

# EAST COAST EXPLOSIVES



## PETROLEUM AND CNG PROJECT

October 2023

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# 1.0 EXECUTIVE SUMMARY

## 1.1 INTRODUCTION

East Coast Explosives is limited liability company incorporated, registered and incorporated in the United Republic of Tanzania to provide solutions to mining and construction companies by providing quality products and services. The company is 100% owned by Tanzanian locals. East Coast Explosives is registered in Tanzania with BRELA certificate No: 156833886 of July 2022. East Coast Explosives is a diversified provider of specialized chemical products and services used in the mining, agriculture, and chemical sector.

Tanzania imports petroleum products on a net basis. Since 2011, Tanzania has used a Bulk Procurement System (BPS) to supply petroleum products. Purchases of petroleum products are done under the BPS from a pool of imports collected from vendors chosen through a competitive bidding process. The BPS is applicable to the following petroleum product grades: Automotive Gas Oil (AGO), Unleaded Motor Spirit Premium (MSP), Jet A-1, and Illuminating Kerosene (IK). The Ministry of Energy's statistics from December 2017 indicates that the total volume of identified natural gas reserves is 57.54 trillion standard cubic feet (TCF). Tanzania has neither discovered any commercial oil recently nor produces crude oil. Tanzania usually uses about 35,000 barrels of refined oil products per day, all of which come from imports. Our team made of local Tanzanians consists of various industry specialists in blasting science, chemical, mechanical, electrical, and software engineering, geosciences, and mathematics. Our modular automation plants and remote emulsion manufacturing facilities offer the company and our clients security and continuity of supply. We are able to rapidly commission our bulk emulsion services anywhere across the country.

Our in-depth knowledge of the industry allows us to be proactive in all aspects of our work from start to finish. We attribute this success primarily to our commitment to excellent service and high levels of technical support. Our goal is to provide added value to our customers with a focus on service quality and the provision of advanced blasting technology. East Coast Explosives' main activities include the storage, distribution and retailing of fuel i.e Petrol, Diesel and Kerosene as well as Compressed Natural Gas (CNG) for automobiles.

## 1.2 VISION

To create high level of customer satisfaction through innovative business operations.

## 1.3 MISSION

To be the best provider of Petroleum services and to create a sustainable world-class company which will benefit the nation.

## 1.4 CORE PURPOSE

To deliver a comprehensive range of market leading products, backed by a highly responsive, client focused and safe culture.

## 2.0 STATE OF FUEL AND GAS SECTOR IN TANZANIA

### 2.1 INDUSTRY IN TANZANIA

The Tanzanian petroleum industry has been growing over the past few years in terms of natural gas output and the consumption of natural gas and petroleum products. Tanzania has the fifth-largest recoverable natural gas reserves in Africa and it produces enough natural gas to satisfy domestic demand. Tanzania is an important channel for neighboring landlocked countries' petroleum imports. Opportunities to grow the industry include planned natural gas pipelines to Kenya and Zambia and the planned Tanzania Liquefied Natural Gas project, which will be the country's largest investment to date.

The Tanzania Petroleum Development Company (TPDC) states that there are five stages of Tanzanian gas exploration. First phase: British Petroleum (BP) and Shell conducted the initial study and gas extraction in Mafia, Pemba, and Zanzibar between 1952 to 1964. The second phase, which lasted from 1969 to 1979, saw the largest gas finding in Lindi's Songo Songo in 1974, and the establishment of TPDC in 1979. The government passed the Petroleum Act in 198, opening the door for the development of gas resources, marking the third phase of the 1980s–1991s. During this phase, many gas finds were made in Mtwara's Mnazi Bay in 1984. The fourth phase, which ran from 1992 to 1999, saw a rise in natural gas extraction and research, which encouraged more foreign oil corporations to work with TPDC to enter the market.

The fifth phase, from 2000 to the present, has seen a growth in foreign oil firms, which has resulted in substantial gas finds. During this time, the government has developed policies and Acts to improve the management of this industry. The policies are the 2013 National Natural Gas Policy and the 2014 Local Content Policy. In 2015, the Oil and Gas Revenue Management Act and the Petroleum Act were passed.

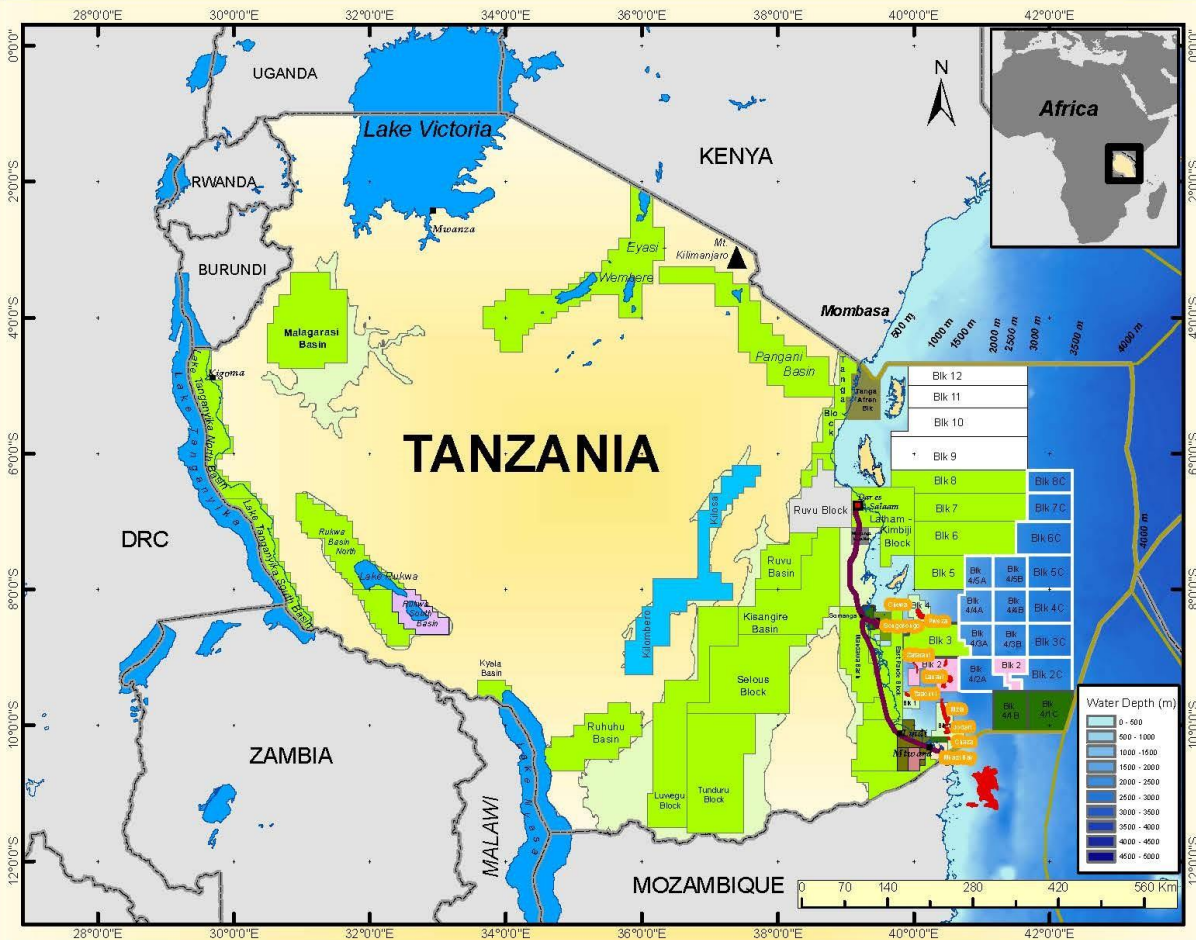
The Tanzanian government planned to sign a host government agreement in February 2023 with Norwegian company Equinor and British company Shell to operate the gas fields and LNG plant. The LNG will be exported to Asia and Europe, while some of the natural gas will be used in the country for power generation and by companies such as manufacturers.

Tanzania is eager to use its natural gas reserves to develop its economy. Securing sufficient funding might prove to be a challenge. Demand for natural gas is growing and liquefied petroleum gas consumption is increasing, especially in rural areas. The number of petrol stations is increasing on the back of economic growth and the expansion of the road network. Some petrol stations at times do not have stock of a specific fuel due to delays in deliveries or a lack of funds. There is a shortage of compressed natural gas filling stations in the country, as increasing numbers of vehicle owners want to switch from petrol.



# UNITED REPUBLIC OF TANZANIA

## EXPLORATION ACTIVITY



### LICENSE STATUS - SEPTEMBER, 2019



#### PSA - Exploration Licenses

- Rukwa Basin - Heritage Rukwa (T) Ltd
- Kilosa - Kilombero Basin - Swala Oil and Gas (T) Ltd
- Tanga - Afren Block
- Ruvu Basin - Dodsai
- Nyuni Area - Ndovu Resources
- Ruvuma - Ndovu Resources (Part Ntorya Location)
- Block 1 and 4 - Shell
- Block 2 - Equinor

#### Development Licenses

- Songo Songo - PanAfrican Energy
- Mnazi Bay - Maurel et Prom
- Kiliwani North - Ndovu Resources

#### Development Application

- Mkuranga Location - Maurel et Prom

#### Application Blocks

- Block 9, 10, 11, 12.

#### Onshore and Shallow Water Open Acreages

- 

#### Future Offshore Bid Round

- 

#### TPDC Reserved Blocks

- 

#### Gas Fields

- 

Borders

Maritime Boundaries

#### Pipelines

- NNGI & Songosongo Pipeline
- Tanzania - Uganda Crude Oil Pipeline
- TAZAMA Oil Pipeline
- Proposed Gas Pipeline

## 2.2 TANZANIA PETROLEUM DEVELOPMENT CORPORATION - (TPDC)

Since its inception in 1980, TPDC has had the exclusive license for upstream operations. TPDC established the Commercial Petroleum Company of Tanzania (COPEC) as a subsidiary to engage in downstream activities in 2009. COPEC was renamed TANOIL when it became active in 2015. GASCO is another downstream and midstream division of TPDC. It runs and maintains two natural gas plants at Songo Songo and Madimba, two natural gas receiving stations in Lindi and Dar Es Salaam, and the pipeline from Mtwara to Dar Es Salaam. The East Africa Crude Oil Pipeline Project (EACOP) is another project in which TPDC is involved. A \$3.5 billion project will be built between Uganda and Tanzania to build the world's longest heated oil pipeline. Uganda and Tanzania are now discussing a host government agreement (HGA) with an international oil consortium developing Uganda's oil deposits.

According to the Petroleum Act of 2015, TPDC is the custodian of petroleum licenses for exploration and development in Tanzania, and it has exclusive rights to participate in all gas projects along the value chain by owning at least a 25% ownership. Many companies collaborate with TPDC on investigation and development operations. Equinor, Shell, ExxonMobil, Ophir, Pavillion Energy, Dodsai, Pam African Energy, Maurel & Prom, Afren (T) Ltd, Aminex, and Ndovu Resource are among them.

## 2.3 ENERGY AND WATER UTILITIES REGULATORY AUTHORITY - EWURA

The Energy and Water Utilities Regulatory entity (EWURA) is a multi-sectoral regulatory entity formed under Tanzania's EWURA Act Cap 414. It is in charge of the technical and economic regulation of Tanzania's power, petroleum, natural gas, and water sectors in accordance with Cap 414 and sector law. Its goal is "To Regulate the Energy and Water Services in a Transparent, Effective and Efficient Manner that Promotes Investments and Enhances the Socio-Economic Welfare of the Tanzanian Society." The authority is a quasi-judicial body tasked with investigating and resolving consumer complaints and disputes, which are critical components of consumer protection. This is an independent quasi-government organization whose funds and finances are dependent on the government.

EWURA is tasked with ensuring the fulfillment of the following duties: promoting effective competition and economic efficiency, protecting consumer interests, protecting the financial availability of efficient suppliers, promoting the availability of regulated services to all customers, including low-privileged customers, regardless of their status, and enhancing public awareness, knowledge, and understanding of the regulated services. Other responsibilities include defining standards for goods and services, as well as standards for the terms and conditions of supply of goods and services, as well as regulating rates and charges, availability, quantity, and quality of services.

## 3.0 SWOT ANALYSIS

### 3.1 STRENGTHS

- I. Our greatest strength lies in the vast experience and capabilities of our technical team and support personnel.
- II. Up-to date equipment and technology used
- III. A complete plan to build a modern storage facility and a first filling station in Morogoro whereas all necessary arrangement are in place
- IV. Well managed storage and transportation facilities for all explosives
- V. At the point of inception, the owners have already figured out a roadmap on how to gather funding and all the necessary resources needed to run the operations.
- VI. From the legal perspective the registration process is already done and the operations are already underway.
- VII. We offer environmental sensitive services in accordance to the laws of Tanzania
- VIII. Company headquarters are located in Dar es Salaam, Tanzania's business capital which makes it easy for the coordination of our operations and ease of access between our plant and where customers will be
- IX. A plan to use a comprehensive all round promotion effort so as to get the word out to as much potential clients as possible

### 3.2 WEAKNESSES

- I. We are entering a business venture that has a dominance of seasoned service providers but we believe our uniqueness in providing first class services will be an added advantage over time
- II. It is always hard to penetrate to the wide and far places to promote our business and to meet clients and for distributions sake, but our aim of bringing the new tech on board is our big USP.
- III. Potential negative connotation especially from seasoned clients who would doubt recommending or even using services from a relatively new company but we will use our few first clients as a testimony and ambassadors by the services they will get.

### 3.3 OPPORTUNITIES

- I. Current government continuing with all big construction projects initiated by last government
- II. Businesses going back to full operations after COVID 19 pandemic
- III. Government focus on new infrastructures such as roads and SGR railway to increase business between Tanzania and neighboring countries means need for more fuel. This will enable us to sell more fuel.
- IV. New directive to open the economy and buses to travel 24hrs means increase in traffic
- V. Our use of new technologies in production, durable machinery and equipment in supply and environmentally friendly vehicles that will enable us to get the edge over the competitors especially with CNG stations.
- VI. Availability of funds and human resource with potential of maximum output.

### 3.4 THREATS

- I. Increase of tight compliance rules from regulatory authorities
- II. The presence of existing dominant service providers: who have a long-established relationship with the clients and regulators as well
- III. New entrants with access to high capital.
- IV. Wars in the middle east and in Russia and Ukraine which affect fuel prices

## 4.0 OPERATIONS PLAN

Starting and running a business in the oil and gas sector is a complex endeavor that involves several key aspects, including legal and environmental compliance, marketing, and customer service. As a company East Coast Explosives has taken up the challenge and here under put an operations plan on how all aspects are going to be touched:

### 4.1 PETROLEUM PRODUCTS AND CNG

In recent years, the three big brands have dominated petroleum retail in Tanzania, but according to Kalibrate's newest market assessment, the situation is changing. In the future years, a number of strong, smaller firms intend to invest aggressively and rapidly across the country. Tanzania is a developing market with numerous potentials for astute merchants to expand their networks through new construction and acquisition.

It's hardly a surprise that Tanzania's Eastern Region, which includes the economic core of Dar es Salaam, accounts for a large share of fuel sales, accounting for 37% of all petrol sales, 33% of all diesel sales, and 40% of all c-store sales in Tanzania. What may surprise you is that the country's Southern Region has the most "under construction" fuel stations of any region, indicating that market development isn't limited to the East. The possibility for fuel retail in Tanzania is obvious, but deciding where to construct or which networks to purchase isn't always that straightforward. Your fuel station's potential is defined by its location, and some locations greatly outperform others.

In terms of the CNG portfolio in the country; by March 2023 the TPDC had given a total of 20 companies a go-ahead to build new stations across the country to serve more than 2000 vehicles already operating countrywide. Because of its abundance and environmental benefits, compressed natural gas (CNG) is a possible alternative fuel in Tanzania's road sector. Despite the unusual jump in road oil costs (6% from December 2020 to March 2021; 12% from March 2021 to June 2021; 10% from June 2021 to December 2021; and 16% from December 2021 to June 2022), the transition to NGVs is not promising. Furthermore, approximately 350 four-wheelers were converted to use CNG in 2018, 450 in 2020, and 1500 in 2022, accounting for 0.08% of its 1.92 million cars. In comparison, the global commercialization of NGVs is estimated to be around 27.4 million (2018), 28.5 million (2019), and more than 30 million units (2021).

East Coast explosives is planning to open filling stations that are going to be offering both petroleum and CNG to fuels automobiles in the Morogoro and Tunduma regions here in Tanzania and expand to the whole of Tanzania as things will go.

## 4.2 STORAGE

There will be a storage facility at our current premises in Morogoro region that will be able to store large sums of Petroleum products and CNG for storage and distribution for filling stations and cylinders here in Morogoro and in Tunduma. The capacity of the storage tanks will be

- i) 100,000 lts Storage tank for Petroleum products
- ii) 100MT Storage facility for CNG

## 4.3 LOGISTICS

A key part of our transportation system is our vehicles and personnel. Our fleet is both the safest and the latest available on site. It features units designed for industry specific applications. Many of our operators have Health, Safety and Environmental safeguard knowledge. The vehicles we are planning to purchase all top of the range for transportation and well equipped with all latest safety features.

## 4.4 FILLING STATIONS

Our filling stations will be designed to be multifunctional in nature. This means that a customer will be able to walk in and get all-round services for twenty-four hours seven days a week. Our stations will have:

- i) Petrol Pump.
- ii) Diesel Pump.
- iii) Kerosene Pump
- iv) CNG Pump
- v) Tyre air refill center and garage
- vi) Mini-supermarket

## Tanzania

Uncovering opportunities for **new fuel stations**

**130**  
fuel stations have closed



**153**  
new fuel stations are  
under construction

Dar Es Salaam has always been the hotspot sites in Tanzania, with petrol sales at 60% above the country average.

But **only 25%** of the sites under construction today are in the Eastern region.

The market in Tanzania is changing. Your competition are optimizing their networks.

Select the right location for your new fuel station and understand the potential of your current sites to **maximize the performance of your network**.



Data, software, analytics, and consulting from [kalibrate.com](http://kalibrate.com)

## Tanzania

Uncovering opportunities for **mergers and acquisitions**

Unbranded fuel stations make up **44%** of the Tanzanian market — but only provide **32%** of the volume

Almost **1/3** of unbranded locations are **under-performing** — making them excellent new to brand targets

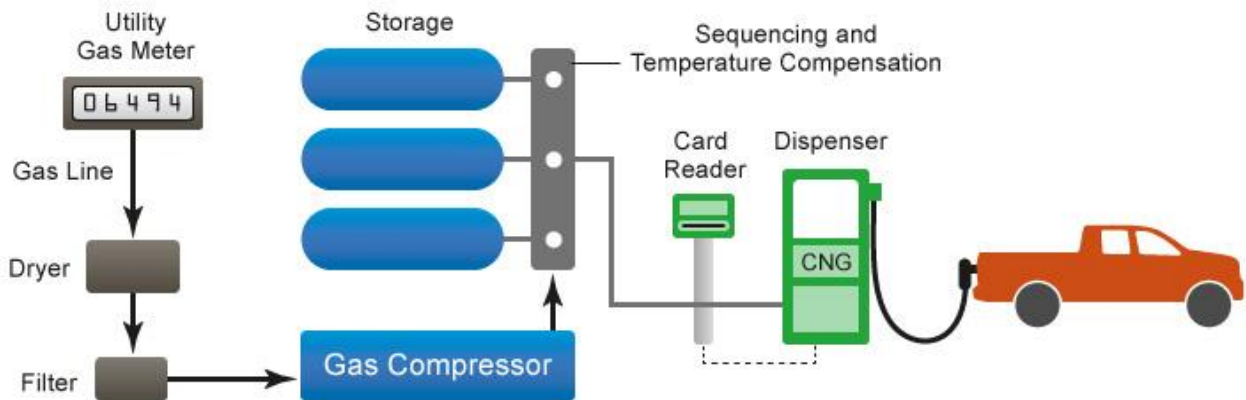
Kalibrate has identified **four** networks in strong locations that are currently operating below their potential and are **prime candidates for acquisition**

A strong location defines the potential of any fuel station. Whether you're building or buying in Tanzania, Kalibrate will help you to select the best locations to **maximize your profit**.



Data, software, analytics, and consulting from [kalibrate.com](http://kalibrate.com)

## Fast-Fill Station



## 4.4 SALES AND MARKETING

### 4.4.1 MARKETING

East Coast Explosives has set aside **USD 315, 542** over a period of five (5) years towards marketing and networking efforts. Our Marketing plan is a combination of techniques, tools and resources designed to achieve commercial and social objectives. We will make sure our company is presented and known for its impact and contribution to the business realm rather than just its financial gains. This is the simple structure at which we are going to carry our activities:

- i) Print (brochures, fliers, magazines and ads on lead print magazines abroad)
- ii) Digital Marketing (emails, web advertising, social media etc)
- iii) Participate in exhibitions in different mining and construction fairs
- iv) Electronic media (radio and TVs as sponsors, partners, interviews etc)
- v) Word of mouth by all company employees and stakeholders
- vi) Pricing customization (Create different packages for different category of clients in order to work with their budgets)
- vii) Direct marketing approach where the management and marketing team will meet potential clients
- viii) Customer follow-up

### 4.4.2 TARGET MARKET

There is a wide range of potential clients who can be reached in order to expand our client base. We have created strategies that will enable us reach out to various partner organizations and government agencies in order to ensure there is an exceptional experience to our clients. The clients we have planned to reach are:

- i) Retail customers in the regions
- ii) Bus companies with routes along our stations
- iii) All major CNG vehicle operating companies such as Dangote, CocaCola Kwanza etc
- iv) Mining companies around the regions as attached in the annexure
- v) Construction companies especially those with mega projects along the regions

- vi) Agricultural projects especially irrigation schemes in areas near the project
- vii) Logistics, freight forwarders and cargo transport companies

#### 4.4.3 PROMOTION STRATEGY

- i) **Quality Assurance** There will be a constant and very strict adherence to making sure the quality coming out of all our services remains at the highest quality. We have already set standards for the service and products that will be offered at our doorsteps and we have stretched our minimum points to go with most of our competitors' quality. And we will make sure we always produce first grade products in order to beat our competitors but most importantly to reach and fulfill our clients' expectations.
- ii) **Customer Satisfaction** Our first, last and every rule is Customer is King! We will make sure no customer ever complains about the way we serviced them or our failure to deliver upon our set standards. And there will be a very strict zero (0) tolerance rule whenever the standards are not met. This will enable us to serve all our clients with the same passion we would want be served.
- iii) **Dynamic and flexible** as different clients will come with different inquiries and wants, we will always be ready to bend and stretch to our last inch to meet their demands. Be it in the manner of funds, distance or time we will always have no rules in getting ahead of the game for the sake of our business and our clients.

#### 4.4.4 COMPETITIVE ADVANTAGE

Acquiring a substantial market share in this business is dependent on four main strategies

- i) **Product development** (taking control of its quality, availability and accessibility and the ensuring we have the best in terms of Human Resource expertise)
- ii) **Market reach and penetration** (building the necessary networks with the markets, keeping a strong presence in different stakeholder gatherings, and promotions through different channels)
- iii) **Modernization of fleet and equipment** in order to meet expectation of such a sophisticated industry
- iv) **Competitive prices** for penetration and placement in the market

#### 4.4.5 PRICING

Much of our prices will be determined by the market standards. Margins on all other products and services will necessarily vary depending upon the levels of related costs such as governmental fees and charges. We will always make sure that we stick and practice our competitive pricing strategy. Prices we charge most of the times cover all of our clients' scope also bringing returns

to our business. We also be flexible to accommodate any specific extra deliverables as per the clients' request at their own a reasonable cost when requested.

#### 4.4.6 PAYMENT OPTIONS

The payment policy adopted by East Coast Explosives is all inclusive because we are aware that different customers prefer different payment options as it suits them but at the same time, we will ensure that we abide by the financial rules and regulation of the United Republic of Tanzania

Here are the payment options that will be available to clients;

- i) Payment via bank transfer
- ii) Payment with cash
- iii) Payment via credit cards
- iv) Payment via online bank transfer
- v) Payment via check
- vi) Payment via mobile money

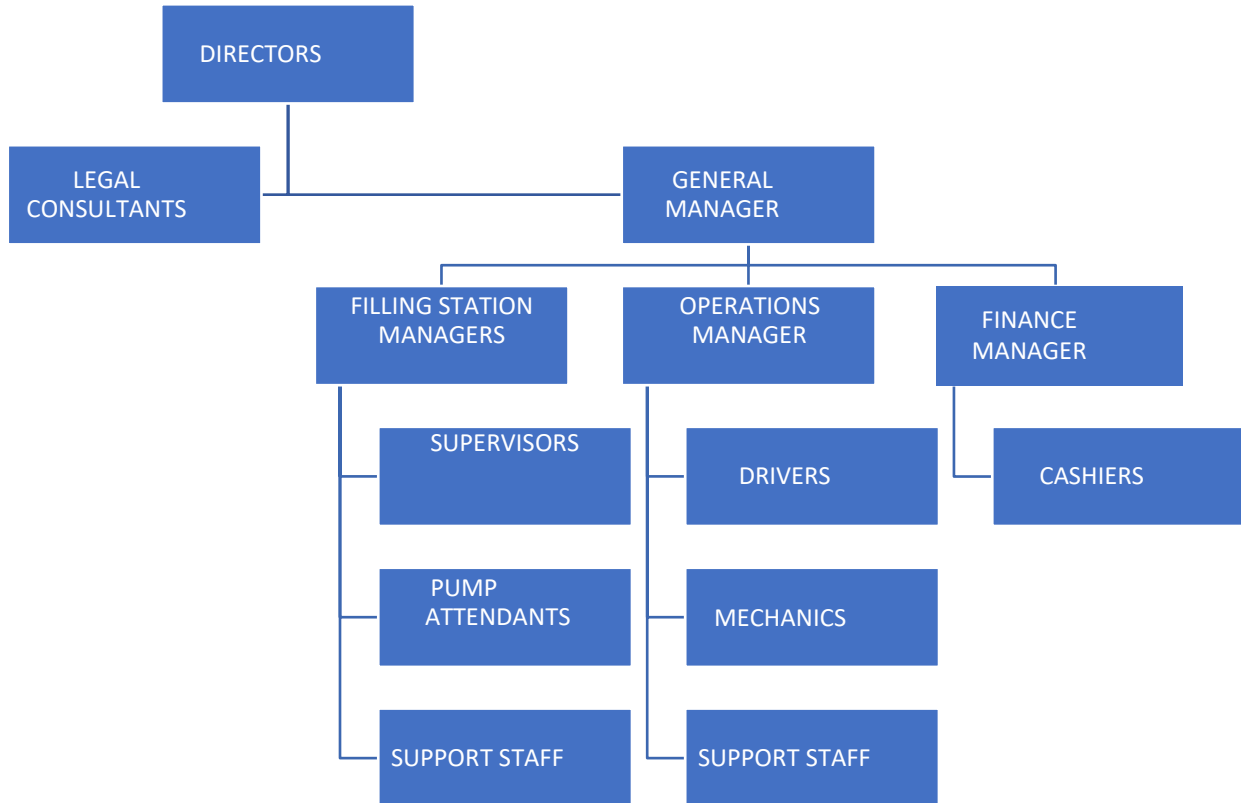
In view of the above, we have chosen banking platforms that will enable our client make payment for our services without any stress on their part. Our bank account numbers will be made available on our website and promotional materials.

## 5.0 TIMELINE

The 5-year project will be operating in two phases namely

- i) Inception: This includes all the preliminary steps such as certifications, permits and importation of goods and building all the major infrastructures and setting up of the two first stations in Morogoro and Tunduma. This will take a period of 1 year beginning December 2023-November 2024.
- ii) Expansion: This will take the next 4 years which will include building new stations across all the regions in Tanzania and the neighbouring countries according to the situation then. This will start from December 2024- November 2028.

## 4.5 ORGANIZATIONAL STRUCTURE



### 4.5.1 THE EMPLOYMENT OPPORTUNITY

The company has planned to provide employment opportunities to Tanzanians on both contractual and temporary basis. There is projected to be a total of 52 (Fifty Two) contractual employees for 2 new stations and 84 (eighty-four) casual workers who are employed on temporary basis according to the project at hand and the need at the particular moment. That bring the total number of people working for the company at any particular hunting season to at least 114 (One hundred and fourteen). The company through its growth phases plans to employ more Tanzanian experts and casual laborers in order to serve the existing clientele. The company philosophy in employing workers is to get Tanzanian youth of all gender and backgrounds and preferably under 30 (thirty) years of age in order to retain the employees longer and grow their careers. At the moment the forecasted number of employees after 5 (five) years of production and servicing the market is projected to be more than 250+ (more than two hundred and fifty) Tanzanian youth. If all goes according to plan, they will all be full time contracted employees. Employee breakdown can be seen in the annexure.

## 5.0 FINANCIAL PROJECTIONS

### 5.1 DIRECT OVERHEADS

Total Investment in Year 1 is USD	<b>10,375,600</b>
<b>DIRECT OVERHEADS (Annual)</b>	<b>USD (\$)</b>
Structure	350,000
Office Expenses	10,000
Utilities	15,000
Communications & Internet	7,000
Fuels & Maintenance	22,000
Security	4,000
Travels	65,000
Laboratory Licenses	5,000
Compliance authorities	5,000
	<b>483,000</b>

### 5.2 CAPEX

CAPEX	Units	Price per Unit (\$)	USD (\$)
Gas storage tanks (25 tons)	40	12,000	480,000
CNG Cylinder re-filling tank (10 tons)	4	10,000	40,000
Petrol and Diesel Pumps	16	1,000	16,000
CNG Filling pumps	8	1,000	8,000
Field Trucks (Toyota Land cruiser pick-ups)	05	80,000	400,000
Office Cars Toyota 4*4	08	20,000	160,000
Director's cars ( 3 Toyota Landcruiser VX & 2 Toyota Land Cruiser Prado)	05	120,000	600,000
Excavators CAT 320	02	120,000	240,000
Dozer CAT D7/D6	02	100,000	200,000
CNG Hauling tankers	10	70,000	700,000
Fuel hauling tankers	30	60,000	1,800,000
Truck heads	80	49,000	4,000,000
Lowbed trailer	02	30,000	60,000
Flatbed trailer	30	30,000	900,000
		<b>Total</b>	<b>9,604,000</b>

## 5.3 HUMAN RESOURCE

TITLE	No/ Filling Station	NO OF PERSONEL	TOTAL	GROSS SALARY P/A (USD)
General Manager	NA	01	01	<b>40,000</b>
Filling Station Manager	01	02	02	<b>20,000</b>
Pump attendants/Shift	08	32	32	<b>76,800</b>
CNG Storage Manager	01	01	01	<b>15,000</b>
CNG Technicians	03	06	06	<b>14,400</b>
Garage technicians	02	04	04	<b>12,000</b>
Mini Supermarket Attendants	03	06	06	<b>14,400</b>
Security/shift	02	08	08	<b>14,400</b>
Drivers	NA	31	31	<b>74,400</b>
Operators	NA	03	03	<b>7,200</b>
			<b>94</b>	<b>288,600</b>

## 5.4 NOTES TO FINANCIAL PROJECTIONS

- i) USD to TZs exchange rate = USD 1 = TZs 2,530
- ii) All the prices are taken from [www.alibaba.com](http://www.alibaba.com) , [www.beforward.jp](http://www.beforward.jp), [www.toyota.com](http://www.toyota.com) and [www.superdoll.co.tz](http://www.superdoll.co.tz) consumption and usage average are according to expert advice on [www.quora.com](http://www.quora.com)
- iii) The entirety of the project is the estimated lifespan of the plan which is 5 years for our two new stations in Morogoro and Tunduma.
- iv) Projected Consumer Prices (% Change): 3.6 according to [the IMF data](#) on Tanzania.
- v) Infrastructural development and maintenance estimates have been taken from an industry experts
- vi) Man Power price is according to sectoral minimum wage directive of 2019 by the government of Tanzania
- vii) All estimated prices are with all duties paid to the Government

## Annexure

### List of Minerals and their operations status in Tanzania

#### Employees at full operation for Morogoro and Tunduma Stations

TITLE	No/ Filling Station	NO OF PERSONEL	TOTAL
General Manager	NA	01	01
Filling Station Manager	01	02	02
Pump attendants/Shift	08	32	32
CNG Storage Manager	01	01	01
CNG Technicians	03	06	06
Garage technicians	02	04	04
Mini Supermarket Attendants	03	06	06
Security/shift	02	08	08
Drivers	NA	31	31
Operators	NA	03	03
			94