmers to increase fertilizer consumption.
- Introduction of new irrigation schemes motivating farmers to cultivate throughout the year.

Notable aspects of the fertilizer subsidy program in Tanzania include:

- All farmers are registered electronically. Non-registered farmers are ineligible for subsidized fertilizer.
- As of 2022, approximately 3 million farmers were registered, but only 900,000 benefited from the program. One of the program's goal is to register 7 million farmers by 2025.
- Private sector including agrodealers are prohibited from selling fertilizer outside the subsidy program.
- The government between 49% - 58% of the fertilizer cost, while the farmer is responsible for the remaining 42% - 51% depending on the fertilizer.
- Partial fertilizer redemption is permitted under the program.

Some challenges in implementing the subsidy program include internet connectivity issues in remote areas, delays caused by late farmer registration, and a lack of awareness among the youth regarding fertilizer usage.

Summary of 2022 Fertilizer Statistics

TANZANIA

HS code	Product	Production	Total Imports	Fertilizer Exports	Non Fertilizer Use	Fertilizer Imports	2022 Apparent Consumption
3102100000	Urea		176,993	21,013	5,627	171,366	150,353
3105300000	Diammonium Phosphate		152,653	10,983		152,653	141,670
3105200000	NPK	32,654	89,076	25,960		89,076	95,769
3102210000	Ammonium Sulphate		76,195	382		76,195	75,813
3102400000	Calcium Ammonium Nitrate		58,026	30		58,026	57,996
3105510000	NP Compounds	2,783	24,940	2,500		24,940	25,223
3102900000	Other Nitrogen Fertilizers		20,659	1,960		20,659	18,699
3105600000	PK Compounds		7,954	4		7,954	7,950
3102600000	Calcium Nitrate		4,509	450		4,509	4,059
2833210000	Magnesium Sulphate		1,864	60		1,864	1,804
3104300000	Sulphate of Potash		1,376			1,376	1,376
9999999990	Enhancers		1,168	36		1,168	1,132
3104900000	Other Potash Fertilizers		957			957	957
3103101000	Triple Super Phosphate		550	60		550	490
3101000000	Organic Fertilizer		369			369	369
3105700000	NK Compounds		334			334	334
2834210000	Potassium Nitrate		235			235	235
3105400000	Monoammonium Phosphate		68			68	68
2834292000	Magnesium Nitrate		14			14	14
3104200000	Muriate of Potash		17,620	17,793	2,398	15,222	(2,571)
3103900000	Phosphate Fertilizer	3,928		26,160		-	(22,232)
Grand Total (MT)		39,364	635,562	107,391	8,025	627,537	584,313
2021		44,392	398,022	112,482		395,033	326,943
% Difference		-11%	60%	-5%		59%	79%

Summary of 2023* Fertilizer Statistics

TANZANIA

HS code	Product	Production	Total Imports	Fertilizer Exports	Non Fertilizer Use	Fertilizer Imports	2023* Apparent Consumption
3102100000	Urea		86,035	26,560		86,035	59,475
3105510000	NP Compounds		59,098	160		59,098	58,938
3105300000	Diammonium Phosphate		53,047	11,700		53,047	41,347
3102400000	Calcium Ammonium Nitrate		27,013			27,013	27,013
3105200000	NPK		32,756	14,057		32,756	18,699
3102210000	Ammonium Sulphate		12,212	321		12,212	11,891
3102900000	Other Nitrogen Fertilizers		2,357			2,357	2,357
3105600000	PK Compounds		1,102			1,102	1,102
3102600000	Calcium Nitrate		1,315	260		1,315	1,055
9999999990	Enhancers		466			466	466
3104300000	Sulphate of Potash		583	210		583	373
3105400000	Monoammonium Phosphate		327			327	327
2833210000	Magnesium Sulphate		213			213	213
2834210000	Potassium Nitrate		103			103	103
3101000000	Organic Fertilizers		92			92	92
2834292000	Magnesium Nitrate		10			10	10
3103900000	Phosphate Fertilizer	6,121	459	7,132		459	(553)
3105700000	NK Compounds		28	1,667		28	(1,639)
3104200000	Muriate of Potash		168	4,305		168	(4,137)
Grand Total (MT)		6,121	277,383	66,372	-	277,383	223,460

*2023 – Data till May

Participants of 2023 FTWG

TANZANIA



List of Participants for 2023 FTWG

TANZANIA

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