

Voluntary Report – Voluntary - Public Distribution

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Report Name: Zanzibar Hotel Restaurant Institutional

Country: Tanzania

Post: Dar Es Salaam

Report Category: Food Service - Hotel Restaurant Institutional

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Report Highlights:

Zanzibar's HRI food service sector has grown significantly, with a 37 percent increase in hotel and lodging facilities in the past five years. While U.S. exports make up less than one percent of Zanzibar's imports, mainly in frozen chicken, the island's expanding economy and youthful population present a promising opportunity for U.S. exporters of consumer-oriented and agricultural products. The rise in tourism and demand for diverse, high-quality food offerings aligns with global trends, suggesting a dynamic market with potential for growth and diversification in U.S. export offerings.

Executive Summary

In 2023, Zanzibar's tourism sector saw a significant boost, attracting 638,498 visitors, a 16.4 percent increase from the previous year. The island's allure includes pristine beaches, the historic Stone Town, spice tours, diverse wildlife, and a range of accommodations from luxury resorts to budget-friendly guesthouses. With tourism driving the economy, demand for diverse and high-quality food offerings is rising, presenting promising opportunities for U.S. exporters in consumer-oriented and agricultural products. Overall, Zanzibar's strategic investments in the hospitality sector underscore a dynamic market ripe for growth and diversification.

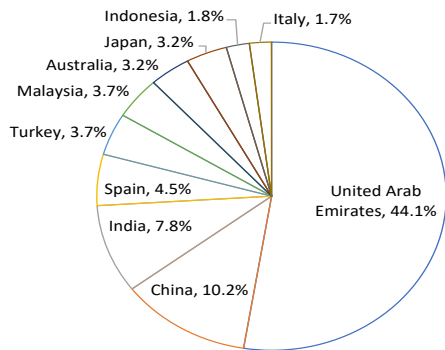
Food Retail Industry

The retail industry in Zanzibar is growing significantly, with a diverse range of businesses such as supermarkets, convenience stores, and liquor stores. In 2022, the total import value for food and beverages was approximately \$43.5 million. The steady growth trend is driven by population growth, increased tourism, and expanding retail businesses. Projections indicate continued growth, with rising demand for diverse food and beverage products, boosting import value.

Consumer Oriented Products

Zanzibar's imports of consumer-oriented products reached a value of \$54.2 million in 2021. The United Arab Emirates (UAE) emerged as the leading supplier, contributing 44.1 percent of the total value of imported goods. Other significant suppliers included China 10.2, India 7.8, and Spain 4.5 percent.

Figure 1: Top Exporting Countries to Zanzibar



Food Processing Industry

The food processing industry in Zanzibar is comprised of several companies. The industry focuses on processing and packaging major food crops such as rice, cassava, and bananas, as well as fruits and vegetables. Additionally, spices such as vanilla, ginger, and peppers are also processed. The sector aims to strengthen the agricultural value chain, reduce post-harvest losses, and improve food security.

Food Service Industry

The food service industry in Zanzibar is experiencing significant growth, driven by increasing tourism. In 2022, the industry generated approximately \$150 million in revenue, with an annual growth rate of eight percent. This sector includes restaurants, cafes, hotels, catering services, and street food vendors, offering a variety of cuisines. The industry provides employment opportunities and contributes to the region's economy, with projections indicating continued growth and further investment.

Quick Facts CY 2022/23

Imports of Consumer Oriented Products:

US \$43.5 million

Top Growth Products in Zanzibar:

1. Frozen Chicken
2. Rice
3. Sugar
4. Dairy Products
5. Vegetable Oils
6. Packaged Snacks

Top Retailers in Zanzibar:

1. The Town Supermarket
2. Fahud Enterprise Supermarket
3. Meat Company Butchery and Super Store
4. Michenzani Mall
5. Kilimani Plaza

Food Industry by Channels (U.S. Million)

Retail Food Industry: Approx. \$43.5 million.

Food Service-HRI: Approx. \$150 million.

Food Processing: Less than \$50 million.

Food and Agriculture Exports: Approx. \$9.5 million

GDP/Population 2023:

Population: Approximately 1.7 million

GDP: Approximately \$340 million

GDP: Approximately \$30,208 PPP

Sources: Trade Data Monitor (TDM), Bank of Tanzania, Zanzibar National Bureau of Statistics, and trade interviews

Strengths/Weaknesses/Opportunities/Threats

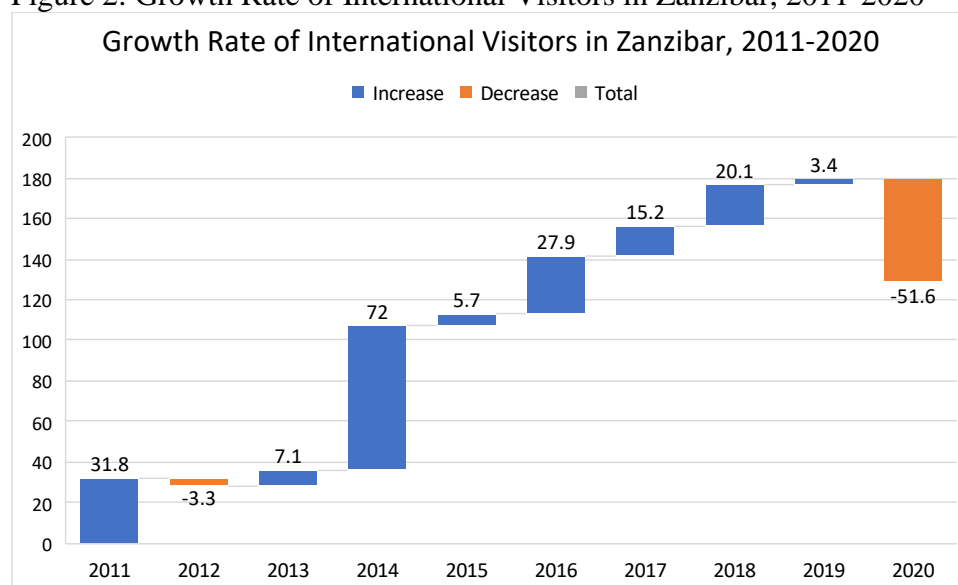
Strengths	Weaknesses
Tourism: Zanzibar is a popular tourist destination known for its beautiful beaches, and history.	Infrastructure: Infrastructure is weak, affecting accessibility and convenience.
Unique Cuisine: Local cuisine, with its blend of African, Arab, and Indian influence, is a major draw.	Seasonality: Tourism in Zanzibar is highly seasonal.
Hospitality: The hospitality industry in Zanzibar is known for its warm and welcoming service.	Competition: The growing number of hotels and restaurants increases competition.
Opportunities	Threats
Eco or Cultural Tourism: Promoting cultural or local experiences and traditions can attract more tourists.	Economic Factors: The local economy is highly dependent on tourism and is sensitive to global trends.
Digital Presence: Enhancing online presence and leveraging social media can attract a global audience.	Environmental Issues: Climate change and environmental degradation can impact the natural beauty of Zanzibar.

SECTION I: MARKET OVERVIEW

Zanzibar's tourism sector has experienced significant growth, with an average 13 percent year-on-year increase in international visitors over the past four years. However, the sector faced a 51.6 percent decline in tourist numbers from 2019 to 2020 due to the COVID-19 pandemic. In 2022, Zanzibar saw a record number of visitors, with official numbers showing an increase of 110.28 percent from 260,644 in 2020 to 548,503 in 2022. The number of tourists has since surpassed the one million mark, with a significant portion coming from mainland Tanzania for conferences and leisure. The tourism sector contributed 29.2 percent to the island's GDP in 2022, up from 16 percent in 2020.

The island has also seen growth in the number of hotels and guesthouses, with 709 establishments in 2023, up from 620 in 2020. This growth has helped meet the demand for accommodation from tourists in all different classes. Zanzibar's allure lies in its natural beauty, rich history, and vibrant culture, making it a top destination for international travelers. The island's proximity to Tanzania's mainland, with its renowned wildlife safaris and Serengeti National Park, adds to its appeal as an add-on to a classic safari itinerary.

Figure 2: Growth Rate of International Visitors in Zanzibar, 2011-2020



Source: Extracted from Zanzibar in figures, 2020

Peak Season

The peak tourism season in Zanzibar typically runs from June to October. During these months, the weather is pleasant, with cooler temperatures and minimal rainfall, making it an ideal time for tourists to visit. This period sees the highest number of visitors, and many hotels and attractions operate at full capacity. In contrast, the months of April and May are considered the low season due to the heavy rains during the "Masika" season. Many hotels take this time to close for renovations or staff training, preparing for the influx of tourists in the peak season. Zanzibar's unique seasonal variations ensure that visitors can enjoy the island's natural beauty, rich history, and vibrant culture throughout the year.

Number of Visitors

In 2023, Zanzibar saw a significant increase in tourism, with 1,067,345 visitors recorded for the year. Italy continued to dominate the tourism market, accounting for 15 percent of all visitors, followed by France at 12.6 percent and Poland at 10.7 percent. The United States

also featured prominently, contributing 8.9 percent of the total visitors. Most visitors (88.5 percent) arrived via the airport, while 11.5 percent entered through the seaport.

Historically, Zanzibar's tourism sector has shown remarkable growth. In 2019, the island welcomed 538,300 visitors, but this number dropped to 260,644 in 2020 due to the COVID-19 pandemic. The sector rebounded in 2021 with 394,185 visitors, marking a 51.2 percent increase from the previous year. The number of tourists has continued to rise, surpassing the one million mark in 2023.

Table 1: Number of International Visitors by Nationality, 2020

Table H.2.1: Number of International Visitors by Nationality, 2020

Nationality	2019			2020			% Change, 2019 to 2020
	Number	% share	Rank	Number	% share	Rank	
Europe							
Scandinavian	24,148	4.5	7	10,919	4.2	8	-54.8
British	30,277	5.6	5	11,750	4.5	7	-61.2
German	42,551	7.9	3	14,337	5.5	5	-66.3
Italian	61,317	11.4	1	21,426	8.2	3	-65.1
French	42,446	7.9	4	22,223	8.5	2	-47.6
Dutch	15,592	2.9	10	5,174	2	12	-66.8
Belgium	18,957	3.5	9	7,173	2.8	10	-62.2
Russian	12,516	2.3	12	43,578	16.7	1	248.2
Turkish	3,450	0.6	21	1,817	0.7	21	-47.3
Polish	20,483	3.8	8	12,331	4.7	6	-39.8
Ukrainian	4,317	0.8	20	5,849	2.2	11	35.5
Czech Republic	7,036	1.3	17	4,758	1.8	13	-32.4
Spanish	13,265	2.5	11	3,373	1.3	15	-74.6
Other European	45,395	8.4		24,323	9.3		-46.4
Sub Total	341,750	63.5		189,031	72.5		-44.7
Asia							
Japanese	1,784	0.3	22	494	0.2	22	-72.3
Chinese	6,731	1.3	18	1,894	0.7	20	-71.9
Indian	5,880	1.1	19	2,211	0.8	18	-62.4
Israeli	9,453	1.8	14	2,356	0.9	17	-75.1
Other Asian	18,689	3.5		7,255	2.8		-61.2
Sub Total	42,537	7.9		14,210	5.5		-66.6
Africa							
Kenyan	11,314	2.1	13	3,473	1.3	14	-69.3
South African	24,932	4.6	6	7,321	2.8	9	-70.6
Other African	25,074	4.7		12,553	4.8		-49.9
Sub Total	61,320	11.4		23,347	9		-61.9
America							
American	43,690	8.1	2	16,139	6.2	4	-63.1
Canadian	7,797	1.4	15	2,813	1.1	16	-63.9
Other American	22,761	4.2		10,441	4		-54.1
Sub Total	74,248	13.8		29,393	11.3		-60.4
Oceania							
Australian	7,319	1.4	16	2,114	0.8	19	-71.1
New Zealand	1,310	0.2	23	321	0.1	23	-75.5
Sub Total	8,629	1.6		2,435	0.9		-71.8
Not stated	9,780	1.8		2,228	0.9		
Total	538,264	100		260,644	100		-51.6

Source: Zanzibar Statistical Abstract 2020

Visitor Demographics and Origin:

- **European Dominance:** European tourists continue to dominate the market, accounting for 81.9 percent of all visitors in January 2023. Italy leads the pack with 15 percent of total visitors, followed closely by France at 12.6 percent.

- **Emerging Markets:** Countries like Poland, India, Russia, Israel, China, and Ukraine have shown a significant increase in visitor numbers, collectively witnessing a 23.2 percent rise compared to the previous month.
- **Gender Distribution:** The visitor demographics are almost evenly split, with 47.7 percent male and 52.3 percent female visitors.

Purpose of Visit:

The majority of visitors, 95.6 percent, come to Zanzibar for holidays, seeking the island's serene beaches and vibrant culture. A small percentage, 0.4 percent, visit friends and relatives, while 4 percent come for other purposes.

Travel and Accommodation:

- **Arrival Methods:** Most visitors arrive via international flights, with 88.3 percent choosing this mode of transport. Seaports also play a role, with 6,877 visitors arriving by sea ferries from Tanzania Mainland.
- **Accommodation:** Zanzibar offers a variety of accommodation options, with 678,570 bed-spaces available in January 2023. Out of these, 472,502 beds were sold, indicating high occupancy rates.

Economic Impact:

Over the past decade, Zanzibar has experienced a significant increase in the number of visitors, tripling its tourist arrivals. As such, tourism is a major contributor to Zanzibar's economy, accounting for 27 percent of the GDP and 80 percent of foreign exchange earnings. The average total expenditure of visitors is \$284 per person per night stayed, highlighting the economic benefits of tourism to the island.

Several factors contribute to the tourist spending in Zanzibar, including distance. Long flight distances from key source markets make travel to Zanzibar less convenient and more expensive. While the island's natural beauty, rich culture, and vibrant history continue to attract a growing number of visitors, there is a need to explore strategies to increase tourist expenditure. Enhancing the quality of services, offering premium experiences, and diversifying the tourism product portfolio could help Zanzibar position itself as a high-value destination and attract higher-spending tourists.

SECTION II: MARKET ENTRY

Entry Strategy:

Direct Exports and Joint Ventures

Direct exports and joint ventures with local distributors are the primary ways of entering the Zanzibar market. Some foreign firms have invested in local processing facilities, although this remains limited.

Identifying Buyers and Local Partners

Potential exporters should identify buyers in Zanzibar and/or local partners by contacting the Ministry of Industry and Trade or business associations such as the Zanzibar Association of Tourism Investors or the Zanzibar National Chamber of Commerce.

Partnering with local companies provides easier access to the Zanzibar market and eligibility for various tax incentives.

Market Access

To enter the Zanzibar market, exporters need to determine the relevant product classification and meet both general and specific importation requirements. The necessary documentation includes:

- Final/Commercial Invoice
- Import Permit from the relevant authority
- Packing List
- Transport Documents (Bill of Lading/Air Waybill/Road Consignment Notes)
- Exemption Document (if applicable)
- Agent's Authorization Letter from the importer
- Certificate of Compliance
- Certificate of Origin
- Zanzibar Maritime Authority Stamp
- Other specific phytosanitary and food safety requirements

For more detailed information, exporters can refer to the latest [Food and Agricultural Import Regulations and Standards \(FAIRS\) report of 2024](#) provided by the USDA Foreign Agricultural Service (FAS), and the [Zanzibar Import and Export Guidelines of 2019](#).

Sub-Sector Profiles:

i. Hotels and Restaurants in Zanzibar

Hotels and Guest Houses: As of 2024, Zanzibar has seen a continued increase in the number of hotels and guest houses, now totaling 700 establishments. In 2023, 220 new hotels and guest houses were registered, adding a total of 3,200 rooms. The Kusini district remains the most popular, with 280 hotels and guest houses, followed by Kaskazini A with 200 establishments. Wete district still has the fewest, with only three guest houses.

International hotel brands present in Zanzibar include:

- Hyatt
- DoubleTree
- Serena
- Hotel Verde
- Melia Hotels
- Best Western
- Essque Zalu
- Elewana Collection

Restaurants: As of 2024, the Zanzibar Association of Tourism Investors (ZATI) database lists 100 registered restaurants, contributing to 2.5 percent of Zanzibar's GDP. Cuisine preferences continue to vary by the origin of visitors. Typically, 30 percent of menu items consist of Swahili cuisine, featuring traditional Zanzibari recipes with seafood ingredients. The remaining 70 percent of the menu items include international cuisines, primarily Italian and Mediterranean dishes, Middle Eastern cuisine, and American food such as burgers, pizza, and pancakes.

ii. International Fast-Food Chains in Zanzibar

As of now, Zanzibar does not have any international fast-food chains. The market remains largely unexplored, primarily because the island is marketed as a slow-paced relaxation destination. Additionally, the wide availability of local street food, food stalls, and the

popular Forodhani Market in Stone Town cater to the culinary needs of both tourists and residents.

Every evening, tourists and local Zanzibari families gather at Forodhani Market to enjoy 'urojo' (Zanzibar Street food) and other local delicacies. The market offers a variety of options, including shawarma, kebabs, coconut milk, sugar cane juice, and more. This vibrant food scene contributes to the island's unique cultural experience and diminishes the demand for international fast-food chains.

iii. Drinking Establishments

In Zanzibar, drinking establishments and restaurants are not distinctly separated. Most beverages and soft drinks are served in hotels and restaurants, which sometimes have designated rooftop or sidebar areas. Traditional cafes or dedicated drinking bars are limited on the island. Instead, street stalls and mobile vendors offering fresh juice and coconut milk are commonly found. This setup contributes to Zanzibar's relaxed, laid-back atmosphere, allowing both locals and tourists to enjoy refreshing beverages in a variety of settings. The vibrant street food culture further enhances the island's unique charm and appeal.

iv. Transport Related Food Service

In Zanzibar, transportation options like taxis, *dala dalas* (local minibuses), and shuttles are quite popular. However, when it comes to food services related to transport, there are not specific services dedicated solely to providing food during travel. Most travellers usually grab food from local eateries or street vendors before or after their journey.

Regarding food delivery services, there were no established services until 2021 when Food Sasa entered the market. Piki, the dominant player from mainland Tanzania, is likely to expand its presence in Zanzibar soon, given its current activity in Arusha, another popular tourist destination.

Market Structure and Distribution

The market structure and distribution of food services in Zanzibar, particularly in the hotel and restaurant sector, are shaped by a diverse group of investors from Italy, South Africa, the United States, and Kenya. Hotel establishments typically fall into two categories: international franchises and emerging regional brands. International hotel chains follow stringent procurement procedures and maintain long-term vendor agreements, often sourcing products from international markets. Conversely, regional hotel brands and restaurants prefer sourcing directly from local producers or distributors.

A significant challenge in Zanzibar's food market is the consistent quality of local meat and dairy products. Hotels often rely on foreign markets for meat and dairy due to issues like less tender local meat and low cream content in local dairy, which is unsuitable for coffee beverages, baking, and desserts. Grains and processed food items are imported directly by hotels during supply shortages or peak demand periods, making local distributors crucial suppliers. Regarding fresh produce, 63 percent of hotels source fruits and vegetables from local contract suppliers and brokers, indicating a strong connection to local agriculture despite the challenges in other food categories.

SECTION III: FOOD CONSUMPTION TRENDS

Between 2016 and 2020, total food imports in Zanzibar saw a notable increase of 22 percent, rising from \$41 million in 2016 to \$47 million in 2020. During the same period, edible oil imports experienced an even more significant growth of 157 percent. This indicates a substantial rise in the demand for edible oils, highlighting changes in dietary trends and the reliance on imported food products to meet the growing needs of the population and tourism sector.

Table 2 - Zanzibar Food Imports, USD millions

Product	2016	2017	2018	2019	2020	+/-
Food and beverages	41.14	49.52	58.66	45.34	47.45	+15%
Animal and vegetable oils and fats	4.65	7.99	12.02	13.11	11.94	+157%

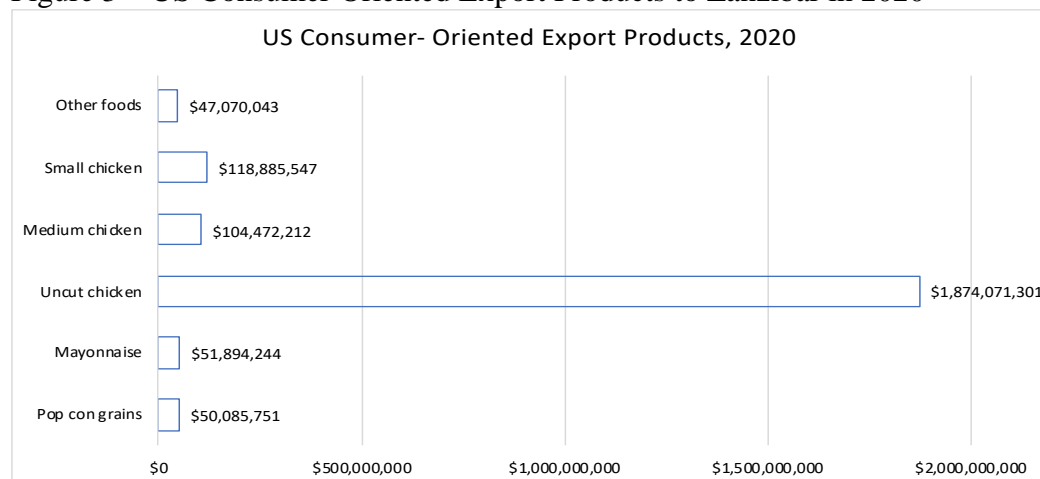
Source: Data from Zanzibar Statistical Abstract 2020

Pakistan (\$18 M), Russia (\$12.5 M) and Malaysia (\$7.5 M) were the leading food exporters to Zanzibar in 2020, followed by India (\$5.6 M), Indonesia (\$3 M), and the UAE (\$2.1 M). Pakistan is the leading supplier of long grain basmati rice while Russia is a key supplier of wheat. Malaysia primarily supplies vegetable cooking oil.

SECTION IV: COMPETITION

While not ranking among the top trading partners, the United States holds a significant role in Zanzibar's trade landscape. In 2020, the U.S. accounted for up to \$2 million in trade with Zanzibar. A considerable portion of this trade involves frozen chicken, which represents 51 percent of U.S. exports to the island. Impressively, the United States supplies 40-50 percent of Zanzibar's total chicken consumption, underscoring its critical contribution to meeting the local demand for poultry products.

Figure 3 – US Consumer Oriented Export Products to Zanzibar in 2020



Source: Zanzibar Bureau of Statistics

From 2011 to 2020, U.S. chicken exports to Zanzibar declined by 41 percent due to increased competition from Brazil and Turkey. The U.S. holds several competitive advantages, including high-quality standards, advanced technology, and strong branding. However, challenges such as intense competition, price sensitivity among consumers, trade barriers, and higher logistical costs have impacted U.S. exporters. Despite these challenges, the U.S. remains a key contributor to Zanzibar's chicken consumption, accounting for 40-50 percent of the market in 2020.

Table 3: Competitive Advantage and Challenges Faced by US Exporters

Advantages	Challenges
Known for high quality meat, dairy, grains, and processed food products.	Logistical proximity disadvantages compared to the UAE and other Asian countries. Cultural affiliation also drives trading relationships.
Well-established presence in the poultry sector.	Stiff competition from Brazil and Turkey for poultry which offer similar quality at lower price.
Good bilateral relations and investment promotion initiatives for foreign investments	High taxes for foreign firms.

Source: Post analysis

SECTION V: BEST PRODUCT PROSPECT CATEGORIES

High Demand Products in Zanzibar

Zanzibar has a growing demand for various food and beverage commodities from the United States. Processed foods, dairy products, and beverages are among the best prospects for U.S. exports. Other high demand opportunities include:

1. **Processed Foods:** There is a significant market for processed foods such as canned goods, snacks, and ready-to-eat meals. This demand is largely driven by urbanization and changing lifestyles, as more people seek convenient and quick meal options. Processed foods offer the benefits of longer shelf life and easy preparation, making them an attractive choice for busy households.
2. **Dairy Products:** The demand for dairy products like milk, cheese, and yogurt is steadily increasing. This growth is driven by rising health awareness among consumers who recognize the nutritional benefits of dairy. Dairy products are essential sources of calcium, protein, and vitamins, which contribute to improved health and well-being.
3. **Meat and Poultry:** The demand for both fresh and processed meat and poultry products is on the rise. This is due to population growth and changing dietary preferences, with more people incorporating meat and poultry into their daily diets. Meat and poultry products are valued for their high protein content and versatility in various dishes.
4. **Non-Alcoholic Beverages:** The market for non-alcoholic beverages, including juices, soft drinks, and other health-oriented drinks, is expanding. Consumers are increasingly focused on health and wellness, leading to a preference for beverages

that offer hydration, vitamins, and other health benefits. The growing awareness of the importance of a balanced diet also contributes to this demand.

5. **Alcoholic Beverages:** There is a notable demand for imported alcoholic beverages, including wines, beers, and spirits. This demand is influenced by tourism, which brings a diverse group of consumers seeking different alcoholic options. Additionally, changing social norms and the growing acceptance of moderate alcohol consumption contribute to the market's growth.
6. **Fruits and Vegetables:** There is a consistent demand for both fresh and processed fruits and vegetables. Health-conscious consumers prioritize these products for their nutritional value, including vitamins, minerals, and fiber. The demand for a variety of fruits and vegetables is also driven by the desire for diverse and flavourful meals.
7. **Spices:** Zanzibar is renowned for its spices, but there remains a demand for imported spices to complement the local varieties. Spices are integral to the culinary traditions of Zanzibar, enhancing the flavour and aroma of dishes. Imported spices provide additional options and variety for both local consumers and the hospitality industry.

High Growth Potential

US exporters have numerous opportunities to tap into the high-growth potential market in Zanzibar. The following food and beverage products are identified as having significant growth potential:

1. **Yeast:** Yeast is essential in baking and fermentation processes, used in producing bread, pastries, and alcoholic beverages such as beer and wine. The rise in homemade baking and the expansion of local bakeries and breweries contribute to the growing demand for yeast.
2. **Milk Powder:** Milk powder offers a convenient and long-lasting alternative to fresh milk. It is used in various applications, including infant formula, bakery products, and beverages. The demand for milk powder is driven by its versatility, ease of storage, and extended shelf life.
3. **Mixed Herbs:** Mixed herbs are used to enhance the flavour of various dishes, making them a staple in kitchens and restaurants. The growing interest in diverse and flavourful cuisines has increased the demand for mixed herbs.
4. **Nuts and Seeds:** Nuts and seeds, such as almonds, cashews, and chia seeds, are becoming increasingly popular due to their health benefits and versatility. They are used in various snacks, bakery products, and health foods.
5. **Organic Products:** The demand for organic products, including organic fruits, vegetables, grains, and packaged foods, is on the rise. Consumers increasingly look for products that are free from pesticides and genetically modified organisms.
6. **Baking Ingredients:** The demand for baking ingredients, such as flour, baking powder, and baking mixes, is growing due to the popularity of home baking.
7. **Confectionery Products:** There is a strong demand for confectionery products, including chocolates, candies, and biscuits. These products are popular among children and adults, driven by the growing middle class and urbanization.

SECTION VI: KEY CONTACTS AND FURTHER INFORMATION

Ministry of Agriculture, Land and Fisheries for Zanzibar

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Nyangumi House, Maruhubi.
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Email: ps@kilimoznz.go.tz
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Ministry of Industry and Trade

Migombani, Zanzibar
Phone: +255 024 223 4843
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Zanzibar Commission of Tourism

P.O.BOX 1410 Amaani Zanzibar
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Hotel Association of Zanzibar

Phone: +255 687 175533 / 768 363289
Email: wshirima@serena.co.tz

Zanzibar Bureau of Standards

P.O. Box 1136, Zanzibar
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Zanzibar Food and Drugs Agency

P.O.BOX 3595 Changu Road Zanzibar
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Tel: +255 242233859
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Tanzania Atomic Commission

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Government Chemist Laboratory Agency

Bububu road/Maruhubi
Tel: +255 024 2238123
E-mail: info@cgcla.go.tz
www.cgcla.co.tz

Zanzibar Port Corporation

P.O. Box 263 Malindi Zanzibar
Tel: +255 2232857/ 2230263-4
www.zpc.go.tz

APPENDIX 1: PRODUCT PROSPECT ANALYSIS

Product Category/HS Code	Market Size (Volume 2020) ** Metric Tons	Import Value (2020)	5-Year Annual Import Growth Rate (percentage) 2016-2020	Import Tariff Rate (percentage) 20201	Sourcing Country	Key Constraints Over Market Development	Market Attractiveness for USA
Rice (mainly Basmati)	104,804 (Excludes local production)	21.8M	+9.75	Sensitive Item (SI)	Pakistan, Arab Emirates, Vietnam, India, and Mainland Varieties	Heavy competition from imports, limited local production	Low
Russian Milling Wheat (Buckwheat)	50,000	12.3M	+400	25%	Russia	Dominant global supplier of wheat	Low
Vegetable Oil	130,460	12.2M	+160	Crude 0 Semi- 10 Refined--25	Malaysia, Indonesia, Singapore	High import taxes on refined oil products	High
Sugar	34,299	5.5M	-19	Sensitive Item (SI)	Brazil, India, Pakistan	Highly regulated industry to protect local manufacturers	Medium
Wheat	7,967	1.85M	-54.6	Sensitive Item (SI)	Netherlands, Turkey, India	High competition from imports, limited local production	Medium
Buttermilk, curdled milk, and cream	1,716	1.8M	+173	60	Arab Emirates and Denmark	Quality of local milk is low	High
Whole Chicken and Cuts	5,622	2M	+286	25	Brazil, US, Turkey	Low import prices and consistent quality available in global vs local market	High
Biscuits and Sugar Confectionery (exclude cocoa)	7622	1.1M	-41	25	Arab Emirates, Colombia, China, India, Turkey	Local processing capacity increasing while market value remains low	Low

¹ <https://www.eac.int/documents/category/eac-common-external-tariff>

Attachments:

No Attachments.