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

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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 the assessment. 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 analyzed 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.

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[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 % ≥ 3.5	25%	37%
mHSR+ micro-nutrients	483	HSR % ≥ 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 ranking 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.

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

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.

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.

[i]   The results for the Tanzania Product Profile have been considered here, as these results have been updated since the last Global Index 2024.
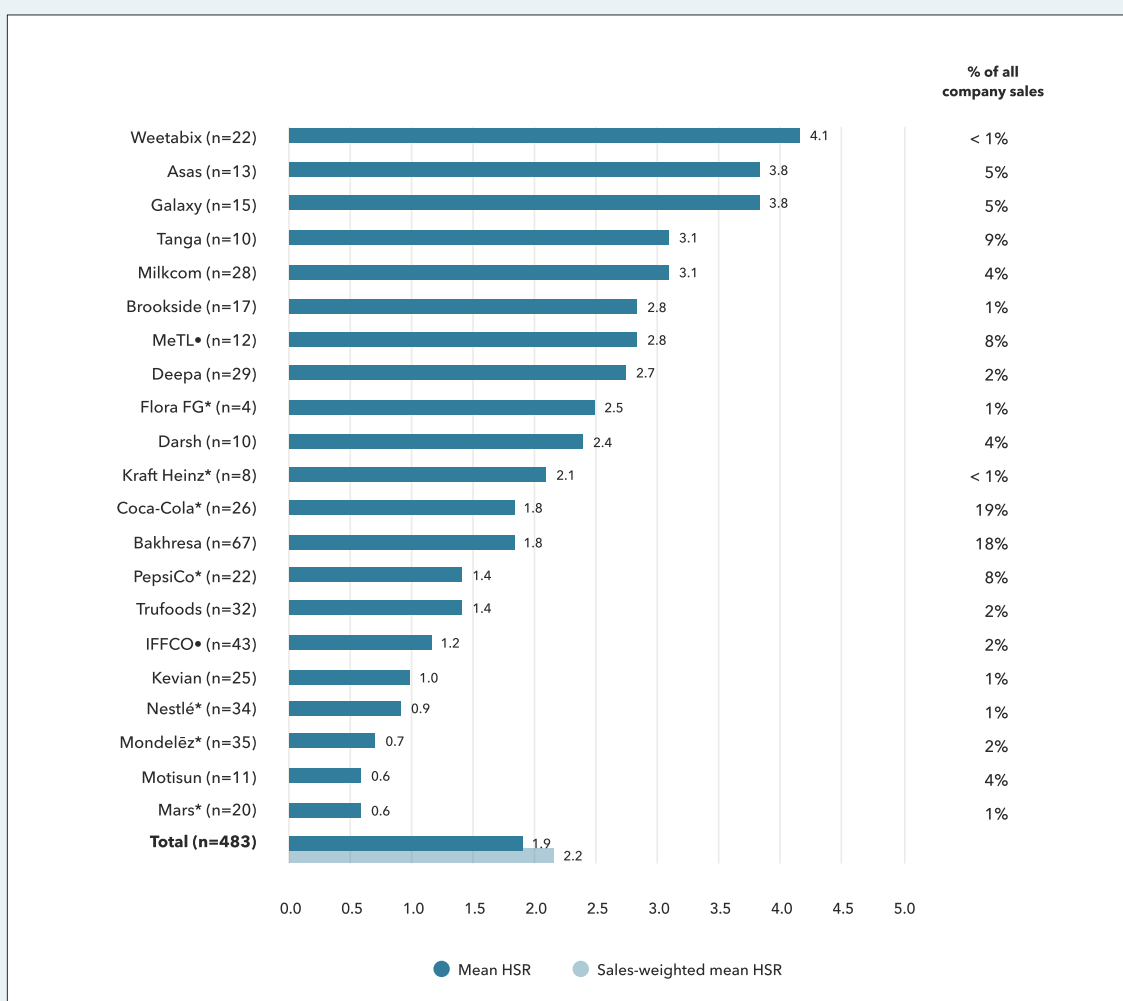
How Do Companies Compare in Terms of Healthiness?

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 result cards and on the ATNi dashboard.

FIGURE 1

**MEAN HSR AND SALES-WEIGHTED MEAN HSR BY COMPANY –
OVERALL PRODUCT PORTFOLIO (21 COMPANIES)**

Company	Mean HSR	% of all company sales
Weetabix (n=22)	4.1	< 1%
Asas (n=13)	3.8	5%
Galaxy (n=15)	3.8	5%
Tanga (n=10)	3.1	9%
Milkcom (n=28)	3.1	4%
Brookside (n=17)	2.8	1%
MeTL• (n=12)	2.8	8%
Deepa (n=29)	2.7	2%
Flora FG* (n=4)	2.5	1%
Darsh (n=10)	2.4	4%
Kraft Heinz* (n=8)	2.1	< 1%
Coca-Cola* (n=26)	1.8	19%
Bakhresa (n=67)	1.8	18%
PepsiCo* (n=22)	1.4	8%
Trufoods (n=32)	1.4	2%
IFFCO• (n=43)	1.2	2%
Kevian (n=25)	1.0	1%
Nestlé* (n=34)	0.9	1%
Mondelēz* (n=35)	0.7	2%
Motisun (n=11)	0.6	4%
Mars* (n=20)	0.6	1%
Total (n=483)	1.9 / 2.2	

● Mean HSR   ● Sales-weighted mean HSR

* 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.[j] See Figure 2.

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j   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

Legend:
● HSR ≥ 3.5   ● HSR < 3.5   - Mean HSR for the companies assessed in the (sub-)category
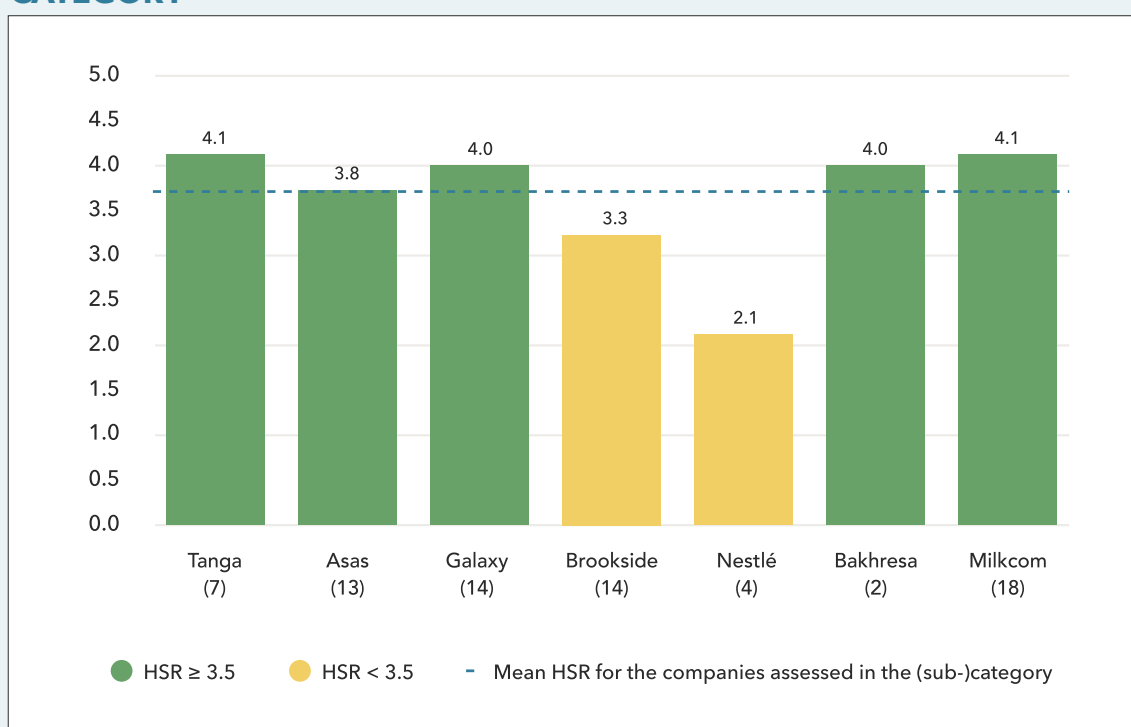
In the "Discretionary/Indulgent Food" category types group (combining Confectionery, Ice cream, Savoury Snacks and Sweet Biscuits), the mean HSR ranged from 0.5 for Nestlé (24 products) and Mondelez (32 products), to 2.6 out of 5 stars for Deepa (27 products) (Figure 3).

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).

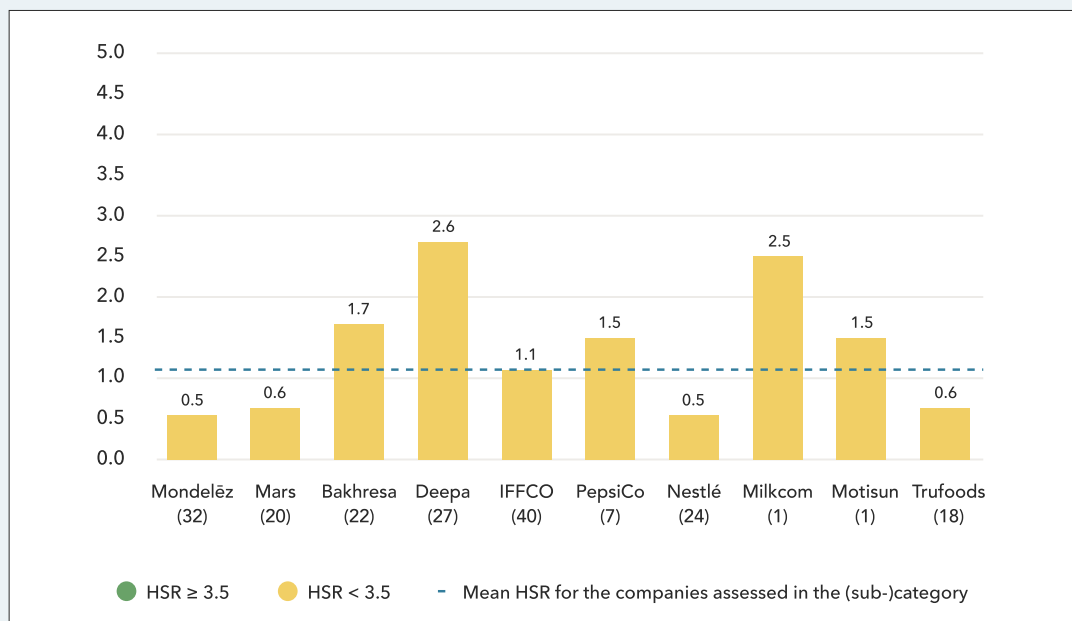**COMPARISON OF MEAN HSR BY COMPANY WITHIN THE DISCRETIONARY/INDULGENT FOOD CATEGORIES**

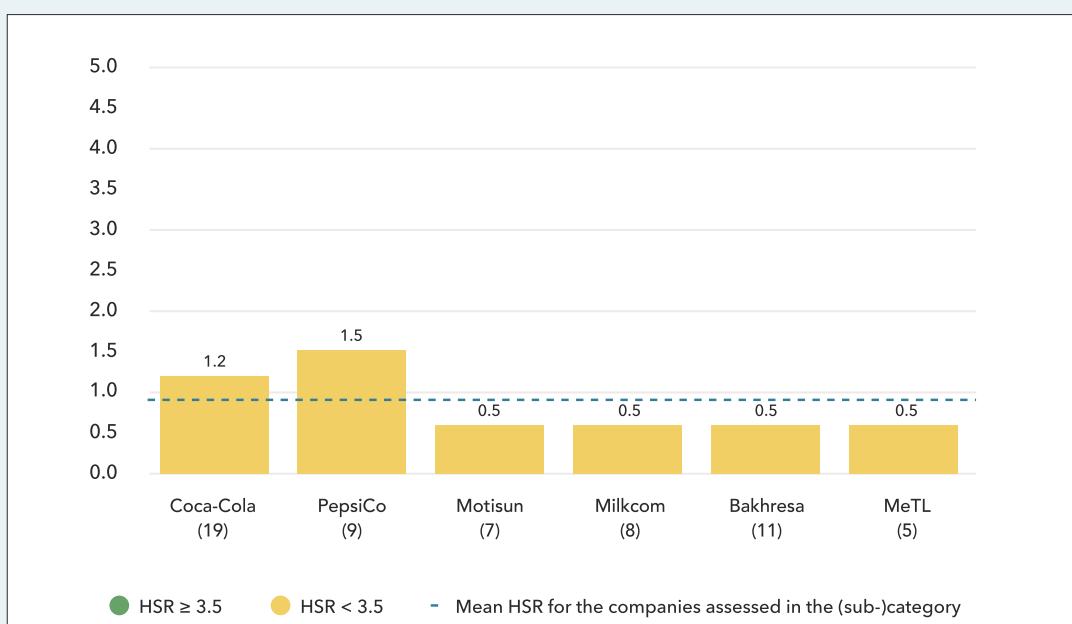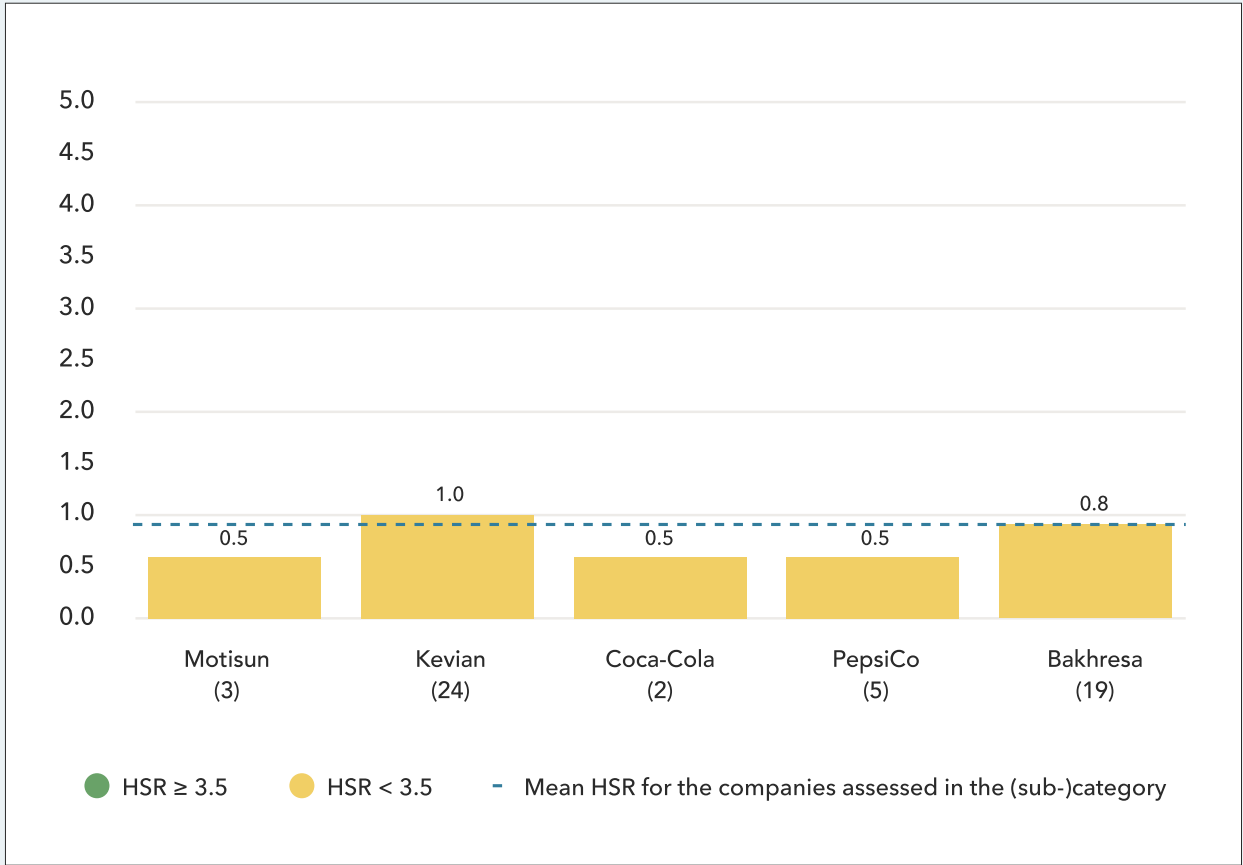**COMPARISON OF MEAN HSR BY COMPANY WITHIN THE CARBONATES CATEGORY**

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).

COMPARISON OF MEAN HSR BY COMPANY WITHIN THE JUICE CATEGORY

Legend:
● HSR ≥ 3.5   ● HSR < 3.5   - Mean HSR for the companies assessed in the (sub-)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

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 a 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.[2]
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.

REFERENCES

1   Dunford E, Cobcroft M, Thomas M, Wu JH. Technical Report: Alignment of NSW Healthy Food Provision Policy with the Health Star Rating System [Internet]. NSW Ministry of Health; 2015. Available from: https://www.health.nsw.gov.au/heal/Publications/health-star-rating-system.pdf

2   Ministry of Health of the United Republic of Tanzania. Tanzania Mainland Food-Based Dietary Guidelines for a Healthy Population: Technical Recommendations [Internet]. Dodoma, Tanzania: Ministry of Health; 2023. Available from: https://www.moh.go.tz/storage/app/uploads/public/658/295/d4b/658295d4bbcba467264195.pdf