THE UNITED REPUBLIC OF TANZANIA
PRESIDENT'S OFFICE PLANNING AND INVESTMENT
NATIONAL PLANNING COMMISSION

ASSESSMENT OF ECONOMIC IMPACTS ON TANZANIA ARISING FROM THE GULF CRISIS

Risks, Resilience, Opportunities and Strategic Priorities

MAY 2026

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Acronyms & Abbreviations

AfCFTA	African Continental Free Trade Area
BoT	Bank of Tanzania
CNG	Compressed Natural Gas
DFI	Development Finance Institution
EWURA	Energy and Water Utilities Regulatory Authority
FYDP	Five-Year Development Plan
GDP	Gross Domestic Product
LGA	Local Government Authority
LNG	Liquefied Natural Gas
MDA	Ministry, Department and Agency
MoF	Ministry of Finance
NFRA	National Food Reserve Agency
NPC	National Planning Commission
PBPA	Petroleum Bulk Procurement Agency
PSSN	Productive Social Safety Net
SGR	Standard Gauge Railway
TASAF	Tanzania Social Action Fund
TCAA	Tanzania Civil Aviation Authority
TPA	Tanzania Ports Authority
TPDC	Tanzania Petroleum Development Corporation
TRA	Tanzania Revenue Authority
UNDP	United Nations Development Programme
UNRCO	United Nations Resident Coordinator's Office
HFO	Heavy Fuel Oil
LATRA	Land Transport Regulatory Authority
LPG	Liquefied Petroleum Gas
MIT	Ministry of Industry and Trade
MNRT	Ministry of Natural Resources and Tourism
NBS	National Bureau of Statistics
TANESCO	Tanzania Electric Supply Company Limited
TFS	Tanzania Forest Services Agency
TTB	Tanzania Tourist Board
VPO	Vice President's Office

Acknowledgement

This rapid assessment was prepared through collaboration between the National Planning Commission and the United Nations Development Programme, with support from the United Nations Resident Coordinator's Office. The collaborative nature of the assessment is recognised upfront because the work reflects joint technical engagement rather than a standard external contribution.

The National Planning Commission acknowledges the technical inputs, data and sectoral observations provided by Government institutions during the rapid assessment process, including the Ministry of Foreign Affairs and East African Cooperation, Ministry of Energy, Ministry of Natural Resources and Tourism, Ministry of Industry and Trade, Ministry of Finance, Bank of Tanzania, National Bureau of Statistics, Tanzania Revenue Authority, Energy and Water Utilities Regulatory Authority, Tanzania Civil Aviation Authority, Tanzania Ports Authority, Tanzania Petroleum Development Corporation, Petroleum Bulk Procurement Agency, National Food Reserve Agency and other relevant institutions.

The Commission also recognizes the technical comments and analytical inputs from various experts and technical contributors. These inputs strengthened the report by distinguishing national food availability from household affordability and access, sharpening the data-monitoring framework, updating fuel-price evidence, and identifying additional energy-use channels, including LPG, clean cooking, electricity generation, and industrial backup energy exposure.

The report remains a rapid assessment. It is intended to guide immediate policy attention and deepen sectoral analysis. It should be updated as new administrative data, market information, budget execution data, field evidence and international market developments become available.

Foreword

Tanzania is implementing its long-term development agenda in an international environment marked by repeated shocks, including pandemics, commodity-price volatility, geopolitical tensions, climate risks and tightening global financing conditions. The Gulf crisis adds a further layer of uncertainty because it affects energy markets, shipping routes, fertilizer supply, tourism confidence, foreign-exchange demand and the cost of delivering public and private investment.

This assessment has been prepared to support timely and evidence-based policy decisions. It does not treat the crisis as a single fuel-price event. It examines the transmission channels through which the shock may affect households, firms, public finance, strategic projects and Tanzania's broader transformation agenda under Dira 2050 and the Fourth Five-Year Development Plan. The report also recognizes that national resilience must be translated into practical protection for households and productive sectors. A food self-sufficiency ratio of 128 percent is a major national strength, but it does not automatically guarantee household affordability when fuel, fertilizer, transport and local market prices rise together.

The National Planning Commission and UNDP have prepared this report as a joint technical product to help Government and partners organize evidence, prioritize immediate actions and identify areas requiring deeper analysis. Its principal message is that Tanzania should protect vulnerable groups, stabilize essential economic activity and position the country to use its structural strengths in energy, minerals, food systems, logistics, tourism and investment attraction.

The proposed response is intentionally practical. It calls for targeted and time-bound cushioning rather than broad and open-ended subsidies; ring-fenced fertilizer and food-market monitoring; accelerated use of domestic gas and CNG; scenario-based fiscal and monetary coordination; and a weekly crisis dashboard that brings macroeconomic, sectoral and community-level evidence into one decision framework.

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Dr. Tausi Kida Mbaga

Permanent Secretary – Planning and Executive Secretary
National Planning Commission

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Shigeki Komatsubara

Resident Representative

United Nations Development Programme, Tanzania

Executive Summary

The Gulf crisis presents Tanzania with a fast-moving external economic shock transmitted mainly through fuel prices, LPG and clean-cooking costs, freight and insurance charges, fertilizer markets, air transport disruption, exchange-rate demand and fiscal exposure. Although Tanzania is not a direct party to the conflict, its reliance on imported petroleum products, globally traded fertilizer, maritime logistics and international air connectivity means that the shock can quickly affect household welfare, production costs, food affordability, tourism receipts, revenue performance and the implementation of priority development projects.

The central finding is that the Gulf crisis is a multidimensional external shock. It is transmitted to Tanzania through petroleum prices, LPG and household clean-cooking costs, shipping and insurance costs, fertilizer prices, exchange-rate demand, tourism airlift, customs revenues, household purchasing power, distribution costs, industrial costs and development-project implementation. The crisis is therefore not only an energy issue. It is a linked macroeconomic, sectoral, environmental and welfare challenge.

Energy is the clearest and most immediate channel. EWURA data show that Dar es Salaam retail cap prices rose from TZS 2,778 per litre for petrol in January 2026 to TZS 4,115 in May 2026. Diesel rose from TZS 2,726 to TZS 4,248, while kerosene rose from TZS 2,763 to TZS 4,677 over the same period. This represents increases of 48.1 percent for petrol, 55.8 percent for diesel and 69.3 percent for kerosene. Diesel is central to freight, public transport, distribution, construction, manufacturing and agricultural logistics, while kerosene and LPG are closely linked to household cooking and energy affordability. Higher LPG prices could slow clean-cooking progress and may push some households back towards charcoal and firewood if not monitored carefully.

Tanzania enters the shock with important buffers. These include a food self-sufficiency ratio of 128 percent, 22.8 million tons of food crop production, growing gold export earnings, 57 trillion cubic feet of natural gas reserves, rising use of CNG in transport, comparatively stable macroeconomic conditions and sovereign ratings of B1 and B+. Additional sector inputs indicate that the national power grid is less directly oil-dependent than the transport system, with diesel and HFO contributing a relatively small share of electricity supply, while only a limited share of factories reportedly rely on oil as a primary energy source, mainly for backup generation. These strengths reduce the probability of a national supply crisis, but they do not automatically protect poor households or small firms. The most important correction made in this final version is the distinction between national food availability and household food affordability and access.

The immediate policy priority is to protect the most exposed households and essential economic activity without undermining macroeconomic stability. The recommended response is built around three imperatives: protect, stabilize and position. Protect households and essential services through targeted, time-bound affordability measures. Stabilize productive sectors through fuel-stock management, fertilizer access, market monitoring and fiscal-monetary coordination. Position Tanzania for medium-term opportunities in domestic gas, CNG, LNG, gold, critical minerals, regional food supply, ports, logistics, tourism and investment attraction.

The report recommends a time-bound Gulf Crisis Economic Coordination and Monitoring Framework, aligned with existing Government structures. The framework should not duplicate statutory mandates. Its purpose should be to connect data, interpretation and escalation decisions across institutions during a rapidly evolving external shock. The dashboard should track fuel stocks, pump prices, freight rates, insurance premiums, fertilizer prices, local food prices, exchange-rate movements, inflation, customs revenues, tourism arrivals, project-cost escalation and community-level hardship indicators.

Immediate message: *Tanzania has meaningful resilience, but resilience should not be confused with immunity. The response must convert national buffers into household protection, productive-sector continuity and fiscal discipline.*

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CHAPTER
ONE

Context, Purpose and Analytical Approach

No.	Priority decision	Main action	Lead & support institutions
1.	Targeted affordability safeguards	Prepare targeted, costed and time-bound support for exposed households and essential economic activities, with attention to diesel, kerosene, public transport and food prices.	MoF, Ministry of Energy, EWURA, TASAF/PSSN, LATRA, LGAs
2	Food and fertilizer access	Ring-fence fertilizer support, monitor agro-dealer availability and track local market prices in vulnerable urban and food-deficit areas.	Ministry of Agriculture, MoF, NFRA, LGAs, private agro-dealers
3	Domestic energy substitution	Accelerate CNG conversion for public transport, freight trucks, bajaj operators and commercial fleets while advancing gas infrastructure.	Ministry of Energy, TPDC, EWURA, LATRA, private sector
4	Weekly crisis dashboard	Track macro, sectoral and grassroots indicators and use pre-agreed triggers for escalation decisions.	NPC, MoF, BoT, NBS, TRA, EWURA, TPA, TCAA, sector ministries
5	Opportunity positioning	Package medium-term opportunities in LNG, CNG, gold, critical minerals, food supply, ports, logistics and tourism recovery.	NPC, TISEZA, Ministry of Minerals, Ministry of Energy, MIT, MNRT, MoFAEAC

1.1 Context and purpose

The Gulf crisis has created a combined energy, logistics, fertilizer, tourism, financial-market and household-affordability shock. Tanzania is exposed through petroleum imports, LPG import costs, maritime and aviation routes, fertilizer markets, transport and distribution costs, exchange-rate demand, customs revenues, development-project costs and household purchasing power.

The purpose of this report is to organize the available evidence into a decision-ready framework for immediate action, sectoral deep dives and institutional coordination. The assessment is written in technical language, but with explanations that allow non-specialists to understand the policy implications without needing econometric background.

The report complements Tanzania's existing planning architecture. It is aligned to Dira 2050, the Long-Term Perspective Plan, FYDP IV, Annual Development Plans, sector strategies and the mandate of the National Planning Commission to provide strategic coordination, policy coherence, economic analysis and development management advice.

1.2 Assessment method

The assessment uses a rapid synthesis method combining official administrative data, market information, institutional inputs and scenario-based interpretation. It does not estimate a full macroeconomic model. Instead, it identifies transmission channels, risk levels, decision triggers and priority data gaps. This approach is appropriate where a shock is evolving quickly and Government needs action-oriented advice before full sectoral studies are completed.

No.	Method element	Application in this report
1.	Evidence consolidation	Integrated the earlier assessment, policy paper, updated clean report, EWURA notices, institutional inputs and reviewer comments.
2	Transmission analysis	Traced how external price, supply and confidence shocks affect households, firms, sectors, public finance and macroeconomic stability.
3	Scenario framing	Organized policy options around limited disruption, prolonged disruption and severe escalation.
4	Risk ranking	Rated sectors by exposure, speed of transmission, social sensitivity, fiscal implications and available coping capacity.
5	Data-gap mapping	Separated available data from additional data required for detailed deep dives and weekly monitoring.

1.3 Case examples from previous shocks

Shock	Impact on Tanzania	Response used	Lesson for current crisis
2008 to 2009 Global Financial Crisis	GDP growth slowed from 7.4 percent to 6.0 percent, although Tanzania avoided recession.	Fiscal stimulus, monetary easing and donor budget support were used to stabilize the economy.	Maintain fiscal buffers and ensure financing does not become pro-cyclical during shocks.
2017 to 2019 trade tensions and Brexit uncertainty	External demand weakened and aid and tourism channels faced uncertainty. Foreign currency holdings were affected by movements in major currencies.	Accommodative monetary policy and diversified reserve allocation helped cushion exposure.	Diversify trade, markets, reserves and external partnerships.
COVID-19 pandemic	Tourism revenues declined sharply from USD 2.5 billion to USD 1.3 billion.	Domestic tourism promotion, air connectivity restoration and destination marketing supported recovery.	Protect strategic sectors while building rapid recovery pathways.
2022 Russia-Ukraine war	Oil and fertilizer prices increased, raising pressure on transport, food prices and inflation.	Government introduced fuel subsidies exceeding TZS 100 billion to cushion consumers and stabilize prices.	Targeted cushioning is more fiscally sustainable than broad permanent subsidies.

CHAPTER
TWO

Global Crisis Context and Tanzania Exposure

The immediate global transmission channels are oil supply disruption, LNG uncertainty, LPG and clean-cooking fuel exposure, fertilizer-market stress, higher marine insurance premiums, freight rerouting, airspace disruption and investor risk repricing. These channels matter for Tanzania because imported petroleum products are used across transport, production, logistics, distribution, power backup, construction, agriculture and public service delivery.

The Strait of Hormuz is a critical global energy corridor. EWURA's May 2026 notice states that the closure and attacks on oil fields, storage facilities and refineries affected Middle East oil production and supply, increased shipping costs and raised cargo insurance premiums. The notice also confirms that the Government provided a TZS 259 per litre diesel subsidy to reduce the price of a product heavily used in manufacturing, freight and public transport.

For Tanzania, the shock should be read through five direct channels. First, domestic fuel prices rise as international FOB prices, premiums and exchange-rate movements pass into pump prices. Second, transport and logistics costs raise food and manufactured-goods prices. Third, fertilizer prices affect planting decisions and crop yields. Fourth, tourism, airlift and confidence affect earnings and employment. Fifth, fiscal space tightens when subsidies, customs revenues, debt service and development spending compete for resources.

No.	Transmission channel	Why it matters for Tanzania
1	Energy market disruption	Higher FOB prices, fuel import costs, pump prices and subsidy exposure.
2	Shipping and insurance	Higher freight rates, war-risk premiums, longer lead times and port scheduling uncertainty.
3	Fertilizer market pressure	Higher urea and sulphur prices may reduce input use and affect the 2026 planting season.
4	Tourism and aviation	Reduced air connectivity, higher fares, cancellations and forward-booking uncertainty.
5	Macroeconomic channel	Higher foreign-exchange demand, import bill pressure and cost-push inflation.
6	Fiscal channel	Lower customs collection risk, higher subsidy demand and potential reprioritization of development spending.

2.1 Main quantitative evidence used in the assessment

Indicator	Value used	Data status & interpretation
Brent crude price	USD 66.96 per barrel in February 2026 rising to USD 112.57 in March 2026.	International market data used in the assessment; to be updated weekly.
EWURA Dar es Salaam retail prices	May 2026 cap prices: petrol TZS 4,115; diesel TZS 4,248; kerosene TZS 4,677 per litre.	Official EWURA public notice, 6 May 2026.
Fuel stock buffers	Petrol 41 days, diesel 29 days and jet fuel 75 days as at 6 March 2026.	Ministry of Energy and sector inputs; requires weekly update.
Food self-sufficiency ratio	128 percent with 22.8 million tons of food crop production.	Agriculture sector inputs; availability buffer, not a household-affordability guarantee.
Fertilizer price shock	Global urea price reported to have risen from USD 475 to USD 680 per metric ton, equivalent to 43 percent.	International market and sector input; requires local agro-dealer verification.
Tourism exposure	Tourism contribution estimated at 17.2 percent of GDP, with 1.5 million jobs and USD 4.2 billion earnings in 2025.	Tourism sector and BoT inputs; forward bookings require update.
Macroeconomic buffers	Growth 5.9 percent in 2025, inflation 3.2 percent, reserves USD 6.3 billion or 4.9 months of import cover.	BoT and macroeconomic inputs.
Natural gas reserves	57 trillion cubic feet.	Energy sector inputs; strategic opportunity for domestic substitution and LNG positioning.
Gold earnings	USD 4.7 billion in 2025, with price-buffer assumptions around USD 5,600 per ounce.	Mining and market inputs; market price should be updated continuously.

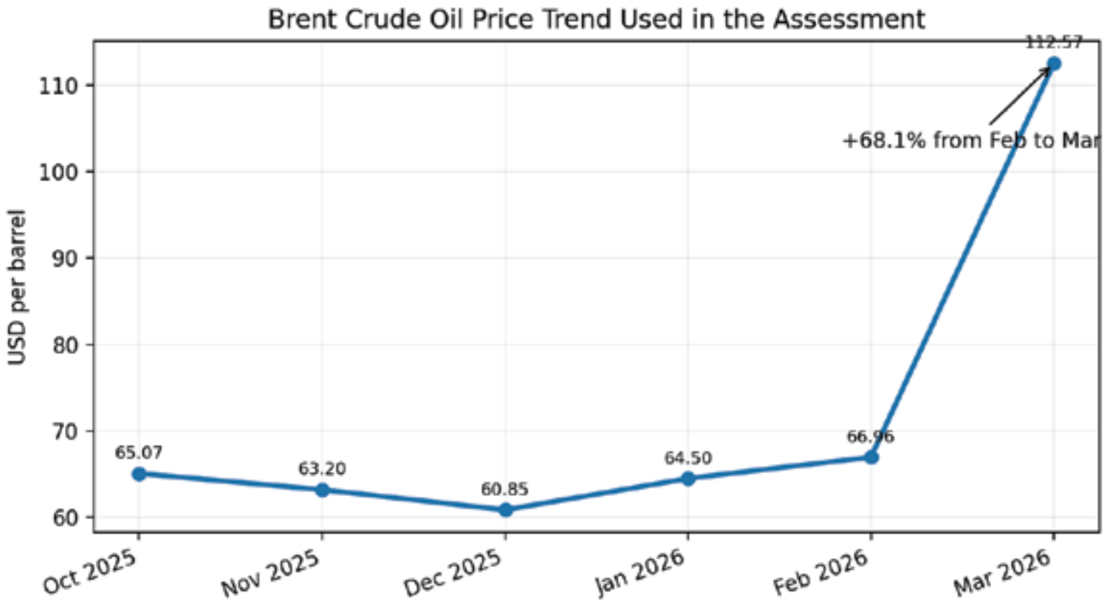

Figure 1: *Brent crude oil price trend used in the assessment. Source: assessment compilation from international market data and sector submissions.*

CHAPTER THREE

Scenario Framework & Risk Rating Logic

3. Scenario Framework and Risk Rating Logic

The assessment uses scenarios because the crisis is fluid. The purpose of the scenarios is not to predict one outcome, but to define what Government should monitor and how the policy response should escalate if conditions deteriorate.

Scenario	Horizon	Main assumptions	Response logic
Limited disruption	0 to 30 days	Oil, freight and insurance costs spike, but supply routes remain partly open.	Close monitoring, targeted relief, no broad subsidies and clear public communication.
Prolonged disruption	1 to 6 months	Fuel and fertilizer costs remain elevated; freight delays persist; tourism airlift and fiscal revenues weaken.	Build strategic stocks, protect fertilizer access, target transport and kerosene support, reprioritize non-essential spending.
Severe escalation	More than 6 months	Major supply interruption, persistent FX pressure, project delays and visible household stress.	Prioritize essential imports, consider supplementary budget measures, activate regional procurement and emergency social protection.

Risk-rating logic

The sector risk ratings are based on five criteria: exposure to the Gulf-related shock, speed of transmission into domestic prices, social sensitivity, fiscal impact and available coping capacity. Sectors are rated high where exposure is immediate and household or fiscal effects can appear quickly; medium-high where effects are material but partly buffered; and medium where effects are important but slower or offset by national strengths.

CHAPTER FOUR

Sectoral Impact Assessment

4.1 Energy and petroleum products

Risk level: High. Energy is the most immediate transmission channel. The April and May EWURA notices show that domestic fuel prices have moved sharply in response to the crisis. The May notice attributes the movement to the conflict, attacks on oil infrastructure, closure of the Strait of Hormuz, higher shipping costs and higher cargo insurance premiums. Diesel is especially important because it is used in freight, manufacturing, public transport, construction, agriculture and distribution. Kerosene is critical for low-income household energy access, while LPG should also be monitored because it is linked to clean cooking and household welfare.

The price pass-through is already visible. In Dar es Salaam, petrol rose by 48.1 percent between January and May 2026, diesel by 55.8 percent and kerosene by 69.3 percent. Between April and May alone, diesel rose by 11.6 percent and kerosene by 27.0 percent. This combination creates direct pressure on household energy costs and indirect pressure on food, transport, distribution, production costs, disposable income and risk premiums across markets.

The policy implication is that Tanzania should avoid permanent universal subsidies, but should maintain readiness for targeted, time-bound cushioning where fuel-price increases threaten essential transport, household cooking and lighting, agricultural logistics or food affordability. The diesel subsidy of TZS 259 per litre in May 2026 provides a precedent for targeted intervention, but the fiscal exposure must be tracked weekly. LPG and clean-cooking affordability should be added to the dashboard so that energy-price pressure does not reverse gains in clean cooking or increase pressure on forests through charcoal and firewood substitution.

Additional sector input indicates that Tanzania has a partial resilience advantage because electricity generation is not as oil-dependent as the transport system, and some factories use diesel mainly for backup power rather than as the primary production fuel. This reduces economy-wide exposure relative to a fully oil-dependent energy system. However, the data should be validated through the Ministry of Energy, TANESCO, EWURA, NBS and industry associations, because backup-generation reliance can still become significant during grid outages, high-load periods or localized supply disruptions.

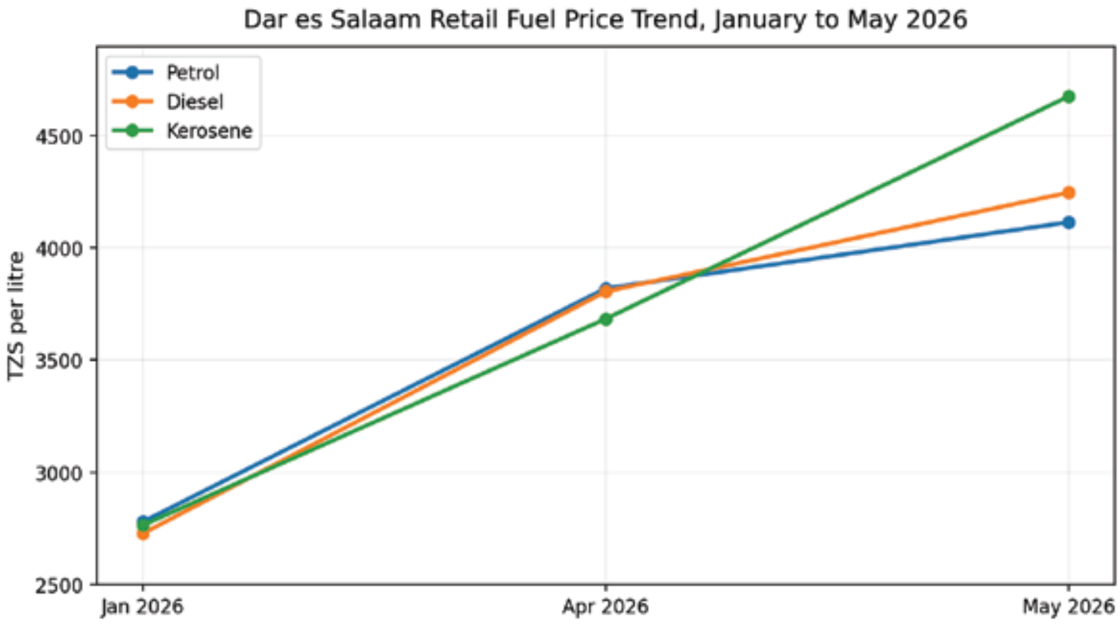

Figure 2: *Dar es Salaam retail fuel price trend, January to May 2026. Source: EWURA public notices on petroleum product cap prices.*

Port	Product	Jan	Apr	May	Jan to May	Apr to May
Dar es Salaam	Petrol	2,778	3,820	4,115	48.1%	7.7%
Dar es Salaam	Diesel	2,726	3,806	4,248	55.8%	11.6%
Dar es Salaam	Kerosene	2,763	3,684	4,677	69.3%	27.0%
Tanga	Petrol	2,839	3,881	4,176	47.1%	7.6%
Tanga	Diesel	2,787	3,867	4,309	54.6%	11.4%
Tanga	Kerosene	2,824	3,745	4,738	67.8%	26.5%
Mtwara	Petrol	2,870	3,912	4,207	46.6%	7.5%
Mtwara	Diesel	2,818	3,898	4,341	54.0%	11.4%
Mtwara	Kerosene	2,856	3,777	4,770	67.0%	26.3%

Energy policy note: *The steepest pressure is on kerosene, while the strongest economy-wide pass-through is likely through diesel. This supports a dual response: protect poor households from cooking and lighting stress, and protect productive logistics where costs threaten food prices and essential services.*

4.2 Transport, logistics and aviation

Risk level: High. Transport and logistics transmit the shock from the global market to domestic households and firms. Higher diesel prices raise the cost of road freight, public transport, construction logistics, food distribution and delivery of public services. Shipping disruption and higher war-risk insurance premiums can increase landed costs and delay imports of petroleum products, fertilizer, construction materials, machinery, medicines and other essential goods.

The aviation channel is also material. The earlier assessment records weekly air-transported tourist arrivals falling from 33,229 to 1,012, equivalent to a 97 percent decline, with more than 1,400 flights cancelled in the initial period. These figures should be treated as early evidence requiring validation through TCAA, airlines, immigration data and tourism booking systems. The practical policy response is to monitor air connectivity, forward bookings, route cancellations and hotel occupancy weekly rather than waiting for annual tourism statistics.

4.3 Food security and agriculture

Risk level: High. Tanzania's food self-sufficiency ratio of 128 percent is a major national buffer. It reduces the probability of a national food availability crisis and positions Tanzania to support regional food supply if managed prudently. However, the central food-security risk is not only availability. It is the combined pressure on household affordability, input access, transport costs and local market functioning.

The report therefore separates three questions. Availability asks whether enough food exists nationally. Affordability asks whether households can buy food in their local markets at prices they can manage. Access asks whether food reaches the right places at the right time, especially in food-deficit areas or poor urban neighbourhoods. A household can experience food stress even when national stocks are adequate if fuel, transport, fertilizer and local market prices rise faster than incomes.

The fertilizer channel is critical. Global urea prices are reported to have increased by 43 percent. Tanzania's average fertilizer use is already low, around 9 kilograms per hectare. A sustained increase in fertilizer prices could reduce application in the 2026 planting season and weaken yields. The policy response should ring-fence fertilizer support, settle verified arrears where they threaten supply, monitor agro-dealer prices and availability, and protect NFRA's ability to stabilize national food reserves.

Dimension	What to monitor	Why it matters
Availability	Production, stocks, imports, NFRA reserves, storage and market flows.	Shows whether national food supply is adequate.
Affordability	Prices of maize, rice, wheat flour, cooking oil, beans, kerosene, charcoal, LPG and transport fares.	Shows whether households can meet basic needs.
Access	Market functioning, transport availability, local incomes and coping mechanisms.	Shows whether food reaches households when and where needed.

4.4 Tourism and natural resources

Risk level: High. Tourism is exposed through air connectivity, travel confidence, airfare increases, cancellations, insurance costs and reduced disposable income in source markets. The assessment records tourism earnings of approximately USD 4.2 billion in 2025, a GDP contribution around 17.2 percent and approximately 1.5 million direct and indirect jobs. These figures make tourism a strategic sector for employment, foreign exchange and local enterprise activity.

At the same time, the crisis can create a repositioning opportunity if Tanzania is marketed as a stable, safe and high-value destination. This requires active digital marketing, route diversification, engagement with airlines from less affected regions, stronger domestic and regional tourism packages and close monitoring of forward bookings. Stability becomes a competitive advantage only if it is paired with air-connectivity recovery and market intelligence.

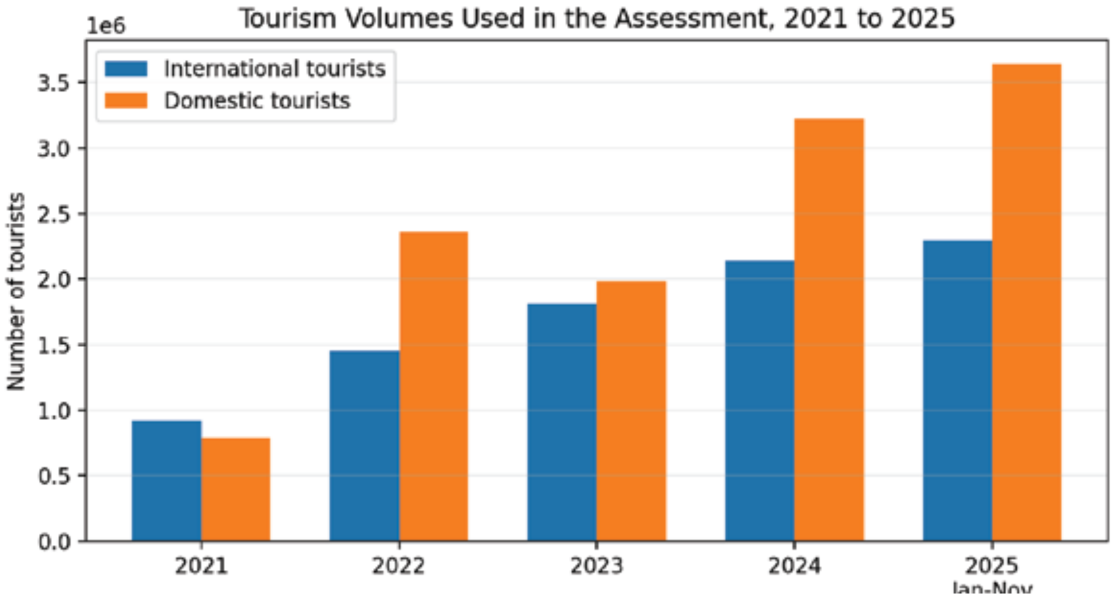

Figure 3: *Tourism volumes used in the assessment, 2021 to 2025. Source: sector inputs, Bank of Tanzania and tourism administrative data cited in the working assessment.*

Year	International tourists	Domestic tourists	Revenue	GDP share
2021	922,692	788,933	USD 1.3bn	About 10%
2022	1,454,920	2,363,260	USD 2.53bn	14%
2023	1,808,205	1,985,707	USD 3.37bn	16.4%
2024	2,141,895	3,218,352	USD 3.9bn	17.2%
2025 Jan to Nov	2,294,495	3,641,066	USD 4.4bn	About 19%

4.5 Macroeconomic and financial stability

Risk level: Medium-high. The main macroeconomic channels are the fuel import bill, LPG and clean-cooking fuel costs, exchange-rate demand, cost-push inflation, current-account pressure, lending and insurance risk premiums, and subsidy-related fiscal exposure. Tanzania enters the crisis with important buffers, including foreign-exchange reserves of about USD 6.3 billion, equivalent to 4.9 months of import cover, and inflation of about 3.2 percent. These buffers should be protected through coordinated monetary and fiscal management.

The March procurement period recorded an 8.54 percent depreciation signal in the petroleum pricing framework, while the assessment notes a movement from TZS 2,537.26 to TZS 2,587.23 per USD between 27 February and 9 March 2026. A prolonged disruption would increase foreign exchange demand for essential imports and raise the current account deficit. The immediate requirement is not panic adjustment, but structured monitoring of the import bill, FX market liquidity, reserves, fuel procurement costs and price pass-through.

4.6 Government budget execution and fiscal risk

Risk level: High. The crisis creates fiscal pressure through potential fuel subsidies, customs revenue shortfalls, higher procurement and transport costs, and possible development-project cost escalation. The assessment notes a possible monthly customs revenue shortfall of TZS 153.7 billion and indicative fuel-subsidy requirements of TZS 325.8 billion in May, TZS 575.0 billion in June and TZS 1,384.2 billion in July under worsening assumptions. These estimates should be treated as scenario inputs requiring validation by MoF, TRA, EWURA, PBPA and the Ministry of Energy.

Parliament approved a 2025/26 budget of TZS 56.49 trillion, including salaries, recurrent spending, debt service and development expenditure. Debt service at TZS 14.21 trillion is a fixed claim. If subsidy or import pressures expand sharply, fiscal management should protect essential services, high-return strategic projects and social protection while delaying or reprioritizing lower-urgency spending.

Month	Indicative subsidy requirement	Analytical basis
May 2026	TZS 325.8 billion	Current price trajectory with unchanged consumption.
June 2026	TZS 575.0 billion	Second-wave procurement at post-conflict prices.
July 2026	TZS 1,384.2 billion	Full exposure if the disruption persists and pre-conflict stock buffers are exhausted.

4.7 Industry, trade and development projects

Risk level: Medium. Industry and trade are affected through fuel, freight, exchange rates, imported inputs, insurance and delivery delays. Petroleum accounts for a large share of import value from the Middle East, and revenues from international trade account for a significant portion of TRA collections. The crisis may also affect inputs such as chemicals, plastics, machinery, fertilizer and transport equipment.

Development projects are exposed through imported construction materials, equipment, fuel-intensive logistics, freight delays and contract variation risks. The response should classify projects into those requiring protection because they are near completion or have high social and economic impact, those requiring cost renegotiation, and those that can be sequenced without undermining the national development trajectory. This should be aligned with FYDP IV, the Public Investment Management Guideline and the Annual Development Plan process.

4.8 Mining, gold and critical minerals

Risk level: Medium, with significant upside buffers. Gold and critical minerals can provide foreign exchange and investment buffers during global uncertainty. The assessment records gold earnings of USD 4.7 billion in 2025 and a price-buffer assumption of USD 5,600 per ounce, with additional opportunities in graphite, nickel, rare earths and helium. The policy question is how quickly Tanzania can convert price and investor interest into higher domestic value addition, tax revenue, local content and processing capacity.

The opportunity should not be framed as celebration of conflict. It is a resilience strategy. Tanzania should strengthen mineral auctions, domestic refining, beneficiation, investor targeting, value addition and market diversification while monitoring any disruption to gemstone and mineral exports linked to Middle East markets.

4.9 Livestock and fisheries

Risk level: Medium. The assessment indicates that 85.4 percent of meat exports go to the Middle East, while aviation and airport disruptions affect perishable exports. The response should identify alternative markets, strengthen cold chain infrastructure, improve export certification and maintain market access through diplomatic and commercial channels. Fisheries and livestock should also be included in the weekly monitoring framework where transport, cold storage or air cargo disruptions are evident.

CHAPTER

FIVE

Data Assessment: Available Evidence and Additional Data Required

This section responds directly to the need to separate available evidence from additional data that should be collected for the sectoral deep dives. The report should not wait for perfect data before action is taken. However, every major policy instrument should be backed by an updateable evidence base.

Area	Available data	Additional data required	Responsible data owners
Fuel prices and supply	EWURA monthly retail and wholesale cap prices; Ministry of Energy stock days; PBPA procurement information.	Weekly stock by product and location; vessel movement; import cargo pipeline; subsidy exposure by product.	Ministry of Energy, EWURA, PBPA, TPDC, TPA
Food and fertilizer	Food self-sufficiency ratio, production estimates, NFRA stock data, global fertilizer price movements.	Agro-dealer retail prices and stocks; farmer purchase intentions; district food-price stress map.	Ministry of Agriculture, NFRA, NBS, LGAs
Transport and logistics	Fuel price data, port throughput, sector observations on freight and insurance.	Freight surcharges, route delays, port dwell time, road freight costs, daladala and bajaj operating costs.	Ministry of Transport, TPA, LATRA, TCAA, LGAs
Tourism and aviation	Tourist arrivals, tourism earnings, reported cancellations and air-route disruption.	Forward bookings, hotel occupancy, airline schedules, source-market sentiment and job stress.	MNRT, Tanzania Tourist Board, TCAA, Immigration, airlines
Macro and finance	Exchange rates, inflation, reserves, current-account indicators and BoT market information.	Fuel import-bill sensitivity, exchange-rate pass-through, inflation basket exposure and liquidity stress.	BoT, MoF, NBS, TRA

Area	Available data	Additional data required	Responsible data owners
Fiscal and revenue	Budget structure, customs revenue exposure and indicative subsidy estimates.	Validated monthly revenue shortfall, subsidy fiscal space, arrears risk and expenditure reprioritization options.	MoF, TRA, EWURA, NPC
Development projects	Project pipeline and sector procurement data.	Imported input exposure, contract variation risk, delivery delay indicators and critical project prioritization.	NPC, MoF, PPRA, MDAs, LGAs
Households and informal economy	TASAF/PSSN registry, LGA administrative data and local market observations.	Rapid phone surveys, coping strategies, skipped meals, reduced mobility, school attendance stress and small trader working-capital stress.	TASAF, PMO-RALG, LGAs, SIDO, NBS
LPG and clean cooking	Reviewer input indicates possible LPG price exposure and risk of households reverting to charcoal or firewood if clean-cooking fuels become unaffordable.	Monthly LPG import prices, retail LPG prices by cylinder size, household fuel-switching behaviour, clean-cooking adoption trend and environmental pressure indicators.	Ministry of Energy, EWURA, NBS, LGAs, VPO, TFS
Electricity and industrial energy use	Reviewer input indicates lower direct oil dependence in grid electricity and limited oil use by factories, mainly for backup generation.	Validated generation mix, diesel/HFO generation share, factory energy-source survey, backup generator use, fuel consumption by industrial subsector and outage-linked diesel demand.	Ministry of Energy, TANESCO, EWURA, NBS, MIT, private sector associations

Data confidence classification

Confidence level	Examples	Treatment in policy decisions
High confidence	EWURA cap prices for petroleum products; official budget aggregates; verified administrative data from BoT, TRA, NBS and sector ministries.	Use directly, but update as new monthly or weekly releases are issued.
Medium confidence	Sector submissions, tourism estimates, fuel stock days, customs exposure estimates and agriculture production data.	Use in policy analysis, with clear source and date, and validate during sectoral deep dives.
Requires validation	Weekly tourist-arrival collapse, subsidy projections, war-risk insurance level, freight surcharges, regional food-demand estimates and gold price projections.	Use as scenario inputs only until validated by responsible institutions.
Requires validation	LPG exposure, clean-cooking household impact, power-grid diesel/HFO share, factory oil-use share and backup-generator fuel demand.	Use as operational monitoring inputs until validated by the responsible sector institutions and reflected in the weekly dashboard.

CHAPTER

SIX

Strategic Response Framework

This section responds directly to the need to separate available evidence from additional data that should be collected for the sectoral deep dives. The report should not wait for perfect data before action is taken. However, every major policy instrument should be backed by an updateable evidence base.

Imperative	Meaning	Operational actions
Protect	Shield vulnerable households and essential services from the sharpest affordability shocks.	Targeted kerosene, diesel, public transport and food affordability measures; TASAF/PSSN targeting; district market monitoring.
Stabilize	Maintain continuity in fuel supply, food markets, fertilizer access, fiscal management and macroeconomic confidence.	Fuel-stock management, procurement coordination, fertilizer ring-fencing, BoT-MoF coordination, revenue monitoring.
Position	Use Tanzania's structural strengths to accelerate medium-term transformation.	CNG and gas deployment, LNG engagement, gold and critical minerals value addition, regional food trade, tourism recovery and logistics hub positioning.

6.1 Proposed Gulf Crisis Economic Coordination and Monitoring Framework

Government may consider establishing a time-bound Gulf Crisis Economic Coordination and Monitoring Framework. The framework should be aligned with existing Government structures and should not duplicate statutory mandates. Its value would be to connect data, interpretation and escalation decisions across institutions during a rapidly evolving external shock.

The framework may be anchored through the appropriate high-level Government forum, with technical coordination by NPC, MoF, BoT and relevant sector ministries. It should bring together the main transmission channels: fuel supply and pricing; food and fertilizer security; transport and logistics; tourism recovery; fiscal and revenue monitoring; inflation, exchange-rate and reserves monitoring; development-project exposure; and household-level impacts.

Transmission channel	Responsible institutions to involve
Fuel supply and pricing	Ministry of Energy, EWURA, TPDC, PBPA
Food and fertilizer security	Ministry of Agriculture, NFRA, LGAs, agro-dealers, extension officers
Transport and logistics	Ministry of Transport, TPA, TCAA, LATRA, transport associations
Tourism recovery	Ministry of Natural Resources and Tourism, Tanzania Tourist Board, airlines, tour operators
Fiscal and revenue monitoring	Ministry of Finance, TRA, NPC
Inflation, exchange rate and reserves monitoring	BoT, NBS
Household and grassroots impacts	LGAs, TASAF/PSSN, community development officers, SIDO, market monitors
Development-project risk	NPC, MoF, MDAs, LGAs, implementing agencies

6.2 Weekly dashboard with macro and grassroots indicators

Monitoring area	Indicator	Data source	Frequency
Fuel security	Fuel stocks, pump prices, subsidy exposure and CNG conversion uptake.	Ministry of Energy, EWURA, TPDC, PBPA	Weekly
Food affordability	Prices of maize, rice, wheat flour, cooking oil and beans in selected markets.	Ministry of Agriculture, NBS, LGAs	Weekly
Fertilizer access	Retail fertilizer price and agro-dealer availability.	Ministry of Agriculture, extension officers, agro-dealers	Weekly or bi-weekly
Household energy access	Kerosene, charcoal, LPG and CNG affordability.	LGAs, EWURA, market surveys	Weekly
Vulnerable households	Skipped meals, reduced mobility, school attendance stress and coping strategies.	TASAF/PSSN, community development officers	Bi-weekly
Informal economy	Small trader sales decline, working-capital stress and market closures.	LGAs, trader associations, SIDO	Monthly

Monitoring area	Indicator	Data source	Frequency
Macroeconomy	Inflation, exchange rate, reserves, customs revenue and current-account indicators.	BoT, TRA, NBS, MoF	Weekly or monthly
Projects	Imported input costs, delivery delays and contract variation risks.	NPC, MDAs, LGAs, implementing agencies	Monthly
Clean cooking and environment	LPG retail prices, cylinder availability, household fuel switching to charcoal/ firewood and charcoal price movements.	Ministry of Energy, EWURA, NBS, LGAs, VPO, TFS	Weekly or bi-weekly
Industrial energy continuity	Diesel/HFO backup use, outages, factory fuel stress and production interruptions in priority subsectors.	Ministry of Industry and Trade, NBS, TANESCO, private sector associations	Monthly

6.3 Escalation triggers

- Fuel stock levels fall below agreed thresholds or price increases continue for two consecutive months without adequate fiscal cushioning.
- Subsidy requirements exceed approved fiscal space or begin crowding out priority development spending.
- Fertilizer prices or stock shortages threaten planting-season access in major producing regions.
- Food prices in selected local markets rise significantly above national averages or vulnerable households report negative coping strategies.
- Tourism arrivals remain below recovery thresholds or air connectivity constraints persist.
- Customs revenues fall materially below target or foreign-exchange reserves come under sustained pressure.
- Strategic development projects report material cost escalation, shipment delays or contract variation risk.

CHAPTER
SEVEN

Priority Action Plan and Responsible Entities

The action plan consolidates the recommendations into practical actions that can be implemented through existing institutions and strategies. The approach is to link crisis response to existing sector strategies, FYDP IV priorities, ADPs and sector plans, rather than creating parallel structures.

Sector	Action	Time frame	Lead / support institutions	Expected implication
Energy	Monitor petroleum vessel movements, import cargo pipeline, stock days and pump price pass-through.	0 to 90 days	Ministry of Energy, EWURA, TPDC, PBPA, TPA	Weekly dashboard and fuel-security decisions.
Energy	Assess targeted fuel-cushioning options for diesel, kerosene and essential transport where prices become socially unsustainable.	0 to 90 days	MoF, Ministry of Energy, EWURA, LATRA, TASAF	Costed, time-bound affordability safeguards.
Energy	Accelerate CNG conversion for public transport, freight trucks, bajaj operators and Government fleets.	0 to 18 months	Ministry of Energy, TPDC, EWURA, LATRA, private sector	Reduced petroleum import exposure.
Energy	Accelerate strategic petroleum reserve expansion, G2G procurement arrangements and petroleum storage infrastructure.	3 to 18 months	Ministry of Energy, TPDC, PBPA, TPA, MoF	Improved supply security and price stability.
Agriculture	Ring-fence fertilizer support, verify arrears and monitor agro-dealer supply ahead of the 2026 planting season.	0 to 90 days	Ministry of Agriculture, MoF, NFRA, LGAs	Protected yields and input access.

Sector	Action	Time frame	Lead / support institutions	Expected implication
Agriculture	Map food-deficit and high-price districts by combining production, food stocks, market prices and household stress indicators.	0 to 90 days	Ministry of Agriculture, NBS, NFRA, LGAs, TASAF	Early warning for affordability and access stress.
Food reserves	Resource NFRA to maintain appropriate stock levels and support strategic food-market stabilisation where needed.	0 to 18 months	MoF, Ministry of Agriculture, NFRA	Sustained food self-sufficiency and regional supply readiness.
Transport	Monitor freight costs, daladala fares, rural transport costs, port dwell time and air-cargo disruptions.	0 to 90 days	Ministry of Transport, LATRA, TPA, TCAA, LGAs	Reduced logistics surprises and better pass-through monitoring.
Tourism	Activate a tourism recovery and market-diversification campaign focused on stable source markets, domestic tourism and regional tourism.	0 to 18 months	MNRT, Tanzania Tourist Board, TCAA, airlines, private sector	Protected earnings, jobs and destination confidence.
Macro-fiscal	Prepare monthly fuel import-bill, subsidy, customs-revenue and FX-reserve sensitivity scenarios.	0 to 90 days	MoF, BoT, TRA, EWURA, NPC	Scenario-based fiscal and monetary decisions.
Revenue	Monitor customs revenue from Middle East imports and reinforce compliance on high-risk import channels.	0 to 18 months	TRA, MoF, TPA, Ministry of Internal Affairs	Reduced revenue leakage and smuggling risk.

Sector	Action	Time frame	Lead / support institutions	Expected implication
Mining	Expand BoT gold purchase and domestic mineral-market mechanisms where market disruptions affect exporters.	0 to 18 months	BoT, Ministry of Minerals, Mining Commission	Additional FX buffer and domestic market support.
Mining	Promote gold refining, critical minerals value addition and strategic investor targeting.	3 to 18 months	Ministry of Minerals, TISEZA, NPC, private sector	Medium-term export diversification and domestic value addition.
Industry and trade	Identify alternative sourcing and export markets for petroleum-related inputs, fertilizer, machinery and high-volume intermediate goods.	3 to 18 months	MIT, TANTRADE, MoFAEAC, private sector	Reduced supply-chain concentration risk.
Projects	Classify public investment projects by import exposure, social impact, completion stage and contract variation risk.	0 to 90 days	NPC, MoF, MDAs, LGAs, PPRA	Protected priority projects and controlled cost escalation.
Social protection	Use TASAF/PSSN and LGA systems to identify households exposed to food, energy and transport stress.	0 to 90 days	TASAF, PMO-RALG, LGAs, NBS	Targeted, evidence-based household support.
Communication	Issue clear public communication on fuel efficiency, market monitoring, consumer rights and Government response measures.	0 to 90 days	Government communication units, EWURA, NPC, sector ministries	Strengthened confidence through coordinated communication

Sector	Action	Time frame	Lead / support institutions	Expected implication
Partnerships	Use NPC-UNDP collaboration to support deep dives, data systems, crisis dashboards and social impact monitoring.	0 to 18 months	NPC, UNDP, UNRCO, NBS, sector ministries	Evidence-backed policy and implementation support.
Household energy	Monitor LPG, kerosene, charcoal and firewood affordability, and prepare targeted clean-cooking protection where price increases risk reversion to biomass fuels.	0 to 90 days	Ministry of Energy, EWURA, VPO, NBS, LGAs, TFS, LPG suppliers	Reduced welfare and environmental risk from fuel switching.
Industry and power	Validate national power-grid and factory oil exposure, including diesel/HFO backup generation, and prioritize energy-continuity measures.	0 to 90 days	Ministry of Energy, TANESCO, EWURA, MIT, NBS, private sector	Clear evidence on production and backup-fuel exposure.

The action plan consolidates the recommendations into practical actions that can be implemented through existing institutions and strategies.

CHAPTER
EIGHT

Resilience Assets and Strategic Opportunities

8. Resilience Assets and Strategic Opportunities

The opportunity analysis does not legitimize or endorse the conflict. The human and humanitarian costs remain deeply concerning. The analysis recognizes that responsible policy must protect citizens while positioning Tanzania to benefit from shifts in global energy, trade, investment and supply-chain patterns where these shifts occur.

A specific resilience issue added in this update is the difference between transport oil dependence and the lower direct oil exposure of parts of the power and industrial system. Transport and distribution remain highly exposed to petroleum prices. By contrast, the national power grid and many factories may have lower direct oil intensity, although diesel and HFO backup generation can still transmit the shock into production costs when grid reliability is constrained. This distinction should guide sector deep dives so that policy measures are targeted to the most exposed channels rather than applied uniformly across the economy.

Opportunity area	Potential opening	Strategic action
Domestic gas and CNG	Higher petroleum import costs strengthen the case for domestic gas substitution.	Accelerate CNG infrastructure, fleet conversion and domestic gas distribution.
LNG and energy investment	Global buyers may seek diversified non-Gulf supply.	Open structured LNG and offtake discussions while protecting domestic allocation.
Gold and critical minerals	Safe-haven demand and clean-energy supply chains can increase investor interest.	Strengthen value addition, domestic auctions, refining and investor targeting.
Food systems	National food surplus can support regional food security if local affordability is protected.	Protect inputs, improve storage, resource NFRA and deepen regional market access.
Ports and logistics	Supply chains may seek reliable corridors and stable logistics hubs.	Improve port efficiency, corridor coordination, digital clearance and private investment.
Tourism	Travelers may shift toward stable destinations.	Reinforce Tanzania as a safe, high-value destination with diversified air routes and markets.
Development finance	Investors may search for stable, credible African destinations.	Package bankable projects under FYDP IV and maintain macroeconomic credibility.

Alignment with Dira 2050 and FYDP IV

The proposed actions support the Dira 2050 drivers of energy, integrated logistics, science and technology, research and development, and digital transformation. They also reinforce FYDP IV priorities in agriculture, tourism, manufacturing, mining, blue economy, construction, real estate, financial services and integrated infrastructure. The crisis response should therefore be mainstreamed into existing sector strategies, Sector Transformation Plans, Regional Development Plans and Annual Development Plans.

A specific resilience issue added in this update is the difference between transport oil dependence and the lower direct oil exposure of parts of the power and industrial system.

CHAPTER NINE

Priority Sector Deep Dives

The report identifies six deep dives that should be undertaken immediately. Each deep dive should produce a short decision note with validated data, quantified scenarios, fiscal implications, responsible institutions and a recommended implementation path.

Deep dive	Purpose	Lead institutions
Energy	Quantify fuel supply scenarios, subsidy costs, diesel pass-through, LPG and clean-cooking exposure, strategic stocks, CNG substitution and power/industrial backup-fuel risk.	Ministry of Energy, EWURA, TPDC, PBPA, TANESCO, MoF, BoT, NBS
Food and agriculture	Map where national food availability, fertilizer access, market prices and household affordability risks overlap.	Ministry of Agriculture, NFRA, NBS, LGAs, TASAF
Fiscal and monetary policy	Estimate import bill, revenue, subsidy, reserves, inflation and exchange-rate scenarios under limited, prolonged and severe disruption.	MoF, BoT, TRA, NBS, NPC
Tourism and aviation	Assess airlift, cancellations, bookings, hotel occupancy, source-market changes and recovery options.	MNRT, TTB, TCAA, Immigration, airlines
Transport and logistics	Quantify freight, insurance, route delays, port congestion, corridor effects and essential import prioritization.	Ministry of Transport, TPA, TCAA, LATRA, TRA
Social protection and local markets	Identify households, informal workers and local markets most exposed to food, transport and energy price shocks.	TASAF, PMO-RALG, LGAs, NBS, SIDO
Household energy and environment	Assess whether LPG, kerosene and charcoal/firewood price movements are affecting clean-cooking uptake, household welfare and environmental pressure.	Ministry of Energy, EWURA, NBS, VPO, LGAs, TFS, TASAF

CHAPTER TEN

Conclusion

The Gulf crisis should be treated as a multidimensional external shock rather than a fuel-price issue alone. Tanzania has meaningful resilience assets, including food self-sufficiency, natural gas reserves, gold and critical minerals, growing infrastructure, policy credibility and a strategic geographical position. The policy challenge is to convert these assets into household protection, productive-sector continuity, fiscal discipline and medium-term transformation.

The most important analytical distinction is between aggregate national resilience and the lived impact on households and firms. A national food surplus can coexist with household food stress if fuel, transport, fertilizer and local market prices rise together. Similarly, strong gold earnings can support foreign exchange, but only if the gains are connected to domestic value addition, fiscal management and investment promotion.

The recommended response is therefore targeted, scenario-based, fiscally disciplined, opportunity-aware and data-driven. Government should act immediately on fuel, food, fertilizer, transport and household monitoring; deepen sector-specific analysis; and use existing planning instruments to mainstream the response into strategies, budgets and implementation systems

Sector	Risk level	Main evidence	Horizon
Energy and petroleum	High	Fuel prices up sharply; strategic stock buffers finite; refinery and shipping chains exposed.	Immediate
Food security and agriculture	High	Fertilizer and transport costs threaten affordability and planting decisions despite national food surplus.	Immediate
Transport and logistics	High	Higher fuel, freight and insurance costs; route disruptions; transport fares under pressure.	Immediate
Tourism and aviation	High	Air connectivity disruption and higher travel costs risk earnings, jobs and seasonal bookings.	Immediate
Government budget	High	Subsidy pressure, customs revenue risk and development-spending constraints.	Immediate
Macroeconomic stability	Medium-high	FX demand, import-bill pressure and inflation pass-through require close monitoring.	Short term
Industry and trade	Medium	Imported input costs, freight costs and market disruptions affect production and margins.	Short term

Sector	Risk level	Main evidence	Horizon
Mining and minerals	Medium	Gold and critical minerals provide buffers, but some Gulf-linked trade channels may be disrupted.	Medium term
Livestock and fisheries	Medium	Middle East export concentration and perishable-export logistics create market risk.	Short term
Development projects	Medium	Imported input costs, shipping delays and contract variations may affect implementation.	Medium term

Annex 2: Customs Revenue Exposure from Middle Eastern Imports, 2023 to 2025 Average

HS chapter	Description	Revenue, TZS billion	Share, %
27	Mineral fuels, oils and distillation products	1,550.65	84.1
39	Plastics and articles thereof	95.32	5.2
17	Sugars and sugar confectionery	60.87	3.3
76	Aluminium and articles thereof	19.64	1.7
87	Vehicles, parts and accessories	11.30	0.6
84	Nuclear reactors, boilers and machinery	11.61	0.6
74	Copper and articles thereof	11.80	0.6
25	Salt, sulphur, earths and stone, cement	10.97	0.6
63	Made-up textile articles and worn clothing	8.45	0.5
38	Miscellaneous chemical products	7.48	0.4
Sub-total		1,788.08	97.0
Others		55.75	3.0
Grand total		1,843.83	100.0

Source: Tanzania Revenue Authority

Annex 3: Selected Policy Measures and Practical Design Options

The following options are not recommendations for automatic adoption. They provide practical policy designs that can be adapted to Tanzania's fiscal space, social-protection systems and sector strategies if the crisis persists.

Policy measure	Typical use during shocks	Implementation requirement	Relevance for Tanzania
Targeted fuel cushioning	Used where fuel prices threaten essential transport, food distribution or household energy access.	Clear eligibility, cost ceiling, sunset clause and weekly fiscal monitoring.	Relevant for diesel, kerosene and essential services, avoiding open-ended universal subsidies.
Cash or voucher support	Used to protect vulnerable households when food and energy prices rise faster than incomes.	Beneficiary registry, payment channel and grievance mechanism.	Can use TASAF/PSSN and LGA structures for the most exposed urban and poor households.
Fertilizer and input protection	Used before planting seasons to prevent price shocks from reducing input use and yields.	Validated arrears, supplier commitment, agro-dealer monitoring and regional price tracking.	Relevant to preserve 2026 planting decisions and protect the food self-sufficiency buffer.
Strategic stocks and procurement coordination	Used where import routes, lead times or supplier concentration create supply-security risks.	Stock targets, financing plan, storage capacity and procurement transparency.	Relevant for petroleum products, fertilizer and food reserves through existing responsible institutions.
Clean-cooking affordability monitoring	Used where LPG or kerosene shocks may push households back to biomass fuels.	Retail LPG data, household fuel-switching indicators and environmental monitoring.	Relevant to protect clean-cooking gains and reduce pressure on charcoal and firewood.
Freight and logistics facilitation	Used to reduce port delays, route disruption and cost escalation in strategic imports.	Fast-track clearance, port coordination, route monitoring and communication with carriers.	Relevant for fuel, fertilizer, medicines, food, project equipment and tourism supply chains.
Investment positioning	Used when global investors seek stable alternative locations during geopolitical shocks.	Bankable project pipeline, investor targeting, offtake strategy and regulatory clarity.	Relevant for LNG, CNG, minerals beneficiation, agribusiness, logistics and tourism recovery.

Annex 4: Source List

Energy and Water Utilities Regulatory Authority, Public Notice on Cap Prices for Petroleum Products Effective Wednesday, 6 May 2026.

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Ministry of Agriculture, food self-sufficiency, production and fertilizer-related data referenced in the working assessment.

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Ministry of Energy, Ministry of Natural Resources and Tourism, Ministry of Industry and Trade, TCAA, TPA, TPDC, PBPA and other Government institutional inputs referenced in the rapid assessment.

President's Office, Planning Commission,
Kambarage Building 9th Floor,
Kambarage 1 Street
P.O. Box. 1324
41104 Tambukareli, Dodoma

www.planning.go.tz

Tume ya Mipango Tanzania @planning_tz @planning_tz @planningtz