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Report Name: Tanzania Poultry Market Dynamics and Access Constraints

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Report Highlights:

The United States continues to lack access to mainland Tanzania's poultry market, despite ongoing supply constraints and shortages of key inputs. In Zanzibar, increased excise duties on frozen chicken have led to the closure of a longstanding U.S. supplier and variable year-over-year U.S. export volumes, despite still having market access.

Poultry Production and Sector Performance Across Tanzania

Tanzania's poultry sector shows visible signs of expansion, yet core structural constraints continue to suppress productivity, limit scale, and weaken competitiveness. Despite reporting approximately 54 million day old chicks from January to June 2026, producers across the country face persistent shortages—especially acute for day-old breeding stock (Table 1) — resulting in long wait times, missed production cycles, and stalled investment. Hatchery output remains inconsistent, and high chick prices disproportionately burden small and medium farms, preventing them from capitalizing on rising demand.

Table 1: Day-Old Chicks Production in Tanzania, January to June 2026

Month	Broiler	Layer	Dual Purpose
Jan	6,475,407	248,504	703,421
Feb	6,881,058	360,424	1,234,569
March	7,681,142	322,421	1,187,695
April	6,815,588	404,758	1,001,829
May	8,581,072	817,449	1,012,900
June	8,022,491	833,919	1,187,079
Total	**44,456,758**	**2,987,475**	**6,327,493**

Source: Tanzania Poultry Industry Association (TPIA)

Table 2: Retail Prices of from January to June 2026 (TZS/Chick)

Month	Broiler	Layer	Dual Purpose
Jan	2,011	2,650	1,800
Feb	2,011	2,650	1,900
March	2,028	2,650	1,900
April	2,067	2,650	1,900
May	2,077	2,720	1,950
June	2,077	2,720	1,950
Average	**2,045**	**2,673**	**1,900**

Source: Tanzania Poultry Industry Association (TPIA)
**Exchange rate: 1USD equals TZS 2600

Feed supply challenges further constrain growth. Irregular raw material availability, variable quality, and high transport costs keep feed expensive and unreliable, reducing growth rates and increasing mortality. These input bottlenecks reinforce low farm-level efficiency and make domestic production costly. At the same time, domestic breeds still account for over 70 percent of rural output, highlighting slow modernization and limited adoption of improved genetics and management practices.

Table 3: Retail Feed Prices in Tanzania from January to June 2026 (USD/50 KG)

Month	Starter	Grower	Finisher
Jan	33	32	31
Feb	33	32	31
March	33	32	31
April	33	32	31
May	34	33	32
June	34	33	32

Source: Tanzania Poultry Industry Association (TPIA)
**Exchange rate: 1USD equals TZS 2600

Zanzibar's poultry sector remains small and supply-constrained, with production dominated by smallholder, low-input systems that face persistent challenges accessing quality feed, veterinary services, and day-old chicks. Hatchery capacity on the island is minimal, forcing producers to depend on mainland Tanzania or foreign suppliers for inputs, which raises costs and contributes to irregular production cycles. Broiler output is largely directed to local wet markets, while layer operations remain limited and continue to struggle with high input prices and inconsistent chick availability.

Several additional pressures further shape sector performance. The tourism industry generates steady demand for affordable poultry products, yet domestic producers are unable to supply hotels and restaurants reliably, reinforcing dependence on imported frozen chicken from the United States, China, Brazil, Turkey, Saudi Arabia, Canada, EU, and the rest of the world. Feed costs remain elevated due to transport expenses and limited milling capacity, reducing margins for small and medium producers. Cold-chain infrastructure is underdeveloped, restricting the growth of commercial broiler operations and limiting access to higher-value markets. Smallholder production continues to face biosecurity and quality challenges, and structural barriers—such as limited financing and fragmented market channels—constrain investment and prevent the sector from scaling to meet rising demand.

U.S. Poultry Market Access to Mainland Tanzania

U.S. poultry has no commercial access to mainland Tanzania, where import bans, discretionary licensing, and stringent sanitary and phytosanitary (SPS) controls collectively block all foreign suppliers. These measures are part of a broader policy framework aimed at protecting domestic producers, limiting external competition, and favoring regional suppliers already aligned with East African Community regulatory norms. High tariffs, periodic enforcement actions, and opaque administrative procedures further raise compliance costs and make market entry unattainable.

SPS requirements are the most restrictive barrier. Tanzania demands extensive facility certifications, detailed animal-health documentation, and verification of disease-control protocols—including avian influenza surveillance and biosecurity standards that diverge from international systems. Approval processes are slow, discretionary, and rarely recognize U.S. regulatory equivalence, while additional requirements such as temperature-control records, transport-sanitation attestations, and origin-traceability documentation are applied inconsistently and often exceed international norms.

U.S. Poultry Market Access to Zanzibar

U.S. poultry market share in Zanzibar remains limited and inconsistent, despite nominal market access. As a semi-autonomous jurisdiction, Zanzibar applies its own regulatory authorities, fiscal measures, and market access procedures, often diverging from mainland Tanzania and creating a fragmented operating environment for U.S. suppliers. The Revolutionary Government of Zanzibar's July 2025 increase in the excise duty on frozen chicken from approximately USD 0.12/kg to USD 0.39/kg—citing support for local producers and enhanced revenue collection—significantly raised landed costs and prompted the withdrawal of a long-established U.S. supplier. With domestic production still capacity constrained and largely smallholder based, the supplier's exit reduced the availability of competitively priced products and increased reliance on intermittent imports from alternative origins.

Table 4: Chicken Exported to Zanzibar, Calendar Year 2020-2025 (MT)

Reporter	2020	2021	2022	2023	2024	2025	Total
Brazil	2,167	2,671	5,005	2,552	6,966	8,153	27,514
USA	3,201	4,292	4,836	2,250	1,725	3,348	19,652
China	0	0	0	0	69	2,133	2,202
Turkey	384	1,124	1,047	50	528	374	3,962
Saudi Arabia	0	162	432	270	189	189	1,242
Canada	0	0	26	0	0	122	148
EU	335	81	242	45	52	51	806
Rest of the world	951	335	7	26	0	50	1,369
Total	7,038	8,665	11,595	5,648	9,529	14,420	**56,895**

Source: Trade Data Monitor, LLC

Zanzibar's chicken import market from 2020–2025 became highly concentrated, dominated by Brazil and the United States, which together accounted for over 80 percent of total volumes. Brazil's exports surged to more than 8,000 MT in 2025, securing its position as the leading supplier and contributing over half of all poultry imports. The United States maintained strong but fluctuating shipments, while China emerged as a new entrant in 2024–25, supplying over 2,200 MT of low-cost, lower-quality chicken breasts that have since established a steady presence. Minor exporters such as Turkey, Saudi Arabia, Canada, and the EU played irregular roles, collectively adding limited diversification. The overall import total of 56,895 MT from 2020–2025 underscores Zanzibar's dependence on a small number of foreign suppliers.

Attachments:

No Attachments.