

A photograph of a woman with long dark hair, wearing an orange polo shirt and blue jeans, standing in a supermarket aisle. She is holding a small bottle of sauce or dressing and looking at it. A blue plastic shopping basket is hanging from her arm. In the background, another person is partially visible, and shelves stocked with various products are out of focus.

TANZANIA MARKET ASSESSMENT **POLICY BRIEF**



ATNi's Tanzania Market Assessment 2025:
Assessing Product Healthiness and Corporate
Practices of Tanzania's Largest F&B Companies

INTRODUCTION

While fresh and minimally processed staple foods remain central to Tanzanian diets, the consumption of packaged and processed products—often high in fats, salt, and sugar—is rising quickly. This shift is contributing to a rising burden of overweight and obesity, while undernutrition and limited access to healthy diets remains a challenge for many.

HOW ATNi'S DATA SUPPORTS TANZANIA'S NUTRITION POLICY

Tanzania has a strong nutrition policy foundation, including policies outlined in the National Multisectoral Nutrition Action Plan II (NMNAPII) and National Roadmap to Sustainable Food Systems Transformation, 2030. However, a recent review of policy coherence in food systems found the domain of healthy diets, more nutritious food consumption and less unhealthy food consumption, had the highest degree of policy incoherence, compared with other food system outcomes.

This incoherence is caused, in part, by overlapping organizational mandates which leads to coordination challenges. While the NMNAPII is coordinated by the Prime Minister's Office, Food Standards are developed by both the Tanzania Bureau of Standards and the Ministry of Industry and Trade, and the National Pathway for Sustainable Food Systems Transformation 2030 is led by the Ministry of Agriculture. Companies also highlight that the current policies' incoherence may limit them in investing in healthier options, and many are unwilling to assume the risks of being the first mover when financial returns in investing in healthier offerings may be uncertain.

Improved policy coherence and stronger government leadership are needed. Policies which support the market to deliver healthier and more affordable offerings can steer the private sector towards increasing availability of healthy and affordable food options, ultimately benefiting the health of all Tanzanians.

METHODOLOGY

To support the government of Tanzania in strengthening their food environment policies, ATNi (Access to Nutrition initiative), a global nonprofit, undertook a market assessment to understand two key issues of relevance to Tanzania's nutrition policy agenda:

- 1 Mapping Tanzania's Food Environment (FEMR):** ATNi's FEMR scoped the broader literature on the food environment, including existing policies in Tanzania to support access to health, safe and nutritious, with a specific focus on processed, packaged food and fortification. The report is available [here](#).
- 2 Product Profile:** the product profile assesses the healthiness of the 21 largest processed and packaged foods covering 48% of the overall market share.^a The full report is available [here](#).

21

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

which accounted for

48%

of the total sales of packaged foods in Tanzania in 2022



- 3 Corporate Profile:** the corporate profile assesses 10 of the largest F&B companies on what they are doing to contribute to healthier diets for Tanzanians, as well as areas requiring action.^b

^a Product Profile assessment was conducted using three nutrient profiling models (NPMs), Health Star Rating (HSR), modified HSR with micronutrients (HSR+), and WHO AFRO model

^b Including 7 Tanzania headquartered companies and 3 globally headquartered companies. The ten companies are: ASAS, Bakhresa Group, Coca-Cola, Darsh, Iringa Food and Beverages, MeTL, Motisun, PepsiCo, Tanga Fresh, and Wilmar

FIGURE 1
COMPANIES ASSESSED IN THE TANZANIA CORPORATE PROFILE



ATNi's Tanzania market assessment provides data to support two strategic outcomes set out in the NMNAPII: strategic outcome four, strengthened multisectoral and private sector engagement for nutrition (focusing on private sector engagement) and strategic outcome five, on creating adequate policies and frameworks that are supportive of nutrition, focusing on policies that shape the food environment.



KEY FINDINGS

The research findings were presented to a group of Tanzanian policymakers from the government including Tanzania Food and Nutrition Centre (TFNC), the Ministry of Trade and Industry, as well as other development partners including civil society organizations and academics from the University of Dar es Salaam and Sokoine University of Agriculture, on 26 June 2025 in Dar es Salaam.

Product Profile

- **The overall healthiness of the 21 Tanzanian companies' portfolios is low, with only 25% of products meeting the 'healthy' threshold** under the Health Star Rating (HSR) system (3.5 stars out of 5), rising to 37% when weighted by sales.
- Only 9% of processed and packaged foods in Tanzania are considered healthy enough to be marketed to children.

- **Multinational companies generally sell less healthy products in Tanzania than across their other markets.** Of the seven global-headquartered companies included in the assessment, six have a lower average HSR for the portfolio they sell in Tanzania, compared to their global average.

Voluntarily fortification: Seven of the 21 companies included in the Product Profile assessment were found to be fortifying at least one product in their portfolio.

- The majority of the products assessed (81%) were voluntarily fortified.
- There was limited data available on micronutrient levels in many products. For products for which nutrient levels were available (40/483), 67.5% (n=27) met the HSR 'healthy' threshold of 3.5 out of 5 stars.

FIGURE 2
OVERVIEW OF THE PRODUCT PROFILE RESULTS FOR 21 COMPANIES



Source: [ATNi's Tanzania Country Dashboard](#)

FIGURE 3
HSR RESULTS OF GLOBAL
HEADQUARTERED COMPANIES:
TANZANIA VS GLOBALLY

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

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

Reporting on the healthiness of portfolio:

Companies are not yet reporting on the overall healthiness of their portfolios.

- Two Tanzania-headquartered companies (Motisun and MeTL) indicated that nutrient profile models (NPMs) are not widely used by the food and beverage industry in Tanzania to evaluate and report on portfolio healthiness.
- Only PepsiCo disclosed the use of an NPM to assess the healthiness of parts of its product portfolio, which they use for reformulation purposes in certain markets; however, it does not report on portfolio healthiness globally, or within Tanzania.

Affordability of healthy foods: affordability is often used as a marketing strategy, but is not clearly defined by companies.

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

Responsible marketing: few companies have commitments to limit marketing of unhealthy foods to children.

- No Tanzanian headquartered companies have published commitments to restrict marketing of all – or 'less healthy' – products to children in Tanzania.
- Three multinationals (Coca-Cola, Wilmar, PepsiCo) were found to publish global commitments for responsible marketing to children, two of which having policies specifying media channels and techniques. However, none of these companies report on the implementation of these policies in the Tanzanian market.

Corporate Profile

Nutrition-related policies and practices of 10 of the largest companies producing processed and packaged food in Tanzania.

Reformulation policies: None of the 10 companies were found to have reformulation targets in the Tanzania market.

- One Tanzania-headquartered company (Tanga Fresh) indicated that it has a reformulation strategy in place to reduce sodium, fat, and sugar content in certain products, but does not report on these efforts.
- Only PepsiCo was found to set global targets to reduce key nutrients of concern and increase levels of positive food components (fruits, vegetables, nuts and legumes). However, they did not disclose Tanzania-specific performance on these targets.

POLICY RECOMMENDATIONS

To Improve Portfolio Healthiness

1 Finalize the development of a Tanzanian Nutrient Profile Model and Mandatory front of package labeling

- In the short term, mandate the use of Swahili language on all package labels, which is currently limited, and ensuring that micronutrient content is included on labels to ensure compliance with East African standards around back of package labeling, which should include nutritional information and a complete list of ingredients (TZS 538:2015 – EAS 38: 2014).
- In the medium term, finalize the ongoing research to identify a Tanzania specific NPM, as well as associated research on the design for effective front of package labeling scheme. The adoption of the NPM is a key first step for other food environment policies providing a basis for use of nutrition and health claims, reformulation targets, and to set standards and healthiness criteria to regulate marketing to children.

2 Product reformulation to remove nutrients of concern: The NMNAP II includes the need for industry reformulation guidelines. The new NMNAP III provides an opportunity to further develop these reformulation guidelines, as well as a policy for rolling these out with companies.

- **Improving the micronutrient content of processed packaged foods while avoiding 'health halos'**
 - To prevent 'health halos', where companies fortify unhealthy foods to make them appear healthier (e.g. cookies made with fortified flour), policies around fortification should include specific cut-off points, using a government endorsed nutrient-profiling model.

3 Fiscal policies to incentivize access to affordable healthier foods

- Modify the existing sugar sweetened beverages tax to be based on levels of sugar content and explore options for a more holistic package of fiscal measures to increase affordability of healthier foods.

4 Limiting children's exposure to harmful marketing

Mandatory policies which protect all children under 18 from marketing of unhealthy foods, using all channels and techniques, are essential. The WHO and United Nation's Children's Fund (UNICEF) has established standards which respect specific needs and vulnerabilities of children and can be used to guide policy development.

- Tanzania has robust policies to restrict marketing of baby foods, but not for restrictions on marketing to children under 18 years. While the NMNAPII recommends adopting the WHO AFRO model to regulate marketing to children, this still has not happened.
- The government is in the process of creating an NPM to inform FOP labels, which could also be used for restricting marketing to children.