Information System Better-iS

ZALF - Output

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Summary:

ZALF conducted a detailed web- and literature based scoping study to gather data from planned or implemented bioenergy projects in Tanzania. As outcome, approximately 50 different projects could be identified which were (theoretically) operating in the biofuel sector.

Title:

Starting Better-iS: Web and literature based data collection about ongoing biofuel projects in Tanzania

Problem and Objective:

When Better-iS started in early 2009, detailed information about projects in Tanzania were hardly available, even though a comparably recent GTZ study (2005) served as adequate starting point.

Therefore, the major initial activity of ZALF in Better-iS was an in-depth web and literature based analysis about ongoing biofuel activities in Tanzania in 2009. Aim was to define the spectrum of ongoing projects and investments and to identify interesting and promising value chain segments.

To identify those projects and activities on the ground, a sound literature review based on 17 different documents and homepages was launched. This initial scanning process was, of course, also connected to a first detailed literature analysis.

The resulting data was, along with the initially collected data, distributed among the Better-iS partners in Tanzania.

Method:

Starting point of the process was the GTZ study “Liquid biofuels for transportation in Tanzania. Potentials and implications for sustainable agriculture and energy in the 21st century” commissioned by GTZ (2005). From this document, cited or related websites and publications were identified which could provide additional information for the identification process. Following this snowball system, the main investments and research projects could be identified.

Results:

This identification process had three major outcomes: 1) an excel file consiting out of the major projects and investments in Tanzania in 2009 to get a picture of the "bioenergy scene" in the country, 2) a first literature overview and 3) identification of potentially interesting collaboration partners .

The list of projects and investments in Tanzania covered a wide range of biofuel feedstocks, business models and scales of investment. The range included, for example, locally embedded religious orders growing Jatropha curcas for their own needs as well as multinational companies investing in hundreds of thousands of hectares for bioethanol production for export.

The literature database was multiplied by using CD-Roms which served as give-away for potential research collaborations during the initial visit to Tanzania by ZALF & IUW.

Identified partners for the project were especially the German windpark developer PROKON, which operated until March 2011 a Jatropha based outgrower system in Mpanda, as well as FELISA, a Belgium/Tanzanian joint venture focussing on oil palm production in Kigoma region. Both collaborations lead to the identification of the respective regions as data collection sites. Furthermore was the Tanzanian NGO TaTEDO identified as potential partner for small-scale electrification projects.

Lessons learnt:

For practitioners:

By the time of the first screening process in early 2009 nearly 50 projects, mainly investments, were planned or ongoing in Tanzania - by late 2012 zero projects are, according to ZALFs knowledge, still existing. It might therefore be recommended to clearly evaluate the boundaries and frameworks an operation is settled in before highlighting it as flagship project.

For research:

Data and in this context especially yield estimations do need to be examined in detail before it should be used for calculating the economic viability of other projects. In the Tanzanian context mainly small-scale farmers did not gain much but gave up their land for a vague promise of employment based on inaccurate economic calculations.

Furthermore do information from the ground need to be evaluated by contacting or even contracting a third party -scoping studies are therefore advised.

For policy implementation:

Frameworks need to be established which guarantee the overall suitability of a bioenergy project. The biofuel guidelines designed by the Tanzanian government to represent a suitable first step in this direction. Highly optimistic project proposals should be checked in detail before permission for widespread land allocation should be given.

Documentation

Projects Overview			
Project name	**Country of orgin**	**Crop**	**Extensiveness of production**
SEKAB BioEnergy Tanzania Ltd.	Sweden	Sugarcane	between 200.000- 400.000 hectares requested
KAKUTE Ltd.	Tanzania	Jatropha	Smallholder farmers
Diligent	Netherlands	Jatropha & Croton	Small scale farmers/Outgrowers
PROKON	Germany	Jatropha	10.000 hectares, 2000 outgrowers
Sun Biofuels	UK	Jatropha	5.500 hectares
TaTEDO	Tanzania	Jatropha	farmers support
FELISA	Tanzania	Oil palm	Outgrowers (5000 ha), Plantation (4658 ha)
Abengoa BioEnergy Company	Spain	Sweet Sorghum	?
Africa Biofuel and Emission Reduction Company (Tanzania) Ltd.	US, Tanzania	Croton	20.000 hectares plantation - potentially 40.000 hectares
GEXSI	Tanzanian	Jatropha	2.000 Small scale outgrowers under contract - aiming at 15.000
CAMS Group	UK	Sweet Sorghum	45.000 hectares
SafiAnzania	Germany	Jatropha	1 Mio. Jatropha trees - 10.000
Kilimanjaro biofuels	UK	Jatropha	200 ha (Center of excellence)
InfEnergy Ltd.	Tanzania, UK	Oil palm	5818 hectares
Kikuletwa	UK	Jatropha	between 400 and 1000 hectares
Brotherhood of Jesus the Good Sheph	Tanzania	Jatropha	less than 2 hectares
Faida MaLi	Tanzania	Jatropha	farmers support
TAF	Tanzania	Jatropha	farmers support
Kiumma Project	Tanzania	Jatropha	1000 ha
Farmer Ismael Manang	Tanzania	Jatropha	80 acres
Monduli women's group	Tanzania	Jatropha	2.5 acres
Selela Village	Tanzania	Jatropha	?
Women's group, Engaruka	Tanzania	Jatropha	?
Green Garden Women Group	Tanzania	Jatropha	2 acres
Jatropha Products Tanzania Limited (J	Tanzania	Jatropha	?
KAMA	Tanzania	Jatropha	?
Arusha Agroflora Farm	Tanzania	Jatropha	80 acres
D1 Oil Tanzania	UK/Tanzania	Jatropha	?
Donesta Ltd. & Savannah Biofuels Ltd.	Tanzania	Jatropha	2.000 hectares
Bioshape Tanzania	Holland	Jatropha	81.000 hectares from 4 villages
BioMassive	Sweden	Jatropha	50.000 hectares acquired
JCJ Group (PTY)	South Africa	Jatropha	?
Bioenergy Resource Tanzania Limited	?	Jatropha	?
Africa Green Oils	Tanzania	Oil palm & Jatroph	860 hectares acquired
Mitsubishi Corporation	Japan	Jatropha	?
Kapunga Rice Project Limited	Tanzania	Jatropha	50.000 hectares acquired
Trinity Consultants	?	Jatropha	16.000 acquired, 30.000 requested
Shana Estates Ltd.	?	Jatropha	14.500 hectares
Tanzania Biodiesel Plant Ltd.	?	Oil palm	16.000 hectares acquired, 25.000
Clean Power TZ Ltd.	?	Oil Palm	3.500 hectares acquired
CMC Agriculture	?	White Sorghum	25.000 hectares acquired
ZAGA	?	Jatropha	?
Vincentian Sisters	?	Jatropha	50.000 Jatropha plants

Shortened version – original downloadable via this link:

www.better-is.com/files/FS36_Matrix_Biofuel_Projects_Tansania_2009.xls

Policy recommendations :

Especially in the African context, investors capacity to guarantee a long-term need to be evaluated in detail. Some of the companies which were supposed to operate on the ground did never start their activities even though land was allocated to them. A recent example for this is the unsuccessful investment by a dutch company called "Bioshape" which caused massive problems in the affected villages (http://www.commercialpressuresonland.org/press/tanzanias-biofuel-projects-promise-proves-barren). The Tanzanian government do need to design frameworks which guarantee that land allocation is potentially reversable - the published biofuel guidelines can, in this regard, only be a first step.

Participating institutions: International Food and Policy Research Institute (IFPRI), Institute for Environmental Economics and World Trade IUW, World Agroforestry Centre ICRAF, Wuppertal Institute for Climate, Environment and Energy, Leibniz-Centre for Agricultural Landscape Research (ZALF e.V.), Association for Strengthening Agricultural Research in Eastern and Central Africa. Associated partners: SOKOINE University of Agriculture, Ministry of Agriculture, Food security and Cooperatives Tanzania, Ministry of Energy and Minerals, Tanzania.