

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.¹ 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).²

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.³⁻⁵ 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. ⁶
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. ⁷
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. ⁸
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. ⁹

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.

^a 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 food & beverage 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.^a 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. The table below shows the number of products which were classified as fortified, and the number for which micronutrient data was available. The table 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 analyzed 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, food & beverage 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.

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