

A woman with a blue patterned headwrap and a green and orange patterned dress is sitting outdoors. She is holding a small object in her hands. In front of her is a large yellow plastic water jug and a pink plastic bag. The background is a lush green area with red flowers.

MAPPING TANZANIA'S PACKAGED FOOD ENVIRONMENT 2025

Insights into Policy, Industry, and
Consumer Landscapes

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Foreign, Commonwealth
& Development Office



ABBREVIATIONS

BOP	Back-of-pack
COPRA	Cereals and Other Produce Regulatory Authority
CTI	Confederation of Tanzanian Industries
EAC	East African Community
F&B	Food and beverage
FAO	Food and Agricultural Organization
Food-EPI	The Healthy Food Environment Policy Index
FOP	Front-of-pack
GAIN	Global Alliance for Improved Nutrition
GIFNA	Global Database on the Implementation of Food and Nutrition Action
HSR	Health Star Rating
NCD	Non-communicable disease
NFFA	National Food Fortification Alliance
NGO	Non-governmental organization
NMNAP II	National Multisectoral Nutrition Action Plan II
NPM	Nutrient Profiling Model
OOH	Out-of-home
PSSN	Productive Social Safety Net
RCT	Rice Council of Tanzania
SADC	South African Development Community
SMEs	Small and medium-sized enterprises
SSB	Sugar-sweetened beverage
TASPA	Tanzania Salt Producers Association
TBS	Tanzania Bureau of Standards
TCCIA	Tanzania Chamber of Commerce, Industry, and Agriculture
TFA	Trans fatty acid
TFDA	Tanzania Food and Drugs Authority
TPSF	Tanzania Private Sector Foundation
TZS	Tanzanian Shilling
UPF	Ultra-processed food
USAID	United States Agency for International Development
USD	United States Dollar
VAT	Value added tax
WHO	World Health Organization
WTO	World Trade Organization

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EXECUTIVE SUMMARY

Across the African continent a significant shift is occurring in the food environment. Economic growth, urbanization, and increased globalization have led to rapid changes in dietary patterns.

This report consolidates information on the growth of the packaged processed food market in Tanzania and its impact on the food environment. Adopting a private sector lens, the report explores **the food and beverage industry's role in the country's ongoing nutrition transition.**

This report delves into consumption patterns, market structure (including supply and distribution chains), policy developments, food industry practices, and food fortification. The research framework was built on pre-existing food environment mapping frameworks—including, for example, 'The Healthy Food Environment Policy Index' (Food-EPI), 'High Level Panel of Experts' report on nutrition and food systems', Informas Food Retail, and United States Agency for International Development (USAID)/Turner frameworks.¹⁻⁴

Between August 2024 and May 2025, ATNi conducted desk research and identified key peer-reviewed publications, studies, reports, and the latest debates surrounding the packaged food market environment in Tanzania. This research found:

- **Tanzania's packaged food sector grew by 21% between 2018 and 2023. Sales of ultra-processed foods (UPFs) grew by 12% in the same period**, reaching USD 2,269.3 million in 2023.
- **Evidence of increasing packaged processed food and beverage (F&B) consumption in both urban and rural areas**, particularly of sugar-sweetened beverages.
- **Limited data on micronutrient-fortified packaged processed products** beyond those covered by mandatory regulation.
- Tanzania's forward-looking national strategies and guidelines acknowledge **the increasing role that packaged processed foods—and UPFs—play in consumers' diets.** The government intends to introduce regulations to mitigate the effects of less healthy packaged processed foods and beverages on public health.

Through this research, ATNi has identified gaps in literature and provided recommendations to support evidence-based policymaking, increase industry accountability, and inform future research aimed at improving the food environment in Tanzania.

In summary:

Policymakers, companies, research institutions, and other nutrition stakeholders are encouraged to refer to the latest 'National Multisectoral Nutrition Action Plan (NMNAP II)'—Tanzania's five-year strategic action plan to address malnutrition in all its forms. The plan underscores the importance of governance, financial resources, and monitoring, evaluation, and accountability in ensuring its effective implementation and positive impact on the nutritional needs of women, men, children, and adolescents.

Policymakers are advised to:

- Hold consultations with relevant nutrition stakeholders to establish a government-endorsed nutrient profiling model (NPM).
- Follow through with the NMNAP II recommendations to strengthen fiscal policies and regulate food marketing and labelling.
- Promote public procurement of healthy food products.
- Establish guidelines for the fortification of packaged processed foods beyond mandatory fortification regulations.

Research institutions are encouraged to:

- Work to standardize definitions related to 'healthy' packaged processed foods.
- Investigate production and distributions chains for packaged processed foods and beverages in Tanzania's urban and rural areas.
- Assess to what extent healthy and less healthy packaged processed products are being fortified.

Food and beverage companies are urged to:

- Align commercial strategies and operations with Tanzania's public health standards and national guidelines for healthy diets.
- Commit to responsible marketing and labelling practices.
- Refrain from fortifying less healthy products.
- Ensure that healthier options are accessible and affordable, particularly for low-income consumers.

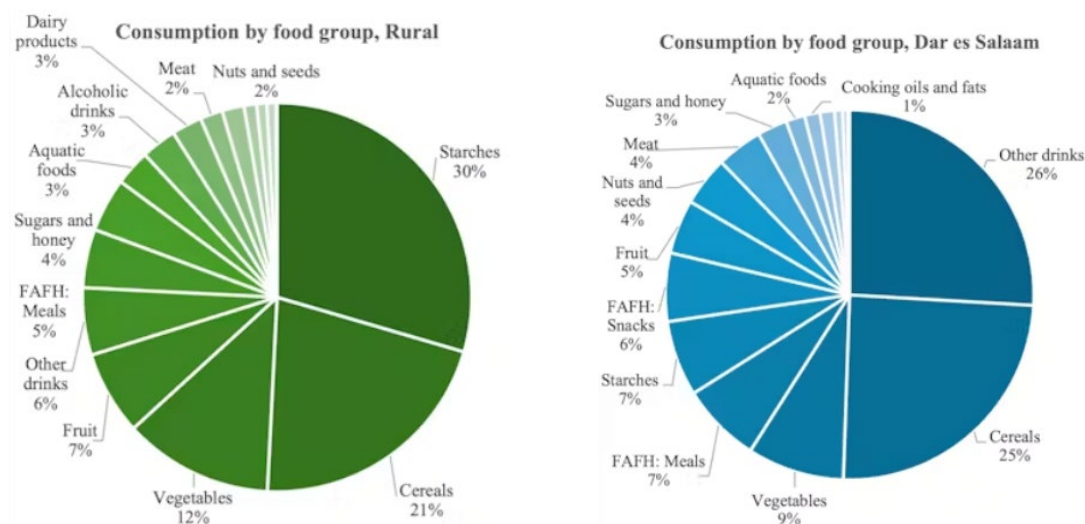
In June 2025, ATNi and its partners will publish a report presenting the findings from an assessment of the healthiness of more than 400 packaged F&B products sold by 21 of the largest F&B companies operating in Tanzania. These companies represent an estimated 40-50% of all commercial packaged F&B sales in the country. The analysis uses three NPMs, including the Health Star Rating (HSR) system, the World Health Organization Model for the Africa Region, and the HSR + Micronutrients, a model specifically designed to assess micronutrient quality and fortification. For 10 of the largest F&B manufacturers in Tanzania, this analysis is complemented with an additional evaluation of corporate nutrition policies, commitments, and disclosure.

THE NUTRITION TRANSITION IN TANZANIA

Tanzania has achieved notable progress in addressing the triple burden of malnutrition. It has made strides in reducing stunting and underweight in children under five by almost 20% and 13% respectively, as well as lowering the prevalence of anaemia in women of reproductive age by 6% over the last two decades.⁵⁻⁷ Yet, in 2022, 75.5% of Tanzanians were unable to afford a healthy diet⁸—and, in the same year, an estimated 32% of women of reproductive age, 17% of men, and 4% of children under five were living with overweight and/or obesity.⁶ Non-communicable diseases (NCDs), including diet-related diseases, accounted for an estimated 34% of deaths in Tanzania in 2019.⁹ Malnutrition and diet-related disease remain a key public health issue in the country, particularly as healthy diets continue to be out of reach for much of the population.

The rise in overweight, obesity, and diet-related disease is linked to Tanzania's rapidly changing food environments, in which less healthy packaged processed foods are becoming more readily available. While 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.¹⁰⁻¹⁴ Agricultural transformation and rural development have altered migration patterns and household incomes, which, combined with the growth of private food enterprises and processing hubs, is reshaping food availability for consumers.^{15,16} This 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.¹⁷

Figure 1. Consumption of food groups in Tanzania, by urban and rural setting



Note: Food Away from Home (FAFH)
Source: Ameye, 2024

In response, the Tanzanian government has implemented several strategic efforts to address the rising burden of overweight, obesity, and NCDs, including promoting healthier diets.¹⁸ Key among these are the NMNAP II and the Tanzania National Strategic Plan for Prevention and Control Of Non-Communicable Diseases 2021–2026.^{19,20}

DESK REVIEW APPROACH AND METHODOLOGY

Several methods were deployed to produce this report. First, a desk review focused on the actors involved in Tanzania's packaged food and fortification value chains. Eleven food environment and food systems analysis frameworks were reviewed to identify the appropriate elements to be assessed within food environments, incorporating a private sector lens. From these, a core set of guiding themes for the research was derived:

1. **Consumption, Affordability, and Accessibility:** Consumption patterns of fresh food and packaged processed food; consumer demand, consumption trends, and affordability and accessibility of food products.
2. **Market Structure and Direct Influencers:** Value chain actors (producers, processors, manufacturers, retailers, out-of-home (OOH), delivery services), food product offerings, share of market (% food sold from different types of actors), economic and political influencers that shape the food market (investors/shareholders and government).
3. **Food Policy and Regulation:** Regulation and standards on food quality, safety, trade law, subsidies, imports/exports, food prices, labelling, marketing, food composition, and social safety net programmes.
4. **Products:** Food promotion/marketing, labelling, offerings, healthiness, categories, composition, and processing.

Next, a literature search for existing tools, peer-reviewed publications, studies, and reports on the packaged food market environment in Tanzania was conducted. The search term 'East Africa food environment', as well as other key search words derived from the aforementioned food environment mapping tools, were used to gather information. In total, 210 sources were reviewed. Apart from the articles obtained directly from journals and academic databases, additional sources were also identified and obtained from grey literature, technical reports, conference proceedings, professional organizations bulletins, and websites of organizations with a stake in the packaged food environment.

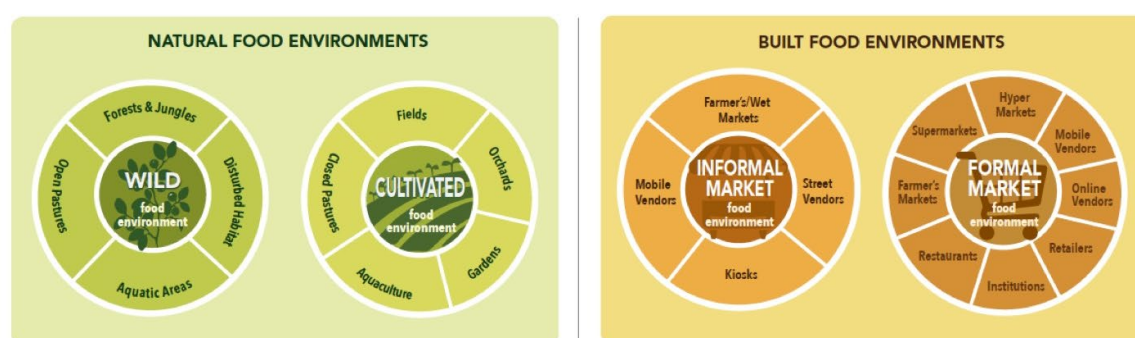
To complement these publications and reports, market databases (such as Euromonitor) were consulted to gather information on the market structure of the F&B industry in Tanzania, including food companies and their market share.

A comprehensive list of definitions used to guide the research and search terms can be found in the accompanying methodology document (published separately). One critical aspect to highlight is the terminology surrounding food processing, which is central to the interpretation of the literature reviewed for this report, and the subject of ongoing global debate. In this report, we use the term 'packaged processed food' to refer to foods manufactured by F&B companies that has undergone any processes or changes to its natural state, encompassing minimally, moderately, highly, and ultra-processed foods (UPFs).^{21,22} Research reviewed for this report often used the term 'processed food' to refer to minimally processed staples (e.g. packaged grains), and the distinction between different types of packaged processed foods was often unclear and inconsistent across studies. To streamline focus, this report does not differentiate between levels of processing, except for when literature explicitly refers to UPFs, such as in the Tanzania Dietary Guidelines, in which case this is clearly stated. For further analysis of this terminology, refer to the ATNi report on UPF terminology.²³

LIMITATIONS

Scope: This desk research aimed to map a specific segment of Tanzania’s food environment for which relatively little research has been conducted to date: the packaged processed food environment. Therefore, the scope of this report focuses on the built food environment and excludes natural food environments. Within this, the analysis encompasses factors that influence informal and formal markets through which consumers may purchase packaged processed foods (see Figure 2).²⁴ For example, Tanzania’s substantial agricultural sector produces the food which forms the backbone of consumers’ diets—but, as this is considered part of the cultivated natural food environment, it is out of scope of this report. However, staple foods^a—such as minimally processed grains, flour, and milk, which are pre-packaged and sold through formal and informal retail channels—are within the scope of this report, as they fall under the category of packaged processed foods.

Figure 2. Food environment typology



Terminology: The term ‘packaged food environment’ is used throughout this report to reference a subsection of the built food environment, encompassing elements that dictate the supply, demand, and enabling environment for the sale and consumption of packaged processed foods. ATNi recognizes that this terminology has not been widely used in the existing literature to date.

Available literature: While the literature on processed staple foods in Tanzania is abundant, research on non-staple packaged processed foods and beverages is notably more limited. Further, much of the existing literature on Tanzania’s packaged food environment is not recent and may not reflect the current situation in the country. This highlights a significant research gap that ATNi initiatives aim to bridge.

Sources: Apart from the articles obtained directly from journals and academic databases, additional sources were also identified and obtained from grey literature, technical reports, conference proceedings, professional organizations bulletins, and the websites of organizations with a stake in the packaged food environment. ATNi recognizes that while these sources are often less rigorously reviewed, they are important for capturing the most recent developments in Tanzania’s food environment.

Generalizability: Tanzania is a very diverse country with heterogeneous topography, foods, and wealth distribution. Much of the literature covered in this exercise focused on urban areas, such as Dar Es Salaam.

^a Staple foods are defined by the Food and Agricultural Organization (FAO) as “foods that are eaten regularly and in such quantities that they constitute a dominant portion of a diet and supply a major proportion of energy and nutrient needs.” In Tanzania, examples of staple foods include cereals (wheat and maize) and starches.

As such, the findings of these studies may not be reflective of the Tanzanian mainland, or the whole United Republic of Tanzania (including Zanzibar).

ATNi acknowledges these limitations and recommends that readers interpret findings within the context of these boundaries, as the exclusion of key components limits the generalizability of conclusions drawn from this analysis.

RESULTS

The results of this desk research are outlined in two sections:

- 1) Packaged food environment
- 2) Fortified packaged food environment and staple food value chain mapping

Each section is structured according to the four elements of the mapping framework introduced in the methodology section of this report: market structure and direct influencers; consumption, affordability, and accessibility; food policy and regulation; and product offering.

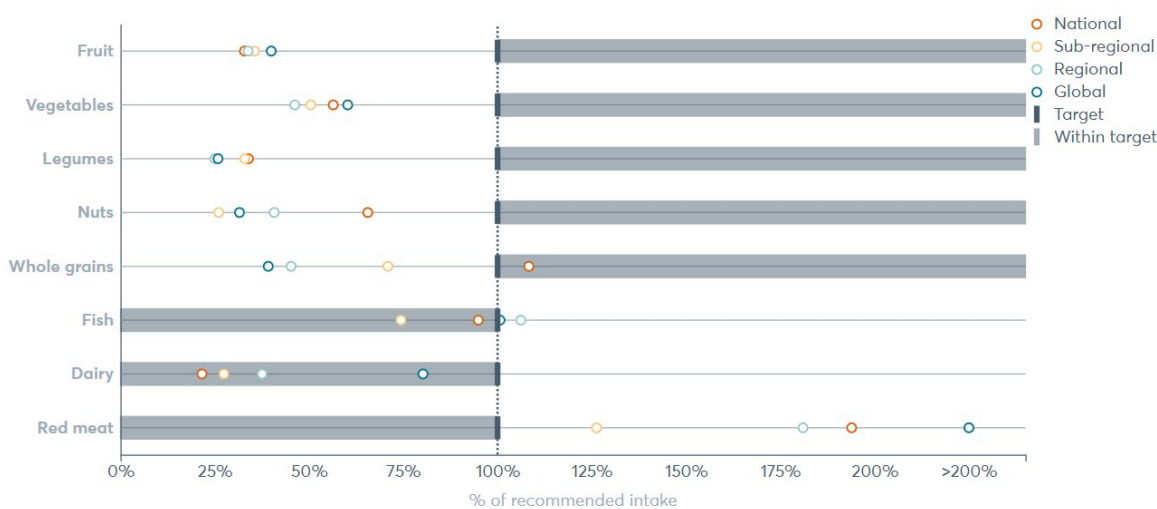
1.1 SECTION A: PACKAGED FOOD ENVIRONMENT

1.1.1 Consumption, Affordability, and Accessibility

Consumption

In 2019, an estimated 43% (58,835 Tanzanian shillings) of urban consumers' total *per capita* monthly expenditure was spent on food, while in rural areas, this increased to 58% (44,473 Tanzanian shillings).²⁵ Consumers' diets largely consisted of cereals, starchy roots, pulses, animal products, and fruits and vegetables.²⁶ For example, Figure 3 shows that Tanzanians' average consumption of red meat (27 grams per day) exceeds global targets, while average consumption of fruits (65.8 grams per day) and vegetables (169.3 grams per day) is lower than required.²⁷

Figure 3. Dietary intake of food categories in Tanzania compared to Global Nutrition Report targets



This is corroborated by data from the Global Diet Quality project, which showed that, in September 2021, 94% of Tanzanians consumed at least one starchy staple the day prior to the survey; 50–70% consumed at least one fruit, vegetable, nuts and legumes; 29% consumed salty or fried snacks; and 16% consumed sweet beverages.²⁸ Studies show that diets are slowly expanding from traditional, locally produced staple foods (such as maize, cassava, sweet potatoes, and cooking bananas) to include packaged processed foods (such as rice, bread, cereal products, confectionery, and sugar-sweetened beverages (SSBs)).²⁹

Much of the literature disaggregates packaged food consumption according to the urban-rural divide in Tanzania. A 2021 analysis of household consumption data in Tanzania showed that packaged food consumption is not limited to urban areas: packaged foods, including ultra-processed products, are also penetrating the diets of consumers in rural areas, and were found to make up 38% of diets amongst the rural poor (see a breakdown per product category in Table 1).³⁰

Table 1. Estimated percentages of ultra-processed food and beverage categories consumed in urban and rural settings

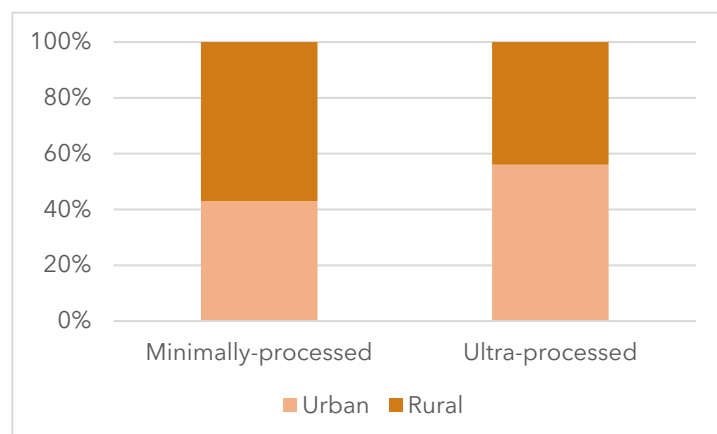
Food Category	% Urban	% Rural
SSBs	32	25
Bread	37	14
Tea and coffee	15	13
Biscuits, cake, and ice cream	3	3
Pasta	4	4
Chocolate and confectionery	1	1
Processed meats	0	0
Dairy	2	2
Canned fruits and jam	0	0
Sauces and condiments	0	0
Baking products	0	0
Other (incl. alcohol)	5	23

Note: The study's definition of 'ultra-processed F&B' categories follows the NOVA classification, adjusted to reflect product categories captured in the Tanzanian Household Budget Survey 2011-2012.

Source: Sauer et.al, 2021³⁰

This is consistent with trends in other African countries: the Food and Agricultural Organization (FAO) State of Food Security and Nutrition in the World 2023 report found that rural households in 11 African countries consumed packaged processed foods.³¹ Additionally, a study spanning several countries in Sub-Saharan Africa, including Tanzania, estimated a fairly consistent share of packaged food consumption across minimally-processed and ultra-processed products in urban and rural areas (see Figure 4).¹⁷

Figure 4. Share of packaged food type consumed in urban and rural areas in Sub-Saharan African countries, including Tanzania



Source: Reardon, 2021

Data from the 2021 Tanzania National Panel Survey suggested that moving to an urban area does not affect fat intake, animal-source foods, or dietary diversity, but is linked to greater consumption of high-sugar, convenience foods.³⁰ This dietary shift was consistent across all urban locations surveyed, including towns and small cities.

Accessibility

The existing literature investigates factors affecting the consumption of different food groups in Tanzania. Increased consumption of less healthy, processed food appears to be influenced by food prices, rising incomes, and the different ways consumers access food in rural and urban settings.³²

Food purchases: In rural areas of Tanzania, 60% of total food consumption comes from food purchases, with packaged and unpackaged highly processed foods^b (such as Mandazi) accounting for three-quarters of these.³⁰ However, in urban settings, up to 97.5% of food consumed comes from food purchases, of which 78% is packaged.³⁰ One study linked lower household food purchases in rural areas to availability of foods produced at home, including fruits and vegetables, which tends to decline when consumers migrate to urban areas.³² Specifically, the study found that, in urban consumers' diets, basic staple foods—including maize, cassava, and sweet potatoes—were generally replaced by convenient packaged processed options like rice, processed cereal, sugary drinks, and meals prepared out of home.³²

Income: Using the NOVA classification for defining levels of processing, another study reported that UPFs represented 21% of food consumption in rural areas and 36% in urban areas of Tanzania, with higher consumption in larger cities and among wealthier consumers.³⁰ For example, 52% of urban and 11% of rural households purchase packaged processed bread.¹⁷

Convenience: An additional factor influencing the increased consumption of packaged processed foods in urban settings is convenience. Packaged processed foods provide a convenient alternative that help adults reduce time spent on home-processing and cooking, particularly as women increasingly participate in the workforce.¹⁷ Given these long-term trends, processed food consumption is expected to continue rising.³⁰

Gender: A 2018 study investigating packaged food consumption in four African countries, including Tanzania, identified two main dietary patterns across men and women: 'mixed' and 'processed' (see Table 2).³³ While the study included mainly fresh and minimally processed food groups in its categorization, it may not reflect current dietary patterns related to packaged processed food consumption in Tanzania.

^b The study defines unpackaged highly processed foods as comprising multiple low-processed products, with the set undergoing further processing, such as frying or baking.

Table 2. Mean daily servings of 37 food groups across men and women in Tanzania, 2018

Food Group	Men	Women
Cereals	1.24	0.93
Starchy roots	0.58	1.07
Plantains	0.34	0.42
Refined grains	0.44	0.7
Desserts	1.29	0.63
Fruit	4.13	6.43
Other vegetables	5.22	6.95
Fruit juice	0.21	1.11
Beans	2.13	2.46
Nuts	0.49	0.59
Tomato	1.99	2.55
Root vegetables	0.81	1.63
Red meat	0.5	0.73
Organ meat	0.16	0.21
Poultry	0.06	0.06
Cold cuts	0.11	0.13
Dried fish	0.07	0.15
Fresh fish	0.05	0.16
Eggs	0.09	0.14
Full-fat milk	0.11	0.19
Low-fat milk	0.32	0.27
Yoghurt	0.14	0.21
Cheese	0.55	0.56
Tea	1.43	1.09
Coffee	0.17	0.14
Soda	0.47	0.42
Diet soda	0.1	0.13
Coconut milk	0.08	0.16
Sugar	0.76	0.9
Peanut butter	0.03	0.08
Dressing	0.01	0.04
Sweets	0.11	0.12
Chips	0.19	0.28
Spread	0.07	0.13
Margarine	0.01	0.04

Note: Highlighted cells in the 'men' and 'women' columns indicate where consumption was higher than one daily serving in 2018

Source: Holmes et.al., 2018³³

Post-harvest loss and food imports: Post-harvest losses—due to inadequate transport infrastructure, cold storage, and handling practices—can limit the availability of locally produced fresh produce, leading to a reliance on less nutritious, packaged processed alternatives.³⁴ In Tanzania specifically, pre- and post-harvest and distribution losses average over 50% due to poor infrastructure and distribution issues, such

as inadequate packaging, rough handling, lack of storage capacity, and poor storage conditions.³⁵ To cover for these losses and supplement domestic production, Tanzania imported over USD 1,000 million-worth of products across different food categories in 2022, with the share of imports higher for urban areas than rural.^{10,30,36} Urban living is associated with increased access to imported packaged food and thus a wider choice of options from foreign cultures.³²

Table 3. Value of Tanzania's food imports, 2022

Food Category	Value (USD million)
Fruits and vegetables	20
Cereals and preparations	501
Meat and preparations	7
Fats and oils	165
Beverages	59
Dairy and eggs	11
Sugar and honey	209
Other	50
Total	1,022

Source: FAO, 2024³⁶

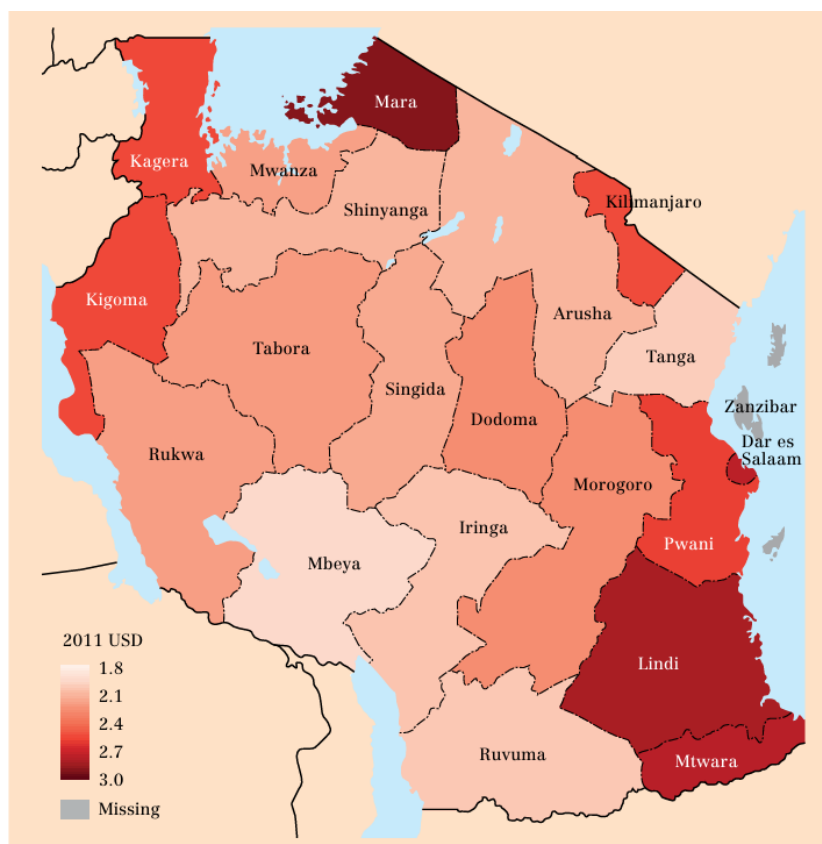
Affordability

In Tanzania, food represents about 60% of total *household* expenditure.³⁷ This is higher for urban households (63%) compared to rural households (55%), linked to higher incomes and broader access to a wide variety of food options in urban areas.^{17,37} Yet, the 2015 Dar es Salaam Urban Cohort Study found that 58% of the 21,000 households surveyed reported experiencing some level of food insecurity, demonstrating that adequate food is not affordable for all urban residents.³⁸ For the poorest households, up to 70% of the household budget can be spent on food.³⁹

The cost of a diet that meets all of a household's nutritional needs is more than double that of a diet that is purely energy-sufficient, suggesting cost is a barrier to healthier diets in the country. One study found that, as household expenditure increases, diet quality improves—with wealthier households consuming higher-quality food items or a wider mix of food groups.⁴⁰ Another study highlighted that the price of a nutritious diet is driven by the high cost of animal-source foods, with 25–30% of Tanzanian families unable to afford them.⁴⁰ For example, the wealthiest households spend more on meat, dairy, rice, sugar, and fruit, whilst maize dominates the budgets of poorer households.⁴⁰

There are striking regional differences in the cost of healthy diets in Tanzania (Figure 5), as well as regional variations in the cost of each food group. The least variation is seen in fruits and protein-rich foods, and the most in vegetables and oils.^{16,41}

Figure 5. Average cost of a healthy diet by region in Tanzania, 2011-2015



Source: Kibona and Kironyi, 2024¹⁶

In general, the affordability of different food groups is exacerbated by inflation. Between 2002 and 2012, Tanzania experienced significant food price inflation, estimated at around 8.51% per year. For example, food inflation reached 4.4% in November 2021.⁴² Largely driven by supply-side issues such as domestic agricultural shocks and global food price crises, the price of food increased more rapidly compared to the price of non-food items.⁴³

While Sauer et al. (2021) demonstrated that purchasing of packaged processed foods is relatively consistent across income levels, another study found that lower intake of traditional foods and increased demand for highly processed, packaged, ready-to-eat foods observed in urban areas is largely explained by purchasing by the higher income groups.^{30,32} UPFs^c appear to be more affordable to wealthier consumers, as they are estimated to make up 12% of the consumption of low-income, 20% of low-middle income, and 32% of upper-middle income groups.⁴⁴

Finally, research suggests that pricing is affected by the outlet through which foods are purchased (see section on retailers, above). Two-thirds of Tanzanian households use both modern and traditional retailers, with wealthier households more likely to shop at supermarkets and hypermarkets.¹⁵ However, informal food vendors remain the primary and most frequently used food source for poorer and food-insecure households.^{45,46} One study examined motivations for residents in Dar es Salaam to purchase foods via informal retailers rather than formal supermarkets, and reasons cited included the fact that

^c In this study, UPFs are defined largely in line with Nova classification group 4.

supermarkets are often more expensive, only sell fixed quantities of foods, are less accessible, and don't sell on credit.⁴⁷

1.1.2 Market Structure and Direct Influencers

The food sector, including agriculture and manufacturing, constitutes a large proportion of Tanzania's economy.⁴⁸ The total food market (both fresh and packaged products) is estimated to generate annual revenue of USD 27.60 billion and expected to grow further, with a projected compound annual growth rate of 8.24% between 2024 and 2029.⁴⁹ This is driven by trends such as population growth, urbanization, rising incomes, product innovation, and widening product portfolios from food manufacturers.⁴⁹⁻⁵¹ Additionally, 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.⁵²

The packaged food sector grew 21% between 2018 and 2023, with sales reaching USD 2,718 million.^{53,54} Sales of UPFs grew 12% in the same period, and reached USD 2,269.3 million in 2023.^{55,56} The packaged food market segment is growing in response to urbanization, shifting consumer lifestyles, and increasing demand for convenient, long-lasting food options.⁵⁷ Table 4 shows the estimated market shares of each packaged food category in 2022.

Table 4. Market shares of packaged food and beverage categories in Tanzania, 2022

Packaged Food Category	% Market Share
Baked goods	5–10%
Bottled water	0–5%
Breakfast cereals	0–5%
Carbonates	20–25%
Concentrates	0–5%
Confectionery	0–5%
Dairy	15–20%
Edible oils	10–15%
Energy drinks	0–5%
Ice cream	0–5%
Juice	5–10%
Meals and soups	0–5%
Other hot drinks	0–5%
Processed fruit and vegetables	0–5%
Processed meat, seafood, and meat alternatives	0–5%
Rice, pasta, and noodles	10–15%
Savoury snacks	0–5%
Sweet biscuits, snack bars, and fruit snacks	0–5%
Sweet spreads	0–5%

Source: EMI International Passport data, 2022

Retailers

Packaged foods are available and sold in both formal outlets (e.g. supermarkets) and informal retail outlets (e.g. semi-permanent kiosks, small shops, and temporary set-ups, such as umbrellas, pallets, boxes, or baskets commonly seen in open markets). While the latter are especially prevalent in rural areas, the informal market currently dominates the food retail environment, with Tanzanians making the majority (estimated 90%) of their household food purchases from informal markets and family-owned shops.^{10,47} This is attributed to the lack of formal retail culture and the lower prices often offered by informal retailers compared to supermarkets.⁵⁸ Although supermarkets are increasingly penetrating urban areas, they continue to co-exist alongside informal retailers rather than displacing them, creating a 'symbiotic' retail environment.⁴⁶ The high density of informal vendors creates challenges for accurately characterizing the food environment. The broader retail sector in urban areas, including Dar es Salaam, is also changing rapidly, with new types of retailers and food-oriented retail developments opening regularly.⁵⁹

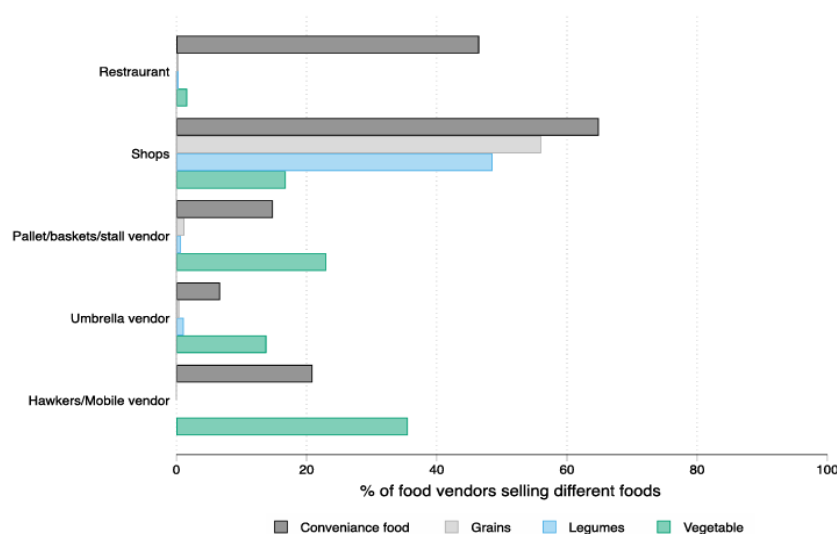
Retail surveys highlight the significance of packaged food sales across traditional shops and supermarkets, with both stocking a diverse range of packaged processed foods including grain flours, cookies, cakes, noodles, sweetened juices, sweetened beverages, and packaged milk.⁵⁹ While traditional shops and supermarkets consistently sell similar types of sugary, salty, and oily highly-processed foods, the latter offers a greater variety within each category.⁵⁹

— *Informal retailers*

Tanzania's informal market is estimated to be 56% the size of the country's gross domestic product. It is a cornerstone of food retail in the country, with two Dar es Salaam markets alone servicing upwards of 90,000 consumers a day.^{60,61} Tanzanians typically source fresh foods from informal vendors, who are estimated to control 95% of the fruit and vegetable market share in the country.⁶² Information on packaged processed foods sold through informal retail outlets is limited; however, informal vendors are also a (potential) source of packaged food consumption.

A 2019 study mapping informal food environments in peri-urban Dar es Salaam reported that permanent structure shops were the most common type of establishment (34%), followed by umbrella vendors (23%), basket/pallet vendors (21%), and mobile vendors (17%) (Figure 6).⁴⁷ Shelf-stable items, such as grains, legumes, and convenience foods (including wafers, biscuits, branded and unbranded chips, peanut butter, sugary drinks, candy, bread, and other snacks) were primarily available in small shops, while mobile food vendors focused on selling vegetables, especially leafy green vegetables.⁴⁷

Figure 6. Types of informal retailers in Tanzania and the foods they stock



— Formal retailers

Supermarkets are becoming increasingly common in Tanzania, with significant growth since the 1990s, especially in big cities and towns. For example, in 2019, Dar es Salaam had more than 30 supermarkets across 12 chains.³² Data from 2023 shows that the density of retail chain outlets grew to 0.17 per 10,000 people in Tanzania, compared to 0.12 in 2009.⁶³ This is still relatively low compared to in the United States, for example, where retail chain outlet density stood at 5.28 per 10,000 people in 2023. The literature suggests that this expansion in Tanzania was driven by rapid urbanization, socioeconomic development, and income growth—the same factors largely driving the nutrition transition across Sub-Saharan Africa.⁶⁴ Supermarkets represent about 20% of Tanzania’s food retail market, and typically service middle-class and higher-income consumers, as they tend to be located in areas such as malls, where a premium is charged.^{4,32} Formal retail outlets typically aim to offer a broad assortment of grocery products under one roof, providing a ‘one-stop’ shopping opportunity for consumers’ convenience.⁶⁵

The existing literature identified several international chains originating from Kenya (i.e. Nakumatt and Uchumi) or South Africa (i.e. Game, Pick N Pay, Woolworth, and Shoprite) that have historically operated in Tanzania. However, many of these chains have since closed.⁶⁵ In some cases, supermarkets aiming to penetrate the Tanzanian market have struggled to gather sufficient resources to maintain their competitive edge against informal retailers. For example, one study suggested that Nakumatt struggled to expand in Dar es Salaam in 2017 due to insufficient retail space, a lack of relationships with local suppliers, and limited free flow of goods due to protectionist policies.⁶⁶ Although further research is needed to understand the current formal grocery retail landscape in the country, estimates of the market share of supermarkets operating in Tanzania in 2023 could be obtained from Euromonitor International (see Table 5).

There is some disagreement in the literature over where supermarkets source their food supply. Some research suggest that consumers shopping at supermarkets are commonly exposed to packaged processed products imported from Kenya, Dubai, India, and Europe.^{32,58} Another study found that 80% of products stocked in South African-owned supermarkets in Tanzania are sourced from South Africa.⁶⁷ However, the literature also found that inadequate infrastructure and the complexities of bureaucratic

procedures related to food importation standards in Tanzania has historically led supermarkets to source food items from local suppliers.⁶⁵

Table 5. Supermarkets operating in Tanzania, 2023

Grocery Retailers	Market Share (%)
Shoppers Supermarket	0–5%
Simply Fresh Retail	0–5%
Shrijee Traders	0–5%
Village Supermarket	0–5%
Mr Discount Supermarket	0–5%
Others	95–100%

Source: EMI International Passport data, 2023

— *OOH food retailers*

The OOH food retail sector in Tanzania is large and growing, with an estimated 25% of food in urban areas and 10% in rural areas being consumed away from home.^{17,68} A 2021 survey of over 6,000 food retailers (including formal and informal outlets) in peri-urban Dar es Salaam found that 33.7% sold prepared or cooked foods.⁴⁷

Formal OOH retail outlets operating in Tanzania include several American franchises, such as Pizza Hut, KFC, and Subway, who have established outlets in Tanzania's leading cities since the late 2010s.⁶⁹ As of 2023, the franchisee of Tanzanian KFC and Pizza Hut–Dough Works—had 27 outlets across Tanzania.⁷⁰

Manufacturers

— *Packaged processed food and beverage manufacturers*

Tanzania's manufacturing sector has experienced significant growth over the past few years, including the notable expansion of the food processing industry—driven by increasing consumer demand, investment in manufacturing infrastructure, and the government's push towards industrialization.^{57,71,72} However, within this, the packaged processed food sector continues to be relatively small compared to the unprocessed food sector. For example, only 2% of beef produced in Tanzania is processed and packaged, and only 4% of the fruit and vegetables produced undergo processing.^{69,73}

The domestic food manufacturing sector largely consists of small- and medium-sized enterprises (SMEs) producing a range of items, including dairy products; canned fruits and vegetables; fish and seafood; vegetable oils; processed grains; sugar and confectionery; spirits, wines, cider, and beer; soft drinks; and bottled water.⁴⁶ Many domestic food processing facilities are concentrated in major cities, such as Dar es Salaam, due to their robust infrastructure and port access.⁷⁴

Tanzania-based companies compete with international F&B manufacturers, including those from Kenya, Uganda, and South Africa. For example, in the case of packaged processed beverages, international companies such as Coca-Cola have historically dominated the market, but local large manufacturers—

including the Bakhresa Group (Azam), Motisun (Sayona), and Mohamed Enterprises (A-One drinks)—are beginning to increase their market share.⁷⁵

Box 1. Case study: Bakhresa Group

Established in the 1980s and headquartered in Tanzania, Bakhresa Group is the largest food processor in East Africa, and has expanded its presence beyond Tanzania to new markets, including Kenya and Zambia. The company has diversified its portfolio from milling and staple food processing (maize and wheat flour) into highly packaged processed food products, including confectionery, ice cream, and soft drinks^d

— Packaged processed food processors

Maize: Tanzania is ranked in the top 25 maize producing countries in the world, with the crop accounting for 70% of cereal production in the country and 93% of its consumers depending on it as a staple food.^{76,77} Tanzania also exports maize to other countries in the region, including Kenya, Somalia, Burundi, South Sudan, Rwanda, Uganda, and Zambia.^{78,79} Four millers (Bakhresa Group, Metl Group, ETG Commodities, and the Cereals and Other Products Board) currently dominate the maize milling industry, alongside a growing prevalence of SMEs.^{80d}

Figure 7. Tanzania's maize value chain



Source: Lunogelo, Gray and Makene, 2020⁸⁰

Wheat: Tanzania imports 90% of the wheat it consumes. For example, in 2019, while farmers produced 94,000 tonnes of wheat grain, there remained a domestic deficit for wheat grain (estimated to be 1 million tonnes), which was accounted for via imports.⁸¹ The domestic wheat milling sector predominantly consists

^d Bakhresa no longer produces maize flour.

of companies with mills and silos in urban areas in Tanzania, including Bahkresa Group and Azania Group (see Figure 8). The sector is expected to see increased demand due to the urbanization and growth of major cities like Dar es Salaam, Mwanza, and Arusha, where 80% of the country's wheat is consumed.⁶⁹

Figure 8. Capacity of Tanzanian wheat millers Bahkresa Group and Azania Group



Note: Bahkresa no longer produces maize flour.

Source: AsokoInsight, 2020⁸¹

Sugar: Tanzania's sugar industry originated in 1924 and is the largest agro-processing sector in the country.⁷⁴ The industry comprises four main millers: Kilombero Sugar Company (40% market share), Tanganyika Planting Company (34% market share), Kagera Sugar (17% market share), and Mtibwa Sugar Estates (9% market share).^{74,82} However, the domestic industry struggles to meet demand for sugar, so imports reached USD 151 million in 2021, following a waiver on import taxes on sugar for industrial use.⁸² The SSB and confectionery sectors are becoming increasingly important to the country's economy as Tanzania's population grows and younger people consume more sugary drinks and snacks. One study estimated that Tanzanian adults consume 150.8 ml of sugary drinks a day, with the highest consumption rates in the 25-34 year age bracket.⁸³ Within the next decade, significant investments are anticipated in sugar cane farming and processing, and the confectionery industry is expected to expand considerably.⁷⁴

Milk: Eighty-three plants process milk products in Tanzania, including large companies such as Tanga Fresh, Galaxy Food (Kilimanjaro Fresh), and ASAS Dairies.⁸⁴ Despite high demand for milk and significant potential of the domestic market, Tanzania is a net importer of dairy products such as milk powder, long-life milk, cheese, and butter. While the country produces around 2.4 billion litres of milk annually, it also currently imports over USD 7.7 million in dairy products annually from Kenya, South Africa, and the Netherlands.⁷⁴ Although Tanzania's milk market is expected to grow by 6.2% between 2025 and 2030, rising consumer demand for highly processed milk products may continue to support increasing imports—as only five local companies are estimated to manufacture such products in Tanzania: Azam Milk, Tanga Fresh, Milkcom, ASAS Dairies, and Galaxy Food.^{85,86}

Table 6. Food manufacturers operating in Tanzania

Snacks	Soft drinks	Dairy	Baked goods	Rice, Pasta, and Noodles
Cadbury (Mondelez International)	Coca-Cola	Tanga Fresh	Bakhresa Group	AKTZ Industries
Wrigleys Co EA (Mars)	SBC Bottling Company (PepsiCo)	ASAS Dairies	Bakers Delight Tanzania	Sawake Kenya Co (Indofood)
Strategic Food International Co (Britannia Industries)	Bakhresa Group	Galaxy Food & Beverage		Kohinoor Foods (Adani Group)
Bakhresa Group	Sayona Drinks (Motisun Group)	Bakhresa Group		Tanzania Pasta Industries
Smart Industry	Watercom	Milkcom Dairies		Selva Gida San AS (Ittifak Holding)
Iringa Foods & Beverages	A One Products & Bottlers (Metl Group)	Nestlé SA		
Deepa Industries	Super Meals	Flora Food Group		
IFFCO Group	Excel Chemicals	Brookside Dairy		
Kenafric Industries	Aqua Cool	Woodlands Dairy		
Parle Products	Chemi & Cotex Industries (Unilever Group)	Tanga Fresh		
Processed meat, Seafood, and Meat alternatives	Cereals	Edible oil	Maize flour	Wheat flour
Chin Huay Co	Weetabix East Africa (Post Holdings)	Metl Group	Metl Group	Metl Group
	Sun Mark	Murzah Oil Mills		Bakhresa Group
	Pioneer Foods/Simba (PepsiCo)			
	Proctor & Allan EA			
	Pioneer Foods			
	Royal Oven			

Source: EMI International Passport data, 2023

Industry Associations

The major industry associations active in Tanzania's F&B sector include:

- **Tanzania Salt Producers Association (TASPA):** Established in 1994, the TASPA plays a role in unifying salt producers, including small-scale producers, providing technical support, and monitoring universal salt iodization.^{87,88}
- **National Food Fortification Alliance (NFFA):** Established in 2003, the NFFA bridges the Tanzanian public and private sector, non-governmental organizations (NGOs), and aid organizations, and was responsible for developing the Food Fortification Action Plan in 2009, which was subsequently adopted by the government.⁸⁹
- **Tanzania Chamber of Commerce, Industry, and Agriculture (TCCIA):** Established in 1988, the TCCIA represents 30,000 members and advocates for business-friendly policies, international trade, and inclusive growth in Tanzania.⁹⁰
- **Tanzania Private Sector Foundation (TPSF):** Established in 1998, the TPSF has 400 members and aims to represent private sector views on policy formulation and reviews, and advocates for an enabling business and investment climate in Tanzania.⁹¹
- **Confederation of Tanzania Industries (CTI):** Established in 1991, the CTI positions itself as the 'Voice of Industry' in Tanzania and represents members from all sectors of the economy. The CTI represents industry interests, focusing specifically on fiscal policy and taxation, legal and regulatory frameworks, regional and multilateral trade arrangements, and infrastructure—mainly electricity, roads, railways, and ports.⁹²

Investors in the food and beverage industry

Information about investors and shareholders in Tanzania's F&B industry is limited, as many of the largest F&B companies are privately owned. Therefore, these companies are not required to disclose detailed financial information in the public domain, including the identities of their shareholders.

The Tanzania Impact Investment Forum 2025 attracted many impact investors in Tanzania's food and agriculture industry, and listed their names (see Table 7).

Table 7. Investors attending the Tanzania Impact Investment Forum 2025

Includes Agri-food Focus	Other Focus
1. Aceli Africa 2. Westerwelle Foundation 3. CRDB Bank 4. Palladium Group 5. ThirdWay Partners 6. IFC 7. Savannah Fund 8. iGravity 9. SEAF East Africa 10. DOB Equity 11. AlphaMundi Foundation	12. SSC Capital 13. Serengeti Business Angels Network 14. Warioba Ventures

Other impact investment platforms operating in Tanzania include Food Securities Fund (founded by Clarmondial) and the Nutritious Foods Financing Facility (founded by the Global Alliance for Improved Nutrition (GAIN) and supported by the United States Agency for International Development (USAID), Eleanor Crook Foundation, and Incofin Investment Management).^{93,94}

National institutions, such as the Tanzania Investment Centre and the Zanzibar Investment Promotion Authority, have been established in Tanzania and Zanzibar to promote investment opportunities in the country.⁹⁵ Both organizations have identified F&B manufacturing as a key area of interest for international investments.^{95,96} Opportunities cited include manufacturing, processing, and the preservation of meat, fish, fruit, vegetables, dairy, bread, sugar, chocolate, pasta, and coffee.⁹⁷

1.1.3 Food Policy and Regulation

The Global Database on the Implementation of Food and Nutrition Action (GIFNA) was used to identify food and nutrition policies in place in Tanzania.⁹⁸ In addition, the Tanzania Healthy Food Environment Policy Index Evidence Pack reviewed 68 resources concerning the food environment in Tanzania, including government policy documents and academic publications. This section is structured according to the key policy mechanisms typically used to influence safe and healthy food environments.

Food quality and food safety

In Tanzania, regulations concerning food quality and safety are embedded in different policies, legal, and regulatory frameworks (outlined below). Largely, these focus more on ensuring the safety of foods, and less on their healthiness.

Policy/Regulation	Description
The Standards Act, 2009	Established the Tanzania Bureau of Standards (TBS), which is responsible for the development, maintenance, and enforcement of standards for products and services in Tanzania, including food. The act and its amendments provide the legal framework for setting standards that ensure products meet quality and safety requirements. The TBS is mandated to certify products, inspect premises, and carry out tests to ensure compliance with established standards. ⁹⁹
Food (Control of Quality) (Food Hygiene) Regulations, 1998	Provides detailed guidelines and requirements for maintaining hygiene in food production, processing, handling, and storage, to ensure food safety and hygiene across the value chain. It specifies the standards for cleanliness and maintenance of food premises and equipment used in food production and processing, and provides regular inspections of food businesses by health inspectors, including penalties for non-compliance. ¹⁰⁰
The Public Health Act, 2009	Addresses a wide range of public health issues, including food safety, and gives the government the authority to implement measures that protect public health, such as inspecting food establishments to ensure they meet public health standards. It also includes provisions for the control of communicable diseases that could be transmitted through food, and provides a legal basis for issuing specific regulations related to food safety, such as hygiene and sanitation standards. ¹⁰¹ The act requires food vendors to comply with food safety measures and requires food manufacturers to undergo registration via a licensing authority who can perform inspections to ensure quality standards are being met.
The National Health Policy, 2017	Addresses food safety and quality within the broader context of public health, recognizing that ensuring access to safe and nutritious food is crucial for

	preventing malnutrition and foodborne illness. ¹⁰² It guides the formulation of laws and regulations related to health and food safety, with a particular focus on preventive measures. It aims to increase public awareness and education on health issues, including food hygiene and nutrition, and calls for strengthening of food safety regulations.
The Tanzania Food, Drugs, and Cosmetics Act, 2003	Established the Tanzania Food and Drugs Authority (TFDA)—responsible for enforcing standards across food, drugs, and cosmetics—and provides guidelines for the registration and licensing of food premises. ¹⁰³
Environmental Management Act, 2004	Addresses environmental factors impacting food production. ¹⁰⁴
Dairy Industry Act, 2004	Ensures the safety of dairy products. ¹⁰⁵
Animal Diseases Act, 2003	Regulates the safety of animal-derived products. ¹⁰⁶
Fisheries Act, 2003	Governs fishery resources. ¹⁰⁷
Industrial and Consumer Chemicals (Management and Control) Act, 2003	Manages chemicals used in food processing. ¹⁰⁸
National Agriculture Policy, 2013	Promotes agricultural productivity and food safety. ¹⁰⁹
Food (Control of Quality) (Market Inspection) Regulations, 2008	Regulates market quality control to address public health concerns. ¹⁰⁰

In addition, Tanzania has three regulatory bodies that support companies' compliance with national regulation.

Organization	Description
TFDA	Offer training on food laws and hygiene to support companies' compliance with local regulations. They also run certification programmes to help local food suppliers meet modern retail standards, enabling many SMEs to access and supply products to retailers. ¹¹⁰
TBS	
Small Industries Development Organization	

Trade law

Tanzania has a specific regulatory body in place that promotes trade and ensures that goods coming in and out of the country comply with local standards.

Policy/Regulation	Description
Tanzania Trade Development Authority Act, 2008	'TanTrade' is established as a semi-autonomous body under the Ministry of Industry and Trade. It is tasked with promoting and developing both domestic and international trade for Tanzania, and plays a crucial role in ensuring that trade policies are aligned with national development goals and the evolving global trade landscape. ¹¹¹ TanTrade has a significant influence on the processed food sector

	through its roles in market access, policy advocacy, trade promotion, and capacity building.
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In addition, Tanzania is a member of international and regional agreements which govern its trading practices.

Organization/Agreement	Description
World Trade Organization (WTO) Agreement on Sanitary and Phytosanitary Measures and Technical Barriers to Trade	Tanzania adheres to international trade standards set by the WTO, which can have implications for imposing trade restrictions or barriers on specific goods without facing economic or legal repercussions. Tanzania participates in the WTO negotiations through the Organization of African, Caribbean, and Pacific States; Least Developed Countries Group; and the G33 Group. ¹¹²
Southern African Development Community (SADC)	Facilitate access to regional markets as a common market and customs union, which involves common external tariffs and the elimination of tariffs on goods traded within the region, including packaged processed foods. ¹¹³
East African Community (EAC)	
African Continental Free Trade Area	

Taxes and subsidies

Evidence suggests that industry lobbying is a barrier to public health-motivated fiscal measures. For example, the food manufacturing industry has publicly lobbied to oppose increases in sugar taxation on the basis of the need to promote industry competitiveness.¹¹⁴ Thus, existing taxation measures in Tanzania are focused on generating revenue and stimulating local production.

Policy/Tax	Description
Value added tax (VAT)	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. ¹¹⁵ These exemptions aim to reduce the cost of agricultural inputs and encourage the production of these essential commodities. ¹¹⁵
Excise tax (luxury goods)	Tanzania has an excise tax on luxury goods, including a tax rate of TZS 54 (USD 0.02) per litre on non-alcoholic beverages (soft drinks). ^{114,116}
Import tax	Tanzania imposes import duties on fresh fruits and vegetables, dairy products, and packaged processed foods. Import duty rates vary depending on the type of product: 0% for capital goods, 10% for intermediate goods, and 25% for consumer goods. ¹¹⁷ This tariff structure and rates are standardized across the EAC under a 'Common External Tariff' and applies to goods imported from outside the EAC region. ¹¹⁸
Import tax (waived)	The Tanzanian Government has an explicit priority regarding sugar industry growth, with measures to promote domestic sugar production and processing. ¹¹⁴ The National Agriculture Policy promotes sugarcane production in order to meet SSB industry needs. ¹⁰⁹ In 2021, the 15% import tax on industrial sugar was waived to lower production costs for domestic manufacturers that use sugar as a key input, and hence enhance competitiveness in domestic industries. ^{119,120}

Imports and exports

Tanzania restricts or prohibits the import of certain packaged processed foods that are deemed unsafe (containing certain additives, preservatives, or chemicals deemed harmful, or excessive levels of artificial colours, flavours, or sweeteners that do not meet local health standards) or that could harm domestic industries.^{121,122}

Policy/Regulation	Description
The Imports Registration and Batch Certification Standards Act, 2021	<p>Outlines the requirements for the registration of imported pre-packaged food (defined as ‘food that is processed to extend its shelf life, packaged, labelled, and complying with specified standards ready for offer to the consumer’).¹²³</p> <p>The act features a clause that imported food must ‘enhance or contribute to the national effort to improve the nutritional status of the people of Tanzania’, although it is unclear how this is implemented. The act deems highly processed foods (including confectionery, sweeteners, SSBs, and processed fruits) as ‘low risk’ commodities (in terms of contamination and food safety), and hence have less arduous import requirements and testing procedures than fresh (perishable) foods.¹²³</p>

Restrictions on imports are governed by national regulatory authorities who have overlapping responsibilities.

Organization	Description
Tanzania Revenue Authority	Oversees the collection of duties, VAT, and other taxes on imports and exports, including packaged foods. ¹²⁴
TBS and TFDA	Responsible for ensuring that imported packaged processed foods meet safety and quality standards—including labelling, packaging, and food safety requirements—especially in relation to processed meat products. ¹²⁵
Tanzania Revenue Authority and the Ministry of Agriculture	Responsible for granting necessary permits and licenses to importers of packaged processed foods and fresh fruit, plant parts, and seeds. ¹²⁶

Food prices

In Tanzania, commodity boards and regulatory bodies play a role in regulating prices for specific foods (such as maize and rice), stabilizing prices, and ensuring market stability. The Tanzania Healthy Food Environment Policy Index Evidence Pack highlights the need for food pricing policies (e.g. taxes and subsidies) to align with health outcomes by helping to make healthy diets an easier and cheaper choice.¹²⁷

Organization	Description
National Food Reserve Agency	A government entity under the Ministry of Agriculture responsible for managing the country’s food reserves. Works to ensure food security and stabilize food supplies during periods of shortages, including due to national emergencies caused by droughts, floods, and other disasters. Its mandate extends to staple foods essential for food security.
Cashew Board of Tanzania	Enforces relevant regulations in the cashew supply chain in Tanzania. ¹²⁸

Dairy Board of Tanzania	Regulatory institution promoting Tanzania's sustainable, competitive and self-sufficient dairy industry. ¹²⁹
Rice Council of Tanzania (RCT)	The RCT is as an apex body representing private sector stakeholders (all farmers, input suppliers and processors, traders, service providers, financiers, researchers, consumer organizations, and NGOs) along the rice value chain in Tanzania. RCT was registered June 2014 to spearhead, coordinate, and lobby rice industry activities in Tanzania.
Cereals and Other Produce Regulatory Authority (COPRA)	The COPRA was established under Section 3 of the Food Security Act, 1991 [CAP 249 R.E 2002]–Consequential Amendments of the Food Security Act (Act No. 19 of 2009) as a semi-autonomous body of the government under the Ministry of Agriculture. The COPRA is responsible for regulating the production, processing, and marketing of cereals and other produce, and providing national food security assurance mechanisms in the mainland Tanzania.
Tanzania Meat Board	An institution enforcing regulation relating to and enabling the production and supply of safe and quality meat, along with supporting the competitive and sustainable growth of Tanzania's meat industry. ¹³⁰

Product healthiness

Tanzania's National Dietary Guidelines (NDGs) and the Tanzania National NCD Strategic Plan provide recommendations on healthy eating and nutrient intake targets. However, no reference was found that the Tanzanian government is developing a nutrient profiling model (NPM) to define product healthiness. Additionally, specific food composition targets, standards, or restrictions for nutrients of concern—such as trans-fats, added sugars, salt, and saturated fats in meals sold from food service outlets—were found.

Policy	Description
Tanzania's NDGs	Provides recommendations to promote healthy eating, including reducing the intake of highly processed foods high in salt, sugar, and unhealthy fats to reduce NCDs (Guideline 3). ¹³¹ The guidelines also highlight the need to limit the intake of deep-fried foods—as well as pizzas, pies, and cookies, which often contain hydrogenated oils and trans fats—and processed meats such as corned beef, sausages, burgers, and beef salami. Additionally, processed fruit juices with high amounts of added sugar and sugary beverages are flagged as products to avoid. For children, the NDGs stress that while sweets and sugary drinks are often convenient and readily available, they offer empty calories without essential nutrients and so displace healthier foods crucial for growth and development. The guidelines incorporate the NOVA classification system to help consumers identify and reduce their consumption of UPFs. This approach provides practical guidance for recognizing and making healthier food choices to support overall wellbeing.
Tanzania National NCD Strategic Plan (2021–2026)	Includes multi-sectoral collaboration, accountability, and capacity strengthening to prevent NCDs (including risk factors related to nutrition) as key strategic goals. The plan outlines activities to implement these goals, including banning advertising and promoting sugary drinks to children (including extra taxation on sugary drinks), monitoring food labelling, and

	educating the public on how to understand/use food labelling to reduce their consumption of unhealthy fats, sugar, and salt. ²⁰
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Labelling

Regulations that address F&B product labelling in Tanzania focus on transparency of BOP labelling information, but do not extend to front-of-pack (FOP) labelling or detailed requirements related to packaging material quality, font size, and label visibility.¹³²

Policy/Regulation	Description
Food (Control of Quality) (Food Labelling) Regulations, 1989	Specifies information required to be displayed on food labels, including brand, type of food, weight/volume/number, whether it is a food substitute or imitation, date of manufacture and expiry, additives, complete list of ingredients, and the details of the manufacturer. ¹³³
Food labelling regulations (TZS 538: 2015 - EAS 38: 2014)	East African Standards applied in Tanzania to govern the labelling of both domestically manufactured and imported pre-packaged processed foods. ¹³² It stipulates that BOP labels must be placed in a visible position on the packaging and include essential information such as the product name, net contents, nutritional information, and a complete list of ingredients. Similarly, food services, including restaurants and hotels, are required to have menu boards that comply with labelling standards. ¹³²
Public Health Act, 2009	Reinforces the mandatory disclosure and labelling of food additives as part of the full ingredients list. ¹⁰¹
Tanzania National NCD Strategic Plan (2021–2026)	Specifies that key to achieving the plan is the monitoring of food labelling and educating the public on how to understand/use food labelling to reduce their consumption of unhealthy fats, sugar, and salt. ²⁰

Marketing

In Tanzania, there is no clear regulation to limit the marketing of products that may contribute to health issues, such as overweight and obesity, to all audiences, including children. However, some regulations on marketing to children do exist. Although the official definition of a child could not be found in these regulations, Tanzania has ratified the United Nations' Convention on the Rights of the Child, which defines a child as under the age of 18.¹³⁴ Similarly, the African Union defines a child as under 18 years of age.¹³⁵

Regulation/Guidelines	Description
Tanzania Food, Drugs, and Cosmetics (Control of Food Promotion to the General Population) Regulations, 2010	Outlines general rules about truthful advertising and avoiding misleading marketing claims. ¹³⁶ This regulation also sets criteria around the use of 'low; less; reduced' health claims with regard to sodium, saturated fat, cholesterol, simple sugar, and energy levels in food products.
Tanzania Food, Drugs, and Cosmetics (Marketing of Foods and Designated Products for Infants and Young Children) Regulation, 2013	Governs the marketing of packaged processed foods, with particular attention to the restriction of marketing and advertisement of breast milk substitutes for children under five. ¹³⁷

Media Council of Tanzania's Code of Ethics for Media Professionals, 2020	Contains guidance on the protection of children in marketing, but applies to disturbing, violent, or offensive material, and does not specifically mention food marketing. ¹³⁸
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Health claims

Tanzania has some regulation governing the use of health claims on food labels and advertisements. Some of these regulations are linked to criteria for levels of nutrients of concern in products, but not to the overall healthiness of a product.

Policy/Regulation	Description
Tanzania's food labelling regulations (TZS 550:2015 - EAS 805:2014)	Sets out guidelines for how nutrition and health claims should be presented on food labels and in advertisements, to ensure claims are accurate, truthful, and not misleading. ¹³²
Tanzania Food, Drugs, and Cosmetics (Control of Food Promotion to the General Population) Regulations 2010	Outlines general rules about truthful advertising and avoiding misleading marketing claims. ¹³⁷ This regulation also sets criteria around the use of 'low; less; reduced' health claims with regard to sodium, saturated fat, cholesterol, simple sugar, and energy levels in food products.

Social safety net programmes

Tanzania has several social safety net programmes in place that focus on improving nutrition outcomes and overall wellbeing among vulnerable populations. These include conditional cash transfers, capacity building, and national school feeding programmes, with a particular focus on women and children in the poorest households.

Programme	Description
Productive Social Safety Net (PSSN)	Focuses on enhancing food security and improving the overall wellbeing of chronically poor and vulnerable households via several initiatives—including conditional cash transfers, capacity building, and community-driven development projects. ¹³⁹ The PSSN demonstrated a significant impact on food security among the beneficiaries, shifting the proportion of families consuming only one meal a day from 36% to 0.5%, two meals a day from 54% to 31%, and three meals a day from 11% to 68%. ¹⁴⁰ It is unclear how these efforts have translated to enhanced nutrition outcomes for participants. ^{140–142}
Stawisha Maisha: Nourishing Life Programme	Piloted the efficacy of delivering additional social and behaviour change sessions to households to enhance infant and young child feeding practices and increase access to nutritious foods. ¹⁴³
National Multisectoral Nutrition Action Plan 2021/2-2025/6	Includes five strategic goals for addressing undernutrition, micronutrient deficiencies, and overweight/obesity: <ol style="list-style-type: none"> 1. Increased coverage of adequate, equitable, and quality nutrition services at community and facility levels; 2. Women, men, children, and adolescents practice appropriate nutrition behaviours; 3. Sustainable and resilient food systems that are responsive to nutrition needs;

	<p>4. Strengthened multi-sectoral and private sector engagement for nutrition;</p> <p>5. Enabling environment (adequate policies and frameworks) that are supportive of suitable human and financial resources for nutrition.</p>
School feeding programmes	<p>The Tanzanian Government supports school feeding programmes as part of its broader educational and health policies (including Policy Guidelines on School Health Services, Education Sector Development Plan, and the Food and Nutrition Security Policy), and these programmes serve as a means of reducing the burden on families who may struggle to provide adequate nutrition.^{144–147}</p> <p>The Guidelines on School Feeding and Nutrition Services mandate the provision of nutritious meals for students.¹⁴⁷ Meanwhile, the National School Feeding Programme is designed to enhance student attendance and performance by providing nutritious meals to children in schools, primarily targeting those in rural and economically disadvantaged areas.^{147,148}</p>

1.1.4 Food Industry Practices

Products

As highlighted previously in this report, packaged food products available to consumers on the market in Tanzania include (not comprehensive):^{69,149}

- Processed meat products (sausages and salami)
- Dairy items (yoghurts and long-life milk)
- Baked goods (bread, cakes, biscuits, doughnuts, and chapattis)
- Dried fish
- Soft drinks
- Crisps (made from potatoes, bananas, and cassava)
- Nuts and other snacks (popcorn)
- Condiments and sauces (bouillon cubes, tomato paste)
- Spreads (margarine and butter)
- Canned foods (beef, chicken, fish, vegetables, and fruits)
- Wheat-based products (pasta, biscuits, breakfast cereals, mandazi, chapattis, cookies, cakes, and doughnuts)
- Packaged staples (cereal flours—maize, wheat, millet, etc.—and rice)

The existing literature does not map these products against their brands, meaning it is unclear which industry players are responsible for the manufacture and distribution of these products in Tanzania.

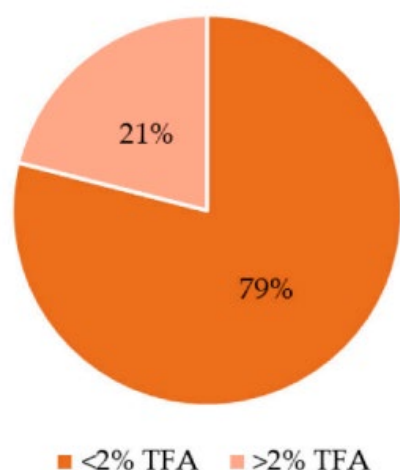
Product healthiness

Tanzania's Food Composition Tables provide detailed information on 47 nutrients in over 400 commonly consumed Tanzanian foods and local dishes.¹⁵⁰ The 2008 edition is currently under review, underscoring ongoing efforts to ensure that nutritional information remains accurate and relevant.¹⁵⁰

Additional literature on the healthiness of packaged products sold in Tanzania is sparse. A 2023 study analyzing trans fatty acid (TFA) levels in Tanzanian food products found that levels persist beyond recommended limits.¹⁵¹ Of the 57 products from 38 different edible oil brands analyzed, 21% exceeded

the World Health Organization (WHO)-recommended level of TFAs (see Figure 9). This was primarily in popular brands of margarine, industrially refined sunflower oils, butter made from animal sources, and peanut butter.

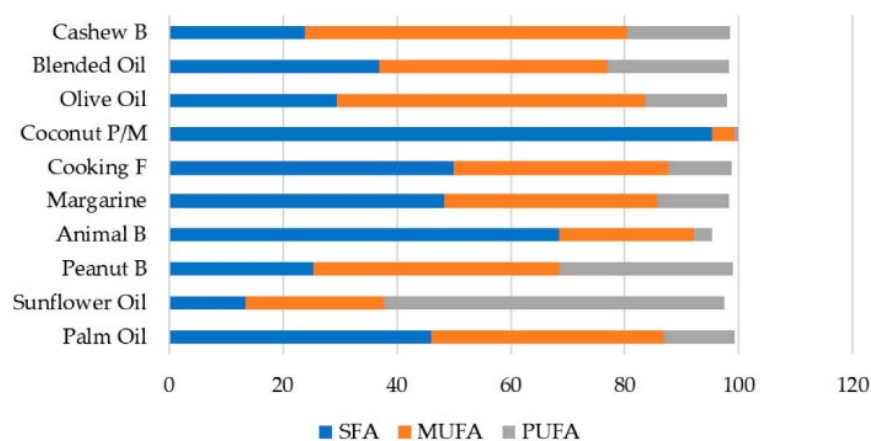
Figure 9. Levels of TFAs in edible oil brands in Tanzania



Source: Mashili, et.al, 2023¹⁵¹

The same study also analyzed levels of saturated fats in popularly consumed edible oils in Dar es Salaam (see Figure 10).

Figure 10. Proportion of saturated fats in edible oils in Dar es Salaam



Note: Saturated fatty acids (SFA), monounsaturated fatty acids (MUFA), and polyunsaturated fatty acids (PUFA)

Source: Mashili, et.al, 2023¹⁵¹

Labelling and health claims

There is some literature on packaged food industry labelling practices in Tanzania, with existing studies showing low compliance with local labelling standards across different packaged food groups.

For example, the aforementioned 2023 study on TFA levels in edible oils in Dar es Salaam found that only 22% of the 57 products analyzed provided TFA content information on the BOP label.¹⁵¹ In addition, a

2024 study of 180 pre-packaged processed snacks from 165 stores in Dar es Salaam found relatively low compliance with Tanzanian and international Codex labelling standards.¹⁵² Imported products demonstrated higher levels of compliance with both Tanzanian and international labelling requirements (see Figure 11). However, it is unclear whether these products received formal clearance for import by Tanzanian food authorities.

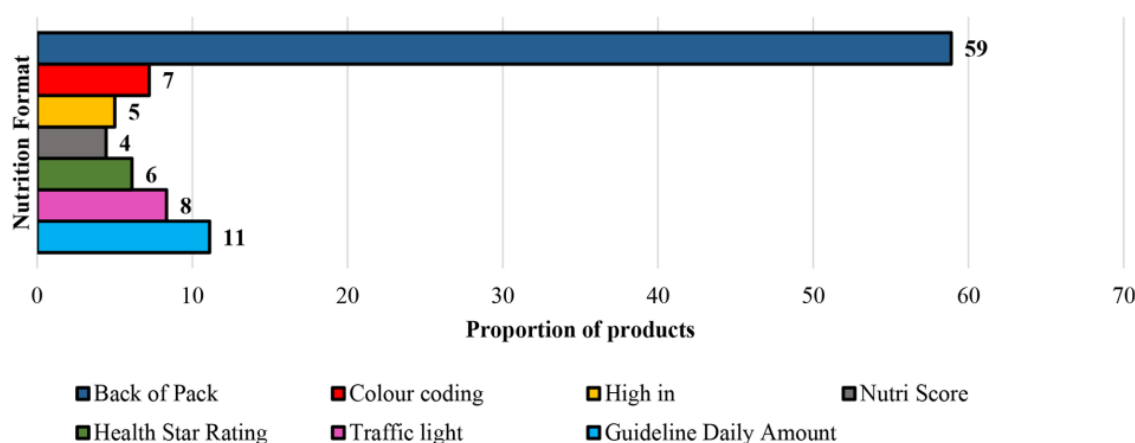
Figure 11. Adherence of pre-packaged snacks to Tanzanian and international labelling standards



Source: Rusobya, 2024¹⁵²

The same study found that 61% of the products used English language and just under 15% used Swahili for labelling. Additionally, 41% used a WHO-recommended FOP nutrition labelling system (see Figure 12).¹⁵²

Figure 12. Proportion of pre-packaged snacks with BOP and FOP labels in Tanzania



Source: Rusobya, 2024

To map the products analyzed in these studies and future studies to specific brands and food companies, further research is needed to fully understand how food industry labelling practices impact the availability of complete and accurate nutrition information in Tanzania.

Marketing practices

Literature addressing F&B companies' marketing practices in Tanzania could not be found. Research is needed to understand the marketing channels and techniques the food industry uses to market products to all audiences, including children, as well as the healthiness of products commonly marketed to children. In addition, evidence about the compliance of packaged processed food manufacturers with marketing guidelines (including TFDA standards) in Tanzania could not be found.

1.2 SECTION B: FORTIFIED PACKAGED FOOD ENVIRONMENT

1.2.1 Consumption, Affordability, and Accessibility

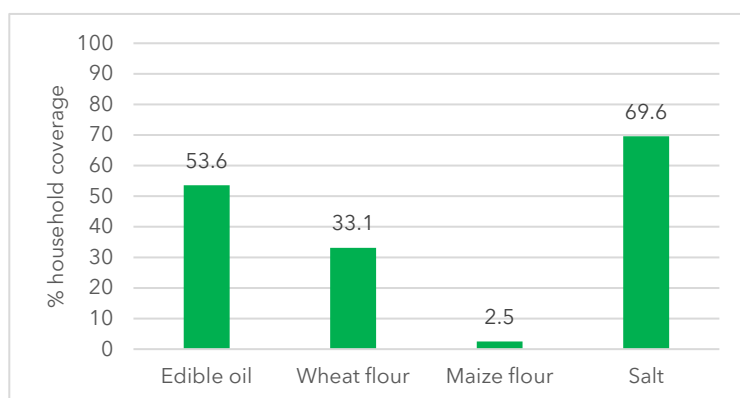
Consumption

— Consumption of fortified staple foods

Mandatory fortification of all industrially processed wheat, maize, and edible oils was launched in May 2013. By March 2014, 92% of both wheat flour and vegetable oil was being fortified, reaching more than 48% of Tanzania's mainland population (21 million people).¹⁵³

A 2015 survey found that high levels of edible oil (85%), salt (95%), and maize flour (75%) were consumed in both rural and urban households, although national wheat flour consumption was lower at 51.5%.¹⁵⁴ Of these, fortified varieties of edible oil, salt, and wheat flour were found to have relatively low household penetration, with fortified maize flour consumed the least due to low rates of compliance amongst maize flour millers (see Figure 13).¹⁵⁵

Figure 13. Percentage household coverage of fortified staples in Tanzania, 2015

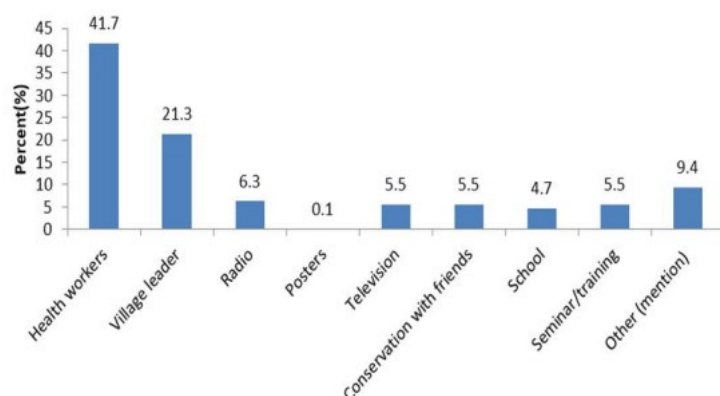


Source: GAIN, 2016¹⁵⁴

The survey also showed that the *quality* of fortification varies by staple food: 16.3% of edible oils, 18.9% of wheat flour, 3.3% of maize flour, and 62.7% of salt samples met national fortification standards. In 2024, compliance rates for maize flour appeared to be higher, with 12.9% samples in Dar es Salaam and the Morogoro Region meeting national fortification standards.¹⁵⁶ This low rate is of particular concern, as maize flour is most widely consumed staple nationally (see Figure 13).^{157,158}

Consumer awareness of fortified foods also affects consumption rates in Tanzania.⁸⁹ Literature indicates that awareness levels of fortified foods among Tanzanian women, mothers, and caretakers are relatively low. Similarly, in a 2019 study on the fortificant folic acid awareness in the Morogoro Region, employment status, number of children, and awareness of folic acid were identified as significant factors affecting intake.¹⁵⁸ A 2018 study in Kinondoni Municipality found that, while 64% of women surveyed had heard of micronutrients, 79% did not know which foods were being fortified in Tanzania.¹⁵⁹ The study also identified healthcare workers as the main source of knowledge food fortification (see Figure 14).¹⁵⁹

Figure 14. Sources of information on fortified foods in Kinondoni Municipality, 2018



Source: Kasankala et.al, 2018¹⁵⁹

Additional and more current research is needed to understand the extent to which adequately fortified staple foods are reaching consumers in Tanzania at the national level.

— *Consumption of fortified packaged processed foods*

Data on the consumption of fortified packaged processed foods, beyond mandatory fortified staples, is lacking. However, Tanzania's National Nutrition Strategy explicitly notes that growing urban populations, which are increasingly consuming industrially processed foods, may provide new opportunities for packaged, processed fortification vehicles.¹⁶⁰

Accessibility

— *Accessibility of fortified staple foods*

The production of fortified staple foods is concentrated in urban areas, where most millers in Tanzania are based.¹⁵³ There is a gap in the availability of these products in more rural and remote regions, representing a significant challenge in reaching rural consumers with fortified staples.¹⁵³ Since fortification rates amongst small-scale millers in Tanzania are low, much of the rural population who source their staple foods from local mills are unlikely to be accessing fortified staples—particularly for maize flour.¹⁵⁵ Several projects supported by organizations—such as the National Food Fortification Alliance, Sanku, and Technoserve—are ongoing to enhance access to fortified staple foods for all consumers in Tanzania.¹⁶¹⁻¹⁶³

While there is limited information on the retail channels through which fortified staple foods are sold in Tanzania (see section on Retailers), a 2014 report suggested that fortified products were less likely to be accessible to consumers who shop at informal markets.¹⁶⁴

— Accessibility of fortified packaged processed products

A 2014 report examining the case study of Power Foods, one of Tanzania's main fortified food producers, noted key challenges in reaching consumers with fortified products¹⁶⁵—and these are explored in Table 8, below. While Power Foods primarily produces packaged and convenient versions of cereal-based foods traditionally prepared in the home, these challenges may also be relevant for manufacturers of other packaged processed food.

Table 8. Constraints to commercial viability for nutrient-rich foods

Market conditions	Implications for businesses
1. Low demand. Most consumers, especially the poor, are unaware of their nutritional needs and unwilling to pay higher prices for nutrient-rich foods.	<ul style="list-style-type: none"> The cost of creating nutrition awareness is too high for a single business. Collective action among businesses, or support from public and non-profit sectors, is needed.
2. Absence of signalling. The nutrient content of most foods is 'invisible' to consumers. For consumers to make informed purchasing decisions, mechanisms are required that 'signal' products' nutritional quality to consumers.	<ul style="list-style-type: none"> Competitors introduce similar products that lack micronutrient content. This undercuts businesses that invest in nutrient-rich products, and leaves them unable to secure a higher price.
3. Distribution channels are needed to bring products to consumers, especially those in rural and low-income areas who are affected by undernutrition.	<ul style="list-style-type: none"> Distribution channels that reach poor and rural consumers are especially expensive to create. This problem is especially daunting for medium-sized businesses, which lack the resources to build their own distribution networks.
4. Sourcing and value chain coordination. In Tanzania, it is difficult to secure high-quality supplies of inputs for food processing.	<ul style="list-style-type: none"> Poor and variable quality inputs raise costs for businesses, which are passed on to consumers as higher prices. Difficult to for downstream actors to coordinate with farmers and other upstream actors to produce quality and sustainable inputs.

In the case study of Power Foods, the strongest market for their fortified processed foods was identified as Dar es Salaam. The company sells directly to independent distribution depots and wholesalers located throughout Tanzania, and delivers to a number of independent shops in Dar es Salaam, modelled on a similar distribution strategy used by Coca-Cola in Tanzania.¹⁶⁵ Food manufacturers without the means to operate distribution networks largely depend on wholesalers and distributors to sell their products outside of urban areas. However, these businesses often have little incentive to target rural and remote markets, where profit margins are lower.

In addition, the case study noted that producing smaller unit-size products, which could appeal to low-income consumers, is impractical from a private sector standpoint due to the significant increase in production and distribution costs.¹⁶⁵

Affordability

Evidence from Tanzania suggests that fortified products are sold at a premium price compared to unfortified products, which are often sold at lower cost.¹⁶⁴ Several reasons for this are highlighted in the literature. Higher prices can be a mechanism used by businesses to signal a product's enhanced nutritional quality.¹⁶⁵ Higher costs can also be attributed to input costs for fortifying staples, which are then passed on to consumers— although this idea was contested in a 2024 study which suggested no extra input costs were incurred by fortifying maize flour millers.^{155,162}

As seen in Table 9, prices for (fortified) staple foods are typically lower in informal markets (e.g. small-scale millers and informal vendors) than in formal markets (e.g. large-scale industrial millers and supermarkets).

Table 9. Price differential for staple foods produced by formal and informal companies in Tanzania

	Name of product	Pack sizes	Price (TZS)
Power Foods' products	Lishe nut	1kg	3,500
	Baby porridge	500g	2,500
	Lishe soya mix flour	1kg	2,500
	Maize flour	1kg	2,500
Informal sector products	Maize flour	1kg	1,000
	Cereal mix for infant feeding	500g	2,000-2,500

Source: Maestre et.al., 2014¹⁶⁵

Higher prices for fortified foods and their limited availability in informal markets can act as a barrier to reaching lower-income consumers. The National Demographic and Health Survey 2010 showed that rural households often access staple foods through the informal sector.¹⁶⁶ For instance, while 85% of rural households bought vegetable oil, only 49% purchased products from large manufacturers involved in the national fortification programme.¹⁶⁶ Additionally, the survey found that when low-income households bought industrially-produced staple foods, they were purchased in smaller quantities compared to amounts purchased by wealthier households.¹⁶⁶

More recent evidence is needed to understand the current price differential between the fortified and non-fortified staples produced and distributed by formal and informal markets in Tanzania. Further research is also needed to map the affordability of fortified packaged processed products compared to non-fortified alternatives.

1.2.2 Market Structure and Direct Influencers

A coalition of stakeholders from the private and public sectors supports the implementation of food fortification in Tanzania. The National Food Fortification Alliance coordinates these efforts, consisting of food processing companies, government bodies, donors, and NGOs.¹⁶⁴

Retailers

There is limited literature on the extent to which different Tanzanian retailers stock and sell fortified staples and other packaged processed foods. Research found that 52% of shops surveyed stocked fortified flour, but did not distinguish between formal and informal vendors and different types of retailers.¹⁶⁷ A 2015

survey reported that low-income consumers typically purchase flour directly from informal, small-scale mills, which are less likely to fortify their products.¹⁵⁴

More up-to-date research is needed to map retailers and other purchase points that stock and sell fortified packaged staples and fortified packaged processed foods.¹⁶⁸

Manufacturers

— Fortified staple food producers

A 2014 scoping study found that fortified wheat flour is predominantly produced by two large companies that control 94% of the market. However, the fortified maize flour value chain is more fragmented, with small-scale millers dominating up to 95% of the market. Additionally, two large companies controlled 80% of the market share of fortified vegetable oil.¹⁶⁴ A more recent review in 2022 identified a total of 64 brands of fortified staples from 37 companies available on the market in Tanzania (Table 10, below).¹⁶⁹

Table 10. Number of fortified brands of different staple foods in Tanzania

Product	No. Food Companies	No. Brands
Maize flour	16	17
Vegetable oil	12	21
Wheat flour	9	26
Total	37	64

Source: Durotoye et.al, 2023¹⁶⁹

Desk research suggests key producers in fortified staples supply chains include:

- **Fortified edible oils:** Primarily consisting of companies producing sunflower and palm oil, Bidco Oil and Murzah Oil Mills are two of the largest edible oil producers. Additional producers include Metl Group, Meru oil, Sunola, and Murzar.¹⁵⁴
- **Fortified wheat flour:** Bakhresa Group and Azam Mills are among the largest milling companies and producers of wheat flour. Also in operation are Metl Group, Azania Group, and Alaska Tanzania.¹⁵⁴
- **Fortified maize flour:** There appears to be an overlap between large maize and wheat milling companies, as Melt Group and Azania Group also produce maize flour.¹⁵⁴
- **Iodized salt:**^e Iodized salt manufacturers in Tanzania include NeelKanth and Bagamoyo Salt.^{154,170-172} Tanzania also imports table salt from other countries in the region, with key brands sold in the country including Malindi, Kay Salt, and Ken Salt.^{154,173}

Beyond mandatory fortified staples, there is evidence that dairy producers are fortifying their products. **For instance**, Galaxy Foods, in partnership with Arla Foods, is fortifying dairy products (such as yoghurt) for distribution in schools.¹⁷⁴

— Manufacturers of fortified packaged processed foods

Tanzania's National Nutrition Strategy 2011/12-2015/16 identified confectionery, snacks, and spreads as existing but relatively uncommon vehicles for fortification.¹⁶⁰ More recent data on the fortification of

^e This section focuses on manufacturers of iodized salt and does not include salt mines.

packaged processed foods in Tanzania is very limited, but examples can be found in the public domain. For example, Nestlé's subsidiary in Tanzania sells products such as NIDO (fortified milk powder) and Milo (a malt-based fortified drink mix).¹⁷⁵ Additionally, Power Foods Tanzania produces porridge flours and cereals for children and adults fortified with iron, vitamin A, and vitamin B, and 'Blue Band Margarine' is fortified with vitamins A and D.^{165,176}

Industry associations and alliances

Key industry associations and alliances representing and supporting fortified staple food manufacturers in Tanzania include:

- **TASPA:** Established in 1994, TASPA is instrumental in enforcing the Universal Salt Iodization surveillance system.⁸⁷
- **Agricultural Council of Tanzania:** Represents and lobbies on behalf of over 900 members from Tanzania's agricultural sector, including producers of staple products falling under the country's mandatory fortification regulation.¹⁷⁷
- **Millers for Nutrition:** Alliance of millers across eight countries, including Tanzania, which aims to support fortification capacity development amongst its members.¹⁷⁸
- **NFFA:** Formed in 2003, the NFFA is an alliance of public and private sector actors, NGOs, and aid organizations, cooperating to address micronutrient deficiencies in Tanzania through large-scale food fortification.⁸⁹ The NFFA developed the 2009 Food Fortification Action Plan which was later adopted by the government.⁸⁹

1.2.3 Food Policy and Regulation

Tanzania has several overarching strategies that highlight large-scale food fortification as a key initiative to improve nutrition and public health.

Strategy	Description
National Nutrition Strategy 2011/12–2015/16	Highlights the need for fortification initiatives, including legislation, to address micronutrient deficiencies in Tanzania. ¹⁶⁰
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. ¹⁹
Pathways for Sustainable Food Systems 2030	Prepared for the United Nations Food Systems Summit 2021, the strategy flags food fortification as one of the key routes to achieving better access to healthy diets. ¹⁷⁹
National Biofortification Guidelines	Established in 2020 by the Ministry of Agriculture, the guidelines identify iron, vitamin A, and zinc deficiencies as critical public health concerns. ¹⁸⁰
Organizations	Description
NFFA	An alliance of public and private sector actors, NGOs, and aid organizations, the NFFA developed a Food Fortification Action Plan in early 2009 and continues to coordinate its implementation in Tanzania. ⁸⁹

Thematic Working Group on Micronutrient Deficiencies	The Thematic Working Group on Micronutrient Deficiencies, established in 2016/17 following endorsement from the National Multisectoral Nutrition Action Plan 2021/22–2025/26, is responsible for reviewing and recommending implementation strategies for various micronutrient programmes. ¹⁹ These programmes include Nutrition Anemia, Vitamin A Supplementation, Universal Salt Iodization, and Food Fortification. ¹⁸¹
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Food fortification standards

While the fortification of key staple foods is mandatory, the fortification of non-staple packaged food products, such as snacks and confectionery, remains voluntary.

Standard/Policy	Description																																																						
Tanzania Food, Drugs, and Cosmetics (Food Fortification) Regulations, 2011	Introduced mandatory standards for the industrial fortification of wheat and maize flour and edible oils. The regulation does not apply to small- and micro-scale manufacturers. ¹⁸²																																																						
	<table><tr><th rowspan="2">Food vehicle</th><th rowspan="2">Nutrient</th><th rowspan="2">Fortified compound(s)</th><th colspan="2">Specifications</th></tr><tr><th>Minimum</th><th>Maximum</th></tr><tr><td rowspan="5">Wheat flour</td><td></td><td>Sodium iron</td><td></td><td></td></tr><tr><td>Iron</td><td>EDTA, zinc oxide</td><td>30 mg/kg</td><td>50 mg/kg</td></tr><tr><td>Zinc</td><td>Vitamin B12</td><td>30 mg/kg</td><td>50 mg/kg</td></tr><tr><td>Vitamin B12</td><td>Folic acid</td><td>0.0005 mg/kg</td><td>0.025 mg/kg</td></tr><tr><td>Folate</td><td></td><td>1 mg/kg</td><td>5 mg/kg</td></tr><tr><td rowspan="4">Maize flour</td><td>Iron</td><td>Sodium iron, EDTA</td><td>5 mg/kg</td><td>25 mg/kg</td></tr><tr><td>Zinc</td><td>Zinc oxide</td><td>20 mg/kg</td><td>25 mg/kg</td></tr><tr><td>Vitamin B12</td><td>Vitamin B12</td><td>0.0002 mg/kg</td><td>0.01 mg/kg</td></tr><tr><td>Folate</td><td>Folic acid</td><td>0.5 mg/kg</td><td>2.5 mg/kg</td></tr><tr><td rowspan="2">Edible fats and oils</td><td>Vitamin A</td><td>Retiyl palmitate</td><td>6 mg/L</td><td>28 mg/L</td></tr><tr><td>Vitamin E</td><td>Alpha tocopherol</td><td>65 mg/L</td><td>190 mg/L</td></tr></table>	Food vehicle	Nutrient	Fortified compound(s)	Specifications		Minimum	Maximum	Wheat flour		Sodium iron			Iron	EDTA, zinc oxide	30 mg/kg	50 mg/kg	Zinc	Vitamin B12	30 mg/kg	50 mg/kg	Vitamin B12	Folic acid	0.0005 mg/kg	0.025 mg/kg	Folate		1 mg/kg	5 mg/kg	Maize flour	Iron	Sodium iron, EDTA	5 mg/kg	25 mg/kg	Zinc	Zinc oxide	20 mg/kg	25 mg/kg	Vitamin B12	Vitamin B12	0.0002 mg/kg	0.01 mg/kg	Folate	Folic acid	0.5 mg/kg	2.5 mg/kg	Edible fats and oils	Vitamin A	Retiyl palmitate	6 mg/L	28 mg/L	Vitamin E	Alpha tocopherol	65 mg/L	190 mg/L
	Food vehicle				Nutrient	Fortified compound(s)	Specifications																																																
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		Zinc	Vitamin B12	30 mg/kg	50 mg/kg																																																		
		Vitamin B12	Folic acid	0.0005 mg/kg	0.025 mg/kg																																																		
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Vitamin E		Alpha tocopherol	65 mg/L	190 mg/L																																																			
	The regulation also stipulates that processors must develop, maintain, and routinely follow procedures for safety and quality assurance throughout the manufacturing process to ensure the final product complies with regulatory standards.																																																						
National Multisectoral Nutrition Action Plan 2021/22-2025/26	Includes a target to increase the percentage of SME food processors engaged in food fortification. ¹⁹																																																						
Tanzania Food, Drugs, and Cosmetics (Iodized Salt) Regulations, 2010	Building on the previous salt iodization regulations from 1995, this regulation prohibits the sale of non-iodized salt for both human and animal consumption, with clear standards for salt iodization. ¹⁸³																																																						
TZS 328: 2014 - EAS 768: 2013 Fortified milled maize (corn) products–Specification	Issued by the TBS, the specification outlines requirements and methods of sampling and testing the quality of fortified milled maize products. ¹⁸⁴																																																						

TZS 1313, Fortified edible oils and fats–Specification.	Multiple specifications outline requirements and methods for sampling and testing the quality of various types of fortified edible oils. ^{185–188}
TZS 439: 2014 - EAS 767: 2013 Fortified wheat flour–Specification	Issued by the TBS, this specification outlines requirements and methods of sampling and testing the quality of fortified wheat flour. ¹⁸⁹
Organizations	Description
TFDA	Large-scale processors must apply via the TFDA to participate in the mandatory fortification programme. ¹⁸² As of 2017, 14 large-scale food producers were certified to participate in the programme, including all 10 of the country's wheat flour producers and four large-scale vegetable oil refineries. ¹⁹⁰
TBS	Responsible for compliance, adherence, and monitoring of fortified products at the national level through regular inspections at the point of production, in the market, and at ports of entry. ¹⁸⁴
Sanku	Partners with small- and medium-scale maize millers in Tanzania to ensure they produce fortified flours for packaged products (such as porridge mixes) that meet government fortification standards. ¹⁹¹
Technoserve	Runs Millers for Nutrition initiative in Tanzania, supporting capacity development amongst millers to fortify their products. ¹⁷⁸

Trade law

Standards	Description
SADC Minimum Standards for Food Fortification	Specifies target micronutrient levels to be added to staple foods traded within the region. These include for salt (iodine), wheat flour (vitamins A and B12, iron, zinc, folic acid), maize flour (vitamins A and B12, iron, zinc, folic acid), edible oil (vitamin A), and sugar (vitamin A). ¹⁹²
EAC Harmonized Standards for Food Fortification	The EAC issues standards for fortifying maize, cereals (for different age groups), salt, edible oils, and the use of premix and other fortificants, to be adopted and implemented by countries in the region. ^{193–197}

Imports and exports

Standards	Description
National Food Fortification Standards and Regulations, 2011	Restricts the importation, manufacturing, and sale of unfortified staple food products covered by the mandatory fortification programme. Additionally, it requires that permission be obtained from the TBS for the manufacture or importation of both fortified and unfortified products. ¹⁸²

Taxes and subsidies



Fiscal measure	Description
Tax exemptions	Fortificants are exempt from taxes and have been classified as essential nutrition supplements since 2013, listed on the essential drugs list. ¹⁹⁸
Subsidies	In 2019, the government procured potassium iodate (KIO3) for salt iodization, assisting manufacturers affected by global price increases. ¹⁹⁹

Food prices

There is some evidence that crop boards are responsible for setting the price of staples falling under Tanzania's mandatory fortification regulation.

Organization	Description
Cereals and Other Produce Regulatory Authority	Responsible for buying and selling cereals and other produce at competitive prices. ²⁰⁰

Labelling and health claims

Regulation	Description
National Food Fortification Standards and Regulations, 2011	Builds on the Tanzania Food, Drugs, and Cosmetics (Food Labelling) Regulations 2006, specifying the manner in which fortified products should be labelled—including the name and amount of micronutrient added, and the application of the food fortification logo. ²⁰¹ The use of the food fortification logo is permitted only if the fortified product meets the standards set by the TBS and has been authorized by the Bureau. Products that do not meet these standards, or which are not part of the mandatory fortification programme, cannot legally use the logo.  
Tanzania Food, Drugs, and Cosmetics (Control of Food Promotion to the General Population) Regulations, 2010	Stipulates a minimum level of each mineral and vitamin a product must contain in order to make a claim that it is fortified with or high in that nutrient. ¹³⁶

Marketing

No marketing guidance specifically pertaining to fortified staples or packaged processed foods in Tanzania could be found.

Social safety net programmes

Programme	Description
National School Feeding Guidelines	Aims to increase the uptake of nutrient-dense fortified foods in schools. ¹⁴⁸
Organization	Description
Tanzania Social Action Fund	Responsible for implementing the PSSN II programme between 2020 and 2025. ²⁰²

1.2.4 Food Industry Practices

Products

— *Fortified staple foods*

Evidence suggests that not all staple products falling under the 2011 Food Fortification Regulation are fortified (or fortified to standard), particularly as the regulation does not apply to small- and micro-scale millers.¹⁹⁰ For example, in 2015, only 18.9% of wheat flour and 3.3% of maize flour samples were adequately fortified.¹⁵⁴ A 2021 study found that 80% of maize and 83% of wheat flour samples met iron fortification standards, but compliance with zinc, folic acid, and vitamin A standards was significantly lower.²⁰³ Further, only 10.5% of cooking oil met vitamin A requirements. This may have also been due to low shelf-stability due to suboptimal packaging.²⁰³

Additionally, while milk fortification is not mandated, some dairy producers are fortifying their products (e.g. Kilimanjaro Fresh Fortified yoghurt).¹⁷⁴

— *Fortified packaged processed products*

Literature on the number and type of fortified packaged processed foods available in Tanzania could not be found.

Product healthiness

Micronutrient-fortified maize, wheat, and edible oils are all part of the 'six food groups for a healthy diet' listed in the Tanzania Mainland Food-Based Dietary Guidelines for a Healthy Population.²⁰⁴

The guidelines also refer to 'fortified' meal and dish substitutes as ultra-processed products to avoid, defining ultra-processed products as those that do not fit in a healthy diet.²⁰⁴ However, other sources investigating the healthiness of fortified packaged processed foods available on the market was not found.

Labelling and health claims

A 2015 survey found that not all fortified staple foods available on the Tanzanian market were adequately labelled.¹⁵⁴ Literature covering multiple markets, including Tanzania, report similar findings—including that products which are non-compliant with regulatory standards for fortification were labelled as compliant.^{205,206}

Some reports also indicated that false health claims related to fortification were present on the market, impacting Tanzanian consumers' trust in the claims made on fortified foods' packaging.^{164,165} Whether this mislabeling also applies to non-staple packaged processed products is unclear.

Marketing practices

Existing literature on the marketing practices of fortified food manufacturers is limited. However, some reports suggest that smaller companies in Tanzania, such as small-scale millers, have less capacity to

market their fortified products.^{163,165,207} One report indicated that the existence on the market and mislabelling of non-fortified products, or products that are not adequately fortified, poses a barrier for marketing products that are fortified.²⁰⁸

Further research is needed to understand companies' marketing practices regarding fortified staples and packaged processed foods.

1.2.5 Comparative Analysis of the Four Staple Value Chains

Tanzania's fortified wheat flour, maize flour, edible oil, and salt value chains share the common goal of delivering micronutrients through widely consumed foods, but they differ in structure, coverage, and challenges. The below table provides a snapshot comparison of industry structure and fortification coverage for the four staples, illustrating some of these differences.

Table 11. Fortification industry structure and market coverage in Tanzania

Staple	Number of staple producers	% of market fortified	Annual fortified output (MT)
Salt	~6500 small producers, and ~10-15 medium/large producers. ^{209*}	61 ²¹⁰	111,000+ MT ^{209,210}
Wheat flour	1300+ total, including 10 large millers** ²¹¹	86-88 ^{211,212}	1,000,000+ MT ²¹¹
Maize flour	16,800+ total, including 4 large millers** ^{213 80}	5 ²¹³	500,000+ MT ^{213,214}
Edible oil	~10-20 large producers, and large number (unknown) of small scale producers*	80 ²¹¹	300,000+ MT ²¹¹

*There is limited recent data on the number of salt and edible oil producers in Tanzania.

*Of 33,721 millers identified in the WFP Miller Census, maize was the predominant staple milled by 50% of millers, and wheat 4%. The actual number of producers may therefore be higher.

Several comparative observations can be made:

— *Industry concentration vs. fragmentation*

Salt and wheat flour value chains in Tanzania are moderately-to-highly concentrated in a few larger producers, which has facilitated high levels of fortification compliance. While salt has a high number of small-scale producers, these are estimated to account for only 20-40% of national salt output, however recent data on this is limited²¹⁵. Edible oil has a mixed concentration, with large players such as Bidco Oil, Murzah Oil, and Alaska Tanzania, as well as a large number of small and medium size processors. Meanwhile, the maize flour sector is highly fragmented with the majority (95%) of production by micro, small and medium millers, followed by milling giants such as Bakhresa (SSB), Mohamed Enterprises Tanzania Ltd (METL), Export Trading Group (ETG) the state-owned Cereals and other Produce Board (CPB).²¹³ This fragmentation and previous exemption of small scale millers from fortification requirements is reflected in the lowest fortification coverage of the four staples.

— *Raw material sourcing differences*

Wheat and edible oil value chains rely heavily on imported raw materials. This means their upstream supply chains are global and subject to import regulations, international price volatility, and trade logistics. Meanwhile, maize and salt are primarily produced domestically. In the case of maize, small quantities of maize seeds are imported. This local sourcing gives Tanzania more self-reliance for maize and salt but also exposes maize to local climatic risks (drought, crop disease) and salt to industrial capacity constraints. The reliance on imports for wheat and oil implies that fortification happens entirely at the processing stage in Tanzania (the country imports raw commodities rather than already fortified finished products).²¹⁶

— *Complexity of the fortification process*

The technical process of fortification differs. Salt and oil fortification each involve adding a single micronutrient (iodine and vitamin A respectively) and are relatively simple to implement in production. Flour fortification (both wheat and maize) is more complex, requiring a micronutrient premix and careful calibration to ensure each nutrient is present at the required levels. This complexity means more rigorous quality control is needed for flour, and potential stability issues (some vitamins can degrade in flour over time or if stored improperly). It also means higher relative cost and technical know-how for flour millers compared to salt producers or oil refineries, contributing to the disparity in compliance.

— *Regulatory monitoring and enforcement*

Enforcement of fortification standards has been uneven across different staple value chains, due to variations in the number and type of producers, and their geographical dispersion. It is comparatively straightforward for regulators to monitor a small number of salt factories or wheat flour mills, as targeted audits and testing can feasibly cover the majority of market output. In contrast, maize presents significant logistical challenges due to the hundreds of mills, many of which are small-scale and unregistered. Limited technical knowledge and capacity to conduct quality analysis have been identified as key limiting factors for fortification by small scale millers²¹⁷. Nonetheless, in March 2025, the Tanzanian government introduced new regulation requiring all millers, regardless of size to fortify maize, wheat and edible oil, with seven months to implement.²¹⁸

— *Economic dynamics*

The economic dynamics of each value chain affect fortification. In salt, the legal enforcement is long-standing, so there is little incentive not to fortify. Similarly for oil, the cost of fortification is generally seen as cost-effective²¹⁹. However, in maize, compliant fortified flour is more expensive due to premix and upfront costs for equipment and training, among others. Premix cost represents approximately 1.4% to 2.3% of overall production cost, depending on time of year. This presents an economic challenge either for the miller who absorbs the costs out of their profit margin, or the consumer, particular those most in need of fortification, who are also the most sensitive to any price increase.²²⁰ The establishment of a micronutrient premix for wheat and maize flour blending facility in Dar Es Salaam is anticipated to reduce costs for processors, particularly through reducing dependence on imported goods.²²¹

More evidence is needed to understand the current price differential between fortified and non-fortified staples produced and distributed by formal and informal markets in Tanzania. Further

research is also needed to map the affordability of fortified packaged processed products compared to non-fortified alternative foods.

Challenges in the fortification value chains

Despite recent progress, Tanzania's fortified staple food value chains face several challenges that hinder the full realization of fortification benefits. These challenges occur at various points of the chain and differ by staple to some extent.

— *Inclusion of small-scale producers*

The most prominent challenge is integrating small enterprises, especially small maize mills, into the fortification program. Most small maize millers do not fortify due to a lack of technology or incentive. The 2024 Food Fortification law's requirement of fortification only for packaged goods means a large share of small scale millers (80%) are exempt²¹³. This creates a nutritional gap and an uneven competitive field. Technical and financial solutions are needed to bring these small players on board. The government has expressed intent to support fortification by small and medium industries, but operationalizing this remains difficult.

— *Compliance and premix quality*

Even among the industries that fortify, maintaining consistent compliance and quality is a challenge. Improper handling and storage of premix can lead to degradation of vitamins and reduce efficacy. Additionally, there is also the issue of premix quality: if millers source cheaper, diluted premix from unofficial distributors, the fortified food may not meet standards. The newly established premix for wheat and maize flour blending facility in Dar Es Salaam is expected to ensure higher quality premix is more widely available on the market.²²¹

— *Monitoring and enforcement limitations*

Enforcement of fortification in Tanzania has previously been identified as having room for improvement, with weak enforcement mechanisms for penalties and fines.²²² The Tanzanian government has partnered with Sanku to enforce the 2024 food fortification regulations, including offering training and support with transitioning to producing fortified blends.²²³

— *Consumer awareness and demand*

There remains a lack of consumer awareness on food fortification, which is compounded by the circulation of misleading or false information about the consumption of fortified foods. is a challenge that affects the demand for fortified foods.²²⁴ Many Tanzanian consumers are not aware of the role of fortified foods in preventing micronutrient deficiencies.²²⁵ Studies have found that the fortification logo is not widely recognized by Tanzanian consumers or considered impactful in purchasing decisions, however more recent data on level of awareness is limited.¹⁵⁴ As a result, consumers rarely demand fortified products specifically. This lack of awareness means market forces alone don't reward fortification; a consumer will not necessarily choose a fortified brand over an unfortified one if price and other perceived qualities are similar. It also means consumers might not be willing to pay a higher cost for fortified products. Educating the public about the benefits of iodine, iron, vitamin A, etc., and how fortified staples provide them, could increase

acceptance and push non-compliant producers to comply due to consumer preference. Currently, this remains an unrealized opportunity, and the challenge is securing resources and attention for ongoing nutrition education focused on fortification.

In summary, Tanzania's fortification value chains must overcome the dual challenges of ensuring compliance/quality, including for small millers who are now in scope, as well as explore opportunities for millers of unpackaged flour to voluntarily participate. Meanwhile, systemic issues like monitoring capacity and consumer education need addressing to consolidate and advance the fortification agenda.

CONCLUSION

A nutrition transition is well underway in Tanzania, evidenced by the 21% growth of the packaged food sector between 2018 and 2023, and 12% growth in sales of UPFs in the same period. Tracking this shift—and the impact of packaged processed foods on diets, especially those high in fats, salt, and sugar—is essential for shaping policies and interventions aimed at preventing diet-related diseases. In 2019, 34% of deaths were attributed to NCDs.⁹ Additionally, in 2022, 32% of women of reproductive age, 17% of men, and 4% of children under five were living with overweight or obesity in Tanzania. In the same year, three-quarters of the population was unable to afford a healthy diet.

This report maps the existing literature on consumption patterns, market structure, policy and regulation, and food industry practices that influence packaged processed foods—including fortified processed and packaged foods—in Tanzania. Much of the existing research addresses improving dietary diversity and the policies and regulations aimed at increasing consumption of fresh and fortified staple foods—such as fruits, vegetables, and animal products. Existing literature focuses on historical challenges related to increasing dietary adequacy and addressing hunger, undernutrition, and micronutrient deficiencies

More recently, research has moved towards a focus on the consumption, retail, nutritional quality, and labelling of packaged processed foods in Tanzania, in line with the changing food environment and evolving dietary patterns.

Tanzania's public health agenda is shifting towards measures which support the prevention of obesity and diet-related diseases, including:

- The NMNAP II, which includes recommendations to strengthen fiscal policies and regulate food marketing and labelling.
- For the Paris Nutrition for Growth Summit 2025, Tanzania's commitments included increasing the reach of school meal programmes; enhancing production of fortified staples; and "Introducing a Nutrition Promotion Levy on SSBs to prevent and control the increasing health risks associated with overweight and obesity among Tanzanians."²²⁶

Further research is needed to support evidence-informed policymaking that promotes healthier food environments in the context of Tanzania's ongoing nutrition transition. Priority research areas include:

- The healthiness of packaged processed foods available on the market.
- The impact of F&B companies' marketing and labelling practices on the consumption patterns of processed packaged foods.
- Whether less healthy processed packaged foods are being used as vehicles for fortification.

RECOMMENDATIONS

The recommendations outlined below for policymakers, companies, and research institutions are informed by gaps identified during this mapping exercise.

Policymakers are encouraged to:

- Consult relevant nutrition stakeholders to develop a country-specific NPM to assess the healthiness of packaged processed foods, drawing on the many examples of regional NPMs (including the WHO NPM for the Africa Region).
- Use this NPM to inform policies that support a healthier food environment, including:
 - A nutrition promotion levy on SSBs;
 - Regulations to restrict the marketing of less healthy (as defined by the NPM) foods and beverages to children under 18 across various media channels and techniques;
 - A standardized FOP labelling scheme to inform consumers about the healthiness of packaged processed foods;
 - Public procurement of appropriate food products for school meals.
- Engage in regional dialogue with other members of the EAC to discuss alignment around a common NPM that can be used to inform policy measures that would support regional harmonization and facilitate trade.
- Update the National Nutrition Strategy 2011/12-2015/16 stipulation that packaged processed foods can be used as vehicles for fortification, which outlines:
 - The use of fortified staple foods as ingredients in these products;
 - Packaged processed products and/or product categories eligible for fortification;
 - Fortification methods (e.g. use of fortified ingredients and/or premixes), as well as minimum and maximum micronutrient levels;
 - Labelling requirements for fortified packaged processed foods, such as limiting the use of the TBS fortification logo to 'healthy' products only.
- Consider additional policy measures, such as:
 - Establishing reformulation targets to help guide and standardize industry efforts to reduce levels of nutrients of concern—such as salt, fats, and sugar—in packaged processed products.

Research institutions and academia are encouraged to:

- Investigate the healthiness of packaged processed foods in Tanzania, using national nutrition guidelines and/or internationally recognized NPMs (such as the WHO NPM for the Africa Region) to standardize definitions of 'healthy' and contribute to the potential development of a government-endorsed NPM in Tanzania.
- Commission research on the share of packaged processed foods entering Tanzanian's diets and factors affecting their consumption—including availability, affordability, marketing, and labelling.
- Conduct research into the role of informal and formal retailers in distributing packaged processed foods to consumers.
- Investigate whether processed packaged foods (both 'healthy' and 'less healthy' according to national nutrition guidelines and/or internationally recognized NPMs) are being used as fortification vehicles in Tanzania and whether fortification-related claims are being used to promote the consumption of 'less healthy' products—and the impact of these claims on consumers' preferences.

Food and beverage companies are encouraged to:

- Develop and publish a clear nutrition strategy detailing how the company integrates nutrition into its commercial operations in Tanzania.
- Adopt nutrition criteria aligned national nutrition guidelines and/or an internationally recognized NPM to measure and report on the healthiness of their product portfolios.
- Establish strategies (e.g. approaches to pricing, distribution, and marketing) to increase sales of healthier products relative to less healthy ones.
- Commit not to fortify products unless they meet the nutrition criteria of national nutrition guidelines and/or an internationally recognized NPM.
- Develop and publish a strategy to deliver more affordable healthy products that are accessible to all consumers, including low-income groups.
- Develop and publish a comprehensive responsible marketing policy that covers all media channels and audiences, including a commitment not to market 'less healthy' products to children under the age of 18.

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