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Voluntary  Public

Date: 11/13/2015  GAIN Report Number:

Tanzania - United Republic of

2015 Exporter Guide

Approved By:

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**Report Highlights:**
Tanzania with its growing population, strategic location in East Africa, increasing middle class and high-growth rate presents an opportunity for U.S. agriculture and food exports. The country has a population of about 45 million, the largest in East Africa, and a growth rate over several years of about 7 percent annually. The best products prospects for U.S. exporters include beverages, spirits, confectionary and snack foods, pet food, pasta and sauces.
**Executive Summary:**
Tanzania with its growing population, strategic location in East Africa, increasing middle class and high-growth rate presents an opportunity for U.S. agriculture and food exports. The country has a population of about 45 million, the largest in East Africa, and a growth rate over several years of about 7 percent annually. The best products prospects for U.S. exporters include beverages, spirits, confectionary and snack foods, pet food, pasta and sauces.

Tanzania’s capital Dar es Salaam has a large port on the Indian Ocean and is the natural trading gateway for five landlocked countries along its border including the Democratic Republic of Congo (DRC), Rwanda, Burundi, Uganda and Zambia. Democratic principles are firmly engrained in the country and since its independence in 1961, and its political leaders have come to power through an electoral process. Free-market principles are now prevalent following its socialist period directly following independence. As a result Tanzania has had five consecutive years of seven percent real GDP growth and is a member what the World Bank has dubbed the 7% Club, a group of countries forecast to achieve a real GDP growth of that or more over next decade.
1.0 MARKET OVERVIEW

Economic Situation
Tanzania is one of the world's least developed countries in 2014 according to the United Nations (UN) with a per capita income of $600 and approximately 36 percent of the total population of about 45 million living below the poverty line. However, the country has achieved a fairly high annual growth rate of about seven percent over the last several years based mainly on gold production and tourism. Tanzania has made a transition to a fairly liberalized market economy, but the government retains strong presence in the telecommunications, banking, energy, and mining sector. Recent reforms in the financial sector have led to an increase in private-sector investment and foreign-owned banks account for about forty eight percent of the banking industry's total assets.

All land in Tanzania is owned by the government, which it can lease out for up to 99 years. A proposal to allow private land ownership and particularly land ownership by non-citizens remains unpopular. Agriculture accounts for about one-quarter of GDP, provides eight five percent of exports, and employs about eight percent of the work force. Government spending on agriculture is estimated at seven percent of the annual budget.

Tanzania is geographically well placed to facilitate trade for the land locked countries in Eastern Africa including Malawi, Burundi, Rwanda, Democratic Republic of Congo (DRC), and Zambia. Donors, including the World Bank, have provided funds to rehabilitate Tanzania's aging rail and port infrastructure.

Population trends
Tanzania has one of the fastest-growing populations in sub-Saharan Africa, recording a Compound Annual Growth Rate (CAGR) of 3% over 2009-2014. Over 50 million people lived in the country in 2014, with the majority being below 20 years. The largest number of habitants is concentrated in the capital city Dar es Salaam with a population of about five million, the next largest cities are Mwanza, Kagera, Mbeya, Morogoro, Tanga, Arusha, and Dodoma with populations of about 2 million each. The majority of Tanzanians, approximately 75 percent, still live in rural areas. By 2020 the urban population is anticipated to rise to over 30 percent.

2.0 EXPORTER BUSINESS TIPS

Local business customs
In Tanzania business people put an emphasis on formal appearance and prolonged, personal conversation, and they respect those who dress well. In urban areas, it is expected you will wear a suit, and in rural areas, pants and a button-up shirt. Business women are expected to wear suits in urban areas, but a long skirt is appropriate in rural areas.

There is an unspoken understanding in Tanzania that business meetings are not to be scheduled between noon and 2 p.m. This is when most working Tanzanians take their lunch break. If you are invited to someone’s home for a business meeting, certainly bring a gift. Usually a small token from your home country is much appreciated. But do not bring flowers — these are given in Tanzania only as condolences.

In some African countries it is typical for business meetings to begin late, however, Tanzanians are aware that most foreigners abide by rigid schedules and make an effort to be punctual. In Tanzania’s rural areas, who you greet first matters. You should greet those in a position of seniority first. In urban areas, these seniority rules are not applied as strictly. There is often a seating plan at meetings in Tanzania, so it is best
wait to be told where to sit before taking a seat at a meeting. It is common in business meetings for someone of seniority to begin and close the meeting with a formal speech, or even a prayer, the person hosting the meeting should be the one to open it and close it.

You will often be working with Muslims in Tanzania, and within this group there are specific rules for the genders. Among them: Muslim men will bow upon meeting a woman, but a non-Muslim man should wait for a woman to extend her hand. Tanzanians may interpret someone being direct and straight to the point as being rude. In some situations you shouldn’t directly offer help. If a Tanzanian needs help, wait for the story. He will tell you a story of something he is struggling with, from which you are to infer what sort of help he needs. Tanzania is a country that cherishes visual arts and the art of good storytelling — two components you see trickle into the way Tanzanians like doing business.

You will see much more success doing business in Tanzania if you build relationships. It is advised that you join the local chamber of commerce, Rotary Club or any industrial or trade organization before you attempt to do business.

**General consumer tastes and preferences**

Tanzania’s middle class is shifting from buying only essential products such as food and beverages, to more specialized products. In most of the urban areas, there has been a rapid growth of modern retail centers and malls in the recent past, specializing in specific products and services. Household necessities, especially food, are still mainly purchased through open markets and corner shops, and informal trade in open markets remains significant in the country. A small section of elite consumers are loyal to imported products, while others easily substitute with similar products. Several American food products and supplements have penetrated retailing markets in Tanzania and U.S. companies are represented including Vemma Nutrition Company, American Garden, Sioux Honey Association, Forever Nutraceutical LLC, Conagra Foods, Central Valley, Bouras Global Trading, Macllhenny Company, Domiane St. Michelle, and the Hershey Company.

**Food standards and regulations**

The main regulatory agencies for imported food products include Tanzania Bureau of Standards (TBS), Tanzania Food and Drugs Authority (TFDA), Tanzania Atomic Energy Commission (TAEC), Tanzania Food and Nutrition Centre (TFNC), Tanzania Plant Inspection Services (TPIS).

**General import and inspection procedures**

In Tanzania, all matters concerning the importation and inspection of imported food products are handled by the Tanzania Food and Drugs Authority (TFDA). To obtain a Food Importer Registration Certificate (FIRC), imported products must satisfy the Tanzanian import requirements as evaluated by TFDA; the FIRC provided by the Director General of the TFDA and it is valid for one year. A registered Food Importer shall be required to apply for Import permit by filling in prescribed forms as stipulated under Schedule III and Schedule IV for registrable and non-registrable foods respectively. Application for Import permit should be accompanied by the following documents:-

(a) Proforma invoice from the supplier
(b) Certificate of analysis from manufacturer of the exporting country
(c) Health certificate from competent regulatory body of the exporting country
(d) Phytosanitary certificate (in case of importation of unprocessed cereal and plant origin products)
(e) Radiation free certificate, where applicable
(f) Zoo sanitary certificate in case non-processed foods of animal origin
(g) Certificates from relevant bodies for specific food products (e.g. Sugar Board, Dairy Board)
(h) Bill of lading/Airway bill
(i) Certificate of origin
(j) A copy of previous import permits which shows that the consignment was inspected at port of entry
Prior to application for importation of non-registrable products pre-shipment samples for analysis whose cost
will be incurred by importer as prescribed in the Fees and Charges Regulations, 2011 shall be submitted. As
elaborated in the link below:-
http://www.tfda.or.tz/index.php?option=com_phocadownload&view=category&id=38:fees-and-
charges&Itemid=388

The Authority, upon receiving applications for import permit and other supporting documents:-
(a) Examine the applications to authenticate whether the applicant is registered as food importer
(b) Examine the proforma invoice to ensure that the food and Food supplements intended to be imported are
those granted marketing authorization (registered) by the Tanzania Food and Drugs Authority.
(c) Calculate the applicable and statutory fees of 0.75% FOB value of goods to be imported to be payable to
the Tanzania Food and Drugs Authority
(d) On completion of above scrutinization and if satisfied with the submitted data, the application shall be
received and processed.
(e) After completion of the above process the applicant shall be issued with Import Permit

Once satisfied that all importation conditions of food consignment have been fulfilled as required in the Act,
the Food inspector shall release the consignment and stamp all documents with an APPROVED FOR
RELEASE stamp.

Where the consignment does not meet the requirements for importation, the inspector shall not release the
consignment and stamp the documents with STOP RELEASE stamp.

Consignment which has not been physically inspected at port of entry shall be inspected at owner’s premises
after payment of fee as prescribed in Fees and charges Regulations, 2011.

3.0 MARKET SECTOR STRUCTURE AND TRENDS

Supermarket sector
Since the 1990s there is rapid growth of supermarkets in the major cities and towns in Tanzania driven
mainly by the rapid urbanization, changes in dietary preferences, increased healthy eating consciousness, and
the general increase in income levels. Some of the major supermarkets brands in Tanzania include Sifamart,
Shoppers, Shrijees TSN, Village, Viva Marche, Uchumi and Nakumatt. The supermarkets stock fast moving
consumer products including snacks, breakfast cereals, bakery mixes, eggs and egg products, dairy products,
fresh or processed red poultry meats, fresh or processed fruits, vegetables, nuts, pet foods and wine. Due to
their high segmentation and consumer targeting, these supermarkets offer the best market entry pathway for
products from the United States. According to the Euromonitor International, the next five years will see
fastest growth in alcoholic drinks (20% CAGR), and hot drinks (17% CAGR).

Food processing sector
Increased urbanization and changing lifestyles show a promise for increased demand in processed foods in
Tanzania. Most of the consumer-oriented food processing industries in Tanzania use local ingredients but
because of the poor agricultural and industrial development in the country some rely on imported food
ingredients and supplements such as soy, corn, rice, wheat and industrial processed products. The food
processing sector is characterized by micro and small scale processors, with very few medium and large size
processors, most of which are located in Dar es Salaam, Tanga, Kilimanjaro and Arusha.

Hotel Restaurants and Institutional (HRI)
There are 174 registered and licensed tourist class hotels in Tanzania, with the large international brands offering international cuisine in their services, and therefore providing demand for imported food products. Some of the international hotels include: Serena, Southern Sun, Hyatt Kilimanjaro, Double Tree, Sea Cliff, and White Sands. In addition, the restaurant sector is also growing with ninety local and international outlets operating. Some of the American franchises that are represented in Tanzania include Kentucky Fried Chicken (KFC), Subway and Spur.

Distribution channels
Marketing channels for imported products often involve several intermediaries. Tanzanian firms typically import, with the help of a clearing and forwarding agent, and distribute food products to retailers. While a number of importers have their own warehouses, others may utilize clearing and forwarding agents to facilitate the storage, movement and distribution of goods given the high cost of building and maintaining warehouses and maintaining truck fleets. Importer/distributors with national distribution typically have sub-offices in regional cities especially Dar es Salaam, Mwanza and Arusha or appoint other distributors to market their products in specific regions.

4.0 BEST CONSUMER ORIENTED PRODUCT PROSPECTS

<table>
<thead>
<tr>
<th>Product Description</th>
<th>2014 Market Size (Volume) Metric Tons</th>
<th>2014 Imports ($)</th>
<th>5-Year Annual Import Growth (%)</th>
<th>Import Tariff Rate (%) 2014</th>
<th>Key Constraint over Market Development</th>
<th>Market Attractiveness for USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cereals</td>
<td>30,000</td>
<td>9,659,920</td>
<td>(6.55)</td>
<td>25</td>
<td>High landed costs</td>
<td>Good growth potential</td>
</tr>
<tr>
<td>Meat And Edible Meat Offal</td>
<td>2,613</td>
<td>3,118,187</td>
<td>74.81</td>
<td>25</td>
<td>No tariff preferences</td>
<td>Moderate growth potential</td>
</tr>
<tr>
<td>Edible Vegetables &amp; Certain Roots &amp; Tubers</td>
<td>3,977</td>
<td>2,159,451</td>
<td>-62.96</td>
<td>25</td>
<td>No tariff preferences</td>
<td>Strong growth potential</td>
</tr>
<tr>
<td>Prep Cereal, Flour, Starch Or Milk; Bakers Wares</td>
<td>1,824</td>
<td>1,266,198</td>
<td>-32.92</td>
<td>25</td>
<td>High landed costs</td>
<td>Good growth potential</td>
</tr>
<tr>
<td>Animal Or Vegetable Fats, Oils Etc. &amp; Waxes</td>
<td>733</td>
<td>1,042,061</td>
<td>-51.84</td>
<td>25</td>
<td>High import costs</td>
<td>Good growth potential</td>
</tr>
<tr>
<td>Oil Seeds Etc.; Misc Grain, Seed, Fruit, Plant etc.</td>
<td>55</td>
<td>330,465</td>
<td>-8.11</td>
<td>25</td>
<td>High import costs</td>
<td>Strong growth potential</td>
</tr>
<tr>
<td>Beverages, Spirits And</td>
<td>6,412</td>
<td>23,752</td>
<td>311.79</td>
<td>25</td>
<td>High import costs</td>
<td>Strong growth potential</td>
</tr>
<tr>
<td>Category</td>
<td>Quantity</td>
<td>Value</td>
<td>% Value</td>
<td>Growth Potential</td>
<td>Import Costs</td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------------</td>
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<tr>
<td>Vinegar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sugars And Sugar Confectionary</td>
<td>8</td>
<td>17,253</td>
<td>39.71%</td>
<td>Low import costs</td>
<td>Strong growth potential</td>
<td></td>
</tr>
<tr>
<td>Miscellaneous Edible Preparations</td>
<td>1,500</td>
<td>10,610</td>
<td></td>
<td>Moderate growth potential</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cocoa And Cocoa Preparations</td>
<td>2</td>
<td>5,044</td>
<td>-45.46%</td>
<td>Moderate import costs</td>
<td>Strong growth potential</td>
<td></td>
</tr>
<tr>
<td>Tobacco And Manufactured Tobacco Substitutes</td>
<td></td>
<td>3,290</td>
<td></td>
<td>High import costs</td>
<td>Low growth potential</td>
<td></td>
</tr>
<tr>
<td>Lac; Gums, Resins &amp; Other Vegetable Sap &amp; Extract</td>
<td></td>
<td>2,955</td>
<td></td>
<td>Low import costs</td>
<td>Good growth potential</td>
<td></td>
</tr>
<tr>
<td>Prep Vegetables, Fruit, Nuts Or Other Plant Parts</td>
<td>3,180</td>
<td>2,520</td>
<td></td>
<td>Moderate import growth</td>
<td>Good growth potential</td>
<td></td>
</tr>
<tr>
<td>Coffee, Tea, Mate &amp; Spices</td>
<td></td>
<td>-100</td>
<td></td>
<td>Low or medium import growth</td>
<td>Strong growth potential</td>
<td></td>
</tr>
<tr>
<td>Fish, Crustaceans &amp; Aquatic Invertebrates</td>
<td></td>
<td>n/a</td>
<td></td>
<td>High import costs</td>
<td>Good growth potential</td>
<td></td>
</tr>
</tbody>
</table>

Source: *Global Trade Atlas and **East Africa Community Tariff Book.*
**Advantages and challenges facing U.S. food products in Tanzania**

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tanzania is a member of the East African Community (EAC), which signed a Trade and Investment Framework Agreement (TIFA) with the United States in July 2008. Under the U.S-EAC Trade and Investment Partnership Initiative, the United States and EAC are seeking to expand trade and investment ties.</td>
<td>Corruption is a major concern in Tanzania. The enforcement of laws, regulations, and penalties to combat corruption is largely ineffective. Corruption is endemic and measures to combat it are applied impartially to both foreign and domestic investors and petty corruption, particularly among customs and immigration agents and traffic police, is an obstacle to investment.</td>
</tr>
<tr>
<td>According to the 2012 census high rate of urban growth and rapid increase of urban population, estimated at 22.4% in mainland Tanzania and 14.5% in Zanzibar Total urban population was 13 million.</td>
<td>Unreliable Infrastructure such as roads railways, storage facilities for perishable agricultural commodities. More than 60% of imported agricultural commodities are transported by roads.</td>
</tr>
<tr>
<td>Tanzania has signed on member of several regional trade protocols including East Africa Community (EAC) and the Southern African Development Community (SADC). Some of the agreements impose common external tariffs on goods from non-member countries.</td>
<td>The Government of Tanzania has a policy emphasizing the development of domestic industries and the buying of domestically manufactured goods, as was enumerated in the Finance Minister’s 2015/16 budget speech. The GOT levies steep import duty of many imported goods;</td>
</tr>
<tr>
<td>The U.S. Overseas Private Investment Corporation (OPIC) signed an incentive agreement with the GOT in December 1996. Tanzania is an active member of the Multilateral Investment Guarantee Agency (MIGA), of the World Bank Group that promotes foreign direct investment in developing countries by offering political risk insurance (guarantees) to investors and lenders, and by providing technical assistance to help developing</td>
<td>Tanzania’s ranking in the ease of doing business index remained relatively stable at 131st out of 183 countries in 2015 compared to 134th out of 185 countries in 2014. Tough conditions for doing business inevitably dampen new investments and business expansion.</td>
</tr>
</tbody>
</table>
countries attract and retain foreign investment.

Since attaining independence, Tanzania has enjoyed a remarkable degree of peace and political stability. Tanzania has held four national multi-party elections since 1995, the most recent in 2010. General elections have been generally been free of political violence.

The congestion at the Dar es Salaam port is due to the rapid increase in traffic has become a critical drag on port efficiency.

Tanzania is strategically located and is considered a gateway to up to six (6) landlocked countries (Uganda, Zambia, Rwanda, Burundi and Malawi and DRC). There are three deep sea ports on the Indian Ocean at Dar es Salaam, Mtwara and Tanga. GOT is opening a new port at Bagamoyo.

### Demographic Indicators

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2007</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Population (thousands)</strong></td>
<td>50,757</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Urban population (% of total)</strong></td>
<td>28.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sex ratio (males per 100 females)</strong></td>
<td>100.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Urban population growth (%)</strong></td>
<td>5.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Unemployment rate</strong></td>
<td>10.70 (2011 estimate)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Population growth rate (%)</strong></td>
<td>2.9</td>
<td>3.0</td>
<td></td>
</tr>
<tr>
<td><strong>Infant mortality rate (per 1000)</strong></td>
<td>46.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total fertility rate (per woman)</strong></td>
<td>5.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Mortality under age 5 (per 1000)</strong></td>
<td>68.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Life expectancy at birth</strong></td>
<td>Total population: 61.24 years; ; male: 59.91 years; female: 62.62 years (2014 estimate)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HIV/AIDS</strong></td>
<td>Adult prevalence rate: 4.95%; People living with HIV/AIDS: 1.4 million (2013 estimate)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Distribution by age (%)</strong></td>
<td>0-14</td>
<td>15-64</td>
<td>65+</td>
</tr>
<tr>
<td></td>
<td>44.8</td>
<td>52.0</td>
<td>3.2</td>
</tr>
<tr>
<td><strong>Projected Population increase, 2015-2050 (thousands)</strong></td>
<td>77,126</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Population 2050/2015 ratio</strong></td>
<td>2.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Active Population increase, 2015-2030 (thousands)</strong></td>
<td>16,892</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Yearly cohort new labor</strong></td>
<td>1,006</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Year</td>
<td>Identification</td>
<td>Value</td>
<td></td>
</tr>
<tr>
<td>--------</td>
<td>----------------------------------</td>
<td>---------</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>Yearly cohort new labor entrants,2030</td>
<td>1,627</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total entrance inflow between 2015-2030</td>
<td>20,800</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>Activity ratio,2015</td>
<td>1.1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Projected rural Population,2050 (thousands)</td>
<td>35,763</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Projected rural population increase, 2015-2050 (thousands)</td>
<td>25,086</td>
<td></td>
</tr>
<tr>
<td></td>
<td>% agriculture in total economically active population, 2010</td>
<td>75.9</td>
<td></td>
</tr>
</tbody>
</table>

**Sources:** African Development Bank (AfDB) Statistics Department; United Nations, Department of Economic and Social Affairs, Population Division, World Population Prospects, the 2012 Revision.

### Economic Trends

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<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Real GDP growth rates (%)</td>
<td>5.8</td>
<td>9.5</td>
<td>5.1</td>
<td>8.2</td>
<td>7.2</td>
<td>6.9</td>
<td>6.7</td>
</tr>
<tr>
<td>CPI inflation (%)</td>
<td>5.6</td>
<td>19.8</td>
<td>12.1</td>
<td>5.6</td>
<td>4.8*</td>
<td>9.9</td>
<td>5.8</td>
</tr>
<tr>
<td>GDP per capita-PPP($)</td>
<td>1,964</td>
<td>2,107</td>
<td>2,202</td>
<td>2,429</td>
<td>2,565</td>
<td>2,691</td>
<td>2,830</td>
</tr>
<tr>
<td>Exchange Rate Tsh: US$ (end period)</td>
<td>1,455</td>
<td>1,572</td>
<td>1,572</td>
<td>1,579</td>
<td>1,744*</td>
<td>2,404</td>
<td>2,485</td>
</tr>
</tbody>
</table>

*Actual,**Economist Intelligence Unit estimates,**Economist Intelligence Unit Forecasts Source: IMF, International Financial Statistics

### 5.0 KEY CONTACTS AND FURTHER INFORMATION

#### Office of the Political and Economic, Embassy of the United States of America
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Telefax: +255 22 245 0959
E-mail: info@tbs.go.tz
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