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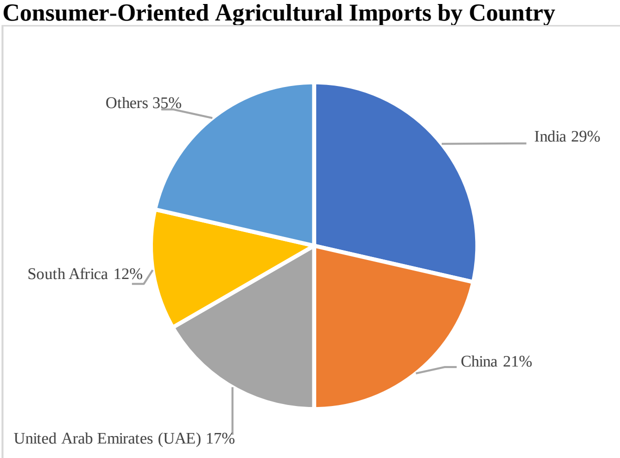
Report Highlights:

Tanzania offers strong growth potential for U.S. food and beverage exports, supported by expanding tourism, rapid urbanization, and rising consumer demand for high-quality imported products. Key opportunities include beverages, wheat, edible oils, and confectionery. The United States can further expand its market share by leveraging its reputation for quality and safety, even amid intensifying competition from established suppliers.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Executive Summary:
Tanzania is a lower-middle-income country, and in 2024 its food economy expanded with steady growth and rising consumer purchasing power. Food retail sales reached $27.6 billion, the processing sector includes over 35,000 firms, and the food service industry generated $2.4 billion supported by strong tourism. Together, these sectors underscore Tanzania's growing importance as a market for consumer-oriented food products and agricultural inputs.

Consumer-Oriented Agricultural Imports by Country



Source: Tanzania National Bureau of Statistics

Food Retail Industry:
Tanzania's food retail sector totaled $27.6 billion in 2024 and is projected to grow nine percent in 2025, with informal outlets still dominant. Modern chains are expanding gradually as urbanization and incomes rise, and food and beverages account for 57 percent of retail sales. Demand for packaged and high-value products continues to increase, driven by a growing middle class and strong tourism.

Food Processing Industry:
Tanzania's food processing sector includes over 35,000 firms, more than 80 percent of which are small enterprises with fewer than 20 employees. The industry is driven largely by the domestic market, which accounts for about 65 percent of total sales. Core activities include grain milling, edible oil production, dairy processing, beverages, and meat and fish products.

Food Service Industry:
Tanzania's food service industry generated an estimated $2.4 billion in 2024, with growth in 2025 expected to ease slightly due to slower hotel and restaurant expansion. The sector is led by independent restaurants, cafés, and street vendors, while modern fast-food outlets and international franchises continue to expand in major cities, supported by strong tourism demand.

Quick Facts CY 2024

Imports of Consumer-Oriented Products *(US $1.46 billion)*

List of Top 10 Growth Products in Tanzania

1) Wheat	2) Sugar
3) Edible Oils	4) Poultry Products
5) Dairy Products	6) Processed foods
7) Beverages	8) Rice
9) Confectionery	10) Frozen foods

Food Industry by Channels ($U.S. billion)

Retail Food Industry	$27.6
Food Service-HRI	$2.4
Food Processing	$4.0
Food and Agriculture Exports	$8.7

Top 10 Host Country Retailers
1. Shoppers Supermarket
2. Village Supermarket
3. TSN Supermarket
4. Imalaseko Supermarket
5. Nakumatt (legacy presence; limited operations)
6. Game Stores (Massmart/Walmart – formerly in market; status fluctuates)
7. Maisha Supermarket
8. JD Supermarket
9. Shreeji Supermarket
10. Mzizima Supermarket

GDP/Population
Population *(millions)*: 69.4
GDP *(billions USD)*: 81.4
GDP per capita *(USD)*: 1,135

Sources:
- National Bureau of Statistics Tanzania
- Bank of Tanzania
- Ministry of Industry and Trade
- Ministry of Agriculture

Strengths/Weaknesses/Opportunities/Threats

Strengths	***Weaknesses***
Rising demand is driven by a growing middle class, tourism, and expanding modern retail.	Elevated logistics and shipping costs, limited cold-chain capacity, slow port clearance, and restricted market access for bulk and intermediate products continue to raise overall import costs.
Opportunities	***Threats***
Rising demand across premium, convenience, and reexport segments driven by growth in packaged foods, the HRI sector, health products, ingredient needs, and regional corridor trade.	Rising competitive and policy risks from low-cost suppliers, import-substitution policies, tighter food-safety rules, global freight disruptions, and currency depreciation reducing import affordability.

Section I: Market Overview

Tanzania's food sector is entering a period of sustained expansion, driven by rapid population growth, urbanization, and a steadily rising middle class. The country's population—now over 70 million—is young, increasingly urban, and projected to nearly double by 2050, which is reshaping consumption patterns toward more diverse, convenient, and higher-value foods. Middle-income households are growing in number and are spending more on packaged foods, animal proteins, fresh produce, and ready-to-eat options as lifestyles become more time-constrained. Urban consumers are shifting away from purely staple-based diets toward foods that offer better nutrition, safety, and convenience. These demographic shifts are occurring alongside rising purchasing power, with the national economy expanding steadily and household consumption increasing in both volume and variety.

The broader business climate is improving, and this is accelerating modernization across the food value chain. Tanzania's retail food market continues to grow strongly, with food and beverages representing most of household spending. While informal markets still dominate, modern supermarkets, specialty food stores, and online grocery platforms are expanding in major cities as logistics, cold-chain capacity, and digital payments improve. The government is prioritizing agribusiness and food processing in its industrialization agenda, leading to more investment in processing capacity, packaging, storage, and distribution. Recent trends include rising demand for healthier products, growth in quick-service and fast-casual dining, and increased interest in locally processed foods as quality improves. Looking ahead, continued urbanization, tourism growth, and improvements in infrastructure will drive further diversification of demand, while long-term population growth will require major increases in domestic production and processing. This positions Tanzania's food sector for sustained expansion, deeper formalization, and growing opportunities for both local and international players.

Table 1: Advantages and Challenges for U.S. Food Exporters in Tanzania

Advantages	Challenges
Strong reputation for high-quality, safe, and consistent food products, appealing to Tanzania's growing middle class and tourism sector.	High shipping and logistics costs compared to suppliers from Asia, the Middle East, and South Africa.
Expanding demand for premium, processed, and specialty foods—categories where U.S. suppliers are globally competitive.	Long transit times reduce competitiveness for perishable or time-sensitive goods.
Rising urbanization and modern retail growth create openings for packaged foods, snacks, beverages, and ingredients.	Market dominated by informal trade, making distribution and brand penetration more difficult.
U.S. agricultural technology and ingredients support Tanzania's growing food processing industry, which seeks reliable inputs.	Strong competition from lower-cost suppliers (India, China, UAE, Turkey) and regional producers (Kenya, South Africa).
Growing demand for health, wellness, and specialty diet products, where U.S. brands are well-positioned.	Limited consumer awareness of U.S. brands outside major cities, requiring higher marketing investment.

Expanding tourism and hospitality sectors increase demand for high-quality imported foods used in hotels, restaurants, and resorts.	Importers face complex customs procedures, inconsistent enforcement, and occasional regulatory delays.
U.S. suppliers benefit from strong food safety standards, appealing to retailers seeking reliable partners.	Price sensitivity among most consumers limits the market for premium-priced U.S. goods.
Opportunities in supplying inputs for local manufacturing (flavorings, additives, baking ingredients, dairy powders).	Limited cold-chain infrastructure in some regions restricts distribution of frozen or chilled U.S. products.

Section II: Exporter Business Tips

Market Research

Exporters are encouraged to conduct thorough market research prior to entering the Tanzanian market. The food and agricultural sectors are characterized by a large informal retail base, complemented by a small but expanding modern retail and hotel, restaurant and industrial (HRI) segment concentrated in major urban centers. National statistical and trade authorities provide essential information on trade flows, tariffs, and regulatory requirements, which can help exporters assess market size, identify growth categories, and understand import procedures.

Local Business Customs and Trends

Business practices in Tanzania emphasize relationship building, trust, and consistent engagement. Exporters should expect a gradual decision-making process and prioritize in-person meetings when feasible. Clear documentation—such as certificates of origin, Sanitary and Phytosanitary (SPS) certificates, and compliant labeling—is essential for smooth customs clearance. Regulatory requirements continue to evolve, and exporters should monitor updates from relevant standards and regulatory agencies.

Price sensitivity is high, making competitive pricing and transparent terms important. Importers may prefer flexible payment arrangements, with letters of credit common for initial transactions. Exporters should also account for longer lead times due to port and inland logistics constraints. Effective market entry typically depends on partnering with established wholesalers and distributors who supply both modern retail and informal outlets. Marketing support—particularly in-store promotions and product visibility, can strengthen brand recognition in urban markets.

General Consumer Tastes and Trends

Consumer preferences in Tanzania are shaped by urbanization, a young population, and growing exposure to international products. Demand is rising for packaged foods, convenience items, fortified products, and premium offerings despite continued price sensitivity. Tourism reinforces demand for higher-value food products in major hospitality hubs such as Dar es Salaam, Arusha, Zanzibar, and the northern safari circuit. Additional trends include increasing interest in health-focused products, stronger brand awareness among younger consumers, growing demand for ready-to-cook and ready-to-eat items, and the influence of modern retail outlets on purchasing habits. Digital marketing, particularly social media—is playing a larger role in shaping consumer choices, while awareness of food safety, labeling, and product quality continues to rise. Seasonal consumption peaks during holidays, and high-tourism periods also affect purchasing patterns.

Section III: Import Food Standards, Regulations and Procedures

Customs Clearance

Food imports into Tanzania are subject to customs procedures administered by the Tanzania Revenue Authority (TRA) and relevant border inspection agencies. Importers should consult current guidance on clearance steps, inspection requirements, and applicable fees to ensure compliance.

Documents Required for Imported Food

Typical documentation includes a commercial invoice, bill of lading, packing list, certificate of origin, and applicable sanitary or phytosanitary certificates. Requirements may vary by product category and should be verified with the appropriate regulatory authorities.

Labeling Requirements

Food labeling must comply with national standards, including product name, ingredients, manufacturer details, shelf life, and storage instructions. English is widely accepted, though Swahili labeling is increasingly preferred for retail products. Exporters should ensure labels meet all applicable requirements before shipment.

Tariffs and Free Trade Agreement (FTAs)

Tanzania applies tariffs under the East African Community Common External Tariff. Exporters should verify current tariff rates and any applicable regional trade agreements that may influence market access or duty structures.

Trademarks and Patents

Brand and intellectual property protection is administered by the Business Registrations and Licensing Agency. Exporters seeking to register trademarks or patents should review procedures, fees, and application requirements to ensure adequate protection of their products and brands.

Section IV: Market Sector Structure and Trends

Tanzania's food sector continues to expand, driven by urbanization, population growth, tourism recovery, and rising demand for packaged and value-added foods. Inflationary pressures and post-COVID adjustments—such as shifts toward packaged foods for safety, accelerated digital and delivery adoption in urban areas, renewed tourism recovery, and tighter household budgets—have increased price sensitivity, but demand for convenience, quality, and safety remains strong. Modern retail and food service channels are growing from a small base, while the food processing sector is expanding through SME-led investment.

Best Market Sector Opportunities

The retail sector offers the strongest opportunity for new consumer-oriented product sales, particularly in urban supermarkets serving middle-income households. The most effective entry strategy is through established importers and distributors who supply both modern retail chains and informal outlets. The HRI sector presents strong opportunities in tourism hubs, while the food processing sector is expanding but remains dominated by SMEs with limited capacity for imported ingredients.

Best Consumer-Oriented Product Prospects

Strong prospects include packaged and processed foods, edible oils, dairy products and alternatives, snacks and confectionery, juices and beverages, frozen foods, poultry products, fortified foods, and premium items for hotels and supermarkets. These categories align with rising urban demand, recovery of tourism sector, and an increased consumer focus on convenience and safety.

Retailer Information and Sector Structure

Information on retail sales, store locations, ownership, and growth rates can be obtained from national statistics, industry directories, and company disclosures. These sources provide insight into the structure and expansion of modern retail chains and their role in shaping consumer purchasing patterns.

Key Issues and Competitive Situation

Key trends include post-COVID tourism recovery, inflationary pressures, growth of private-label products, emerging interest in plant-based and health-focused items, expansion of e-commerce, strong competition from regional suppliers, and continued dominance of the informal sector.

Section V: Agricultural and Food Imports

Tanzania's agricultural and food import profile has evolved significantly over the past five years, driven by rapid urbanization, population growth, and persistent supply gaps in key commodities. Analysis of five-year import trends—based on changes in import value and volume across major HS chapters—shows that the fastest-growing sectors are those where domestic production remains insufficient and consumer demand continues to rise.

Cereals and Cereal Preparations

Imports of wheat and wheat flour have grown steadily due to structural production deficits and strong demand from bakeries and urban consumers. Rice imports also increase in years of domestic shortfall. Growth is evident in sustained increases in import volumes.

Sugar and Sweeteners

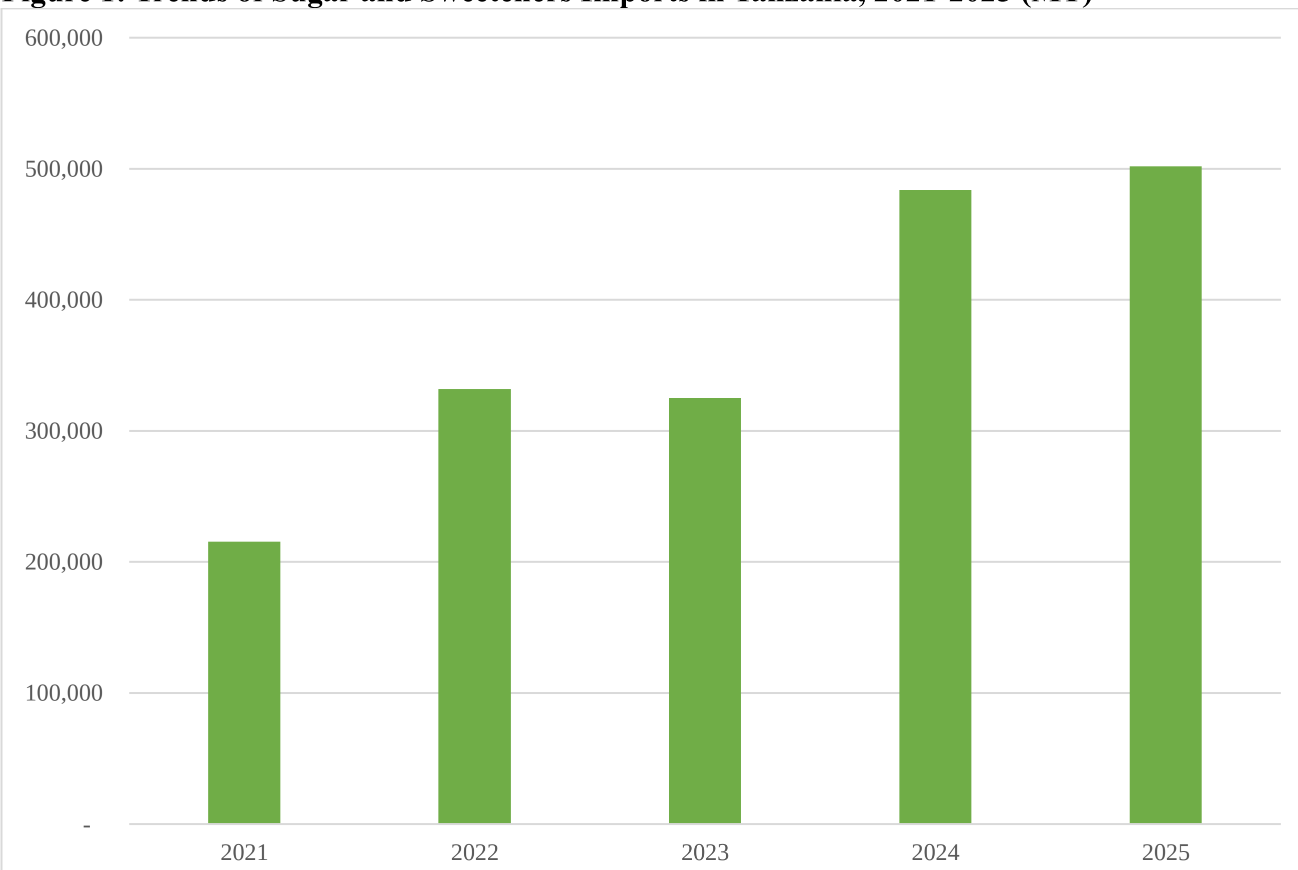
Sugar remains one of the most dynamic import categories. Domestic production frequently falls short of national requirements, prompting recurring import surges and year-on-year increases in import value.

Table 2: Import of Sugar and Sweeteners in Tanzania by Country, 2021-2025 (MT)

Reporter	2021	2022	2023	2024	2025
India	103,958	156,170	157,271	324,651	276,012
Saudi Arabia	38,142	15,981	37,737	61,751	101,645
Brazil	21,764	8,219	46,141	32,082	31,631
Thailand	25,000	123,485	51,219	26,050	22,675
Rest of the world	26,661	28,028	32,838	39,303	69,965
Total	**215,525**	**331,883**	**325,206**	**483,837**	**501,928**

Source: Trade Data Monitor LLC

Figure 1: Trends of Sugar and Sweeteners Imports in Tanzania, 2021-2025 (MT)



Source: Trade Data Monitor LLC

Edible Oils and Fats

Vegetable oils, especially palm, sunflower, and soybean oils—are among the fastest-growing imports. Limited domestic crushing capacity and rising household and industrial demand have driven consistent growth in both value and volume.

Table 3: Import Values of Edible Oils and Fats in Tanzania, 2021-2025 (USD)

Reporter	2021	2022	2023	2024	2025
Malaysia	231,016,574	295,636,020	306,116,448	263,803,000	409,680,508
Indonesia	292,914,563	179,676,937	195,358,922	186,291,517	215,515,484
Kenya	23,135,222	23,655,518	15,951,456	18,061,607	20,000,944
EU 27	5,732,474	9,057,638	19,812,377	14,114,604	18,450,112
Uganda	0	0	2,745,209	5,791,764	12,821,915
Turkey	8,787,694	8,396,401	16,632,442	8,673,024	11,845,600
Ukraine	8,805,389	1,164,282	446,911	4,316,501	6,341,940
India	1,961,438	1,890,600	2,654,845	2,822,792	3,220,240
Cote d'Ivoire	490,148	167,925	1,488	288,764	637,052
Rest of the world	12,286,939	4,760,394	6,042,374	916,194	1,734,350
Total	**585,130,441**	**524,405,715**	**565,762,472**	**505,079,767**	**700,248,145**

Source: Trade Data Monitor LLC

Animal Products

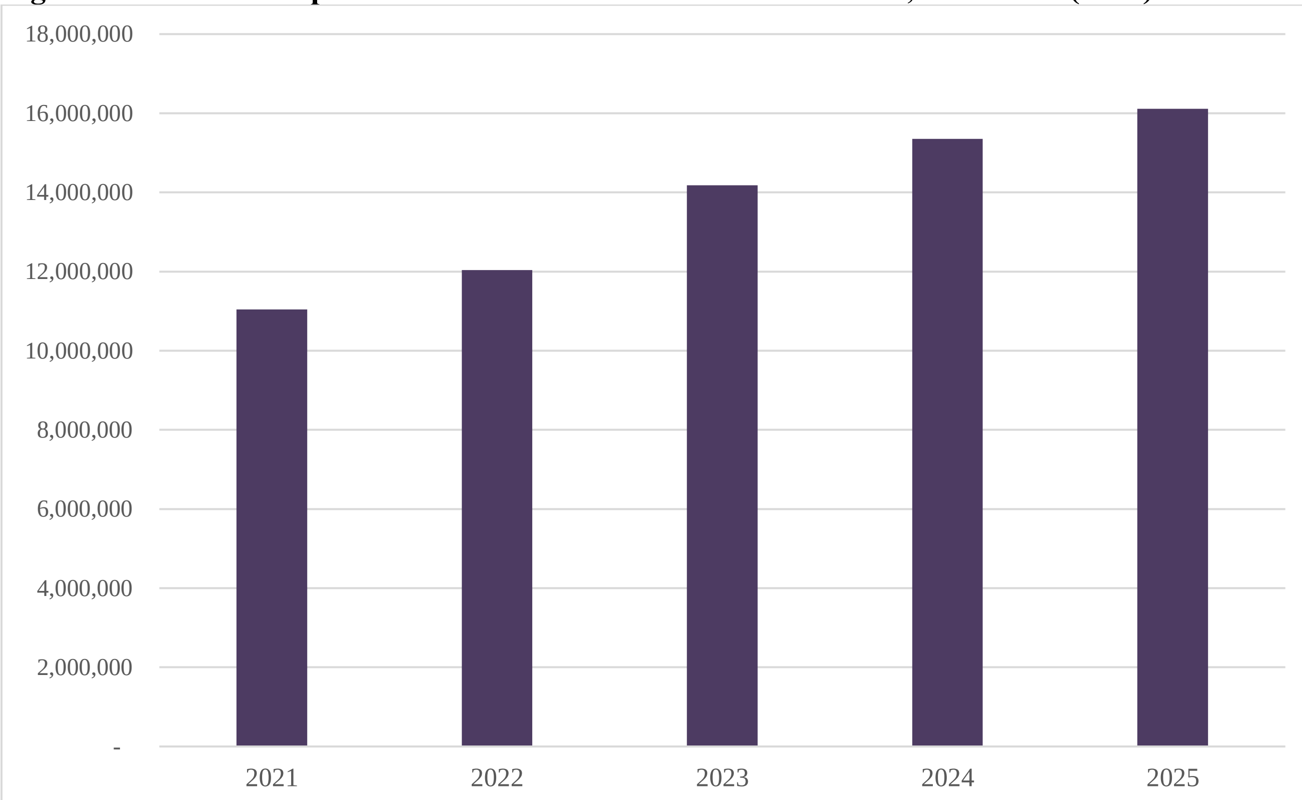
Imports of dairy items such as milk powder and cheese, and certain meat preparations have expanded from a low base. Growth is supported by rising demand from hotels, restaurants, and higher-income urban consumers seeking consistent quality and year-round supply.

Table 4: Import Values of Animal Products in Tanzania, 2021-2025 (USD)

Reporter	2021	2022	2023	2024	2025
EU 27	5,883,876	6,072,020	4,823,964	4,989,694	5,250,590
Kenya	1,308,689	1,332,650	1,585,315	2,143,966	2,188,958
Malaysia	716,336	1,022,078	522,243	1,574,836	1,401,702
South Africa	1,979,369	1,494,738	1,463,387	1,369,206	1,216,008
India	49,842	124,255	139,000	114,171	715,591
New Zealand	492,451	833,826	390,105	86,264	367,599
Turkey	317,589	596,058	4,819	2,185	3,275
United Kingdom	214,996	531,611	1,080,821	1,166,282	427,208
Rest of the world	76,647	33,369	4,172,293	3,909,620	4,538,579
Total	**11,039,795**	**12,040,605**	**14,181,947**	**15,356,224**	**16,109,510**

Source: Trade Data Monitor LLC
Animal Products include Butter; Cheese; Cream & Powdered/Condensed Milk; Ice Cream; Whey Protein; Yogurt & Dairy Drinks

Figure 2: Trends of Import Values of Animal Products in Tanzania, 2021-2025 (USD)



Source: Trade Data Monitor LLC
Animal Products include Butter; Cheese; Cream & Powdered/Condensed Milk; Ice Cream; Whey Protein; Yogurt & Dairy Drinks

Processed Foods, Snacks, and Confectionery

Urbanization and a young consumer base are driving rapid growth in packaged snacks, confectionery, biscuits, breakfast cereals, and other convenience foods. These categories show above-average growth rates compared to total food imports.

Table 5: Import Values of Processed Foods in Tanzania, 2021-2025 (USD)

Reporter	2021	2022	2023	2024	2025
Malaysia	232,994,103	298,349,943	308,256,466	267,469,596	412,982,966
Indonesia	294,542,760	182,213,102	197,149,066	192,788,105	223,629,769
EU 27	77,622,272	79,721,325	109,635,608	113,260,059	108,137,163
India	47,748,368	63,209,380	56,509,421	50,978,884	62,821,688
Kenya	48,621,069	54,521,219	45,596,742	42,733,688	47,566,625
South Africa	30,986,067	37,820,656	33,009,442	41,691,282	44,466,114
Turkey	41,783,045	58,158,575	66,598,287	44,053,719	41,576,235
China	15,331,164	21,755,088	19,494,980	25,892,917	30,429,105
Singapore	15,554,521	6,639,362	11,972,549	9,288,222	10,347,847
United States	1,758,175	2,705,168	7,736,290	3,039,190	2,242,060
Rest of the world	45,448,966	30,985,247	44,103,337	52,605,298	58,801,590
Total	**852,390,510**	**836,079,065**	**900,062,188**	**843,800,960**	**1,043,001,162**

Source: Trade Data Monitor LLC
Processed Foods include Alcoholic beverages, Baby food, Canned, Dried, and Frozen fruit, Chocolate and Confectionery, Condiments, Sauces, Jams and Jellies, Dog and Cat food, Fats and Oils, Food Preparations and Ingredients, Non-Alcoholic beverages, Prepared/Preserved Meats, Prepared/Preserved Seafood, Processed Egg Products, Processed Vegetables and Pulses, Processed/Prepared Dairy Products, Snack foods, Soups, Spices, Syrups and Sweeteners.

Beverages and Juices

Imports of fruit juices, soft drinks, and other non-alcoholic beverages have increased alongside the expansion of modern retail and the hospitality sector, driven by rising urban incomes, stronger consumer preference for branded packaged drinks, and limited local production capacity for consistent, high-quality beverage supply.

Table 6: Import Values of Non-Alcoholic Products in Tanzania, 2021-2025 (USD)

Reporter	2021	2022	2023	2024	2025
EU 27	6,081,011	5,964,453	11,584,749	5,019,866	5,814,163
South Africa	2,947,193	3,412,995	3,340,049	3,796,075	4,036,113
Kenya	1,136,254	1,842,351	1,648,397	1,825,591	1,401,353
Israel	98,000	468,000	893,000	494,000	593,000
Malaysia	158,700	674,735	200,446	263,934	374,807
India	156,358	232,234	1,518,847	883,274	316,818
Zambia	1,400,717	905,479	546,999	1,104,014	217,767
United Kingdom	52,317	6,177	22,658	134,832	172,378
Turkey	468,162	444,177	348,069	210,589	139,978
Taiwan	56,509	69,225	88,254	38,477	64,052
Thailand	109,653	32,509	26,286	38,001	32,140
Total	**1,083,193**	**267,270**	**822,530**	**399,023**	**1,205,059**

Source: Trade Data Monitor LLC
Non-Alcoholic Products include Bottled Drinks (Incl. Soda, Juice Mixes, etc.); Dry Beverages (Coffee, Tea, Herbal, etc.); Juices

Inputs for Food Processing

As Tanzania's food processing sector expands, imports of intermediate inputs—such as specialized flours, premixes, additives, and flavorings—have increased. Growth is driven by SMEs upgrading product quality and diversifying product lines.

Table 7: Import Values of Intermediate Products in Tanzania, 2021-2025 (USD)

Reporter	2021	2022	2023	2024	2025
Malaysia	239,397,313	311,953,323	318,019,808	285,051,072	425,272,154
Indonesia	303,246,712	186,326,208	198,817,544	191,711,251	222,973,702
India	55,764,377	96,923,857	124,546,199	233,285,525	187,009,195
EU 27	37,315,128	51,908,902	73,769,923	95,764,397	105,539,747
Zambia	36,179,913	41,255,415	49,345,910	45,379,559	79,818,641
Saudi Arabia	19,966,814	10,104,881	28,302,799	38,849,022	55,839,999
Kenya	36,586,285	41,586,353	33,854,133	36,214,205	45,985,671
South Africa	19,202,482	28,344,905	60,138,331	36,479,962	37,903,311
Pakistan	2,232,340	784,492	6,462,200	21,056,134	32,136,140
Turkey	29,369,238	38,504,765	49,900,067	31,251,502	27,235,199
China	4,881,073	7,960,157	10,199,808	14,427,331	22,061,167
Brazil	8,787,384	5,730,918	28,126,215	21,035,368	17,659,213
Thailand	14,634,273	70,912,011	29,193,542	19,649,009	15,705,797
Ukraine	9,124,828	1,311,596	704,578	4,320,584	7,202,871
United Kingdom	3,341,559	3,819,202	4,244,156	5,198,289	6,897,178
Egypt	5,298,834	8,782,815	17,102,039	6,780,722	1,912,312

Mozambique	1,556,275	303,750	4,000	1,442,280	1,903,524
United States	211,150	460,216	393,754	508,323	1,070,635
Rest of the world	27,920,394	11,128,976	14,064,853	20,418,888	49,090,840
Total	**855,016,372**	**918,102,742**	**1,047,189,859**	**1,108,823,423**	**1,343,217,296**

Source: Trade Data Monitor LLC
Intermediate Products include: Animal Fats; Dextrins, Peptones, & Proteins; Distillers Grains; Essential Oils; Ethanol, incl. bev.; Hay; Hides & Skins; Industrial Alcohols & Fatty Acids; Live Animals; Milled Grains & Products; Oilseed Meal/Cake (ex. soybean);Other Feeds & Fodders; Other Intermediate Products; Palm Oil; Planting Seeds; Soybean Oil; Sugars & Sweeteners; Vegetable Oils NESOI

Section VI: Key Contacts and Further Information

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Appendix I

U.S. Agricultural Exports to Tanzania (USD Millions)

Category	**2021**	**2022**	**2023**	**2024**	**2025**
Bulk Products	963,403	128,737	26,139,167	15,586,807	17,618,757
Intermediate Products	211,150	60,216	393,754	508,323	1,070,635
Consumer-Oriented Products	5,562,691	8,480,365	10,230,990	5,169,826	6,286,146
Agricultural-Related Products	6,793,213	9,109,318	36,770,388	21,274,456	24,985,538
Total U.S. Agricultural Exports	**13,530,457**	**18,178,636**	**73,534,299**	**42,539,412**	**49,961,076**

Source: Trade Data Monitor LLC

Attachments:

No Attachments