# 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 analyzes 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 analyzed, 37% meet ‘healthy’ thresholds—63% do not.

This report therefore provides important data and analyzes 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 mobilization 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.**

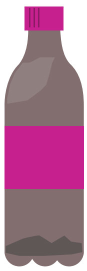
**21**

**COMPANIES INCLUDED IN THE PRODUCT PROFILE IN TANZANIA**

which accounted for

**48%**

of the total sales of 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 Meetings the Healthier Threshold | % Sales of Healthier Products |
|---|---|---|---|---|
| HSR | 483 | HSR % ≥ 3.5 | 25% | 37% |
| mHSR+ micro-nutrients | 483 | HSR % ≥ 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 ad 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 should prioritize investment in companies that demonstrate improvements; 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.

- Investors can 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 should help drive progress by demanding that global-headquartered companies operating in the region to apply the same or better nutrition and health standards in emerging and frontier markets as they do in more mature markets.

- Investors should 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