

Gulf Crisis Economic Assessment

Risks, Resilience and Strategic Priorities for
Tanzania

Resilience is not immunity. Protect. Stabilise. Position.

128%

Food self-sufficiency

57 TCF

Natural gas reserves

B1 / B+

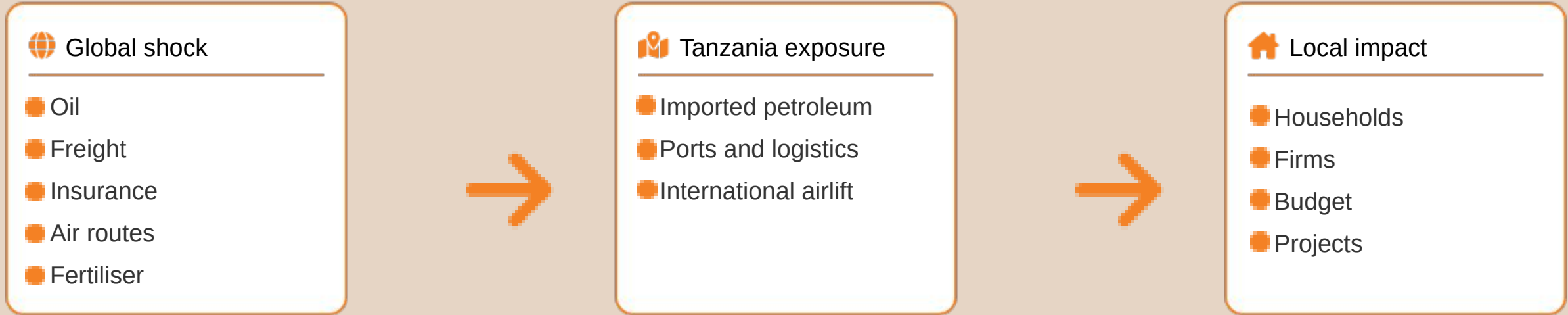
Sovereign ratings



National Planning Commission & UNDP | 22 May 2026

Johari Rotana Hotel, Dar es Salaam

Why This Assessment Matters



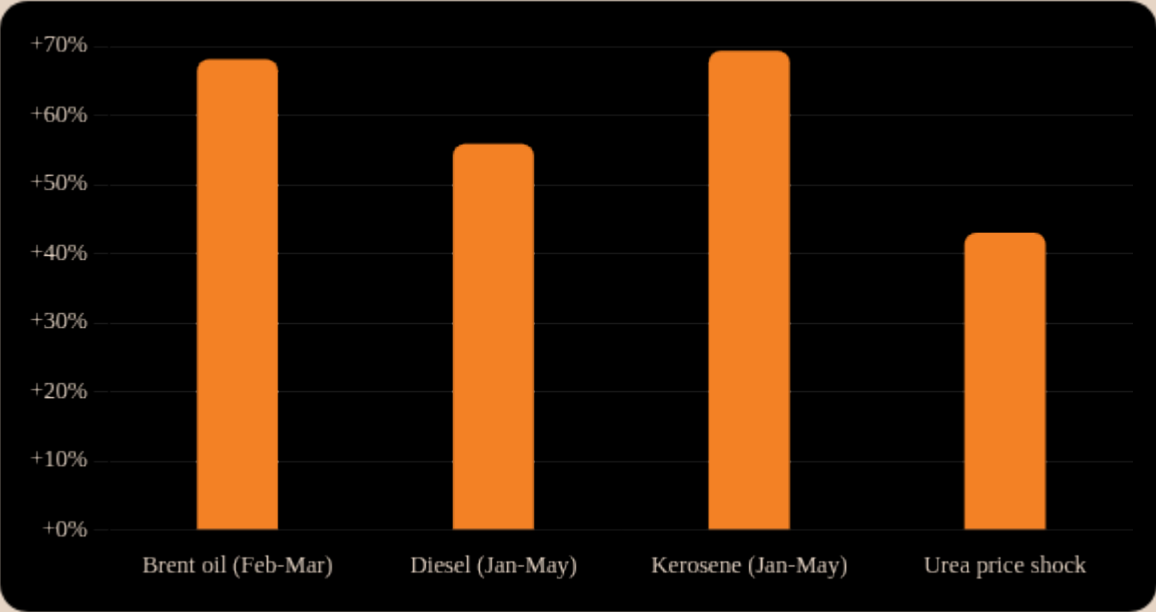
Purpose

- See pressure early
- Target support
- Protect essential activity
- Avoid panic responses

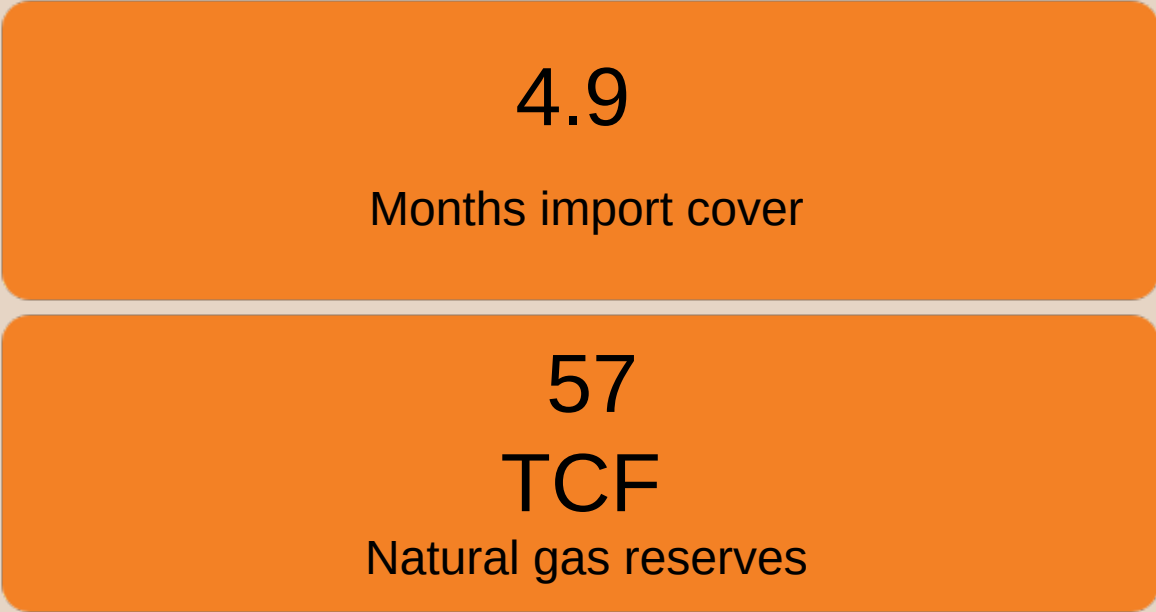
Key evidence at a glance

The assessment shows pressure in fuel, fertiliser and logistics, but also important national buffers.

Pressure points



Resilience assets



Additional indicators

- Fuel & LPG costs
- Freight & insurance
- Fertiliser prices
- Tourism airlift
- Food surplus
- Gas & CNG potential
- Gold and minerals
- Macro buffers

How the shock reaches people and businesses

The crisis is multidimensional. It should not be treated as a fuel-price issue alone.



Energy

Fuel and LPG



Food & fertiliser

Inputs and prices



Transport

Freight and fares



Tourism

Routes and jobs



Budget & FX

Subsidies and reserves

Higher import costs



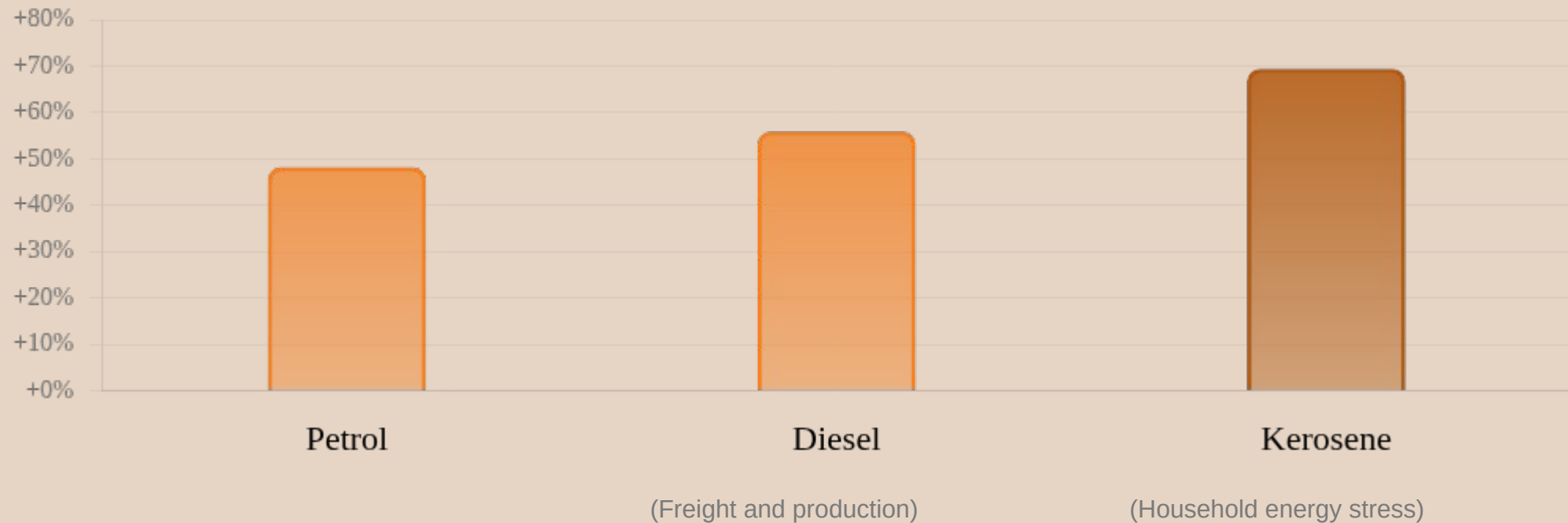
Higher domestic costs



Lower disposable income and
tighter fiscal space

Fuel prices: fastest visible channel

EWURA Dar es Salaam cap prices show sharp increases between January and May 2026.



Policy Implication

Use targeted, costed and time-bound cushioning. Avoid permanent universal subsidies.

Food security: availability ≠ affordability

National food availability is strong, but households can still face stress if transport, fertiliser and local market prices rise faster than incomes.

Availability

Is there enough food nationally?

Production
Stocks
Reserves

Affordability

Can households buy it?

Prices
Fares
Incomes

Access

Does it reach the right places?

Transport
Local markets

22.8m

Tons of food crops

128%

Food self-sufficiency

+43%

Urea price shock

9 kg/ha

Fertiliser use baseline

Immediate Focus

- Fertiliser support
- Agro-dealer prices
- District food-price stress map

Sector risk priorities

Immediate attention should focus where the shock moves quickly into prices, jobs, fiscal exposure and essential services.

HIGH RISK

- Energy & petroleum
- Transport & logistics
- Food & agriculture
- Tourism & aviation
- Government budget

MEDIUM / TRACK CLOSELY

- Macro stability
- Industry & trade
- Mining & minerals
- Livestock & fisheries

Risk logic: exposure • speed of pass-through • social sensitivity • fiscal impact • coping capacity

Resilience Assets and Opportunities

Tanzania should not celebrate the crisis. It should prepare responsibly and use national strengths where global supply chains shift.

57 TCF Gas & CNG

(Reduce fuel imports)

128% Food systems

(Protect inputs and prices)

USD 4.7bn Gold & minerals

(Add value locally)

Corridors Ports & logistics

(Reliable trade routes)

USD 4.4bn Tourism

(Stable destination)

FYDP IV Projects

(Bankable pipeline)

Alignment: Dira 2050 and FYDP IV: energy, logistics, agriculture, tourism, mining, manufacturing and infrastructure.

Recommended Response Framework

The response should be easy to coordinate: protect households, stabilise essential systems and position Tanzania for medium-term gains.

PROTECT

Households
Essential services
Food, transport and energy affordability

STABILISE

Fuel supply
Food markets
Fertiliser, revenue, FX and reserves

POSITION

CNG and gas
Minerals and value addition
Food trade, logistics and tourism

Implementation principle: Use existing Government structures and plans. Do not create parallel systems.

Immediate decisions and monitoring dashboard

A time-bound coordination framework should connect data, interpretation and escalation decisions across institutions.

0–30 days

Set weekly dashboard
Validate priority indicators

0–90 days

Monitor stock days
Map price stress
Classify exposed projects

3–18 months

Accelerate CNG and gas
Package opportunities

Weekly dashboard - six items to watch:

Fuel stocks and pump
prices

Food prices and fertiliser
access

Transport fares and freight

FX, inflation and customs
revenue

Tourism arrivals and bookings

Household coping
signs

Convert resilience into household protection, productive-sector continuity and fiscal discipline



**THANK YOU
FOR
LISTENING**