



TANZANIA REPORT 2025

EAST AFRICA
MARKET ASSESSMENTS



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ABBREVIATIONS

ATNi	Access to Nutrition initiative
CODEX	Codex Alimentarius (International food standards body)
EMI	Euromonitor International
FAO	Food and Agriculture Organization of the United Nations
F&B	Food and Beverage
FOP	Front-of-Pack
HSR	Health Star Rating
mHSR+	Modified Health Star Rating including micronutrients
NCDs	Non-Communicable Diseases
NPM	Nutrient Profiling Model
NMNAP II	National Multisectoral Nutrition Action Plan II (2021–2026)
SSB	Sugar-Sweetened Beverage
UNICEF	United Nations Children’s Fund
WFN	Workforce Nutrition
WHO	World Health Organization
WHO AFRO	World Health Organization Regional Office for Africa

EXECUTIVE SUMMARY

PREFACE

The food industry in Tanzania stands at a pivotal crossroads. Embracing nutrition is no longer an option but essential. There is a confluence of related trends in Tanzania including an increase in the proliferation of modern food retail outlets; an increase in the consumption of unhealthy processed foods; and an increase in obesity and overweight and ongoing micronutrient deficiencies in the country.

This first-ever independent assessment of the Tanzania Food and Beverage (F&B) manufacturing sector analyses the portfolio healthiness of 21 of the largest F&B companies producing packaged foods and beverages in Tanzania. Together, these companies represent approximately 48% of the formal packaged F&B market in the country. Among the 483 packaged F&B products analysed, 37% meet 'healthy' thresholds -- 63% do not.

This report therefore provides important data and analyses to support: policymakers to develop market-shaping policies to improve food environments; responsible investors to allocate capital wisely in food businesses, the food industry to reformulate for health; and the mobilisation of civil society and consumers to ensure their voice is leveraged for the improvement of products they consume.

CONTEXT

While fresh and minimally processed staple foods still constitute a large part of Tanzanian consumers' diets, packaged processed foods are being increasingly consumed, including products high in fats, salt, and sugar—such as sugar-sweetened beverages (SSB).

Sales of "ultra-processed" packaged foods grew by more than 300 USD million over six years, rising from USD 1,913.9 million in 2017 to USD 2,269.3 million in 2023.^a

These dietary changes are accompanied by increasing rates of obesity. In 2022, it was estimated that 32% of women of reproductive age, 17% of men, and 4% of children under five were living with overweight and/or obesity. At the same time, while Tanzania has made progress in reducing stunting and underweight in children under five, as well as anaemia in women of reproductive age, **75.5% of Tanzanians were still unable to afford a healthy diet in 2022.** Addressing these challenges requires multifaceted strategies

that improve access to nutritious foods, encourage healthier eating habits, and reduce the negative impacts of urbanization and globalization on dietary choices.

To mitigate the impact of this shift in consumers' diets, the government has mandated the fortification of staples such as edible oil, wheat and maize flour, and salt. The latest National Multisectoral Nutrition Action Plan (2021–2026) also includes commitments to implement **new policy measures, including responsible marketing to children, mandatory front-of-pack (FOP) labelling, workforce nutrition, a nutrition promotion levy on SSB and a tax on foods high in fats, salt, and sugar.** Several of these commitments were also submitted by the government to the Nutrition for Growth global forum in 2025.

^a Ultra-processed foods from the Food Systems Dashboard are defined as foods made of mostly industrial ingredients and additives with minimal amounts of unprocessed foods, mainly used to increase palatability and shelf-life.

PURPOSE AND SCOPE

To support national policymaking processes, ATNi (Access to Nutrition initiative) conducted the **first independent assessment of the portfolio healthiness of 21 of the largest food and beverage (F&B) companies producing packaged foods and beverages operating in Tanzania. Together, these companies represent an estimated 48% of the formal packaged F&B market.**

21

COMPANIES INCLUDED
IN THE PRODUCT PROFILE
IN TANZANIA

which accounted for

48%

of the sales of total packaged foods in Tanzania in 2022



The Product Profile assessment applied three **Nutrient Profiling Models (NPMs)** to provide insight into the relative “healthiness” of products sold by **21 companies on the Tanzanian market.** A total of 713 F&B products were identified for the assessment, 483 were included in the Health Star Rating model (HSR) and the modified HSR + micronutrients model (mHSR+) assessment. The World Health Organization’s Africa Regional Office (WHO AFRO) model was applied to determine whether products were eligible to be marketed to children, for this, a total of 496 products were included.

In addition, the Tanzania **Corporate Profile methodology** evaluated the nutrition-related policies and practices of **10 of the largest companies** (Asas; Bakhresa; Darsh; IFB; MeTL; Wilmar; PepsiCo; Motisun; Tanga Fresh; Coca-Cola) to better understand the food industry’s potential impact on food environments and healthy food choices.

The ATNi Global Index 2024 methodology served as the foundation for developing the framework for the Tanzania Corporate Profile assessment. The framework was substantially revised to reflect the Tanzanian nutrition context and to ensure applicability for the selected companies. The revision process was informed by one-on-one consultations with

relevant stakeholders and experts; insights from the [Tanzania Food Environment Mapping Report \(2025\)](#); additional literature reviews; and the latest guidance from authoritative public health bodies. Lessons from previous ATNi Index iterations were incorporated where relevant.

The Corporate Profile methodology comprises 21 indicators, evaluating companies across three themes and eight categories: 1) Product healthiness (product profile, portfolio improvement, reporting on healthiness, and micronutrients and fortification), 2) Influencing consumers (labelling, marketing and affordability); and 3) Corporate governance (nutrition governance and workforce nutrition).

The report assesses companies’ policies and commitments and self-reported practices, either in the public domain or directly shared by companies with ATNi. Independent verification of company disclosures was not conducted.

KEY FINDINGS

The level of engagement varied across the evaluated companies, which included both Africa-headquartered and global-headquartered manufacturers. For the Corporate Profile assessment, four companies engaged in the data collection process: two global-headquartered companies (Coca-Cola and PepsiCo), and two local companies (Bakhresa and Tanga Fresh).

ATNi’s research found that while nutrition and health are increasingly appearing on the agenda of the 10 largest F&B companies in Tanzania, companies still have considerable progress to make to show how they contribute to food and nutrition security in Tanzania. Global-headquartered companies may have stronger global policies and commitments but could improve transparency regarding how their global practices are implemented in the Tanzania market.

Product Healthiness

Product Profile: The overall healthiness of the 21 Tanzanian companies' portfolios is low, with substantial variation between companies. Results from the HSR assessment showed that just 25% of products met the 'healthy' threshold of 3.5 out of 5.0 stars, which increased to 37% when results were weighted by company sales.

When micronutrient data were included using the mHSR + model, these figures rose by 5%. The lower results under the WHO AFRO model (9%; 16% sales-weighted) reflect the more stringent criteria applied by WHO for eligibility to market packaged F&B products to children.

TABLE 1
PROPORTION OF INDIVIDUAL PRODUCTS AND SALES CONSIDERED 'HEALTHIER' ACROSS THE THREE NPMS

NPM	No. Products Assessed	Healthy Threshold	% of Products Meeting the Healthier Threshold	% Sales of Healthier Products
HSR	483	HSR % $\geq$ 3.5	25%	37%
mHSR+ micro-nutrients	483	HSR % $\geq$ 3.5 + micro-nutrients	30%	41%
WHO AFRO	496	% eligible	9%	15%

When comparing the mean HSR for the seven global-headquartered companies included in this Tanzania Product Profile (1.1, n=149) with their mean in the ATNi Global Index 2024 (1.7, n=21.617) it is evident that six out of the seven companies have a lower average HSR in Tanzania than their global average.

Portfolio Improvement: Macronutrients and Food Components:

None of the 10 companies in the Corporate Profile assessment were found to report on reformulation targets in the Tanzania market. One Tanzania-headquartered company (Tanga) indicated that it has a reformulation strategy in place to reduce sodium, fat, and sugar content in certain products, but does not report on these efforts. Only PepsiCo was found to set global targets to reduce key nutrients of concern and increase levels of positive food components (fruits, vegetables, nuts and legumes), though no Tanzania-specific performance on these targets was disclosed.

Portfolio Improvement: Micronutrients and Fortification:

Seven of the 21 companies included in the Product Profile assessment were found to be fortifying one or more products in their portfolio. Among these, a total number of 106 out of 713 products were classified as fortified—based on micronutrients mentioned on ingredients lists—of which 87 were voluntarily fortified. For 40/483 products for which micronutrient and nutrient levels were available for the analysis, 67.5% (n=27) met the HSR 'healthy' threshold of 3.5 out of 5 stars. 28% (n=11) of products reached only 1.5 stars; these were in the Breakfast Cereals (n=2, 5%), Energy Drinks (n=1, 2.5%), Juice (n = 5, 12.5%), Sauces, Dips and Condiments (n=1, 2.5%), Sweet Biscuits, Snack Bars and Fruit Snacks (n=1, 2.5%), and Sweet Spreads (n=1, 2.5%) categories.

Reporting on Healthiness: Of the 10 companies assessed, two Tanzania-headquartered companies (Motisun and MeTL) indicated that NPMS are not widely used by the F&B industry in Tanzania to evaluate and report on portfolio healthiness. Only PepsiCo disclosed the use of an NPM to assess the healthiness of part of its product portfolio for reformulation purposes in certain markets; however, it does not report on portfolio healthiness globally or within Tanzania.

^b The Kenyan government mandates the fortification of staple foods such as salt, vegetable oils and fats, wheat flour, and maize flour. Specific standards can be found under Kenya's Food, Drugs and Chemical Substances Act (CAP 254), as amended in 2015 (Legal Notice No. 157).

Influencing Consumers

Responsible Labelling: Back-of-pack labelling is regulated in the Tanzanian market and is therefore not evaluated in this assessment, which aims to evaluate companies' labelling commitments beyond regulatory compliance. A government-endorsed FOP nutrition label has not yet been introduced. No company was found to explicitly commit to placing claims only on products meeting specific nutrition criteria (e.g. passing an NPM), meaning that health and nutrition claims may be placed on products of low nutritional quality in Tanzania.

Responsible Marketing: Three multinationals (Coca-Cola, Wilmar, PepsiCo) were found to publish global commitments for responsible marketing to children. However, none of these companies report on the implementation of these policies in the Tanzanian market. Other companies in this assessment have not published commitments to restrict marketing of all-or 'less healthy'—products to children in Tanzania. Such commitments, when in line with WHO and United Nation's Children's Fund (UNICEF) standards and implemented in full, are crucial to ensure this is only done for healthy products and respecting specific needs and vulnerabilities of children.

Affordable Nutrition: Three Tanzania-headquartered companies (Darsh, MeTL, Bakhresa) highlight the affordability of their products on their websites, but do not define how 'affordability' is measured, or specifically state an intention to improve the affordability of 'healthy' products. Two companies—Wilmar and PepsiCo—disclose that they aim to improve the affordability of 'healthy' products, but do not report on their efforts in the Tanzanian market.

Corporate Governance

Nutrition Governance: Four companies (Asas, Bakhresa, Darsh, and Tanga) shared information with ATNi on how health and nutrition considerations are integrated into their commercial operations, with key topics including fortification and affordability. Three multinational companies (PepsiCo, Wilmar, and Coca-Cola) have published global nutrition strategies; however, only Coca-Cola provided evidence of implementation specific to the Tanzanian market.

Workforce Nutrition: Two companies (Coca-Cola and PepsiCo) have global workforce nutrition (WFN) policies and programmes in place, covering areas such as healthy food at work, nutrition education, nutrition-focused health checks, and breastfeeding support. However, both companies indicated they have minimal presence in Tanzania, and it remains unclear whether their WFN activities extend to workers in their supply or distribution chains in the country. None of the Tanzania-headquartered companies were found to have formal policies or programmes in place to support employee nutrition beyond statutory parental leave requirements.



CONCLUSION

This assessment underscores the complex and evolving nature of the F&B industry's role in shaping Tanzania's food environment. While the government has made notable progress through policy commitments and regulatory frameworks to promote healthier diets, the F&B industry's response remains limited in scope and transparency.

The healthiness of packaged F&B products is generally low, with six out of the seven global-headquartered companies appearing to perform worse in Tanzania compared to their global aggregate. This underscores the need for global-headquartered companies to assess whether they are making their healthier products equally available across all regions, including Tanzania.

Although some companies are taking positive steps regarding affordability and product fortification, few demonstrate a sustained commitment to improving the health profile of their portfolios or provide evidence of comprehensive nutrition efforts to responsibly influence consumer behaviour through labelling and marketing are also insufficiently reported on. No company was found to use nutrient profiling models to report on healthiness of products and none have responsible marketing policies in place which fully align with WHO and UNICEF standards.

On the nutrition governance front, only a handful of companies—primarily global-headquartered—have articulated specific nutrition strategies, while none have demonstrated comprehensive implementation in Tanzania. Workforce nutrition remains an underreported area, particularly among local companies, with no published evidence of structured programmes to support employee health and nutrition.

To foster a healthier food environment and improve the nutritional quality of the packaged food supply in Tanzania, stricter regulatory accountability mechanisms, enhanced transparency, and more robust industry engagement are essential. This assessment provides a critical evidence base to inform national policymaking, guide corporate action, and support civil society advocacy. Sustained, cross-sector collaboration will be vital to ensuring that nutritious, affordable, and safe food is accessible to all Tanzanians.

RECOMMENDATIONS

Manufacturers

1 Assess Product Healthiness, Marketing to Children, and Affordability in line with Tanzania's National Multisectoral Nutrition Action Plan II

F&B companies in Tanzania should evaluate their product portfolios using an internationally recognized NPM and use this to inform other nutrition-related commitments. This includes:

- Assessing which products qualify as 'healthier', and for global-headquartered companies to evaluate whether they are making healthier products equally available across all regions;
- Ensuring that 'less healthy' products are not marketed to children, using the World Health Organization's Africa Regional Office (WHO AFRO) standards;
- Measuring the affordability and accessibility of 'healthier' options—especially for low-income groups.

2 Set Clear Targets for Healthier, Affordable Products and Responsible Marketing

Companies should adopt clear policies including measurable targets to:

- Increase sales of healthier and affordable foods and assign CEO accountability for nutrition, or Board reviews.
- Improve availability of fortified products that meet health standards and are affordable across all income groups.
- Fully align marketing practices with WHO and UNICEF standards—defining children as under 18 and restricting or limiting child-directed marketing to only healthy products through all media channels.

3 Disclose Nutrition Policies, Progress, and Quality Controls

Companies must enhance transparency by:

- Publicly reporting on each aspect of their nutrition policies, including sales of healthier products and responsible marketing and labelling commitments, for example.
- Clearly disclosing fortification policies and verifying that fortified products meet health standards through robust quality control.
- Ensuring back-of-pack nutrition labelling includes standardized micronutrient content.

Government and Policymakers

- Through the NMNAP II, the Tanzanian government has demonstrated a strong commitment to reducing overweight and obesity, curbing diet-related non-communicable diseases (NCDs), and to promoting healthier diets. To accelerate progress and enhance the effectiveness of these interventions, increased regional cooperation—particularly through the establishment of East African nutrition standards—is recommended.
- The government is encouraged to implement the key policy actions outlined in NMNAP II, prioritising: the development of a nationally accepted NPM; the rollout of mandatory FOP nutrition labelling; the adoption of regulations to protect children from harmful F&B advertising; and integration of workplace nutrition interventions into national health strategies.
- The government is commended for the proposed Nutrition Promotion Levy on SSBs, to reduce sugar intake and 2025 excise tax measures on unhealthy foods.^a Prompt implementation of this levy is advised to support public health objectives and to help balance potential tensions between health priorities and economic interests in the sugar sector. Revenue generated by taxes from unhealthy products could be used to support national health programmes.

Investors

- Investors are encouraged to prioritize investment in companies that demonstrate transparency in their nutrition-related policies, responsible marketing practices, and workforce nutrition initiatives. They should support investees that align with national and international nutrition standards (such as Codex Alimentarius and WHO/Food and Agriculture Organization (FAO) and back businesses that offer healthier product portfolios and actively contribute to Tanzania's public health goals.
- Leverage tools, such as ATNi's Investor Expectations on Nutrition, Diets, and Health, to evaluate company actions on nutrition and guide them towards progress on nutrition and health.
- Investors can help drive progress by urging multinational companies operating in the region to apply the same nutrition and health standards in emerging and frontier markets as they do in more mature markets.
- Investors are encouraged to leverage their influence by integrating nutrition into their own reporting standards.

^b Government targets junk food in new excise tax measures [Internet]. The Citizen. 2025 [cited 2025 Jun 24]. Available from: <https://www.thecitizen.co.tz/tanzania/news/national/government-targets-junk-food-in-new-excise-tax-measures-5080250>

CONTEXT

SECTORAL LANDSCAPE AND INDUSTRY DYNAMICS

The 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 USD 30.40bn in 2025 with an expected annual growth of 7.82%.¹ Tanzanian Beverage's annual sales is estimated to reach USD 3.1 billion in 2026, by rise of 2% from its 2021 total of USD 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

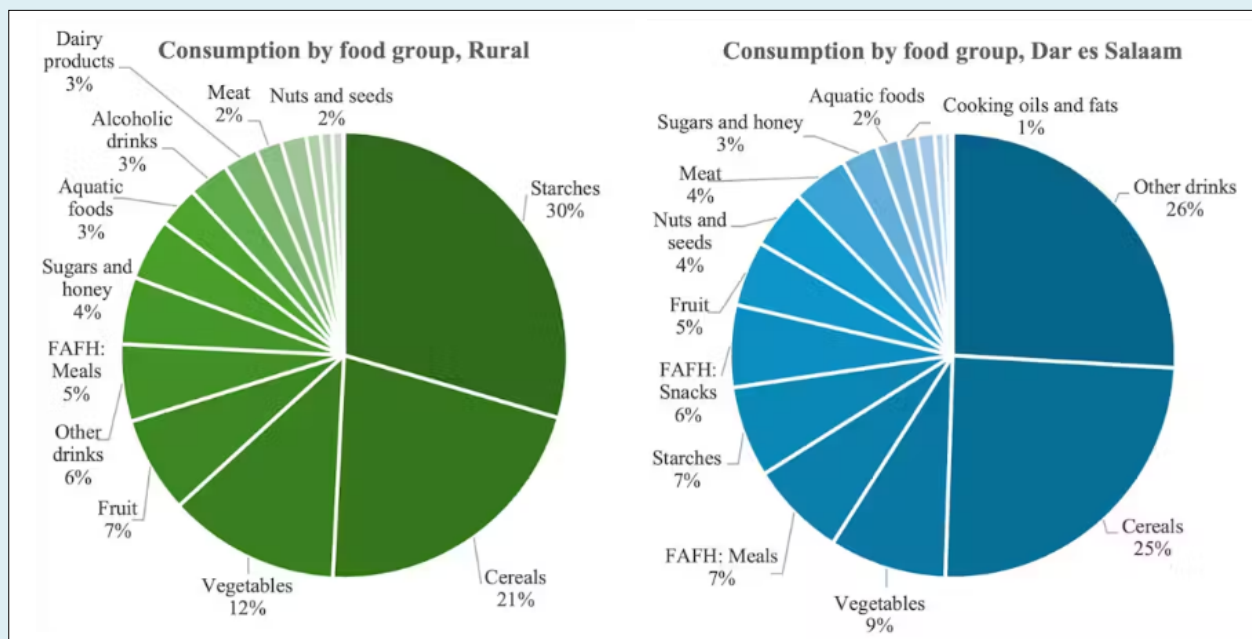
Tanzania has made noteworthy progress in addressing the triple burden of malnutrition -- the coexistence of underweight, micronutrient deficiencies, and overweight and obesity. This continuous progress has seen a reduction in stunting and underweight in children under five by almost 20% from 50% in 1991/92 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 USD 1.988 in 2010 to USD

2.903 in 2023.⁵ The inability to access nutritious diets has led to an increase in diet-related NCDs. In 2022, 32% of women of reproductive age, 17% of men, and 4% of children under five were overweight.⁴ Mortality rates due to 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 USD 300 million (USD 1,913.9 million in 2017 to USD 2,269.3 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 the International Organization for Standardization. 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 F&B 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 and the FAO to prevent malnutrition and 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.



METHODOLOGY

PURPOSE AND SCOPE

The Tanzania Market Assessment includes two components with different sample sizes of companies included in each component.

- The **Product Profile** assessment evaluates the product portfolio healthiness of 21 of the largest F&B manufacturers in Tanzania, representing approximately 48% of the national packaged F&B market.
- In addition, the **Corporate Profile** assesses 10 companies (representing approximately 35%) on their policies, practices and transparency across a range of nutrition-related topics.

This work forms part of the ATNi East Africa Market Assessment project, which also includes a similar evaluation of the largest F&B manufacturers in Kenya and companion reports for both countries titled 'Mapping Tanzania's/Kenya's Packaged Food Environment: Insights into policy, industry, and consumer landscapes' (hereafter referred to as the Food Environment Mapping Report). Through this project, ATNi aims to challenge the food industry, investors, and policymakers to shape healthier food systems. ATNi's goal is to translate data into actionable insights that will drive policy, partnerships, innovation, and market change—ensuring more people have access to nutritious and sustainable food.

METHODOLOGY DEVELOPMENT

The 2024 ATNi Global Index methodology served as the foundation for developing the framework for the Tanzania Corporate Profile assessment. The framework was substantially revised to reflect the Tanzanian nutrition context and to ensure its relevance for the companies selected. This process was informed by one-on-one consultations with relevant stakeholders and experts; insights from the Tanzania Food Environment Mapping Report (2025); additional literature reviews; and latest guidance from authoritative public health bodies. Lessons from previous ATNi Index iterations were incorporated where relevant.

Companies with the largest market share in Tanzania were selected based on their national retail sales of food and non-alcoholic beverages, using sales estimates from Euromonitor International (EMI) Passport data for the financial year (FY) 2022.

For the Tanzania Product Profile assessment, ATNi applied the Health Star Rating (HSR) NPM to assess the healthiness of F&B manufacturers' product portfolios with direct relevance for people's diets. ATNi also applied the mHSR + micronutrients (mHSR+)—a modified HSR model that accounts for levels of six micronutrients relevant to public health), and the World Health Organization's Africa Regional Office (WHO AFRO).

RESEARCH PROCESS

For the Corporate Profile, the 10 companies are provided with access to a survey in an online data gathering platform and are invited to submit responses and evidence for the indicators across eight categories (see Table 1). Information submitted for each indicator may be either publicly available or shared confidentially. ATNi researchers review the submissions to make a preliminary assessment, after which companies are offered a second opportunity to provide additional information and respond to any clarification questions. Engagement in the assessment is voluntary but there is no opt-out. For companies that decide not to engage, researchers rely on information available on the companies' public domains (website, online platform, annual reports etc).

TABLE 1
SUMMARY LIST OF CORPORATE PROFILE INDICATORS

Thematic Area	Category	Number of Indicators
Product Healthiness	Portfolio Improvement: Macronutrients and Food Components	6
	Portfolio Improvement: Micronutrients and Fortification	3
	Reporting on Healthiness	2
Influencing Consumers	Affordable Nutrition	2
	Responsible Marketing	3
	Responsible Labelling	1
Corporate Governance	Nutrition Governance	3
	Workforce Nutrition	2

Statements in the report and company result cards which are about the lack of information/evidence in the public domain are carefully worded to avoid implying that the company does not have a specific policy, strategy, or target. Rather, the statements indicate that while these policies, strategies or targets may exist internally, they are not published publicly in a report, on a public website or on an online platform. These could not be reviewed during the research period, nor were they shared with ATNi during that research period.

The Product Profile analysis using various NPMs is conducted by ATNi together with The George Institute of Global Health (TGI). Products are categorized according to Euromonitor International (EMI) product categories, and scores for HSR, mHSR+, and WHO AFRO NPM are also sales-weighted using EMI sales estimates.

For the full methodology approach, see the published full [Tanzania Methodology Document](#). The full details of the methodology, findings, and limitations of the Product Profile study are available in the ATNi - TGI [Product Profile report](#).

TABLE 2

COMPANIES INCLUDED IN THE PRODUCT PROFILE AND CORPORATE PROFILE ASSESSMENTS IN TANZANIA

Company Name	Company Short Name	Headquarters	Percentage Packaged F&B Market Share in Tanzania	Selected for Corporate Profile	Included in Product Profile
Asas Dairies Ltd	Asas	Tanzania	0-5%	Yes	Yes
Bakhresa Group	Bakhresa	Tanzania	5-10%	Yes	Yes
Brookside Dairy Ltd	Brookside	Kenya	0-5%	-	Yes
The Coca-Cola Company	Coca-Cola	USA	5-10%	Yes	Yes
Darsh Industries Ltd	Darsh	Tanzania	0-5%	Yes	Yes
Deepa Industries Ltd	Deepa	Kenya	0-5%	-	Yes
Flora Food Group	Flora FG	Netherlands	0-5%	-	Yes
Galaxy Food & Beverage Ltd	Galaxy	Tanzania	0-5%	-	Yes
IFFCO Group	IFFCO	UAE	0-5%	-	Yes
Iringa Foods & Beverages Ltd	IFB	Tanzania	0-5%	Yes	-
Kevian Kenya Ltd	Kevian	Kenya	0-5%	-	Yes
Kraft Heinz Co	Kraft Heinz	USA	0-5%	-	Yes
Mars Inc	Mars	USA	0-5%	-	Yes
MeTL Group	MeTL	Tanzania	0-5%	Yes	Yes
Milkcom Dairies/ Watercom Ltd	Milkcom	Tanzania	0-5%	-	Yes
Mondelez International Inc	Mondelez	USA	0-5%	-	Yes
Motisun Group Ltd	Motisun	Tanzania	0-5%	Yes	Yes
Nestlé SA	Nestlé	Switzerland	0-5%	-	Yes
PepsiCo Inc	PepsiCo	USA	0-5%	Yes	Yes
Tanga Fresh Ltd	Tanga	Tanzania	0-5%	Yes	Yes
Trufoods Ltd	Trufoods	Kenya	0-5%	-	Yes
Post Holdings Inc	Weetabix	USA	0-5%	-	Yes
Wilmar Tanzania (Murzah Oils)	Wilmar	Tanzania	0-5%	Yes	-



SECTION 1

PRODUCT

HEALTHINESS

CATEGORY PRODUCT PROFILE

(21 COMPANIES)



CATEGORY CONTEXT

Product profiling is a key tool for evaluating the nutritional quality of F&B companies' product portfolios. It enables stakeholders—including institutional investors, governments and consumers—to compare the relative healthiness of portfolios across companies and over time.

This Product Profile presents the first publicly available objective assessment of the nutritional quality of packaged F&B portfolios from the largest manufacturers in Tanzania. It evaluates **the relative 'healthiness' of products across 21 companies** using three distinct nutrient profiling models (NPMs):

1. The Australasian Health Star Rating (HSR) model
2. A modified HSR model that includes micronutrients (mHSR + micronutrients)
3. The World Health Organization's Africa Regional Office (WHO AFRO) NPM

BOX 1

DESCRIPTION OF THE DIFFERENT NUTRIENT PROFILING MODELS

Nutrient profiling is the science of classifying or ranking foods based on their nutritional composition for the purpose of preventing disease and promoting health. Different models are used depending on the policy objective or purpose.

The Health Star Rating (HSR) is a FOP interpretive nutrition labelling system designed to help consumers make healthier choices. It scores products from 0.5 (least healthy) to 5 stars (most healthy), based on nutrients to limit (energy, sodium, total sugar and saturated fat) and positive food components (fruit/vegetable content, protein, fibre) on the basis of nutritional composition per 100g or 100mL across one of six categories. Products scoring 3.5 stars or higher are considered 'healthier'.^{11c} ATNi uses the HSR in its Global Index and Country Spotlight Indexes to enable cross-company comparisons.

The mHSR + micronutrients (mHSR+) model was developed by The George Institute in collaboration with ATNi. The mHSR+ model builds on the original HSR by incorporating six key micronutrients: iron, vitamin A, vitamin B12, vitamin D, folic acid, and iodine. This enables better differentiation of products based on their micronutrient content.

The WHO AFRO model is designed for use by Member States of WHO in the African Region. It supports policies aimed at restricting food marketing to children. The model categorizes products into 25 categories and applies nutrient thresholds per 100g/mL. Products must meet all thresholds to be eligible for marketing to children under 18 years. Results are binary: either 'marketing permitted' or 'marketing not permitted.'

^c The threshold of 3.5 or above (≥ 3.5 HSR) is based on research commissioned by the New South Wales Ministry of Health in Australia, which concluded that "healthy core foods with a HSR of ≥ 3.5 can be confidently promoted in

DATA COLLECTION

For this analysis, nutrient information was collected for 483 packaged F&B products sold by 21 of Tanzania's largest companies.^d Collectively, these companies accounted for an estimated 48% of all packaged F&B sales in Tanzania in 2022.^e

Product composition data was sourced from Innova Market Insights and shared with the companies for verification. To enable meaningful comparisons, Euromonitor International (EMI) F&B categories and sub-category definitions were used to create subsets of products large enough for nutritional analysis. These categories are ordered based on sales estimates. Sales-weighting was applied using data from EMI. Of the 21 companies, 11 provided (partial) additional feedback or confirmed the use of their data—including product identification and nutrition label information—for the analysis.

Where nutrition information was incomplete, proxy values were used to estimate missing data and enable scoring. The largest product sub-categories represented in the dataset were these three: Dairy (n=72), Confectionery (n=77), and Sweet Biscuits, Snack Bars and Fruit Snacks (n=64)—in total 213 out of the 483 total (44%). These factors should be considered when interpreting the results. Further details on the methodology, findings, and limitations of the Product Profile study are available in the full ATNi—[The George Institute for Global Health \(TGI\) Product Profile report](#). The results are also accessible via [ATNi's interactive dashboard](#).

Table 1 provides an overview of the companies included in the Tanzania Product Profile assessment. It details per company the number of products analysed under the HSR model, along with the product categories, example brands and the estimated proportion (range) of retail sales by the company in Tanzania that is represented by this research.

^d Due to missing nutrient data for some products, the number of products assessed per NPM differ.

^e ATNi estimates derived from Euromonitor International.



TABLE 1

PERCENTAGE RANGES OF TANZANIA SALES AND PRODUCT CATEGORIES INCLUDED IN THE HSR ANALYSIS FOR THE PRODUCT PROFILE

Company (A-M)	No of Products Assessed for HSR	Categories Included	Examples of Brands Included	% Tanzania 2022 Retail Sales Values Represented
Asas	13	Dairy (13)	Asas	95-100%
Bakhresa	67	Baked Goods (1) Dairy (2) Flour (8) Ice Cream (10) Processed Fruit and Vegetable (1) Sauces, Dips and Condiments (1) Sweet Biscuits (12) Bottled Water (1) Carbonates (11) Energy Drinks (1) Juice (19)	Azam, African Fruti	95-100%
Brookside	17	Dairy (14) Butter and Spreads (3)	Farm Fresh, Dairy Fresh	95-100%
Coca-Cola	26	Bottled Water (5) Carbonates (19) Juice (2)	Kilimanjaro, Dasani, Fanta, Krest, Sprite, Stoney, Schweppes, Coca-Cola, Minute Maid	95-100%
Darsh	10	Flour (1) Sauces, Dips and Condiments (5) Sweet Spreads (4)	Redgold	95-100%
Deepa	29	Sauces, Dips and Condiments (2) Savoury Snacks (27)	Tropical Heat	95-100%
Flora FG	4	Butter and Spreads (2) Sweet Spreads (2)	Blue Band	95-100%
Galaxy	15	Dairy (14) Butter and Spreads (1)	Kilimanjaro Fresh	95-100%
IFFCO	43	Baked Goods (1) Confectionery (5) Ice Cream (5) Rice, Pasta and Noodles (1) Sauces, Dips and Condiments (1) Sweet Biscuits (30)	Tiffany, London Dairy	35- 40%**
Kevian	33	Asian Specialty Drinks (1) Juice (24)	Afia, Afia Nectar, Pick N Peel, Acacia Kids	95-100%
Kraft Heinz	8	Processed Fruit and Vegetable (1) Sauces, Dips and Condiments (7)	Heinz	95-100%
Mars	20	Confectionery (20)	Twix, Skittles, M&Ms, Galaxy, Snickers, Bounty	95-100%
MeTL	12	Butter and Spreads (1) Flour (4) Sauces, Dips and Condiments (1) Bottled Water (1) Carbonates (5)	Mo-Safi, Mo-margarine, Mo Poa, Mo Maisha, A-One drinks	20- 25%**
Milkcom	20	Bottled Water (1) Carbonates (8) Dairy (18) Ice Cream (1)	Dar Fresh, Afya, Afiya, Super Cola	95-100%
Mondelēz	35	Confectionery (28) Sweet Biscuits (4) Other Hot Drinks (3)	Cadbury, Oreo	95-100%
Motisun	11	Savoury Snacks (1) Carbonates (5) Juice (3)	Sayona	95-100%

Table continues on next page.

TABLE 1 (CONTINUED)

PERCENTAGE RANGES OF TANZANIA SALES AND PRODUCT CATEGORIES INCLUDED IN THE HSR ANALYSIS FOR THE PRODUCT PROFILE

Company (N-W)	No of Products Assessed for HSR	Categories Included	Examples of Brands Included	% Tanzania 2022 Retail Sales Values Represented
Nestlé	34	Confectionery (24) Dairy (4) Sauces, Dips and Condiments (1) Concentrates (1) Instant Tea and Coffee Mixes (1) Other Hot Drinks (3)	KIT KAT, Milkybar, Smarties, Milo, Nido-ND, Maggi, Nescafe 3IN1	15-20%***
PepsiCo	22	Savoury Snacks (7) Carbonates (9) Juice (5) Bottled water (1)	Pepsi, Pepsi Zero, Lays, Ceres Nectar, Mirinda, 7Up	95-100%
Tanga	10	Dairy (7) Butter and Spreads (3)	Tanga Fresh	95-100%
Trufoods	32	Flour (1) Sauces, Dips and Condiments (5) Sweet Biscuits (18) Sweet Spreads (8) Other Hot Drinks (3)*	Golden, Zesta, Kenylon	95-100%
Weetabix	22	Breakfast Cereals (22)	Weetabix, Weetabix Crispy Minis, Alpen, Weetos, Oreo O's, Oatibix	95- 100%

* These categories were only included in the WHO AFRO analysis

** This assessment did aim to include all products of a company's portfolio, however, for some companies like IFFCO and MeTL, nutrition information required to apply NPMs was lacking for their biggest selling category (edible oil products), therefore the findings might not represent the full portfolio.

*** Nestlé also sells coffee and baby food in Tanzania, which are excluded under the Product Profile analysis.

FINDINGS

Aggregate industry level results across NPMs

At the industry level, the overall healthiness of company portfolios is low, with substantial variation observed between companies, as shown in Table 2.

TABLE 2
PROPORTION OF INDIVIDUAL PRODUCTS AND SALES CONSIDERED 'HEALTHIER' ACROSS THE THREE NPMs

NPM	No Products Assessed	Healthy Threshold	% Individual Products	% Sales
HSR	483	HSR % $\geq$ 3.5	25%	37%
mHSR+ micro-nutrients	483	HSR % $\geq$ 3.5 + micro-nutrients	30%	41%
WHO AFRO	496	% eligible	9%	15%

Of all products analyzed, 25% met the original **HSR** 'healthy' threshold of 3.5 out of 5.0 stars, increasing to 37% when results were weighted by company sales.^f Over half (58,1%) of all products on the market scored 1.5 stars or below. Seven out of the 21 companies had 50% or more of their products meeting the HSR healthier threshold.

When including micronutrient data, using the **mHSR+**, these figures rose by 5%.^g Six companies increased their rankings under mHSR+ compared to HSR and 11 companies improved their overall healthiness score. This is an indication of a positive contribution of micronutrients and appropriate fortification to product healthiness. It should be noted that none of the products had data for all six micronutrients included in the model so for the purposes of generating an mHSR+ result, proxy values were used which can result in an underestimation of the real differences between companies.

The lower results observed under the **WHO AFRO** model— 9% of individual products, 15% sales-weighted—reflect the more stringent criteria applied by WHO for eligibility to market to children. Using the WHO AFRO model, none of the companies had more than 50% of their products to be eligible to be marketed to children, with MeTL reaching 38%.^h

Comparison with Global Benchmarks

The average healthiness of packaged foods sold by the 21 largest companies operating in Tanzania is comparable to other regions in the world. The proportion of 'healthier' products when using HSR in Tanzania—25%—is lower when compared with ATNi's Global Index, but similar as to the most recent India Index, as shown in Table 3.

The sales-weighted mean HSR in Tanzania was 2.2—slightly lower compared to the Global Index 2024. However, the product sample in Tanzania (483 products) is significantly smaller than in the Global Index (52,414 products), which may limit comparability. Comparing regional findings, ATNi's Product Profile assessment in Kenya (746 products), found a higher proportion individual 'healthier' products at 33%, though the sales-weighted mean HSR was more similar.

^f The threshold of 3.5 or above (≥ 3.5 HSR) is based on research commissioned by the New South Wales Ministry of Health in Australia, which concluded that "healthy core foods with a HSR of ≥ 3.5 can be confidently promoted in public settings as healthier choices." Reference: Dunford, E., Cobcroft, M., Thomas, M., Wu, J.H. (2015). Technical Report: Alignment of the NSW Healthy Food Provision Policy with the Health Star Rating System. Available at: <http://www.health.nsw.gov.au/heal/Publications/health-star-rating-system.pdf>. (Accessed: 24/10/2024).

^g For the purposes of generating an HSR+ result, proxy values were used for missing values of iron, vitamin A, vitamin B12, vitamin D, folic acid and iodine, but only if the product label included energy, total fat, protein and carbohydrate, otherwise no mHSR+ micronutrients score could be given.

^h This assessment did not investigate whether these products are in practice marketed to children and teens by the companies in scope. Instead, it provides an extra indication of the healthiness of the company's portfolios by checking whether the products, in theory, would be eligible to be marketed to children using WHO AFRO criteria.

TABLE 3
HSR RESULTS ACROSS OTHER ATNI INDEXES

Product Profile (HSR) Results	Tanzania Market Assessment 2025	Kenya Market Assessment 2025	Global Index 2024	India Index 2023	US Index 2022
No. companies assessed	21	30	30	20	11
Combined market share of companies assessed	45-50%	55-60%	20-25%	35-40%	30-35%
No. products analysed with HSR	483	746	52,414	1,901	11,041
Mean HSR	1.9	2.1	2.3	1.9	2.3
Sales-weighted mean HSR	2.2	2.3	2.3	2.0	2.2
% individual 'healthier' products	24%	33%	31%	17%	31%
% sales from 'healthier'	37%	38%	34%	24%	29%

When comparing seven global-headquartered companies included in this Tanzania Product Profile with their overall HSR results from the Global Index 2024 (see Table 4), it is evident that six of the seven companies have a lower average HSR in Tanzania than their global average.ⁱ The remaining 14 companies in this assessment (mostly Tanzania-headquartered companies) have a combined mean HSR of 2.2, which is a higher than the combined mean of 1.1 for the global-headquartered companies that were also assessed in ATNi's 2024 Global Index.

While differences in sample sizes between the two datasets should be taken into account, this finding raises important questions about the consistency of product healthiness across markets. It underscores the need for most global-headquartered companies to review the types of products they choose to market in Tanzania and assess whether they are making their healthier products equally available in all regions, including Tanzania.

ⁱ The results for the Tanzania Product Profile have been considered here, as these results have been updated since the last Global Index 2024.

TABLE 4
HSR RESULTS OF GLOBAL-HEADQUARTERED COMPANIES: TANZANIA VS GLOBALLY

Company	Mean HSR in Tanzania	Mean HSR Globally
Coca-Cola	1.8 (n=26)	2.2 (n=1170)
Flora FG	2.5 (n=4)	2.0 (n=202)
Kraft Heinz	2.1 (n=8)	2.3 (n=2763)
Mars	0.6 (n=20)	1.4 (n=2999)
Mondelēz	0.7 (n=35)	1.3 (n=1945)
Nestlé	0.9 (n=34)	1.9 (n=4378)
PepsiCo	1.4 (n=22)	2.3 (n=2513)
Total mean HSR of global-headquartered companies in Tanzania analysis	1.1 (n=149)	1.7 (n=21,617)
Total mean HSR for all companies in analysis*	1.9 (n=483)	2.3 (n=52,414)

* Both for this Tanzania 2025 Product Profile as well as the Global Index 2024 Product profile, 30 companies were assessed, but they are not the same companies - seven overlap.

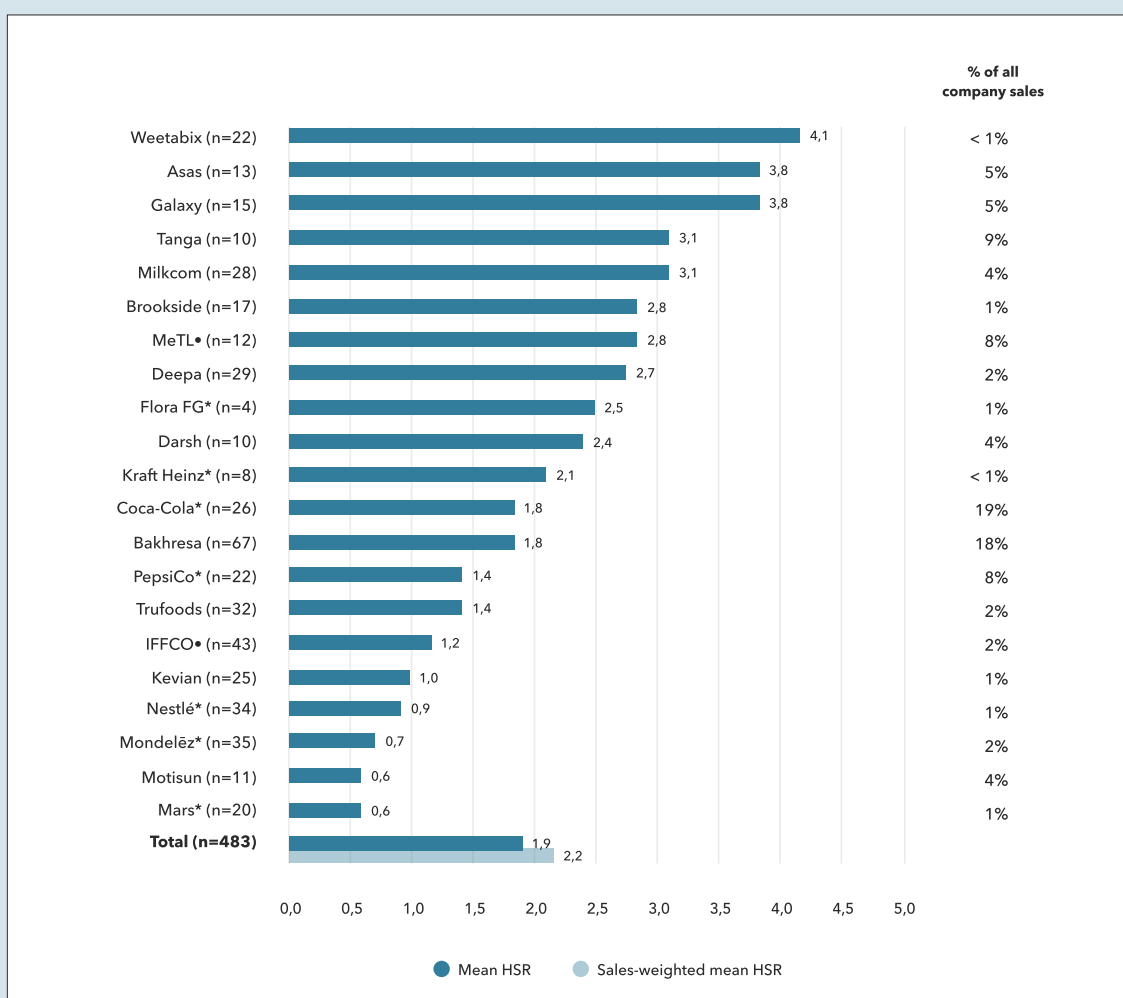
How Do Companies Compare in Terms of Healthiness?

Based on the HSR, the mean healthiness of products from all 21 companies assessed in Tanzania was 1.9 out of 5 stars, increasing slightly to 2.2 stars when weighted by sales. This indicates that healthier products accounted for a slightly larger share of total sales. Only three out of the 21 companies achieved a mean HSR of 3.5 or higher, which is considered the 'healthier' threshold (see Figure 1 below).

Differences in mean healthiness between companies primarily reflect differences in product mix, but this is also an indication of differences in the healthiness of products within the same categories. For example, Mars, which primarily produce confectionery, and Motisun, with carbonates and juice, both had a low average HSRs of 0.6. In contrast, the dairy companies, like Asas and Galaxy had significantly higher mean HSRs of 3.8 each.

For more detailed results per model, see the full [Product Profile report](#). Detailed results for each company, including performance across product categories, are available in the company scorecards and on the [ATNi dashboard](#).

FIGURE 1
MEAN HSR AND SALES-WEIGHTED MEAN HSR BY COMPANY - OVERALL PRODUCT PORTFOLIO (21 COMPANIES)



* Also assessed in ATNi's Global Index 2024.

** MeTL and IFFCO sales mainly derive from oil products; however, nutrition information was not available for these products in analysis.

How Do Product Categories Compare in Terms of Healthiness?

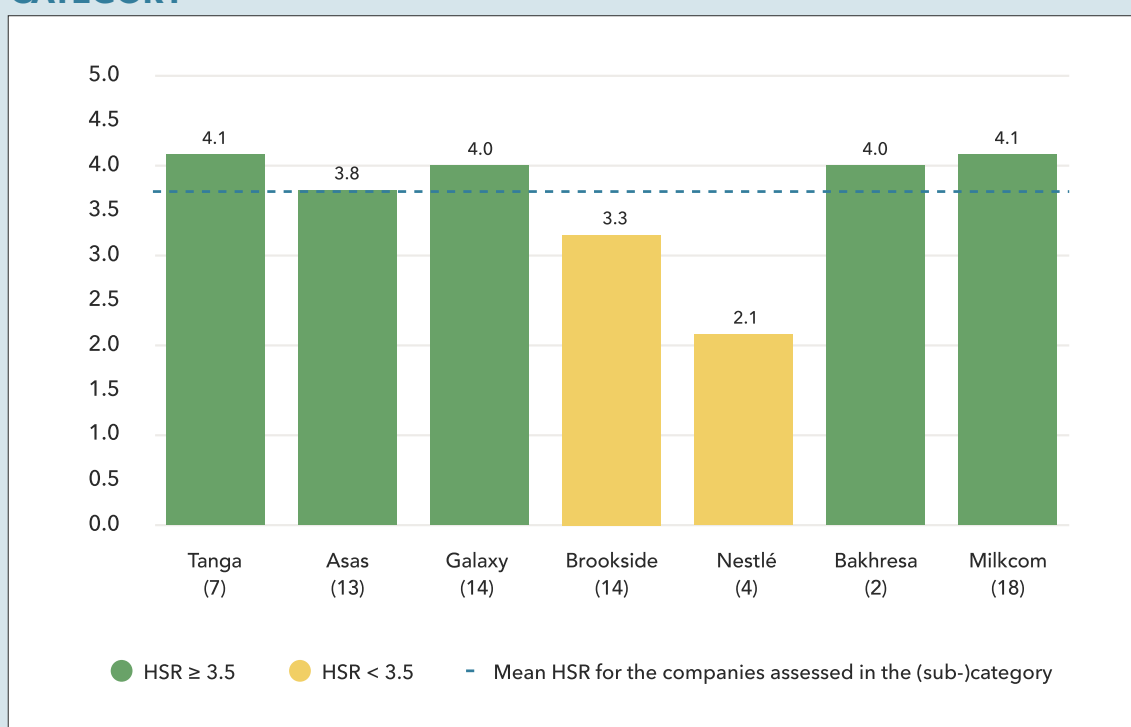
There was considerable variation in mean HSR values among companies, even within the same product categories. Overall, food products had a higher mean HSR of 2.2, compared to beverages, which averaged at just 1.2. Four categories—Bottled Water, Rice, Pasta and Noodles, and Flour—had between 80-100% of products with an HSR of 3.5 or higher. None of the products in the Asian Specialty Drinks, Concentrates, Energy Drinks, Instant Coffee Mixes, Juice and Confectionery categories reached the HSR healthier threshold. For more detailed results by category, see the full [Product Profile report](#).

Of all the products assessed, most were concentrated in the Dairy category (72 products, including milk, yoghurt, and cheese), Beverages (131 products), and a combined group of “Discretionary/ Indulgent” food categories (192 products) which includes Confectionery, Ice cream, Savoury Snacks and Sweet Biscuits.

Within the Dairy category (excluding butter and spreads), five out of the seven companies reached the HSR healthier threshold of 3.5 out of 5 stars. In this category, the average HSR was 3.8 stars. Mean HSR in this category ranged from 2.1 for Nestlé (4 products) to 4.1 for Milkcom (18 products) and Tanga (7 products) out of 5 stars.¹ See Figure 2.

¹ Companies with only one product in a category are not shown here, see the full Product Profile report.

FIGURE 2
COMPARISON OF MEAN HSR BY COMPANY WITHIN THE DAIRY CATEGORY



In the “Discretionary/Indulgent Food” category types group (combining Confectionery, Ice cream, Savoury Snacks and Sweet Biscuits), the mean HSR ranged from 0.5 for Nestlé (24 products) and Mondelez (32 products), to 2.6 out of 5 stars for Deepa (27 products) (Figure 3).

Within the Beverage categories, Carbonates and Juice were the largest sub-groups. For Carbonates, the mean HSR ranged from 0.5 for four companies to 1.5 for PepsiCo (10 products) out of 5 stars (Figure 4).

FIGURE 3
COMPARISON OF MEAN HSR BY COMPANY WITHIN THE DISCRETIONARY/INDULGENT FOOD CATEGORIES

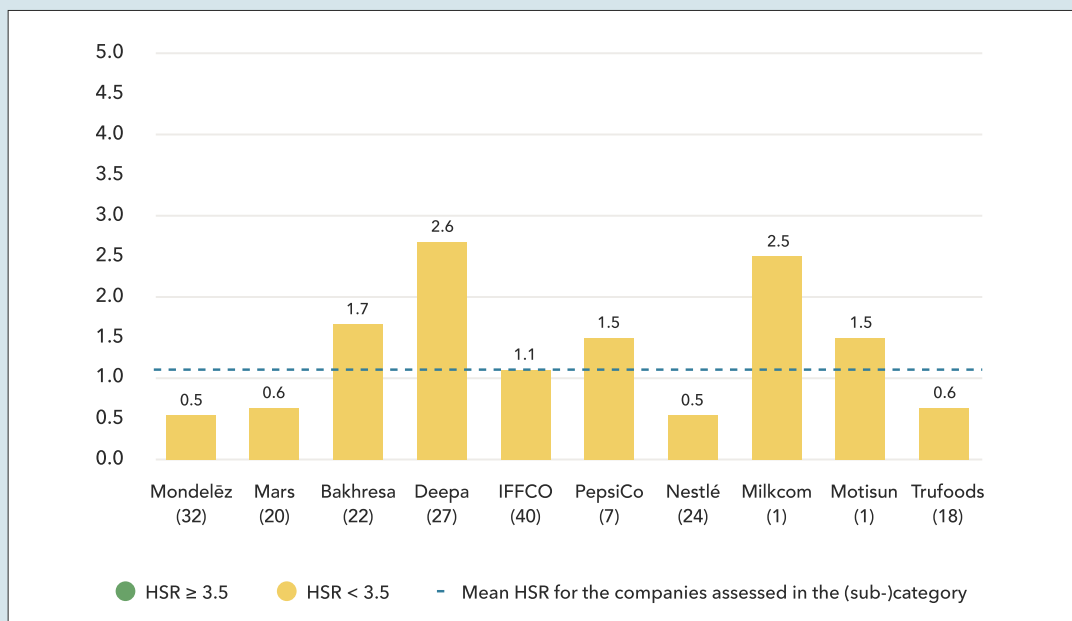
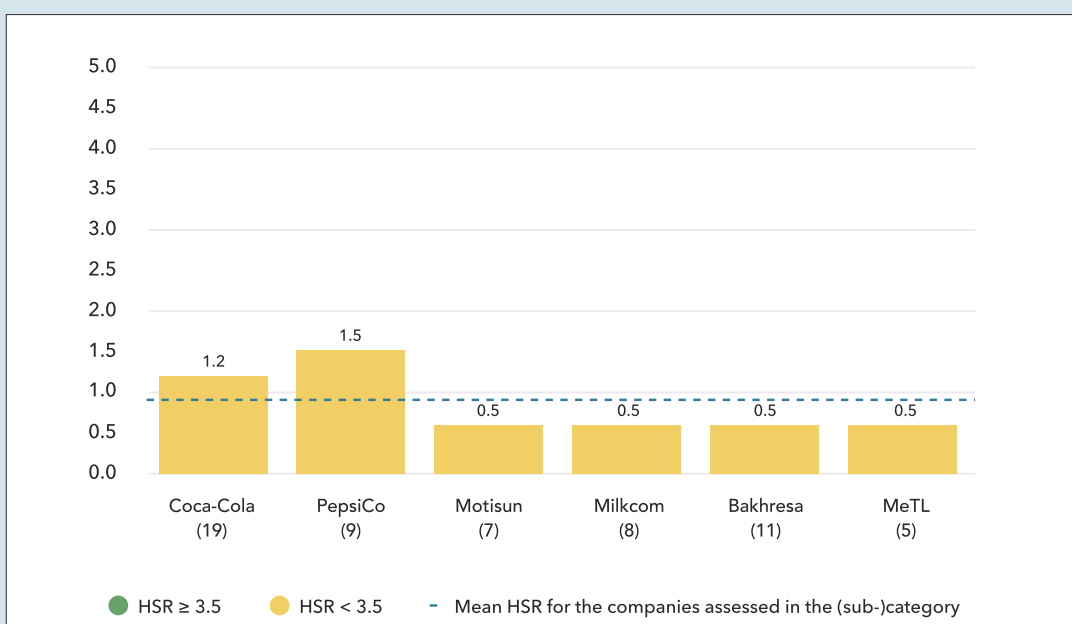


FIGURE 4
COMPARISON OF MEAN HSR BY COMPANY WITHIN THE CARBONATES CATEGORY



BOX 2

SUGAR-SWEETENED BEVERAGES

In Tanzania, the government has published its plan to implement a tax on SSBs to address diet-related NCDs like obesity and diabetes. When looking at the sweet carbonates (excluding soda waters) sold by the six manufacturers in Figure 5, the main differences between the companies is in the offering of diet- and zero-sugar products by Coca-Cola and PepsiCo. However, when comparing the mean sugar levels in the SSBs assessed by gram per 100mL, excluding the diet- and zero-sugar varieties, the sugar mean is higher for Coca-Cola and PepsiCo (see Table 5). When excluding the diet- and zero-sugar varieties, the mean HSR is the same for all six companies.

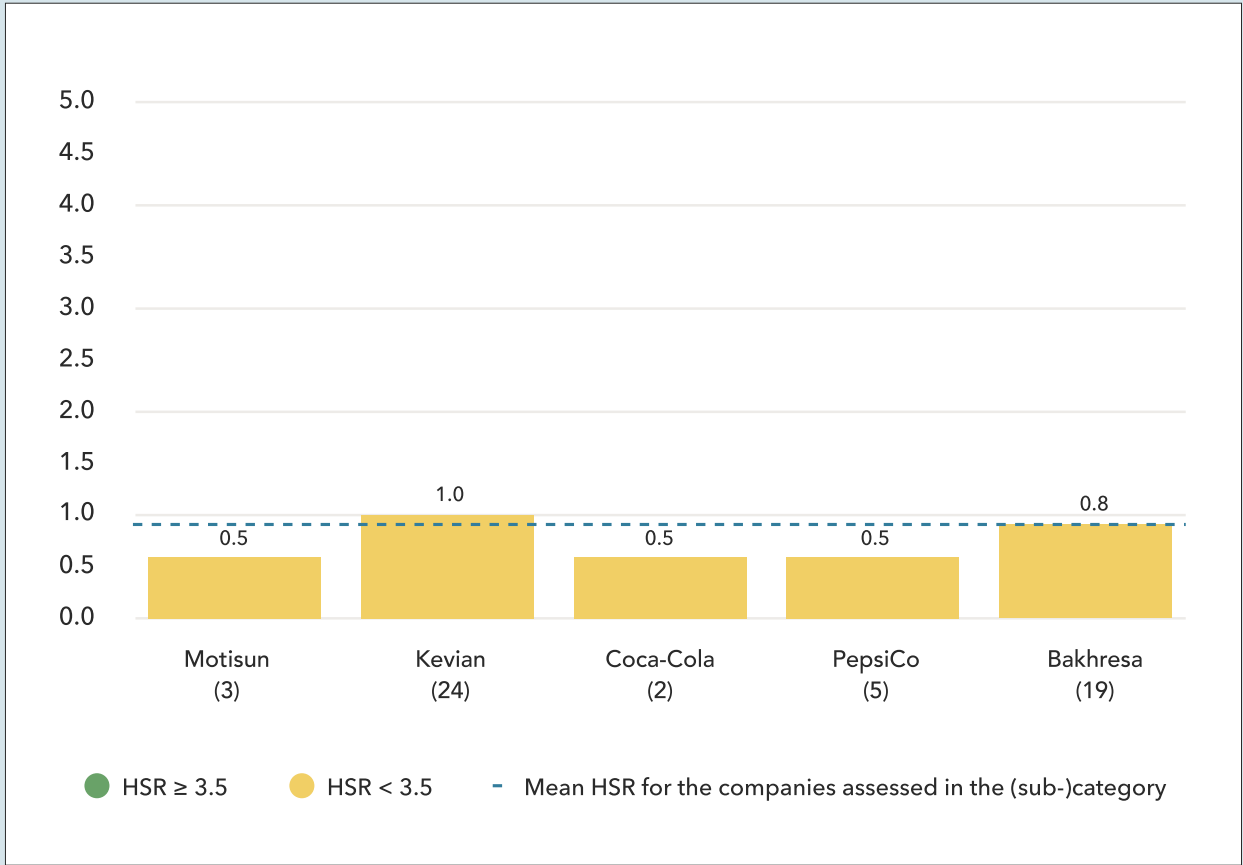
TABLE 5
COMPARISON OF MEAN HSR BY COMPANY WITHIN THE CARBONATES CATEGORY

Company	Excluding Diet- and Zero-sugar Drinks			Including Diet- and Zero-sugar Drinks		
	No.	Mean Sugar	Mean HSR	No.	Mean Sugar	Mean HSR
Bakhresa	11	10.0	0.5	11	10.0	0.5
Coca-Cola	15	12.3	0.5	19	9.7	1.2
MeTL	5	9.8	0.5	5	9.8	0.5
Milkcom	8	9.6	0.5	8	9.6	0.5
Motisun	7	9.7	0.5	7	9.7	0.5
PepsiCo	6	11.9	0.5	9	7.9	1.5
Total	52	10.8	0.5	59	9.5	0.9



For Juice, the mean HSR in this sub-category was 0.8 out of 5 stars, with all five companies scoring close to this mean (Figure 5).

FIGURE 5
COMPARISON OF MEAN HSR BY COMPANY WITHIN THE JUICE CATEGORY



CONCLUSION

The overall healthiness of the 21 Tanzanian companies' portfolios is low, with substantial variation between companies. Only four out of the 21 companies achieved a mean HSR of 3.5 or higher, which is considered the 'healthier' threshold.

Overall, these results align with ATNi's global findings. The sales-weighted mean HSR in Tanzania was 1.9—slightly lower to the mean of 2.3 for Global Index 2024 but similar as to India Index 2023. However, when comparing the 11 global-headquartered companies included in this Tanzania Product Profile with their results from the Global Index 2024, six of the seven companies have a lower average HSR in Tanzania than their global average. This underscores the need for global-headquartered companies to assess whether they are making their healthier products equally available across all regions, including Tanzania.

Only 9% of products were eligible for marketing to children under the WHO AFRO criteria, increasing to 15% after sales-weighting. The low proportion of products eligible for marketing to children is indicative of the unhealthy nature of most products offered by Tanzania's largest F&B manufacturers. These findings highlight the need for a strong policy environment to improve the nutritional quality of the food supply.

Across the different NPMs used in this assessment, the overall results improved after weighting by sales. This illustrates the opportunity for companies to increase the proportion of sales deriving from healthy foods and decrease their reliance on sales of less healthy foods. This can be achieved not only by accelerating product (re)formulation, but also by redirecting marketing strategies and budgets to healthier products and brands, and by incorporating nutrition considerations into merger and acquisition strategies.

There was also considerable variation in healthiness scores between companies within the same product category. This suggests that healthier product formulations are possible. Companies with lower average 'healthiness' scores in a specific category are encouraged to step up their reformulation efforts and/or develop new, healthier products.

INDUSTRY RECOMMENDATIONS

A healthy diet plays a crucial role in protecting consumers from chronic NCDs. To support this, consumers should have access to a diverse range of foods while limiting their intake of salt, sugars, and industrially produced trans fats.²

F&B companies can contribute to healthier diets for Tanzanian consumers, by taking a comprehensive, portfolio-wide approach to nutrition. Specifically, companies should aim to:

1. Increase revenue from healthier products:

Derive a significant proportion of revenue from products classified as 'healthier'—using an internationally recognized NPM the HSR system (with a rating of 3.5 or higher) – and set measurable targets to grow this share.

2. Improve sales-weighted nutritional quality:

Achieve a high average sales-weighted nutritional score across the product portfolio, based on models such as the HSR.

3. Support responsible marketing to children:

Maintain a high proportion of products eligible for marketing to children, according to the WHO AFRO NPM.

4. Demonstrate continuous improvement: Show measurable improvements in the healthiness of the product portfolio over time, and aim to lead on nutritional quality within specific product categories relative to industry peers.

POLICY RECOMMENDATIONS

The findings of this Product Profile assessment highlight the urgent need to introduce and enforce effective, mandatory food environment policies—especially those related to clear labelling and the restriction of marketing unhealthy products to children.

CATEGORY PORTFOLIO IMPROVEMENT:

MACRONUTRIENTS AND FOOD COMPONENTS

CATEGORY CONTEXT

Improving the healthiness of F&B companies' product portfolios and limiting the negative impact of increased consumption of 'less healthy' foods and diets is crucial to addressing public health challenges in Tanzania. Rising rates of NCDs—such as hypertension, diabetes, and cardiovascular diseases—are increasingly linked to dietary factors, particularly the increasing consumption of packaged processed foods that are high in fats, sugar and salt.¹²

FINDINGS

Of the 10 companies assessed in the Corporate Profile, only one company—PepsiCo—has established global targets to address key nutrients of concern, including saturated fat, industrially produced trans fats (iTFA), sodium, and added sugars, across some but not all product categories. The company has set clear targets for these nutrients and publicly reports on its global progress toward meeting them. It is also the only company in this assessment to have set targets to increase levels of minimally processed fruits, vegetables, nuts, legumes and wholegrains in its global portfolio. However, PepsiCo does not report on progress against these targets in the Tanzanian market.

While Coca-Cola reports on efforts to reduce sugar across its global product range, it has not defined targets or reported progress specific to the Tanzanian market.

TABLE 1
POLICY LANDSCAPE

National Policy or Regulation	Summary
National Multisectoral Nutrition Action Plan 2021/22-2025/26	Focuses on creating healthier food environments and reducing both overnutrition and undernutrition by limiting the consumption of 'less healthy' foods and ensuring equitable access to healthy food choices through coordinated, evidence-based, multisectoral action. ¹³
National Strategic Plan for the Prevention and Control of NCDs 2021-2026	Recognizes the role of excessive intake of foods high in saturated fats, sugars, and salt in increasing NCD prevalence in Tanzania, and emphasizes healthy diets as essential for maintaining good health. ¹²
Tanzania Food-Based Dietary Guidelines for a Healthy Population: Technical Recommendations, 2023	Provides recommendations aligned with WHO guidance on nutrient intake, such as promoting dietary diversity by encouraging the daily consumption of six food groups and increasing intake of vegetables and fruits, and limiting saturated and trans fats and reducing the intake of free sugars, salt, and ultra-processed foods. ⁶
Tanzania Food, Drugs and Cosmetics (Food Labelling) Regulations, 2006 and Nutrition Labelling Requirements 2015	Mandates that all food products sold in Tanzania must have clear, accurate, and non-misleading labels, including the product name, net contents, list of ingredients and additives, manufacturing and expiry dates, and manufacturer's details. ^{14,15}

One Tanzania-headquartered company—Tanga—informed ATNi that it has a product reformulation strategy in place to reduce sodium content by using sodium substitutes and potassium-based salts in its cheese production. The company also expressed its

intention to reduce fat and sugar levels in its milk and yoghurt products. However, the company has not published information on these efforts in the public domain.

BOX 1

POLICY COHERENCE CHALLENGES FOR REDUCING SUGAR INTAKE IN TANZANIA

Sugar is one of the key commodities underpinning Tanzania's economic growth, agricultural industry and trade. In 2023, the country produced 342,000 tonnes of sugar;¹⁶ however, as demand outstripped local supply, Tanzania also imported up to USD 204 million in sugar primarily from Brazil, India, Thailand and United Arab Emirates in the same year.¹⁷ Tanzania also exports smaller quantities of sugar to countries such as Kenya, United Arab Emirates, Uganda, Italy, and India.¹⁷ The government has committed to achieve sugar self-sufficiency by 2025 through investments in boosting local sugar production and processing factories.¹⁸

The economic significance of sugar is at odds with growing public health priorities in the country, which flag sugar as a key nutrient of concern. Sugar has been identified as one of the most consumed commodities in Tanzania, as per capita consumption of sugar reached 10.3kg in 2021.¹⁹ This is likely attributed to high rates of SSB consumption.¹⁹ In addition to suggested measures to reduce sugar intake outlined in Tanzania's Food-based Dietary Guidelines, the government has committed to introduce a Nutrition Promotion Levy on SSBs.²⁰ Research suggests that a tax of 20% on SSBs could lead to a 6.6% reduction in obesity rates in the country.²¹ Such taxes have stimulated effective industry reformulation efforts in other markets.²⁰ However, in Tanzania, regulatory hurdles may exist: current regulation specifies that beverages containing non-nutritive sweeteners cannot also contain sugar, meaning that companies can either sell full-sugar products or sugar-free products, rather than reduced sugar varieties.

In summary, policy coherence challenges exist between Tanzania's ambition to grow its sugar sector and to reduce sugar intake to meet public health goals. There is a strong case for the industry and government to address these hurdles for sugar reduction in products.

INDUSTRY RECOMMENDATIONS

To ensure their products contribute to healthy diets in Tanzania, F&B companies are recommended to:

- Identify products or categories that are high in applicable nutrients of concern (sodium, sugar, saturated fats and tFAs) and publish specific, measurable, and time-bound targets for reducing levels of these nutrients across all relevant product categories sold in Tanzania.
- Publicly report on annual progress against reformulation targets in the Tanzania market using quantitative metrics.

POLICY RECOMMENDATIONS

F&B companies in Tanzania are encouraged to integrate reformulation strategies into their company policies, aligning with international guidelines such as those from the WHO and regional policies. These strategies should aim to reduce levels of salt, sugars, and fats, while enhancing the overall nutritional profile of products to support national efforts to improve dietary health. Policymakers are encouraged to use the findings from this research to develop a roadmap outlining measures to drive and align industry reformulation efforts to increase the healthiness of F&B products across the market.

CATEGORY PORTFOLIO IMPROVEMENT:

MICRONUTRIENTS AND FORTIFICATION



CATEGORY CONTEXT

Micronutrient deficiencies remain a major public health concern in Tanzania, particularly among women of reproductive age and young children.²² Tanzania has mandated the fortification of staple foods—such as maize flour, wheat flour, and edible oil—by adding trace amounts of iron, vitamin A, and/or zinc to improve micronutrient intake at scale. These efforts are aligned with regional guidance set out by the Southern African Development Community (SADC).²³

However, recent research highlights gaps in compliance, especially among small-scale producers; limited consumer awareness of the benefits of fortification; and growing concern over the fortification of packaged processed foods with low nutritional value.²⁴⁻²⁶ While fortification is an essential means of addressing micronutrient deficiencies in Tanzania, the food industry should also prioritize the production and promotion of packaged processed foods that are naturally rich in essential macro- and micronutrients, rather than relying on fortifying products of poor nutritional quality.

FINDINGS

Three out of 10 companies assessed in ATNi's Corporate Profile were found to fortify staple foods in line with mandatory regulation. Of these three, two companies—MeTL and Bakhresa—fortify maize and wheat flour, and one company—Wilmar—fortifies edible oil. It is unclear whether these companies are using fortified staples as ingredients in other packaged foods. Beyond adherence to mandatory regulations, companies did not publish information regarding the practices, policies or procedures they may have in place for fortifying their products with micronutrients.

TABLE 1
POLICY LANDSCAPE

National Policy or Regulation	Summary
National Multisectoral Nutrition Action Plan 2021/22-2025/26	Includes food fortification as a priority action to address micronutrient deficiencies and improve the nutritional status of women, children, men, and the elderly in Tanzania. ¹³
National Roadmap for Sustainable Food Systems Transformation 2030	Prepared for the UN Food Systems Summit 2021, the strategy flags food fortification as one of the key routes to achieving better access to healthy diets in Tanzania. ²⁷
National Food Fortification Alliance (NFFA)	An alliance of public and private sector actors, NGOs and aid organizations, the NFFA developed a Food Fortification Action Plan in 2009 and continues to coordinate its implementation in Tanzania. ²⁸
Thematic Working Group on Micronutrient Deficiencies	Established in 2016/17 following the endorsement of the National Multisectoral Nutrition Action Plan 2021/22-2025/26, this technical working group is responsible for reviewing and recommending implementation strategies for various micronutrient programmes, including nutrition anaemia, vitamin A supplementation, universal salt iodization, and food fortification. ²⁹

However, some instances of companies making voluntary efforts to fortify their products was found. For example, Darsh was found to fortify its tomato paste products with iron. These are sold throughout the country, also in small package sizes.

Of the 10 companies included in the Corporate Profile assessment, one company—PepsiCo—was found to have a global policy outlining its commitments for the fortification of its products. PepsiCo’s policy, which is not published in the public domain, includes commitments:

- Not to fortify or enrich products classified as ‘less healthy’ according to the company’s own thresholds.
- Adhere to CODEX CAC/GL 9-1987 General Principles for The Addition of Essential Nutrients to

Foods, which provides international guidance on the appropriate selection and levels of micronutrients to use in fortification (a commitment aligned with standards set by the government).

One global company—Coca Cola—also provided evidence of a global commitment to adhere to Codex guidance in countries where local regulations do not exist, but without explicitly linking the fortification of its products to specific nutrition standards.

Coca Cola confirmed that it has global requirements for implementing quality control or assurance methods when fortified staples are used as ingredients in its products. However, no evidence was submitted to ATNi, and it remains unclear how this applies to products sold in Tanzania. No information on this topic was found or shared by the other nine companies.

^k The Tanzanian government mandates the fortification of staple foods such as salt, vegetable oils and fats, wheat flour, and maize flour. Specific standards can be found under the Tanzania Bureau of Standards (TBS) guidelines.



BOX 1 PRODUCT PROFILE FINDINGS

ATNi’s Product Profile assessment confirmed that companies are fortifying products beyond mandatory fortified staples. The assessment, covering 21 of the largest F&B manufacturers operating in Tanzania (including those in ATNi’s corporate Profile assessment), found that 13 companies had at least one product for which micronutrient data (inherent from product ingredients or fortified) was available. Of the 713 products assessed, 85 (11%) were classified as voluntarily fortified and total of 19 (3%) products were mandatorily fortified, these were in the flour (n=12) and edible oil (n= 7) category.^k For this assessment a product was classified as fortified if micronutrients were listed as an ingredient, but data for the specific micronutrient quantities was not always available for these products.

The greatest number of products with micronutrient information available were in the Dairy (n=17, 29%) and Breakfast Cereal (n=17, 29%) categories. No data for micronutrients was found for products in the Asian speciality drinks, Baked Goods, Concentrates, Confectionery, Edible oils (fortification mandated), Flour (fortification mandated for wheat and maize), Ice Cream, Instant coffee mixes, Juice, Processed Fruit and Vegetables, RTD tea, or Savoury Snacks categories. Table 2 below shows the number of products which were classified as fortified, and the number for which micronutrient data was available, and depicts large inconsistencies in data availability.



BOX 1 (CONTINUED) PRODUCT PROFILE FINDINGS

TABLE 2
FORTIFICATION STATUS OF PRODUCTS FOR WHICH MICRONUTRIENT DATA WAS FOUND

Category	Total Number	No. Products Fortified**	Total No. Products with Micronutrient Data***
Asian Specialty Drinks	1	0	0
Baked Goods	6	1	0
Bottled Water	7	0	4
Breakfast Cereals	22	17	17
Butter and Spreads	10	1	8
Carbonates	61	0	2
Concentrates	1	0	0
Confectionery	86	0	0
Dairy	80	0	17
Edible Oils*	6	5	0
Energy Drinks	2	1	1
Flour*	14	11	0
Ice Cream	68	0	0
Instant Coffee Mixes	1	0	0
Juice	124	62	0
Other Hot Drinks	14	1	2
Processed Fruit and Vegetables	11	0	0
Rice, Pasta and Noodles	1	0	0
RTD Tea	1	0	0
Sauces, Dips and Condiments	45	2	1
Savoury Snacks	49	0	0
Sweet Biscuits, Snack Bars and Fruit Snacks	75	1	0
Sweet Spreads	28	1	4
Total	713	103	56

Note: Grey rows indicate product categories in which no products with micronutrient data were found.

* Category is subject to mandatory fortification regulations in Tanzania.

** Products were classified as fortified if this was clearly stated, or if micronutrients were listed in the ingredients. In many cases, the specific levels of micronutrients were not available.

*** Products were included if micronutrient data were available from Innova Market Insights, visible on product images from company websites, or directly provided by the company, for at least one micronutrient. Micronutrients could be inherent in ingredients used or fortified.

40/713 (6%) of F&B products included in the HSR product profile assessment were classified as fortified, including staple food products subject to mandatory fortification (maize flour, and wheat flour).



BOX 1 (CONTINUED) PRODUCT PROFILE FINDINGS

Table 3 below summarises the number of products classified as fortified, categorized by Euromonitor categories along with their mean HSR and mHSR+ micronutrient scores. The highest number of fortified products in the HSR assessment were in the Breakfast cereals (n=17, 43%) and Flour (n=11, 28%) categories. For some product categories, nutritional information was insufficient (i.e., data on saturated fat was missing in the edible oils category) to calculate a HSR, and therefore scores are not reflected in Table 3. Analysing products with the HSR, 32.5% did not meet the 'healthier' threshold of 3.5 stars, and 28% scored 1 star or below indicating many may not be suitable for fortification. For example, in 5 fortified juice products scored 1.5 stars or less.

The mean healthiness for products analysed with the mHSR+ model in Tanzania was 3.7, which is higher than with the regular HSR model (3.5). Compared to Kenya findings, ATNi's Product Profile assessment of fortified products in Tanzania shows a higher proportion of 'healthier' fortified products at 67.5%; however, the total number of products included in the HSR assessment was lower in Tanzania (n=40) compared to (n=140) in Kenya.

TABLE 3
PROPORTION OF FORTIFIED PRODUCTS CLASSIFIED AS 'HEALTHIER'
USING THE HSR AND HSR+

Category	No. of Fortified Products/Total No. Products Assessed in HSR (%)	HSR										Mean HSR	Mean mHSR+
		Below 3.5 HSR: 32%						Above or equal to HSR 3.5: 68%					
		0.5	1.0	1.5	2.0	2.5	3.0	3.5	4.0	4.5	5.0		
Baked Goods	1/2 (50%)	0	0	0	0	0	0	0	0	0	1	5.0	5.0
Breakfast cereals	17/22 (77%)	0	0	2	0	0	1	1	5	5	3	3.9	4.4
Butter and Spreads	1/10 (10%)	0	0	0	0	1	0	0	0	0	0	2.5	2.5
Energy Drinks	1/1 (100%)	1	0	0	0	0	0	0	0	0	0	0.5	0.5
Flour*	11/14 (79%)	0	0	0	0	0	0	0	0	0	11	5.0	5.0
Juice	5/53 (9%)	5	0	0	0	0	0	0	0	0	0	0.5	0.5
Sauces, Dips & Condiments	2/23 (9%)	1	0	0	0	0	0	0	1	0	0	2.3	2.8
Sweet Biscuits, Snack Bars & Fruit Snacks	1/64 (2%)	0	1	0	0	0	0	0	0	0	0	1.0	1.0
Sweet Spreads	1/14 (7%)	1	0	0	0	0	0	0	0	0	0	0.5	0.5
Total	40/203 (19%)	8	1	2	0	1	1	1	6	5	15	3.5	3.7

Note: Table represents the number of products identified as fortified based on information shared by companies, Innova Market Insights or public sources. Products were classified as fortified, if a micronutrient was listed in the ingredients.

* Category is subject to mandatory fortification regulations in Tanzania.

KEY INDUSTRY RECOMMENDATIONS

To ensure fortified packaged foods & beverages contribute to healthy diets and help to address micronutrient deficiencies in Tanzania, F&B companies are encouraged to:

- List in full the micronutrients present in products, including fortified staples used as ingredients, and disclose levels of micronutrients in products on back-of-pack nutrition labels.
- Develop and publish a fortification policy that explicitly commits to follow the CODEX CAC/GL 9-1987 and/or the WHO/FAO 'Guidelines on Food Fortification with Micronutrients' as per standards set out by the Tanzanian government, and to only fortify products that meet the nutrition criteria of an NPM or as required by law.
- Publish quality control or assurance methods to determine whether the levels of micronutrient(s) are adequate in the final product.

POLICY RECOMMENDATIONS

While clear policy infrastructure exists to govern the fortification of certain staple foods in Tanzania, the government has an opportunity to extend this to regulate the fortification of packaged processed foods. This could include mandating use of fortified staples as ingredients in such products.

The absence of clear policy guidance allows F&B manufacturers to fortify products that may be high in sugar, salt, and fats. This raises the risk of misleading health claims and consumer perceptions, potentially undermining broader nutrition goals. Tanzania's regulatory framework for food fortification also includes standards for labelling and health claims. However, it does not establish a definition a 'healthy' product based on formal nutrition criteria. As a result, claims can be used to suggest that a fortified product offers health benefits, without considering the product's overall nutritional profile.

To address these gaps, policymakers are encouraged to use the outcomes of this research to develop a roadmap for industry and policymakers outlining specific measures to strengthen policy on the fortification of packaged processed foods.

CATEGORY REPORTING ON HEALTHINESS



CATEGORY CONTEXT

NPMs are tools used to classify F&B products based on their nutritional content and potential impact on health. In Tanzania, packaged, processed foods are increasingly entering the market and consumers' food baskets. Many of these products are high in fats, salt and sugar, which can negatively impact the diet quality.

This nutrition transition is contributing to rising rates of obesity and diet-related disease, alongside undernutrition and micronutrient deficiencies. Applying NPMs to assess the nutritional quality of packaged, processed products, monitor progress and inform policies to improve healthy diets can help create healthier food environments and support improved public health outcomes.

FINDINGS

Of the 10 companies assessed, only one company—PepsiCo—publicly discloses the use of an NPM to assess the healthiness of its product portfolio for reformulation purposes. PepsiCo's NPM includes clear thresholds for nutrients to limit (sodium, saturated fats, industrially-produced trans fatty acids (iTFA), and added sugars) as well as nutrients to encourage (fibre, minerals, fruits, vegetables, nuts, and legumes).³⁰ However, the NPM does not specify a threshold for defining 'healthier' products and, as such, PepsiCo does not report on the overall healthiness of its portfolio either globally or in Tanzania.³⁰

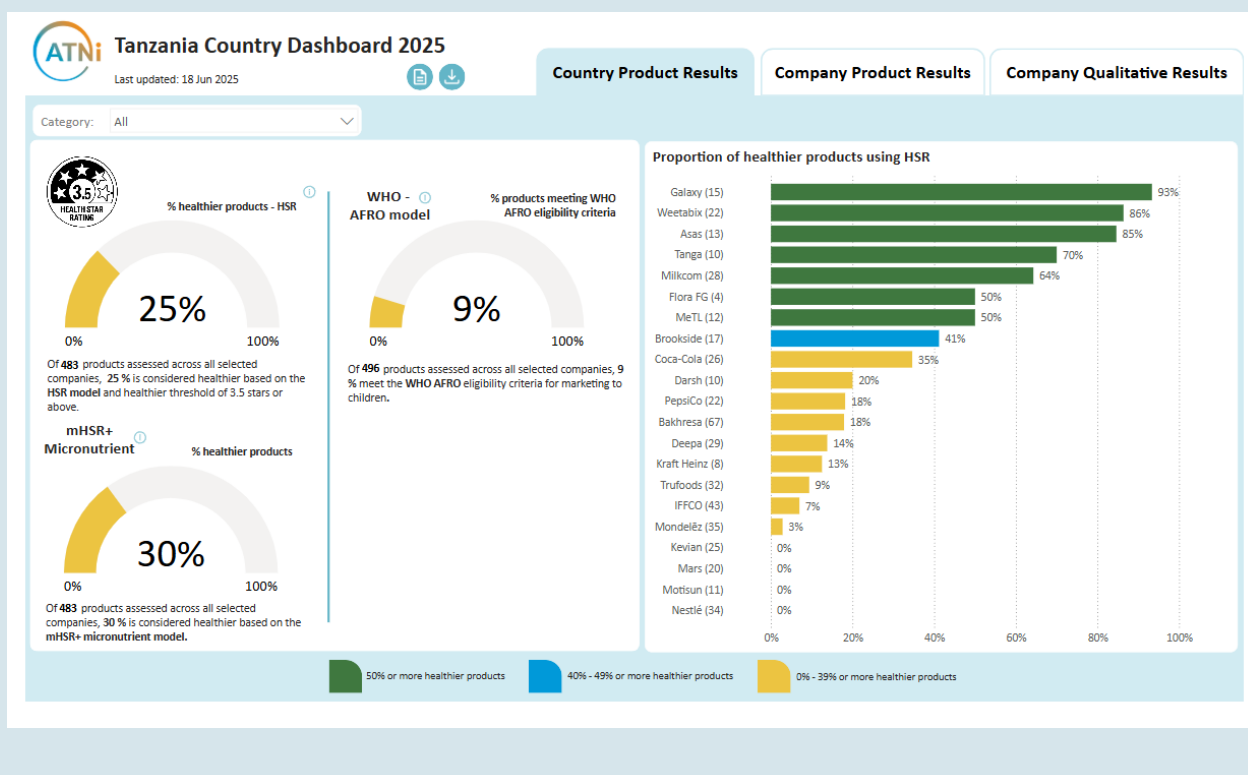
Some Tanzania-headquartered companies shared their nutrient profiling perspectives with ATNi and indicated that NPMs are not widely used by the F&B industry in Tanzania to evaluate and report on portfolio healthiness. One company indicated that its primary focus in terms of the quality of its products was food

TABLE 1
POLICY LANDSCAPE

National Policy or Regulation	Summary
National Multisectoral Nutrition Action Plan 2021/22-2025/26	Targets improved nutrition for all—especially women, children and vulnerable groups—by addressing undernutrition and non-communicable diseases (NCDs). While the plan refers to 'nutritious' and 'unhealthy' foods in proposed policy measures on marketing, labelling, and taxation, it does not provide a clear definition or criteria for how such foods categories are determined. ¹³
Tanzania Food-Based Dietary Guidelines for a Healthy Population: Technical Recommendations, 2023	Provides recommendations on nutrients to increase and limit in the diet, aiming to prevent malnutrition, obesity, and NCDs. The Guidelines also outline the use of the NOVA classification to identify varying levels of food processing and emphasize the importance of reducing the consumption of ultra-processed foods, while encouraging consumption of unprocessed and minimally processed foods. ⁶
National Strategic Plan for the Prevention and Control of NCDs 2021-2026	Addresses the growing prevalence of NCDs in Tanzania by recognizing the role of excessive intake of saturated fats, sugars, and salt. It emphasizes the promotion of healthy diets as essential for maintaining good health. ¹²



FIGURE 1
OVERVIEW OF THE PRODUCT PROFILE RESULTS FOR 21 COMPANIES



KEY INDUSTRY RECOMMENDATIONS

To ensure transparency on the impact of companies' product portfolios on healthy diets and public health goals in Tanzania, F&B companies are encouraged to:

- Measure and publicly report the percentage of sales in Tanzania derived from products classified as 'healthier' according to the Tanzania Food-Based Dietary Guidelines or an internationally recognized NPM.
- Publish information on how the NPM is applied to the company's portfolio in Tanzania, specifying which product categories are included and how the products are categorized.

POLICY RECOMMENDATIONS

The Tanzanian government has not yet developed a government-endorsed NPM to define and categorize the healthiness of packaged processed foods and beverages. Policymakers are encouraged to use the outcomes of this research to develop a roadmap for industry and policymakers outlining measures to define and report product healthiness and the proportion of sales derived from 'healthy' products.



SECTION 2

INFLUENCING CONSUMERS

CATEGORY AFFORDABLE NUTRITION



CATEGORY CONTEXT

In 2022, 75.5% of Tanzanians were unable to afford a healthy diet.³¹ Convenient and affordable packaged, processed products are increasingly becoming part of consumers' diets in Tanzania. To mitigate the potential negative impact of packaged processed products high in fats, salt, and sugar on public health, it is imperative that all consumers have the choice to opt for 'healthier' varieties which are affordably priced. Ensuring access to affordable, healthy food is particularly important for low-income consumers in Tanzania, who spend up to 70% of their household budgets on food.³²

TABLE 1
POLICY LANDSCAPE

National Policy or Regulation	Summary
Value added tax (VAT) exemption	Unprocessed agricultural products—such as vegetables, fruits, nuts, bulbs and tubers, maize, wheat, other cereals, cashew nuts, sugarcane, seeds, and plants—as well as fish, livestock, and milk products are exempt from VAT. ³³
Excise tax (luxury goods)	Tanzania applies an excise tax on luxury goods, including a tax on non-alcoholic beverages, including SSBs. However, the tax is not based on sugar levels in the product. ³⁴
Import tax	Consumer goods are subject to 25% import duty rate in Tanzania. ³⁵ This includes all non-staple processed food products, including sausages, chocolate, bread, pastries, cakes, biscuits, condiments, and SSBs. ³⁵ This tariff applies across the East African Community under a 'Common External Tariff' and applies to goods imported from outside the East African Community region. ³⁶

FINDINGS

Of the 10 companies assessed, three Tanzania-headquartered companies—Bakhresa, Darsh, and MeTL—highlight the affordability of their products on their websites but do not specifically publish an intention to improve the affordability of 'healthy' products.

For example, MeTL states that it delivers "great value products at affordable prices" through its "efficient distribution network." Bakhresa describes a vertical integration strategy aimed at delivering a "wide range of low-cost to premium-quality consumer goods", including but bottled water, fruit concentrates, fruit juices, carbonated drinks, and dairy products. However, the company has not disclosed details of this strategy.

In addition, two global companies—Wilmar and PepsiCo—disclose a commitment to improving the affordability of 'healthy' products but do not report on these efforts to do so in Tanzania. For example, Wilmar states in its 2023 Sustainability Report that the company contributes "to the accessibility of affordable, healthy and nutritious food, especially in emerging markets" by investing in reformulation, smaller pack sizes and staple foods.

PepsiCo discloses its global goal to "increase access to nutritious food for 50 million people by 2030" through a combination of philanthropic and commercial activities, linking this commitment to its internal Global Nutrition Criteria for Affordable Nutrition Initiatives. The company's Food and Nutrition Security webpage states that it aims to ensure products meeting its nutrition criteria are "accessible to lower-income consumers at risk of poor nutrition." While PepsiCo reports examples of implementing this goal in South Africa, it does not specifically report on its efforts in Tanzania.

BOX 1 THE AFFORDABILITY OF 'LESS HEALTHY' PRODUCT CATEGORIES IN TANZANIA

Two companies in this assessment—Coca-Cola and IFB—have relatively limited scope to contribute to affordable nutrition in Tanzania due to their portfolios being predominantly composed of SSBs and confectionery. Yet both indicated to ATNi that they have mechanisms in place to address the affordability of their products.

- **Coca-Cola offers smaller pack sizes at lower prices, while IFB sells its products to wholesalers, who distribute small portion sizes of sweets to local vendors serving low-income consumers.**

Companies producing 'less healthy' products such as confectionery and SSBs—Bakhresa, Coca-Cola, IFB, MeTL, PepsiCo and Motisun—are encouraged to focus on making healthier products (or healthier varieties of their products) more affordable. They are also encouraged to use their distribution networks to prioritize the sale of healthier products to low-income consumer in Tanzania.

KEY INDUSTRY RECOMMENDATIONS

To ensure that 'healthier' F&B options are more affordable to consumers as 'less healthy' options in Tanzania, F&B companies are encouraged to:

- Adopt and publish a strategy to ensure that the company offers 'healthier' products that are priced affordably for low-income consumers in Tanzania.
 - o Align the definition of 'healthier' products with the Tanzania Food-based Dietary Guidelines or the criteria of an internationally recognized NPM.
 - o Use a formal, Tanzania-specific classification of 'low-income consumers' to guide the strategy.
- Measure and report on the price differential between 'healthier' products relative to products that do not meet formal nutrition criteria in Tanzania, and work on improving the differential between them.

POLICY RECOMMENDATIONS

Some fiscal mechanisms exist at the national level to regulate the price of staple foods and packaged processed foods in Tanzania, but these are not specifically linked to nutrition outcomes. Policymakers are encouraged to use the outcomes of this research to develop a roadmap for industry and policymakers outlining measures to incentivize the affordability and consumption of 'healthier' foods relative to 'less healthy' foods.



CATEGORY RESPONSIBLE MARKETING



CATEGORY CONTEXT

Evidence shows that marketing of ‘less healthy’ foods and beverages—including marketing that uses channels and techniques that appeal to children, and in places (online or offline) where children typically gather—is a common industry practice that influences children’s preferences, purchasing requests, and consumption patterns.² Public health organizations globally, including in the East Africa region, recognize that such marketing is a key contributor to overweight and obesity amongst children. While Tanzania has regulations in place to restrict the marketing of breastmilk substitutes, it does not have standards to restrict the marketing of foods and beverages to children under the age of 18.³⁹ ATNi conducts separate assessments of the marketing practices of companies that produce baby foods, breastmilk substitutes, and complementary foods.⁴⁰

FINDINGS

Of the 10 companies assessed, the three global-headquartered companies—Coca-Cola, Wilmar, and PepsiCo—were found to publish their global commitments on responsible marketing to children.

Wilmar’s Code of Conduct states that all marketing directed at children “should not encourage or promote unhealthy eating or drinking habits; and should not actively encourage children to eat excessively throughout the day or replace main meals with confectionary or snack foods.” However, Wilmar does not specify the age threshold it uses to define a child, the media channels and techniques covered by its commitments, or whether it uses nutrition criteria to guide its marketing to children practices. Coca-Cola and PepsiCo include these details in their global policies (see Table 2).

TABLE 1
POLICY LANDSCAPE

National Policy or Regulation	Summary
Electronic and Postal Communications (Radio and Television Broadcasting Content) Regulations, 2018	Stipulates child protection mechanisms for broadcasting content on TV and radio. The regulations outline requirements for content and advertisements shown during a watershed period (10:00pm to 5:30am), and define ‘unsuitable content’ for children as content that may cause harm, depict violence, or use offensive language. These regulations are not specific to the F&B industry. ⁴¹
Media Guidelines on Reporting Children, 2022	Outlines voluntary standards for media professionals when reporting on children and their rights. The guidelines define a child as anyone under the age of 18, in line with the Tanzania’s Constitution and the Children’s Act of 2009. The Guidelines apply to traditional media (newspapers, radio, television) and social media, and call on media professionals to exercise the principles of truth, accuracy, fairness, objectivity, and privacy and confidentiality. These guidelines are not specific to the F&B industry. ⁴²

TABLE 2
COMPANIES' GLOBAL RESPONSIBLE
MARKETING TO CHILDREN
COMMITMENTS

Company	Age Threshold	Nutrition Criteria	Audience Threshold	Media Channels/ Techniques
Coca-Cola	13	No products marketed to children	30%	14
PepsiCo	13	Products meeting industry association nutrition criteria	30%	13

None of these companies report on the implementation of their policies in the Tanzanian market. While PepsiCo disclosed to ATNi that marketing in countries where bottlers 'produce' products on behalf of the company remains the responsibility of PepsiCo, no information is available in the public domain on whether or how the companies require their subsidiaries and bottling partners in Tanzania to adhere to their global commitments.

During the research, ATNi did not conduct an independent assessment of the marketing practices of companies. However, during the time of the assessment, some examples were found of companies marketing products to children on their social media accounts, including Instagram and Facebook. Some examples include companies with sugar-sweetened beverage products in their portfolios promoting their products to children on their social media accounts. For example, Motisun featured children in some advertisements, and Bakhresa posted that it sponsors youth sports events.

None of the Tanzanian companies publish commitments related to responsible marketing to children. This underscores the importance for companies publishing a responsible marketing policy, outlining how the company avoids direct marketing of 'less healthy' products to children.

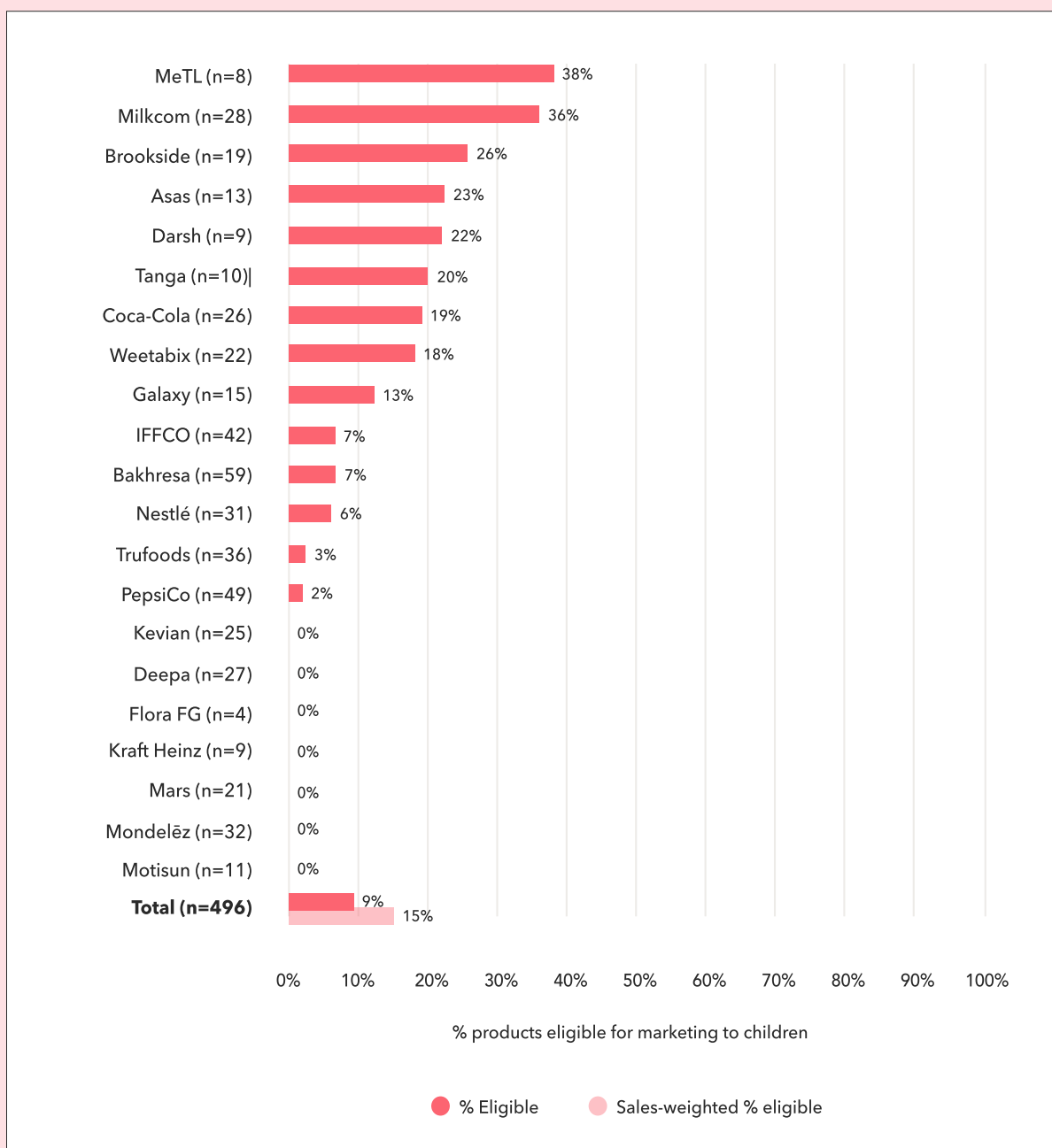




BOX 1 PRODUCT PROFILE FINDINGS

ATNi's Product Profile assessment evaluated the portfolio healthiness of 21 of the largest F&B companies operating in Tanzania against the WHO AFRO (see Figure 1). This model was designed to determine products that are suitable to be marketed to children, and found that only 9% of products (representing 15% of sales) in Tanzania meet the model's criteria.

FIGURE 1
**PROPORTIONS OF PRODUCTS MEETING WHO AFRO ELIGIBILITY
CRITERIA FOR MARKETING TO CHILDREN IN TANZANIA**



KEY INDUSTRY RECOMMENDATIONS

To avoid marketing 'less healthy' foods to all consumers, but specifically to children in Tanzania, F&B companies are encouraged to:

- Commit to adhere to the ICC Framework for Responsible Food and Beverage Marketing Communications.
- Adopt and publish a responsible marketing policy to ensure that the company does not market any products—or 'less healthy' products—to children up to 18 years of age in Tanzania.
- Explicitly apply the responsible marketing policy to a comprehensive range of media channels and techniques identified by the WHO and UNICEF Guidelines.
- Commission an independent third-party audit of the company's responsible marketing commitments in Tanzania, covering a wide range of media channels and marketing techniques, and publish the results.

POLICY RECOMMENDATIONS

While some regulations and guidelines exist to limit marketing to children through print and broadcast media in Tanzania, they do not specifically address the marketing of F&B products. Policymakers are encouraged to use the findings from this research to help develop a roadmap for industry and policymakers outlining policy measures to restrict the marketing of 'less healthy' products to children under 18.



CATEGORY RESPONSIBLE LABELLING



CATEGORY CONTEXT

Nutrition labelling is an important tool for promoting food safety, raising consumer awareness and encouraging healthier food choices. Both back-of-pack and FOP labelling enable consumers to make informed choices about the nutritional content and quality of purchased food. In addition, labelling schemes and standards can incentivize F&B manufacturers to improve the healthiness of their products thereby contributing to healthier diets.

FINDINGS

Back-of-pack nutrition labelling is regulated in Tanzania, and therefore is not assessed in this chapter, which aims to scope companies' labelling commitments that go beyond regulatory compliance. Currently, the Tanzanian government has not yet developed or endorsed a FOP nutrition labelling scheme, and therefore this assessment did not include questions on FOP labelling.

None of the 10 companies assessed was found to explicitly commit to only placing nutrition or health claims on products that meet the defined specific nutrition criteria of a NPM. However, some company websites show examples of the use of nutrition and/or health claims for specific products (see Table 2).

**TABLE 1
POLICY LANDSCAPE**

National Policy or Regulation	Summary
Tanzania Food, Drugs and Cosmetics (Food Labelling) Regulations, 2006 and Nutrition Labelling-Requirements 2015	Provides detailed specifications for the labelling of prepackaged foods. The standards mandate that labels must provide essential information such as the product name, list of ingredients, net weight or volume, and contact details for the manufacturer or distributor. In addition, nutritional information such as calorie content and key nutrients levels are required, along with expiration dates to indicate shelf life. Labels must also state the country of origin and be written in either . Health and safety warnings, including storage instructions, must also be included. ^{14,15}
Standard on the use of nutrition and health claims (EAS 805:2022)	Specifies requirements for the use of nutrition and health claims in food labelling and advertising. These standards are aligned with Codex Alimentarius guidelines on Nutrition and Health Claims (CAC/GL 23-1997).

TABLE 1
EXAMPLES OF PRODUCTS THAT CARRY HEALTH AND NUTRITION CLAIMS

Company	Content of Health or Nutrition Claim
Coca-Cola	Zero Sugar Monster Energy: Online description states “Monster Zero Sugar helps fight fatigue with 160mg of caffeine and improves mental performance and focus.” ⁴³
Bakhresa	Azam Tiger Glucose Biscuits: Carries the “Eat Healthy” tagline on pack.
Asas	Asas Yoghurt Drink: Online description states “Rich in calcium for stronger body and mind... Low fat.” ⁴⁴
Motisun	Sayona Pineapple Juice: Online description states “Pineapples are exceptionally rich in compounds that have been linked to impressive health benefits, including improved digestion, a lower risk of cancer, improved immunity and relief of arthritis symptoms.” ⁴⁵ Sayona Chwunga Orange Juice: Online description states “Oranges have been known to help increase levels of good cholesterol and decrease bad cholesterol in the blood. Chungwa (Oranges) have also been known to decrease inflammation, aid in disease prevention, improve heart health, promote bone formation and wound healing. Fun Fact: Chungwa (Orange) juice can increase the pH of the urine and, as a result, lower the risk of kidney stones.” ⁴⁵
MeTL	MeTL Safi Oil: Carries the “Mafuta safi kwa afya yako” tagline on pack, meaning “Pure oil for your health.”

KEY INDUSTRY RECOMMENDATIONS

To ensure that F&B companies accurately contribute to consumers’ awareness on healthy food choices in Tanzania, companies are encouraged to:

- Support Tanzania’s National Multisectoral Nutrition Action Plan 2021-2026, including a potential future government-endorsed FOP label. Refrain from using FOP labels in the absence of a government-endorsed FOP labelling scheme.
- Commit to refrain from using nutrition or health claims on products that are not considered ‘healthier’ according to the Tanzania Food-based Dietary Guidelines or formal nutrition criteria of an internationally recognized NPM.

POLICY RECOMMENDATIONS

The government is encouraged to develop and implement a FOP nutrition labelling scheme—ideally on a mandatory basis—to complement existing regulations for back-of-pack labelling and the use of nutrition and health claims. Policymakers are further recommended to make use of the findings of this research to help develop a roadmap for industry and policymakers that outlines measure to incorporate nutrition criteria—potentially linked to an existing or Tanzania-specific NPM—into the requirements for nutrition and health claims.



SECTION 3

CORPORATE GOVERNANCE

CATEGORY

NUTRITION

GOVERNANCE



CATEGORY CONTEXT

There is increasing global awareness among policymakers, investors, and civil society about the influence of F&B manufacturers in shaping consumers' diets, and the resulting impact on public health. This is particularly evident in Tanzania, where diets are shifting from fresh and minimally processed foods towards more processed, packaged foods, including foods high in fat, salt, and sugar. F&B manufacturers influence consumers' diets not only through the nutritional quality of the products they sell but also through how these are marketed, priced, distributed, and labelled. It is therefore important that companies develop a clear strategy or plan to ensure these practices are aligned with public health goals, as defined by standards set by public health goals, as defined by public health and food authorities in Tanzania.

FINDINGS

Reporting by companies on their nutrition-related policies and practices in Tanzania was generally found to be limited. Some Tanzania-headquartered companies acknowledge their role in improving nutrition and health for consumers. Among the 10 companies assessed, three—Asas, Bakhresa, and Tanga—shared information or examples with ATNi on how health and nutrition are integrated into their business operations. Key topics of consideration included fortification, affordability, and school feeding programmes. For example, Tanga informed ATNi that it has an internal, multi-faceted nutrition strategy focused on raising public awareness on nutrition and nutrition education; participating in school feeding programmes; collaborating with relevant stakeholders to ensure more affordable pricing; and supporting farmers and farmer cooperatives to increase production and availability. However, the company has not published information on these activities in the public domain.

TABLE 1
POLICY LANDSCAPE

National Policy or Regulation	Summary
National Strategic Plan for the Prevention and Control of Non-communicable Diseases (NCDs) 2021-2026	Outlines the role of food industry in addressing growing non-communicable disease (NCD) prevalence through investing in healthy diets. ¹²
Tanzania Food-Based Dietary Guidelines for a Healthy Population	Provides recommendations to promote healthy eating, including reducing the intake of 'highly processed' foods high in salt, sugar, and fats to reduce the risk of NCDs. ⁶
Tanzania Multisectoral Nutrition Action Plan 2021/22 - 2025/26	Coordinates efforts to address the triple burden of malnutrition, including actions to strengthen the capacity and engagement of the private sector in tackling nutrition challenges and improving diets. ¹³

Three global-headquartered companies with headquarters outside Tanzania—PepsiCo, Wilmar and Coca-Cola—have published global nutrition strategies. Key features of these global strategies include:

1. Improving portfolio healthiness through product reformulation and the development of new 'healthier' products;
2. Ensuring affordability, including through selling various pack sizes and using local socioeconomic indicators; and
3. Implementing responsible marketing and labelling policies.

Of these three companies, only Coca-Cola provided Tanzania-specific evidence to ATNi, including examples of ‘healthier’ products introduced to the market, information on packaging variants, and specific evidence on how the company provides nutritional labelling. However, due to the lack of systematic reporting against quantitative metrics, it remains unclear to what extent each element of the company's global nutrition strategy has been implemented in Tanzania.

BOX 1 GLOBAL-HEADQUARTERED COMPANIES AND THEIR DISTRIBUTION CHAINS

Two of the global-headquartered companies—PepsiCo and Coca-Cola—indicated that they partner with local bottling companies to package and distribute their products in Tanzania.

- **PepsiCo disclosed to ATNi that its Tanzanian bottler, SBC/Varun Beverages, operates as a separate entity in terms of nutrition policies and commitments, while PepsiCo retains control over product reformulation decisions and marketing. However, the SBC website displays the PepsiCo name and logo, and states that its “quality processes [are] guided by the stringent standards of PepsiCo International.”**
- **Coca-Cola indicated to ATNi that its bottling partners are required to adhere to the company's global responsible marketing policy.**

It is generally unclear to what extent the global businesses are accountable for the nutrition policies and practices of their bottling companies in Tanzania.

Evidence was found that two global-headquartered companies—Coca-Cola and PepsiCo—assign accountability at the senior management level for their global strategies. However, it remains unclear whether these companies conduct progress reviews on implementing their strategies at the national or regional level, or whether a person is assigned at the national or regional level to be accountable for implementation in Tanzania. No information was found on nutrition governance mechanisms or accountability frameworks for the Tanzania-headquartered companies.

KEY INDUSTRY RECOMMENDATIONS

To ensure that companies’ commercial operations contribute to public health goals in Tanzania, F&B companies are encouraged to:

- Develop and publish a clear commercial strategy to contribute to healthier and more nutritious diets and publicly report on its implementation in Tanzania,.
- Set a specific, measurable, and timebound target to increase sales of products that meet Tanzania-specific or internationally recognized nutrition criteria, showing annual progress on meeting set targets.
- Have the Board of Directors (or regional equivalent) review progress against the nutrition strategy on at least an annual basis.
- Assign formal accountability for the implementation and success of the nutrition strategy ideally to the Chief Executive Officer (CEO), or another senior-level executive in Tanzania. Link executive (or regional equivalent) remuneration to at least one of the nutrition strategy’s targets or metrics.

POLICY RECOMMENDATIONS

The Tanzanian government has taken important steps to establish a policy framework to improve diets, particularly through the development of national-level strategic plans. The government is encouraged to use the outcomes of this research to help build a roadmap for industry and policymakers, outlining measures to mitigate the potentially negative impact of packaged processed foods and beverages on healthy diets.

CATEGORY WORKFORCE NUTRITION



CATEGORY CONTEXT

Improving nutrition in the workplace—where 58% of the global population spend at least one-third of their adult lives—has been identified by the World Health Organization (WHO) as one of several key strategies to address the global malnutrition crisis.¹ The benefits to businesses are clear, with studies estimating returns on investment (ROI) for workforce nutrition programmes to be as high as 6:1.⁴⁶ As a result, such programmes are gaining increasing traction in the private sector, particularly those focusing on direct employees.⁴⁷

According to Chatham House research, 9.6% of Tanzania's workforce was underweight and 5.4% was affected by obesity in 2020.⁴⁸ The cognitive and physical impacts of these conditions have been found to reduce workforce productivity through presenteeism and absenteeism. The economic cost of this was estimated at 1.55% of Tanzania's GDP—approximately USD 1 billion in 2025.^{6,48,49} Enhancing workforce health will therefore have a positive impact on companies' financial returns and economic wellbeing over the long term.⁵⁰

FINDINGS

Of the 10 companies assessed, only two—Coca-Cola and PepsiCo—were found to provide workers with workforce nutrition activities at the global or regional level. However, both companies indicated to ATNi that they either have no direct presence or only a minimal presence in Tanzania, meaning that these activities are not implemented in the Tanzania market. It is also unclear whether their workforce nutrition activities extend to employees in their supply or distribution chains in the country.

Some companies indicated to ATNi that they have activities to support workers or farmers in their supply chains. However, no evidence was found in the public domain that the Tanzania-headquartered food and beverage (F&B) companies assessed have formal policies or programmes to support workforce nutrition. This includes providing employees with healthy food at work, nutrition education, nutrition-focused health-checks, and breastfeeding support beyond mandatory parental leave.

TABLE 1
POLICY LANDSCAPE

National Policy or Regulation	Summary
National Multisectoral Nutrition Action Plan 2021/22-2025/26	Outlines priority actions to “strengthen nutrition interventions at formal workplaces,” including scoping current workforce nutrition interventions, developing ‘nutrition packages’ for workplaces, and advocating for employers to implement these packages. Calls for private sector actors to engage in implementing of nutrition interventions at least once per year. ¹³
Employment and Labour Relations Act 2019	Stipulates a minimum of 84 days (12 weeks) paid maternity leave (or 100 days (14 weeks) if giving birth to more than one child at the same time). Requires employers to grant employees up to four terms of maternity leave, and at least three days of paid paternity leave within seven days of their child's birth. ⁵¹
Nutrition Workforce Handbook	In 2022, the SUN Business Network (SBN), in collaboration with GAIN and Eat Well Global, and with the support of the Tanzania Food and Nutrition Centre, launched a practical guide to providing healthy meals and snacks in the workplace. ⁵² It is being piloted by two SBN member companies. ⁵²

KEY INDUSTRY RECOMMENDATIONS

To ensure that F&B companies invest in employees' nutritional health in Tanzania, companies are encouraged to:

- Develop a comprehensive workforce nutrition program for all employees in Tanzania (including at manufacturing sites, and where possible, in supply and distribution chains), which includes 1) Healthy food at work; 2) Nutrition education; 3) Nutrition-focused health checks; and 4) Breastfeeding support and parental leave.
- Set and publicly report against outcome-focused targets or key performance indicators (KPIs) to measure progress on implementing the program in Tanzania.

BOX 2: EVIDENCE OF WORKFORCE NUTRITION PROGRAMMES IN TANZANIA

One of the companies leading on workforce nutrition in Tanzania is coffee production company Aviv Tanzania, a subsidiary of Olam Food Ingredients (OFI). In 2023, the company collaborated with the Workforce Nutrition Alliance and, with support from district medical offices, district nutritionists, and a local NGO, launched a programme providing nutrition education, nutrition-related health checks, and breastfeeding support.⁵²

By 2024, only 4-14% of the 3,500 workers employed during peak season had participated in the programme. While still limited, this represents a positive first step for companies implementing workforce nutrition programmes in the Tanzanian market.⁵³

POLICY RECOMMENDATIONS

Tanzania has regulations that mandate specific aspects of workforce nutrition programmes, including breastfeeding support. However, policymakers are encouraged to use the findings of this research to help develop a roadmap for industry and policymakers of policy measures to expand the current regulatory landscape to cover all elements of workforce nutrition programmes.



CONCLUSION AND RECOMMENDATIONS

CONCLUSION

This assessment underscores the complex and evolving nature of the F&B industry's role in shaping Tanzania's food environment. While the government has made notable progress through policy commitments and regulatory frameworks to promote healthier diets, the F&B industry's response remains limited in scope and transparency.

The healthiness of packaged F&B products is generally low, with global-headquartered companies appearing to perform worse in Tanzania compared to their global aggregate. Although some companies are taking positive steps—such as highlighting affordability—few demonstrate a sustained commitment to improving the health profile of their portfolios or provide evidence of comprehensive nutrition strategies. This underscores the need for global-headquartered companies to assess whether they are making their healthier products equally available across all regions, including Tanzania.

Efforts to responsibly influence consumer behaviour through labelling and marketing are also insufficiently reported on. No company was found to apply NPMs or nutrient criteria to determine healthiness of products and nor have responsible marketing policies in place which fully align with WHO and UNICEF standards.

On the nutrition governance front, only a handful of companies—primarily global-headquartered companies—have articulated specific nutrition strategies, while none have demonstrated comprehensive implementation in Tanzania. Workforce nutrition remains an underreported area, particularly among local companies, with no published evidence of structured programmes to support employee health and nutrition.

To foster a healthier food environment and improve the nutritional quality of the packaged food supply in Tanzania, stricter regulatory accountability mechanisms, enhanced transparency, and more robust industry engagement are essential. This assessment provides a critical evidence base to inform national policymaking, guide corporate action, and support civil society advocacy. Sustained, cross-sector collaboration will be vital to ensuring that nutritious, affordable, and safe food is accessible to all Tanzanians.

RECOMMENDATIONS

Manufacturers

1 Assess Product Healthiness, Marketing to Children, and Affordability in line with the in Tanzania's National Multisectoral Nutrition Action Plan II (NMNAP II)

F&B companies in Tanzania should evaluate their product portfolios using an internationally recognized NPMs and use this to inform other nutrition-related commitments. This includes:

- Assessing which products qualify as 'healthier', and for global-headquartered companies to evaluate whether they are making healthier products equally available across all regions;
- Ensuring that 'less healthy' products are not marketed to children, using WHO Regional NPM standards;
- Measuring the affordability and accessibility of 'healthier' options—especially for low-income groups.

2 Set Clear Targets for Healthier, Affordable Products and Responsible Marketing

Companies should adopt clear policies including measurable targets to:

- Increase sales of healthier and affordable foods and assign CEO accountability for nutrition, or Board reviews.
- Improve availability of fortified products that meet health standards and are affordable across all income groups.
- Fully align marketing practices with WHO and UNICEF standards—defining children as under 18 and restricting or limiting child-directed marketing to only healthy products through all media channels.

3 Disclose Nutrition Policies, Progress, and Quality Controls

Companies must enhance transparency by:

- Publicly reporting on each aspect of their nutrition policies, including sales of healthier products and responsible marketing and labelling commitments, for example.
- Clearly disclosing fortification policies and verifying that fortified products meet health standards through robust quality control.
- Ensuring back-of-pack nutrition labelling includes standardized micronutrient content.

Government and Policymakers

- Through the NMNAP II, the Tanzanian government has demonstrated a strong commitment to reducing overweight and obesity, curbing diet-related NCDs, and to promoting healthier diets. To accelerate progress and enhance the effectiveness of these interventions, increased regional cooperation—particularly through the establishment of East African nutrition standards—is recommended.

- The government is encouraged to implement the key policy actions outlined in NMNAP II, prioritising the development of a nationally accepted NPM, the rollout of mandatory FOP nutrition labelling, of the adoption of regulations to protect children from harmful F&B advertising, and integration of workplace nutrition interventions into national health strategies.
- The government is commended for the proposed Nutrition Promotion Levy on SSBs, to reduce sugar intake and recent tax on unhealthy foods. Prompt implementation of this levy is advised to support public health objectives and to help balance potential tensions between health priorities and economic interests in the sugar sector. Revenue generated by taxes from unhealthy products could be used to support national health programmes.

Investors

- Investors are encouraged to prioritize investment in companies that demonstrate transparency in their nutrition-related policies, responsible marketing practices, and workforce nutrition initiatives. They should support investees that align with national and international nutrition standards (such as Codex Alimentarius and WHO/Food and Agriculture Organization (FAO) and back businesses that offer healthier product portfolios and actively contribute to Tanzania's public health goals.
- Leverage tools, such as ATNi's Investor Expectations on Nutrition, Diets, and Health, to evaluate company actions on nutrition and guide them towards progress on nutrition and health.
- Investors can help drive progress by urging multinational companies operating in the region to apply the same nutrition and health standards in emerging and frontier markets as they do in more mature markets.
- Investors are encouraged to leverage their influence by integrating nutrition into their own reporting standards.

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