

CONTEXT

SECTORAL LANDSCAPE AND INDUSTRY DYNAMICS

The food and beverage (F&B) industry in Tanzania plays a central role in the country's economic development, industrial growth, and food security objectives. Food processing accounted for 24% of Tanzania's total manufacturing sector in 2021, with production concentrated in milled grains, vegetable oils, canned fish, canned fruits and vegetables, dairy products, sugar, confectionery, and animal feeds.¹

The F&B industry is strategically important for Tanzania's national development agenda, due to its contributions to value addition, ensuring food safety and food security, and achieving inclusive economic transformation. Tanzania's food market generated US\$30.40bn in 2025 with an expected annual growth of 7.82%.¹ Tanzanian Beverage's annual sales is estimated to reach \$3.1 billion in 2026, by rise of 2% from its 2021 total of \$2.75 billion.² The total food market (both fresh and packaged products) is estimated to generate annual revenue of USD 27.60 billion and is expected to grow further, with a projected compound annual growth rate of 8.24% between 2024 and 2029.²

THE TRIPLE BURDEN OF MALNUTRITION

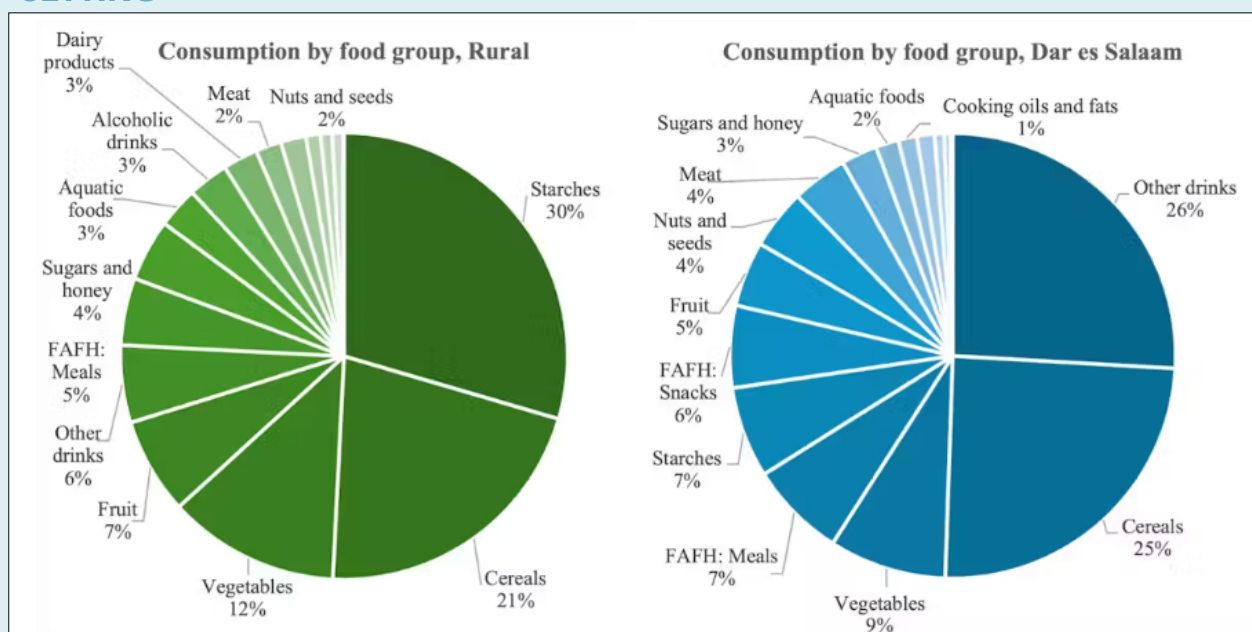
Tanzania has made noteworthy progress in addressing the triple burden of malnutrition – the coexistence of underweight, micronutrient deficiencies, and overweight and obesity. This continuous progress has seen a reduction in stunting and underweight in children under five by almost 20% from 50% in 1991/92 to 30% in 2022 and 13%, respectively.³ The prevalence of anaemia in women of reproductive age has reduced by 6% over the last two decades.⁴ However, 59% of Tanzanian households, representing 57.2 million people, were unable to afford a nutritious diet in 2023. This is due to a 31% rise in the cost of a healthy diet between 2010-2023, as the overall cost of



a nutritious diet rose from \$1.988 in 2010 to \$2.903 in 2023.⁵ The inability to access nutritious diets has led to an increase in diet-related non-communicable diseases. In 2022, 32% of women of reproductive age, 17% of men, and 4% of children under five were overweight.⁴ Mortality rates due to non-communicable diseases (NCDs), including diet-related diseases were estimated to be 557 per 100,000 men and 498 per 100,000 women in 2021.⁵ Malnutrition and diet-related disease remain a key public health issue in the country, particularly as healthy diets are increasingly out of reach for the majority of the population.

The rise in diet-related disease in Tanzania is linked to the rapidly changing food environments in the country. While dietary patterns in Tanzania vary by age and livelihood types, less healthy packaged processed foods are becoming more readily available in the market.⁶ Despite reports that fresh and minimally processed staple foods continue to make up a large part of Tanzanian consumers' diets (see Figure 1), the country is undergoing a nutrition transition alongside sociodemographic shifts.^{7,8}

FIGURE 1
CONSUMPTION OF FOOD GROUPS IN TANZANIA, BY URBAN AND RURAL SETTING



This shift is in line with regional trends, as consumers across Africa have been purchasing increasing amounts of packaged processed foods and beverages over the past five decades.⁹ Tanzania recorded a significant growth in total sales of (ultra-)processed packaged foods over a period of 6 years. Sales of UPF rose by more than 300 USD million (1,913.9 USD million in 2017 to 2,269.3 USD million in 2023).¹⁰

POLICY AND REGULATORY DEVELOPMENTS IN TANZANIA

Tanzania's F&B sector operates under a multi-agency regulatory framework aimed at ensuring food safety, quality control, and industrial competitiveness. The place of these agencies in the Government system (the ministries they report to) has been the subject of debate in the parliament (The National Assembly) in 2025. Key regulatory agencies include:

- Tanzania Bureau of Standards (TBS):** TBS formulates national standards for food products, aligning with international guidelines such as those from the Codex Alimentarius and ISO. These standards cover aspects like ingredient specifications, processing methods, packaging, labelling, and permissible levels of contaminants, ensuring that food products meet safety and quality requirements. TBS ensures that the food and beverage products available in Tanzania are safe for consumption, of high quality, and compliant with both national and international standards
- Tanzania Food and Nutrition Centre (TFNC):** TFNC leads the formulation and coordination of national food and nutrition policies, ensuring alignment with both national and international frameworks. It collaborates with sectors like agriculture and health to integrate nutrition into broader development plans.

Tanzania's government has put in place various policy frameworks to ensure compliance with national food safety standards, labelling regulations, and nutritional guidelines and to improve healthy food environments, including:

- **Tanzania Development Vision 2025:** This is a long-term development plan aiming to transform Tanzania into a middle-income nation by 2025. The vision outlines objectives centered around achieving a high quality of life for all, good governance, and a resilient economy that can withstand global competition.
- **Tanzania Mainland Food-Based Dietary Guidelines Technical Recommendations 2023:** The guidelines provide evidence-based advice on healthy eating and lifestyles for a healthy population. These guidelines were launched in collaboration with the European Union (EU) and the Food and Agriculture Organization of the United Nations (FAO) to prevent malnutrition and non-communicable diseases (NCDs) by promoting optimal nutrition through dietary patterns and food choices.
- **National Multisectoral Nutrition Action Plan II (2021-2026):** A five-year strategy aimed at addressing malnutrition in all its forms and for all ages. It builds upon the previous NMNAP (2016-2021) and focuses on scaling up high-impact interventions and creating an enabling environment for improved nutrition.
- **National Strategic Plan for Prevention and Control of Non-Communicable Diseases 2021-2026:** This plan outlines strategies for reducing the burden of NCDs through prevention, early detection, and treatment. Key aspects of the strategy include strengthening coordination and multisectoral engagement, promoting healthy lifestyles, and improving healthcare capacity for NCD management.

The government has demonstrated its commitment to implementing policies to shape healthy food choices by rolling out a new excise tax on unhealthy food categories. The government is encouraged to follow through on other commitments made in the National Multisectoral Nutrition Action Plan II (2021-2026), including taxation on unhealthy foods, mandatory front-of-pack (FOP) labelling, and regulations for marketing to children, amongst other commitments.

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