



Ministry of Livestock and Fisheries

NATIONAL POULTRY DEVELOPMENT STRATEGY (NPDS)

*BUILDING A COMPETITIVE, INCLUSIVE AND SUSTAINABLE POULTRY
INDUSTRY FOR FOOD SECURITY, NUTRITION, JOBS AND PROSPERITY*



2026 - 2036

FOREWORD

The poultry industry represents one of the most dynamic and inclusive opportunities within Tanzania's agricultural transformation agenda. As our nation advances toward the aspirations of the Tanzania Development Vision 2050, to become a high-income, competitive, and industrialized economy, the modernization and commercialization of strategic value chains such as poultry will be central to achieving sustainable growth, food security, employment creation, and resilience.

The poultry industry already plays a critical role in supporting millions of Tanzanian households, particularly women and youth, while contributing meaningfully to national GDP and rural livelihoods. However, as population growth, urbanization, and changing dietary patterns accelerate, the demand for affordable, high-quality animal protein continues to rise. To meet this demand and to position Tanzania as a regional leader in poultry production, processing, and trade, we must address long-standing structural bottlenecks across feed, breeding capacity, veterinary services, processing infrastructure, market integration, and access to finance.

The Tanzania Poultry Development Strategy (2026–2036) provides a comprehensive and forward-looking roadmap to unlock the full potential of the poultry value chain. It adopts a holistic, whole-of-value-chain approach that aligns public policy, private investment, research and innovation, financial systems, and institutional coordination under a shared national vision. The strategy is anchored in four strategic pillars that strengthen input supply, enhance farm-level productivity, promote processing and industrial development, improve market access, and reinforce governance and ecosystem enablers.

The successful implementation of this Strategy will require strong partnership and coordinated action among government institutions, private sector actors, financial institutions, research bodies, development partners, and poultry associations. The Government of the United Republic of Tanzania reaffirms its commitment to creating a predictable and enabling environment that supports investment, innovation, compliance with standards, and inclusive participation across the value chain.

I call upon all stakeholders to actively support and participate in the implementation of this Strategy. Together, we can transform the poultry industry into a modern, competitive, and resilient industry that contributes significantly to national prosperity, food security, export growth, and the realization of Tanzania Development Vision 2050.



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The Ministry particularly recognizes the support of the World Bank, AGRA, the Poultry Industry Technical Working Group (PSTWG), the Tanzania Poultry Executive Compact Committee (TPECC), SAGCOT Centre Limited (SCL), and the USAID Feed the Future Tanzania Private Sector Strengthening Activity (PSSA) for their technical facilitation, coordination, and strategic support. The Ministry also extends its appreciation to the Consultant, Steve Kisakye, for his technical leadership in developing, refining, and finalizing the Strategy.

The successful development of this Strategy reflects a shared commitment to transforming Tanzania’s poultry industry into a competitive, inclusive, and sustainable sub-sector. The Ministry looks forward to continued partnership in its implementation.

LIST OF ABBREVIATIONS AND ACRONYMS

ACT	Agriculture Council of Tanzania
AfCFTA	African Continental Free Trade Area
AGRA	Alliance for a Green Revolution in Africa
AI	Artificial Insemination
AMR	Antimicrobial Resistance
AMCOS	Agricultural Marketing Cooperative Societies
AMP 2050	Agriculture Master Plan 2050
ANSAF	Agricultural Non-State Actors Forum
APOKA	Arusha Poultry Keepers Association
ARVs	Antiretroviral Drugs
ASDP II	Agriculture Sector Development Programme Phase II
AU	African Union
AWAN	African Women in Animal Resources Farming and Agribusiness Network
CGIAR	Consultative Group on International Agricultural Research
CRDB	CRDB Bank Plc
CSA	Climate Smart Agriculture
DED	District Executive Director
DOC	Day-Old Chick
DPs	Development Partners
DRC	Democratic Republic of Congo
DVS	Directorate of Veterinary Services
EAC	East African Community
EFTA	Eastern and Southern African Trade and Development Bank (TDB)
FAO	Food and Agriculture Organization
GDP	Gross Domestic Product
GPS	Grandparent Stock
HIV/AIDS	Human Immunodeficiency Virus / Acquired Immunodeficiency Syndrome
IBD	Infectious Bursal Disease
ICT	Information and Communication Technology
ILRI	International Livestock Research Institute
IoT	Internet of Things
ITV	Independent Television
LGA	Local Government Authority
LITA	Livestock Training Agency
LSTP	Livestock Sector Transformation Plan

M&E	Monitoring and Evaluation
MLF	Ministry of Livestock and Fisheries
MIT	Ministry of Industry and Trade
MoA	Ministry of Agriculture
MoEST	Ministry of Education, Science and Technology
MoF	Ministry of Finance
MoH	Ministry of Health
MUHAS	Muhimbili University of Health and Allied Sciences
NBC	National Bank of Commerce
ND	Newcastle Disease
NEMC	National Environmental Management Council
NGO	Non-Governmental Organization
NGOs	Non-Governmental Organizations
NM-AIST	Nelson Mandela African Institution of Science and Technology
NMB	National Microfinance Bank
NPDS	National Poultry Development Strategy
NPDS	National Poultry Development Steering Committee
PAT	Poultry Association of Tanzania
PASS	Private Agricultural Sector Support Trust
PMO	Prime Minister's Office
PMO-RALG	Prime Minister's Office – Regional Administration and Local Government
PPI	Poultry Processing Industries
PPP	Public–Private Partnership
PS	Parent Stock
PSSA	Private Sector Strengthening Activity
PSTWG	Poultry Sector Technical Working Group
R&D	Research and Development
REA	Rural Energy Agency
RS	Regional Secretariat
SADC	Southern African Development Community
SAGCOT	Southern Agricultural Growth Corridor of Tanzania
SACCOs	Savings and Credit Cooperative Societies
SCL	SAGCOT Centre Limited
SMEs	Small and Medium Enterprises
SOP	Standard Operating Procedure
SPS	Sanitary and Phytosanitary Standards

SUA	Sokoine University of Agriculture
TABROFA	Tanzania Broiler Farmers Association
TADB	Tanzania Agricultural Development Bank
TAFMA	Tanzania Animal Feed Manufacturers Association
TALFA	Tanzania Layer Farmers Association
TALIRI	Tanzania Livestock Research Institute
TANTRADE	Tanzania Trade Development Authority
TARI	Tanzania Agricultural Research Institute
TAVEPA	Tanzania Veterinary Paraprofessionals
TBC	Tanzania Broadcasting Corporation
TBS	Tanzania Bureau of Standards
TCPA	Tanzania Commercial Poultry Association
TIC	Tanzania Investment Centre
TIPA	Tanzania Indigenous Poultry Association
TLMP	Tanzania Livestock Master Plan
TMDA	Tanzania Medicines and Medical Devices Authority
TMB	Tanzania Meat Board
TNBC	Tanzania National Business Council
TPECC	Tanzania Poultry Executive Compact Committee
TPBA	Tanzania Poultry Breeders Association
TPSF	Tanzania Private Sector Foundation
TRA	Tanzania Revenue Authority
TVLA	Tanzania Veterinary Laboratory Agency
UDSM	University of Dar es Salaam
UFUKUDA	Ufugaji Kuku Dar es Salaam
URT	United Republic of Tanzania
USAID	United States Agency for International Development
UWAFUKUMO	Umoja wa Wafuga Kuku Morogoro
UWAKUNYATA	Umoja wa Wafuga Kuku wa Nyama Tanga Jiji
UWAU	Umoja wa Wajasiriamali wa Ufugaji
VAT	Value Added Tax
VCT	Veterinary Council of Tanzania
VETA	Vocational Education and Training Authority
VPO	Vice President's Office
WOAH	World Organisation for Animal Health

LIST OF FIGURES AND TABLES

Figure 1: National Chicken Population and Poultry Meat Production.....	9
Figure 2: Eggs Production	9
Figure 3: Chicken population trend in Tanzania 2017-2024.....	13
Figure 4: Overview of the Chicken Value Chain Nodes and Key Strategy Pillars.....	14
Figure 5: Regional Distribution of Parent Stock Farms in Tanzania	16
Figure 6: Number of DOC produced in Tanzania	18
Figure 7: Regional Hatchery Capacity and DOC Types in Tanzania	18
Figure 8: Day Old Chick Distribution.....	19
Figure 9: Percentage Distribution of Crop Harvest Uses for Cereals During 2023/24 Agricultural Year	22
Figure 10: National Abattoir Infrastructure and Regional Distribution of Abattoir Processing Capacity	38
Figure 11: Overview of Domestic Market.....	44
Figure 12: Proposed Coordination Structure of the National Poultry Development Strategy 2026–2036.....	85
Figure 13: Investment Phasing and Financing Structure	102
Table 1: SWOT Analysis - Breeding and DOCs	
Table 2: Projection of demand of poultry meat, eggs and poultry feed 2020 – 2050	20
Table 3: Top 10 poultry feed manufacturers in Tanzania	23
Table 4: SWOT Analysis - Poultry Feed Production	24
Table 5: SWOT Analysis - Poultry Production and Productivity	28
Table 6: SWOT Analysis - Health Services	31
Table 7: SWOT Analysis - Processing and Value Addition.....	40
Table 8: SWOT Analysis - Logistics and Cold Storage	42
Table 9: Poultry exports and import quantity in Tanzania	45
Table 10: SWOT Analysis - Research and Innovations	49
Table 11: Key Institutions for Implementation of NPDS.....	77

TABLE OF CONTENTS

FOREWORD	I
ACKNOWLEDGEMENT	II
LIST OF ABBREVIATIONS AND ACRONYMS	III
LIST OF FIGURES AND TABLES	VI
TABLE OF CONTENTS	VII
EXECUTIVE SUMMARY	X
CHAPTER 1: BACKGROUND	1
Strategic Context of the Poultry Value Chain	1
Rationale for National Poultry Development Strategy	3
Key policies and strategies supporting the poultry strategy	4
Methodology for developing the National Poultry Development Strategy	7
CHAPTER 2: SITUATION ANALYSIS OF THE POULTRY INDUSTRY	8
Overview of the Poultry Value Chain	8
Poultry Breed Typologies	10
A. Indigenous Chicken	10
B. Improved Chicken	11
C. Exotic Commercial Broiler and Layers	11
D. Other Poultry	13
Poultry Value Chain Analysis	13
I. Quality And Competitive Inputs	14
A. Breeding, Hatchery, and Day-Old Chick (DOC) Production	14
B. Feed Production and Supply	19
Raw Materials for Poultry Feeds	21
II. Productive, Resilient and Inclusive Production	27
A. Modes of Production	27
B. Health Systems (Veterinary Services, Biosecurity, Veterinary drugs, and Vaccines)	29
C. Extension Services	35

III. Processing, Markets and Trade	38
A. Slaughtering, poultry processing and packaging.....	38
B. Logistics and cold chain services.....	41
C. Domestic Markets	43
D. International Markets	44
IV. Cross-Cutting Issues and Enabling Environment.....	47
I. Access to Finance	47
II. Research and Development (R&D).....	48
III. Women and Youth Inclusion.....	50
IV. Environmental Sustainability	50
V. Farmer Associations and Capacity Building.....	50
VI. Nutrition and Other Social Inclusion Issues	52
CHAPTER 3: STRATEGIC FRAMEWORK	54
Scope of the Poultry Strategy	54
Vision, Mission, and General Objectives.....	55
Strategic Pillars	55
Pillar 1: Quality and Competitive Inputs	55
Pillar 2: Productive, Resilient and Inclusive Production	58
Pillar 3: Processing, Markets and Trade	60
Pillar 4: Cross-cutting Issues and Enabling Environment.....	62
CHAPTER 4: PROPOSED FLAGSHIP PROJECTS	67
Flagship 1: Investing in Maize and Soybeans for Poultry Feed.....	67
Flagship 2: Investing in Poultry Breeding, Hatcheries, and Indigenous Poultry Development.....	69
Flagship 3: Investing in Poultry Processing, Value Addition, and Cold Chain Infrastructure	71
Flagship 4: Investing in Capacity Building for Poultry Value Chain Actors.....	73
Flagship 5: Strengthening Government Capability and Service Delivery Systems.....	75
CHAPTER 5: INSTITUTIONS AND IMPLEMENTATION ARRANGEMENTS	77
A. Institutional Arrangement	77
B. Coordination Structure	82
	VIII

C. Monitoring and Evaluation	85
D. Data Collection Methods	86
E. Roles and Responsibilities.....	86
F. Reporting and Feedback Mechanism.....	86
G. Financing Strategy and Investment Opportunities.....	87
I. Financing Vision and Objectives.....	87
II. Investment Opportunities Aligned to Strategic Pillars	87
CHAPTER 6: PERFORMANCE FRAMEWORK AND INVESTMENT PLAN	91
Introduction.....	91
Sector Impact Metrics and Strategic Performance Indicators	91
I. 2036 Impact Metrics Framework.....	92
II. Strategic Performance Indicators	93
Investment Plan	98
I. Investment Requirements by Strategic Pillar	98
II. Investment Phasing and Financing Structure	102
REFERENCES	103
ANNEX 1: LIST OF STAKEHOLDERS CONSULTED	108

EXECUTIVE SUMMARY

The Tanzania Poultry Development Strategy (2026–2036) provides a comprehensive roadmap to transform the poultry industry into a commercially viable, competitive, resilient, and inclusive industry that contributes significantly to national food security, economic growth, and employment creation. The poultry subsector is one of the fastest-growing segments of Tanzania’s livestock economy, contributing approximately 1.8 percent to national GDP and supporting more than four million households (over 55% of agricultural households). The livestock sector contributes approximately 6.2% of national GDP (2024/25), with poultry accounting for an estimated 30% of livestock GDP. It is highly inclusive, with strong participation from youth and women, and plays a critical role in improving household nutrition, generating income, and strengthening rural livelihoods.

The sector has experienced strong growth in recent years. The national chicken population increased from 79.1 million in 2019 to over 108.2 million in 2024/25. Poultry meat production has also expanded, with chicken contributing approximately 14% of total national meat output in 2024/25, up from 11.5% in 2018/19. Egg production nearly doubled over the same period, increasing from 3.57 billion eggs in 2018/19 to over 7.1 billion eggs in 2024/25, while day-old chick (DOC) production reached approximately 83.9 million in 2026. This reflects rising domestic demand and expanding private sector investment across breeding, feed production, disease control, commercial farming, and processing.

Despite this progress, the industry continues to face structural constraints that limit its productivity, competitiveness, and ability to meet rapidly growing domestic and regional demand. Per capita consumption of eggs and poultry meat remains low at approximately 107 eggs and 2.07 kg per person per year, respectively, highlighting both a persistent nutrition gap and a substantial untapped market opportunity. Feed costs, which account for approximately 70 percent of production expenses, remain high and volatile due to supply constraints and dependence on imported protein sources. Limited breeder and hatchery capacity leads to supply gaps and high chick mortality rates, particularly among producers. Gaps in veterinary service delivery, inadequate biosecurity systems, and inconsistency in the supply of quality feed further undermine productivity and profitability. In addition, most poultry products are marketed live, with limited processing, value addition, and cold-chain infrastructure, resulting in post-harvest losses, food safety risks, and constrained access to formal domestic and export markets. Access to finance remains limited, particularly for women and youth, while fragmented markets, weak coordination systems, and limited timely and quality data reduce overall sector efficiency and evidence-based decision-making.

In response to these challenges, the Tanzania Poultry Development Strategy adopts a whole-of-value-chain approach designed to address systemic bottlenecks while unlocking investment, production and productivity growth, and inclusive participation. The Strategy provides a structured framework to align public policy, private sector investment, research, finance, institutional strengthening, and monitoring and evaluation under a shared national

vision for sector transformation. By targeting both supply-side and demand-side constraints, it aims to strengthen competitiveness, enhance resilience to climate and disease risks, and position Tanzania as a leading poultry producer in the region.

The strategy is structured around four strategic pillars. The first pillar focuses on strengthening quality and competitive inputs by improving feed production and breeding capacity. It prioritizes local production of inputs, private sector investment, and innovation to reduce production costs, enhance quality, and increase sector resilience. The second pillar targets productive, resilient, and inclusive production and productivity by improving farm-level practices, expanding extension and digital advisory services, promoting climate-smart housing, strengthened biosecurity, and disease management, while supporting the transition from subsistence to commercially viable production models. The third pillar emphasizes value addition, markets, and trade by promoting investment in modern slaughterhouses, cold storage, packaging, logistics, and market infrastructure, enabling the shift from informal live-bird markets toward structured, high-value supply chains for regional and international markets. The fourth pillar addresses enablers, governance, and inclusive ecosystem development, including access to finance, research and development, environmental sustainability, youth and women inclusion, monitoring and evaluation, institutional strengthening, and policy alignment to improve the business environment and ensure long-term sector transformation.

To accelerate implementation, the Strategy prioritizes five flagship investment programs. The first flagship focuses on sustainable poultry feed, aiming to expand local production of maize and soybeans for feed, modernize feed processing, and reduce the share of feed in total production costs. The second flagship supports breeder farms, hatchery expansion, and improved day-old chick distribution, including investments in integrated grandparent and parent stock farms, decentralized brooding units, strengthened quality control, and the development and scaling of indigenous poultry breeds to reduce early chick mortality and improve smallholder access to quality genetics. The third flagship promotes poultry processing, value addition, and cold-chain infrastructure to increase the share of processed poultry products, reduce post-harvest losses, enhance food safety, and improve export readiness. The fourth flagship focuses on strengthening capacity building for poultry value chain actors through extension systems, technical training, digital advisory services, and entrepreneurship development. The fifth flagship focuses on strengthening government capability and service delivery systems through improved coordination, digital systems, poultry desks, inspection systems, and institutional performance management.

Implementation of the Strategy will be coordinated through a multi-stakeholder governance framework led by the Ministry of Livestock and Fisheries, in collaboration with relevant ministries, regulatory bodies, research institutions, private sector actors, financial institutions, poultry associations, and development partners. A strengthened Monitoring and Evaluation framework will track progress across productivity, feed cost reduction, biosecurity compliance, disease control, processing capacity, investment mobilization,

market access, and inclusion indicators to ensure accountability and adaptive management.

Implementation of the strategy is estimated to require approximately TZS 3.5 trillion over the ten-year period, financed through a combination of private sector investment, public financing, public–private partnerships, blended finance mechanisms, and development partner support. The private sector is expected to contribute the majority of financing, particularly in commercially viable areas such as feed production, hatcheries, commercial farming, processing, logistics, and market infrastructure, while government and development partners will play catalytic roles in strengthening public goods, institutional systems, regulation, extension, and research.

By 2036, the Strategy aims to transform Tanzania’s poultry industry into a modern, competitive, and investment-driven sector that contributes significantly to national economic growth, food security, and industrialization. The strategy targets increasing poultry contribution to national GDP from 1.8% to 3%, while increasing poultry contribution to livestock GDP from approximately 30% to 40%. Poultry meat production is projected to increase from approximately 156,000 metric tonnes to over 380,000 metric tonnes annually, while egg production is expected to rise from 7.1 billion to over 17 billion eggs annually. In addition, the strategy aims to mobilize over TZS 2.14 trillion in private investment across the poultry value chain, significantly expand processing and value addition, strengthen domestic input systems, and position Tanzania as a leading regional poultry producer and exporter.

Through coordinated public and private investment, institutional strengthening, and targeted interventions across the value chain, the Tanzania Poultry Development Strategy positions the poultry sector as a strategic driver of food security, industrialization, rural development, employment creation, and inclusive economic growth.

CHAPTER 1: BACKGROUND

Strategic Context of the Poultry Value Chain

The poultry industry in Tanzania stands as a dynamic and rapidly expanding agricultural subsector, playing a pivotal role in enhancing national food and nutrition security, generating employment opportunities, particularly for women and youth, and offering growing potential for increased export revenue from regional and international markets such as SADC, the EAC, and the Middle East. The sector is highly inclusive, engaging 65% of youth and 51.3% of women, thereby contributing significantly to socio-economic empowerment and inclusive growth¹.

Economically, the livestock sector contributes 6.2% to the national GDP, with poultry specifically accounting for 1.8%². Over 4 million households (about 55.4% of agricultural households) are engaged in poultry farming, highlighting the sector's extensive reach, employment generation capacity, and socio-economic capacity. Furthermore, the poultry value chain is notably inclusive, engaging a significant proportion of youth (65%) and women (51.3%), thereby contributing to socio-economic empowerment and inclusive growth³. This expansion has stimulated private sector investment across the value chain, including breeder farms, hatcheries, feed production, commercial broiler and layer farms, aggregation, processing, logistics, and veterinary services, contributing to the emergence of a more structured and commercially viable poultry ecosystem⁴.

Driven by rising domestic demand for poultry meat and eggs and supportive government policies, the poultry sector has experienced strong and sustained growth. Between 2017 and 2025, the poultry sector exhibited a substantial growth rate of 57.16%, with the total poultry population increasing from 71.93 million to 113.4 million⁵. This expansion has facilitated the development of a structured poultry value chain, where various actors contribute to productivity and efficiency, ultimately ensuring a steady supply of poultry products to local and regional markets. The predominance of farmers in poultry production presents opportunities for interventions that can enhance productivity, such as capacity building, access to credit, and improved market linkages.

Despite this positive trajectory, the poultry value chain continues to face structural bottlenecks that constrain productivity, profitability, and export competitiveness. Key challenges include high and volatile feed costs, limited access to high-quality breeding stock, inadequate veterinary and extension services, disease burden, weak biosecurity, and underdeveloped processing, cold-chain, and storage infrastructure⁶. Technological integration across the poultry value chain remains limited, largely due to the structure of the

¹ FAO, 2020

² NBS, 2022

³ FAO, 2020

⁴ United Republic of Tanzania, 2021

⁵ Ministry of Livestock and Fisheries, 2026

⁶ ILRI, 2022

sector, where indigenous poultry production is dominated by a large number of smallholder keepers each managing relatively small flock sizes. Indigenous poultry accounts for approximately 43.8%⁷ of the national poultry population and is primarily characterized by low-input, subsistence-oriented production systems dispersed across rural areas. In contrast, exotic chicken production is more commercially oriented and concentrated primarily in urban and peri-urban areas. While the sector has experienced gradual intensification and commercialization, overall production remains largely informal, weakly regulated, and characterized by low technology adoption. This has constrained the uptake of improved genetics, efficient feeding systems, strengthened farm management practices, and the use of digital platforms for market access, traceability, and extension service delivery.

Furthermore, low farmer technical capacity, combined with inadequate access to advisory services, has constrained the adoption of climate-smart poultry production practices, including improved housing, vaccination regimes, waste management, and biosecure production. As a result, the sector continues to experience high mortality and morbidity rates, frequent disease outbreaks, and unstable productivity. Collectively, these constraints elevate production risks, suppress farm incomes, reduce investment attractiveness, and limit the sector's ability to meet rapidly growing domestic demand and penetrate regional and international markets.

Various policy interventions and private sector investments have been implemented to address these challenges. In collaboration with development partners, the government has introduced initiatives to improve feed production, expand hatchery operations, and enhance biosecurity measures to control poultry diseases⁸. Additionally, promoting contract farming and cooperative models has helped farmers access better inputs, technical support, and guaranteed product markets.

Given Tanzania's increasing population, urbanisation, and changing dietary preferences, the poultry industry's potential for further growth and development is evident. Strengthening the value chain through policy support, research, and private sector involvement will maximise the sector's contribution to food security, employment, and economic development⁹. Integrating poultry farming with other agricultural activities, such as crops and livestock, can further enhance productivity and resilience among farmers.

Thus, the poultry value chain in Tanzania presents vast opportunities for economic growth, employment creation, and food and nutrition security. While challenges remain, strategic interventions, investments, and technological advancements pave the way for a more sustainable and competitive poultry sector. Strengthening partnerships among stakeholders, improving access to finance, and enhancing capacity-building efforts will be critical in unlocking the full potential of poultry farming in Tanzania. In this regard, the Ministry of Livestock and Fisheries (MLF) has seen the demand for having a guiding

⁷ Ministry of Livestock and Fisheries Budget 2026/27

⁸ USAID, 2021

⁹ World Bank, 2022

document for key stakeholders in the poultry value chain. Hence, MLF has decided to develop a National Poultry Development Strategy (NPDS).

Rationale for National Poultry Development Strategy

The poultry value chain presents significant opportunities for inclusive economic growth, employment creation, export development, and improved food and nutrition security in Tanzania. Unlocking this potential will require coordinated public and private investments, strengthened policy and regulatory frameworks, innovative financing mechanisms, enhanced research and extension, and targeted capacity building for farmers and poultry SMEs.

Under the National Agriculture Master Plan (AMP), the poultry subsector has been identified as a flagship driver of agricultural transformation, with a strategic target to increase its contribution to GDP from USD 155 million in 2022 to USD 592 million by 2030, representing a compound annual growth rate of approximately 18%¹⁰. Achieving this ambitious growth trajectory will require a dedicated, sector-level national strategy to systematically address structural bottlenecks, coordinate public-sector interventions, and crowd in private investment across the poultry value chain.

Beyond its economic importance, the poultry sector is also strategically aligned with Tanzania's national health and nutrition objectives. Poultry products, including eggs and meat, are rich sources of high-quality protein, essential vitamins, and minerals, making them critical for improving dietary diversity, child nutrition, and maternal health. With malnutrition and micronutrient deficiencies still prevalent in many rural and peri-urban communities, a coordinated national poultry strategy can position poultry farming as a scalable, affordable, and sustainable solution for enhancing food security, improving public health outcomes, and reducing vulnerability among low-income households.

A national strategy can also strengthen value chain integration, attract private investment, and create employment opportunities, particularly for youth and women, who constitute a significant share of the sector's workforce. Tanzania has strong potential to emerge as a regional leader in poultry production and trade, particularly within the East African Community (EAC). However, high feed costs, limited access to improved genetics, inadequate processing infrastructure, weak cold-chain infrastructure, and poor market linkages continue to constrain productivity, competitiveness, and export readiness. A well-defined strategy can systematically address these constraints, improve quality standards, and unlock regional and international market opportunities.

Feed accounts for approximately 70% of poultry production costs, making it the most significant constraint faced by farmers¹¹. A national strategy can promote local feed production, strengthen raw material supply chains (including maize, soybeans, and

¹⁰ Tanzania Agriculture Master Plan 2050, 2024

¹¹ Tanzania Agriculture Master Plan 2050, 2024

sunflower), and incentivize research into alternative feed sources, thereby reducing dependence on imports, lowering costs, and improving feed quality. In parallel, poultry diseases, including Newcastle disease and avian influenza, pose major threats to sector stability. Strengthening veterinary services, disease surveillance, vaccine access, and biosecurity enforcement through a coordinated national framework will be critical to reducing mortality, improving farm productivity, and safeguarding public health.

Most poultry farmers in Tanzania are smallholders, who face persistent challenges in accessing finance, quality inputs, technical knowledge, and reliable markets. A national strategy can expand cooperative and contract farming models, strengthen extension and advisory services, and promote innovative financing mechanisms to enable small-scale producers to scale production, improve quality, and integrate into formal value chains. In addition, climate change is increasingly affecting poultry production through rising temperatures, water scarcity, and disease dynamics. A coordinated strategy can promote climate-resilient production, including improved housing, energy-efficient technologies, water management practices, and climate-smart farm management.

Due to limited processing and cold-chain infrastructure, most poultry products in Tanzania are sold live, limiting value addition, shelf life, food safety, and export potential. Strategic investment in modern slaughter facilities, cold storage, logistics, and poultry-based processed products will enhance product quality, reduce post-harvest losses, and strengthen market competitiveness. Furthermore, increased investment in research, innovation, and technology adoption can accelerate improvements in breeding, feeding, disease control, and production efficiency. A national strategy should therefore promote strong partnerships between research institutions, universities, private sector actors, and development partners to drive continuous innovation across the poultry ecosystem.

Currently, poultry sector development efforts remain fragmented across multiple stakeholders, limiting coherence, efficiency, and impact. A National Poultry Development Strategy will provide a comprehensive roadmap to align government institutions, the private sector, financial institutions, and development partners around a shared vision, coordinated investment framework, and harmonized policy agenda. By focusing on productivity, competitiveness, market expansion, inclusion, and sustainability, the strategy will enable Tanzania to transform its poultry industry into a key driver of food security, economic growth, rural development, and national resilience.

Key policies and strategies supporting the poultry strategy

The growth and development of Tanzania's poultry industry are guided by a range of national policies, strategies, and legislative frameworks that aim to enhance production, productivity, market access, and sector competitiveness. These frameworks recognise poultry as a priority sub-sector for advancing food security, nutrition, employment creation, income generation, and inclusive economic growth, particularly for farmers, women, and

youth. Collectively, they provide a strong policy foundation for accelerating transformation across the poultry value chain.

- The National Livestock Policy (2006) provides an overarching framework for livestock sector development, including poultry. It emphasizes the adoption of improved breeds, strengthened disease prevention and control, improved availability and quality of feed, and enhanced market development. The policy also promotes private sector participation by encouraging investment in hatcheries, feed production, processing facilities, veterinary services, and research and extension, thereby supporting productivity growth, commercialization, and value addition across the poultry sector.
- The Livestock Sector Transformation Plan (LSTP) 2022/23–2026/27 further operationalises these objectives by outlining targeted interventions to transform livestock production, including poultry. The plan focuses on improving access to high-quality genetics, feed, and veterinary services, strengthening commercialization and industrialisation, expanding infrastructure and access to finance, and promoting modern production technologies. Through these interventions, the LSTP aims to significantly increase poultry productivity, strengthen value chain linkages, and enhance export competitiveness to meet growing domestic and regional demand.
- The Agriculture Sector Development Programme Phase II (ASDP II) complements these efforts by strengthening poultry value chains, improving rural infrastructure, and enhancing farmer access to markets and financial services. Under ASDP II, poultry farmers benefit from expanded extension and advisory services, training in best production practices, and improved integration into agri-business markets. The programme also integrates climate-smart agriculture principles, promoting sustainability, resilience, and environmentally responsible poultry production.
- Lastly, the Tanzania Industrialisation Policy (2021–2026) and the National Strategy for Youth Involvement in Agriculture (2016–2021) support poultry sector growth by promoting agribusiness development, value addition, youth employment, and private sector investment. These policies encourage the establishment of modern poultry farms, processing plants, cold-chain logistics, and distribution infrastructure, thereby strengthening industrial capacity, employment creation, and market competitiveness within the poultry sector.

The poultry industry is further governed by a comprehensive legislative framework, including the Animal Diseases Act, Cap 156; the Meat Industry Act, Cap 421; the Grazing Land and Animal Feeds Resources Act, Cap 180; the Livestock Identification, Registration and Traceability Act, Cap 184; and the Animal Welfare Act, Cap 154. These laws collectively regulate animal health, food safety, feed quality, traceability, and animal welfare, providing the legal foundation for sustainable poultry sector development.

- The Animal Diseases Act, Cap 156 establishes the framework for disease surveillance, vaccination, quarantine, and outbreak response, enabling national programmes for controlling major poultry diseases such as Newcastle disease and avian influenza. While progress has been made through vaccination campaigns and partnerships with organisations such as FAO and USAID, enforcement gaps persist, particularly in smallholder and informal production, where limited veterinary extension services and weak biosecurity practices contribute to recurrent disease outbreaks.
- The Meat Industry Act, Cap 421 regulates poultry slaughter, processing, hygiene, and meat quality standards. Its enforcement has facilitated the establishment of modern poultry processing plants in major urban centres and improved compliance with food safety standards. However, enforcement within the informal sector remains limited, with backyard slaughter and unregulated poultry sales still widespread. Expanding access to certified slaughter facilities and cold-chain infrastructure remains essential for improving food safety, public health, and export readiness.
- The Grazing Land and Animal Feeds Resources Act, Cap 180 governs animal feed quality, safety standards, and inspection protocols. Despite the existence of regulatory frameworks, enforcement remains constrained by limited technical and institutional capacity, allowing substandard and adulterated feeds to persist in the market. Recent investments in feed mills, quality testing laboratories, and industry self-regulation mechanisms, particularly through the Tanzania Animal Feed Manufacturers Association (TAFMA), have contributed to gradual improvements in feed quality and compliance.
- The Livestock Identification, Registration and Traceability Act, Cap 184 supports disease control, food safety, and market access by enabling traceability across livestock value chains. While implementation has advanced in the cattle and dairy sectors, poultry traceability remains at an early stage, limiting biosecurity management and export competitiveness. Emerging pilot initiatives among commercial poultry farms offer promising models for future sector-wide scaling.
- The Animal Welfare Act, Cap 154 promotes ethical treatment, humane handling, and proper housing of poultry. Compliance is relatively strong among large-scale commercial farms but remains weak within smallholder and informal systems, where overcrowding, inadequate housing, and poor transportation practices persist. Government-led training programmes and partnerships with animal welfare organisations have begun to improve farmer awareness and adoption of better housing and husbandry practices, leading to gains in productivity and animal health outcomes.

While Tanzania has established a robust policy and legislative foundation for poultry sector development, significant implementation gaps remain, particularly in disease control, feed

quality assurance, traceability, processing infrastructure, and regulatory enforcement within informal production systems. Addressing these gaps will require strengthened institutional capacity, enhanced extension services, improved infrastructure investment, and better coordination among public and private stakeholders. A National Poultry Development Strategy will therefore provide a coherent framework to align policies, harmonise interventions, mobilise investment, and accelerate sustainable transformation across the poultry value chain.

Methodology for developing the National Poultry Development Strategy

In 2024, the Ministry of Livestock and Fisheries, in collaboration with a wide range of stakeholders, initiated the development of the National Poultry Development Strategy (NPDS). The process was highly consultative, beginning with the formation of a technical committee of poultry stakeholders tasked with drafting the NPDS. With support from SAGCOT Centre Limited (SCL)/AGCOT and the USAID Feed the Future Tanzania Private Sector Strengthening Activity (PSSA), the committee convened two technical meetings to review literature and prepare the situation analysis and strategy chapters. Subsequently, the Tanzania Poultry Executive Compact Committee (TPECC), with technical support from the Ministry of Livestock and Fisheries and SCL, organized a series of online meetings to refine the content and produce the first draft of the NPDS.

With support from the World Bank, the NPDS was further validated through a structured series of stakeholder consultations, comprising a technical review workshop, meetings with Directors from the Ministry of Livestock and Fisheries, and two zonal workshops held in **Morogoro and Mwanza**. These engagements gathered inputs from a wide range of stakeholders, including farmers, processors, government institutions, development partners, donors, and other key actors across the poultry value chain. The zonal workshops enabled the strategy to capture region-specific perspectives and contextual realities, ensuring that local priorities and implementation challenges were adequately reflected in the final NPDS.

CHAPTER 2: SITUATION ANALYSIS OF THE POULTRY INDUSTRY

Overview of the Poultry Value Chain

The poultry industry in Tanzania plays a crucial role in the agricultural sector, contributing significantly to food security, nutrition, employment, and income generation for millions of households. It is a key component of the livestock sector, supporting rural and urban livelihoods. Poultry farming is predominantly characterized by two major production systems: traditional extensive production and commercial intensive production. Traditional extensive systems account for the majority of poultry keepers and are primarily based on indigenous poultry raised under low-input, smallholder conditions. In contrast, commercial intensive production—largely focused on exotic chicken breeds—is gradually expanding, driven by increased private investment, urban market concentration, and growing demand for poultry meat and eggs.

The industry has recorded notable growth in meat and egg production. However, current production remains insufficient to meet national demand, particularly in the context of a rapidly growing population now exceeding 61 million. Per capita consumption stands at 107 eggs and 2.07 kg of poultry meat per year, far below the FAO-recommended levels of 300 eggs and 50 kg of meat, highlighting a substantial consumption and nutrition gap¹². This gap translates into significant unmet market potential, with annual demand projected to expand substantially, with chicken meat reaching 472,140 metric tonnes and egg consumption rising to 27.35 billion units by 2050¹³. Demand is driven primarily by urban, middle-income populations, though consumption is increasing nationwide, reflecting changing dietary preferences and rising incomes.

¹² FAO, 2011

¹³ Ringo & Lekule, 2020

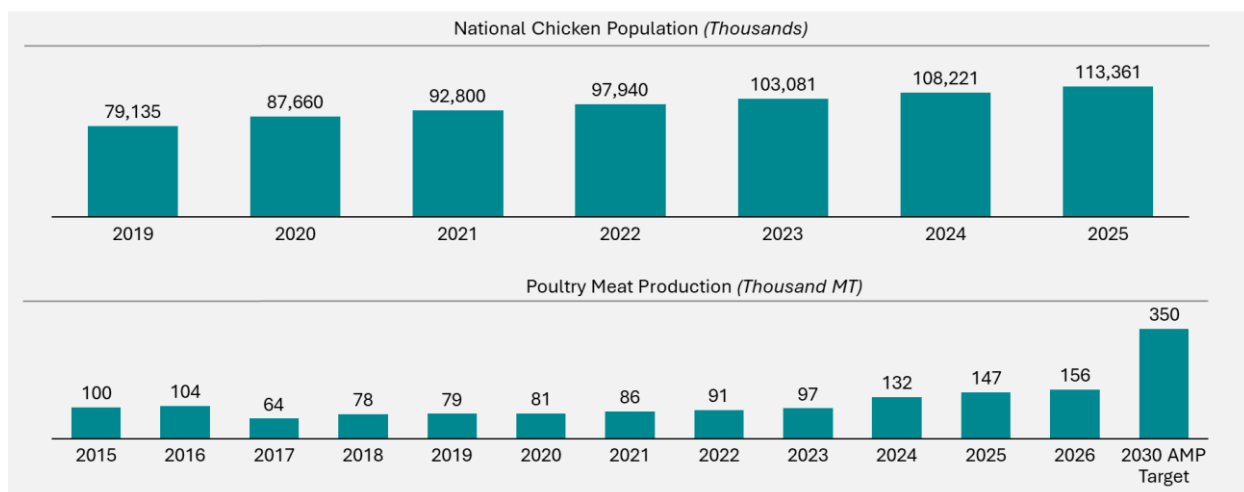


Figure 1: National Chicken Population and Poultry Meat Production, Ministry of Livestock and Fisheries 2026/27

The Tanzania Livestock Master Plan 2018 set ambitious targets to scale poultry production, aiming to increase chicken meat to 465,600 tonnes and egg production to 4.2 billion by 2021/22, with the objective of eliminating national supply deficits and generating exportable surpluses¹⁴¹⁵. These targets were to be achieved through improvements in traditional poultry, promotion of improved dual-purpose breeds, and expansion of commercial poultry operations.

As of 2025, progress has been achieved but targets remain unmet. Government-backed intensification initiatives have driven significant growth, with chicken meat production increasing by approximately 86% and egg production nearly doubling since 2018/19¹⁶¹⁷. These trends underscore strong sector momentum, while also highlighting the need for accelerated investment, productivity enhancement, and systemic value-chain transformation to meet rapidly growing domestic and regional demand.

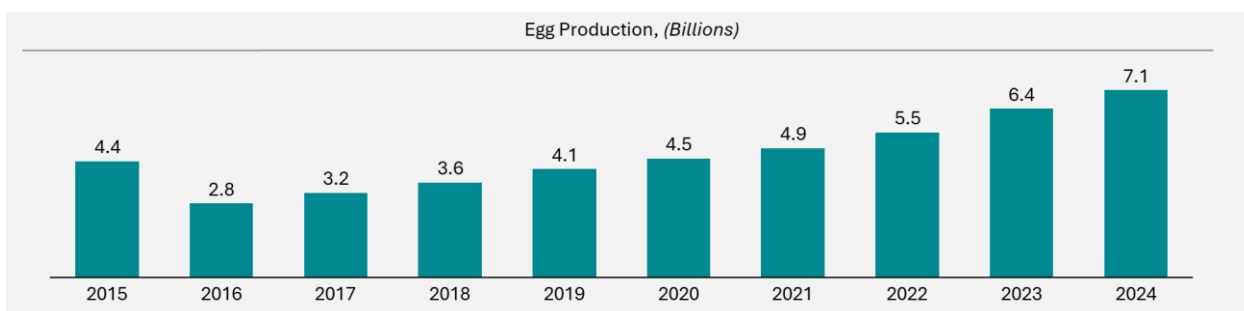


Figure 2: Eggs Production, 2025/26 Budget Speech, Ministry of Livestock and Fisheries

14 MLF, 2018

15 ILRI, 2023

16 ILRI, 2023

17 Ministry of Livestock and Fisheries, 2026

This chapter provides a comprehensive analysis of the status of the poultry industry in Tanzania. It examines key trends, production modes, market dynamics, policy frameworks, and the sector's challenges and opportunities. The findings from this analysis serve as a foundation for formulating strategic interventions to foster a more competitive, resilient, and sustainable poultry industry.

By addressing the existing bottlenecks and harnessing available opportunities, the NPDS seeks to create an enabling environment to increase productivity, enhance value addition, strengthen supply chains, and improve overall sector performance. Through coordinated efforts by stakeholders, including the government, private sector, research institutions, and development partners, Tanzania's poultry industry can achieve greater efficiency, sustainability, and contribution to national economic growth.

Poultry Breed Typologies

A. Indigenous Chicken

Indigenous chickens play a central role in the livelihoods of rural and peri-urban communities in Tanzania, contributing significantly to household food security, income generation, and nutrition. The indigenous chicken population is estimated at 49.7 million chickens (43.8% of total number of chicken population in Tanzania)¹⁸. They are mainly raised by farmers under extensive free-range production approaches. These low-input approaches rely largely on natural breeding, scavenging feed, and traditional management practices, with minimal external inputs.

Despite the low productivity associated with indigenous breeds, they remain highly valued for their resilience, adaptability to local conditions, and strong consumer preference, particularly in urban markets. Indigenous chickens contribute substantially to household consumption of poultry meat in rural areas and supply a significant share of eggs and meat to urban markets, where consumers are willing to pay a premium for their distinctive taste and perceived quality¹⁹. This demand has strengthened market incentives for rural producers and stimulated growing commercial interest in indigenous poultry value chains.

Production approaches are predominantly small-scale and subsistent in nature, with flock sizes typically below 20 birds per household. Birds roam freely and primarily scavenge for food, occasionally supplemented with household waste or crop by-products such as maize bran. While vaccination against Newcastle disease is increasingly promoted through public health initiatives, access to broader veterinary services, improved housing, and quality feed remains limited²⁰. As a result, indigenous poultry systems experience high mortality rates, driven by disease outbreaks, predation, and sub-optimal husbandry practices. Evidence suggests that targeted interventions in veterinary service provision, improved feeding,

¹⁸ Ministry of Livestock and Fisheries budget 2026/27

¹⁹ Goromela et al., 2006

²⁰ Yongolo, 1996

housing, and genetic upgrading could significantly enhance productivity and reduce losses²¹.

Post-farm value chain of indigenous poultry products is largely informal and multi-tiered, involving village-level assemblers, district traders, and urban wholesalers. Chickens are aggregated from dispersed rural households and transported to urban markets, where slaughter and retailing often occur under informal conditions²². Eggs are mainly consumed within rural communities, and small portions are sold commercially in urban centers.

B. Improved Chicken

Improved chicken breeds represent an important transitional production system bridging traditional and fully commercial poultry farming. These breeds offer significantly higher productivity than indigenous chickens, with average egg production of approximately 150 eggs per hen per year and mature live weights of 1.8 kg²³. The category includes locally adapted improved ecotypes, such as Horasi, as well as imported dual-purpose breeds, including Sasso, Kuroiler, and Tanbro, which have been selectively introduced to enhance productivity while retaining resilience under smallholder production conditions.

Improved chickens are predominantly raised by small and medium-scale farmers across rural, peri-urban, and urban areas, with flock sizes typically ranging from 100 to 1,000 birds. Production approaches are generally semi-intensive or intensive, incorporating improved housing, supplemental feeding, vaccination, and better management practices. These systems offer a balanced model combining moderate capital requirements, improved productivity, and reduced production risks, making them particularly attractive to emerging agricultural entrepreneurs.

The expansion of improved chicken production has been supported by government and development partner programmes promoting genetic upgrading, farmer training, and access to improved inputs^{24,25}. However, challenges remain, including high feed costs, limited access to affordable credit, inconsistent supply of quality day-old chicks, and uneven extension support. Addressing these constraints through targeted investments in hatchery capacity, feed value chains, financing mechanisms, and farmer capacity building will be critical for scaling improved poultry production and strengthening its contribution to national food security and employment generation.

C. Exotic Commercial Broiler and Layers

Exotic commercial poultry production in Tanzania is primarily undertaken through intensive and semi-intensive approaches using high-performing broiler and layer breeds sourced from international breeding companies and local hatcheries based on imported parent

²¹ Mwalusanya et al., 2001

²² Mlozi et al., 2003

²³ CSIRO Research, 2018

²⁴ Andrew, 2022

²⁵ Wilson et al., 2022

stock²⁶. These systems are to an extent supported by improved housing, commercial feed, vaccination programmes, and biosecurity measures, and are concentrated around urban and peri-urban centres with better access to inputs and markets. The segment has expanded rapidly due to rising urban demand, private-sector investment, and supportive government policies, and now contributes to a significant share of national poultry production²⁷.

Despite this growth, the sector faces major cost and structural constraints. Feed remains the largest cost component, accounting for approximately 60–70% of total production costs, driven by volatility in maize and soybean supply and reliance on imported protein source²⁸. Additional challenges include high energy and transport costs, dependence on imported breeding stock, and limited domestic genetic capacity, all of which contribute to high day-old chick prices and production risks, particularly for small and medium-scale producers.

Productivity performance within commercial poultry production in Tanzania remains below optimal levels despite the adoption of intensive production models designed for efficient feed utilisation and rapid growth. In practice, performance is frequently constrained by inconsistent feed quality, suboptimal farm management practices, and persistent disease risks. Under standard commercial conditions, broiler chickens typically reach a market weight of around 2 kg within 5–7 weeks; however, achieving this potential consistently depends on maintaining optimal production conditions²⁹. These include high-quality and balanced nutrition, appropriate housing and ventilation, effective health management, strict biosecurity, and sound flock management practices.

Strengthening these areas presents a clear opportunity to improve feed efficiency, reduce mortality, and enhance overall productivity through improved feed formulation, stronger extension support, and better biosecurity enforcement. In parallel, investment in processing and cold-chain infrastructure will be essential to support the transition toward more efficient, resilient, and market-oriented poultry value chains in Tanzania.

²⁶ Ringo & Lekule, 2020

²⁷ Ministry of Livestock and Fisheries, 2026

²⁸ Tanzania Agriculture Master Plan 2050, 2024

²⁹ Abioja & Abiona, 2021

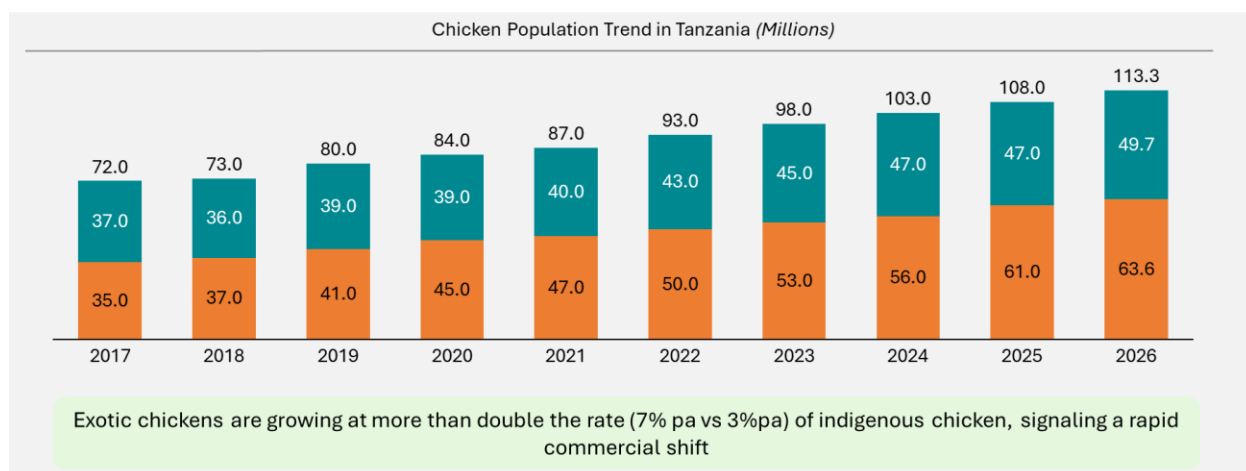


Figure 3: Chicken population trend in Tanzania 2017-2024, MLF

D. Other Poultry

Other poultry species, namely ducks, turkeys, and guinea fowl, are kept in relatively small numbers compared to chickens and remain underdeveloped within Tanzania's livestock sector. As of 2020, national estimates indicated approximately 4.3 million ducks, 0.7 million guinea fowls, and 86,700 turkeys³⁰. Production is predominantly small-scale, extensive, and informal, largely concentrated among rural households and peri-urban producers, with limited commercialization. These species are primarily raised for household consumption, cultural ceremonies, and niche local markets, rather than structured commercial supply chains.

Markets for non-chicken poultry are fragmented and poorly integrated, characterised by informal trading, weak aggregation mechanisms, minimal processing, and limited cold-chain infrastructure. Sales mainly occur through live bird markets, roadside vendors, and farm-gate transactions, with negligible participation in formal retail, hospitality, or export channels. Demand is highly seasonal, peaking during festive periods, social events, and tourism cycles, particularly for turkey and guinea fowl. Ducks, while more widespread, are primarily consumed locally with limited organised marketing.

Poultry Value Chain Analysis

This strategy prioritizes the chicken value chain, which accounts for over 90% of Tanzania's poultry sector, ensuring maximum impact on national food security and economic growth. The situation analysis will adopt a poultry value chain structure to provide a comprehensive assessment of the sector and ensure that constraints and opportunities are analyzed across all key stages of the value chain. The analysis will be organized around four interconnected pillars: (i) Quality and Competitive Inputs, covering feed, breeding, hatchery systems, and

³⁰ NBS, 2020

access to quality inputs; (ii) Productive, Resilient and Inclusive Production, focusing on on-farm production systems, farmer capacity, veterinary and extension services; (iii) Processing, Markets and Trade, examining processing, cold chain systems, market access, and trade; and (iv) Cross-cutting Issues and Enabling Environment, including policy, finance, research, climate resilience, inclusion, and sector coordination.

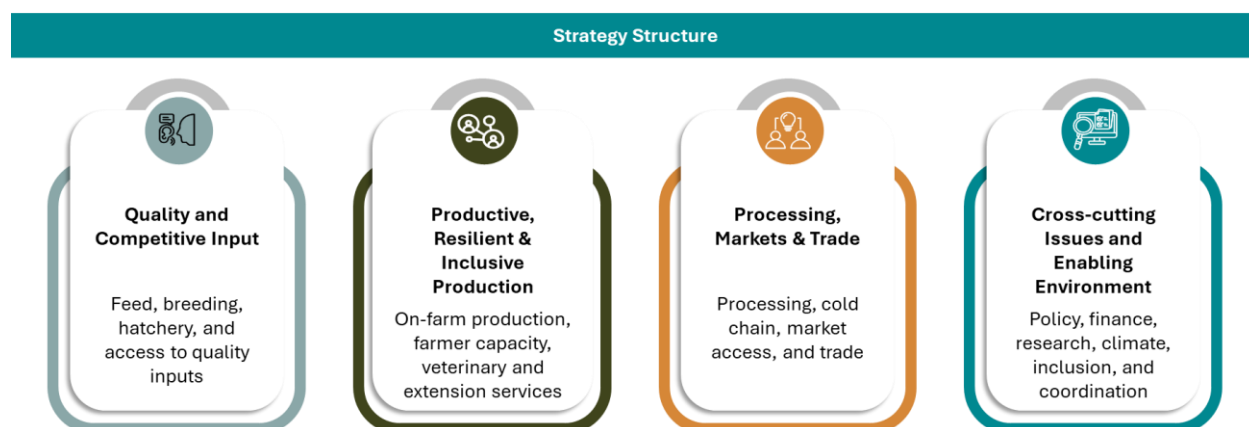


Figure 4: Overview of the Chicken Value Chain Nodes and Key Strategy Pillars

I. Quality And Competitive Inputs

A. Breeding, Hatchery, and Day-Old Chick (DOC) Production

Breeding Stock Production (Grandparent and Parent Stock Farms)

Breeding stock production forms the genetic foundation of Tanzania’s poultry industry, directly influencing productivity, disease resistance, feed efficiency, and overall sector competitiveness. The poultry breeding pyramid comprises grandparent stock (GPS) and parent stock (PS) farms, which supply fertile eggs to hatcheries for the production of day-old chicks (DOCs) used in broiler, layer, and improved dual-purpose production systems. Over the years, Tanzania has expanded its breeding stock capacity; however, rapid growth in poultry demand continues to outpace domestic supply.

At the apex of the breeding pyramid, Tanzania currently hosts two active grandparent stock operations, Aviagen East Africa Ltd and Cobb East Africa, both located in Siha District, Kilimanjaro Region³¹. These farms import elite breeding lines from global genetics companies, primarily Aviagen and Cobb-Vantress, and produce parent stock DOCs for both domestic distribution and regional export. In 2023/24, Aviagen East Africa produced 515,174 grandparent stock DOCs, of which 468,340 were exported to regional markets including Uganda, Kenya, DRC, and Rwanda, highlighting Tanzania’s emerging role as a regional hub

³¹ Ministry of Livestock and Fisheries, 2026

for poultry genetics. In addition, the country supports approximately 25 parent stock farms distributed across key production zones.

Nevertheless, domestic breeding capacity remains limited in scale and geographic coverage, concentrated mainly around Dar es Salaam, Pwani, Arusha, Kilimanjaro, and parts of the Southern Highlands. While several commercial breeding farms operate modern facilities with controlled environments, biosecurity protocols, and veterinary oversight, overall production capacity remains insufficient to meet the rapidly growing demand for high-quality DOCs.

The import bans on day-old chicks imposed in 2016 (which were later lifted) and again in July 2022 highlighted structural supply gaps within domestic breeding and hatchery³². These policy measures, while aimed at protecting local producers, exposed insufficient domestic capacity to meet market demand, resulting in supply shortages, price volatility, and market disruption. This underscores the urgent need for expanded investment in breeding stock production and hatchery infrastructure to ensure stable and affordable access to high-quality genetic material.

Key constraints affecting breeding stock production include high capital investment requirements, limited access to long-term financing, and biosecurity compliance costs, dependence on imported feed ingredients, and limited domestic expertise in advanced poultry genetics and breeding management. In addition, regulatory complexity and lengthy importation procedures for genetic materials further constrain timely access to quality breeding inputs. Collectively, these challenges limit the private sector participation in breeding investments and restrict the expansion of domestic genetic capacity, thereby constraining productivity gains and sector competitiveness.

Table 1: SWOT Analysis - Breeding and DOCs

Category	Key Points
Strengths	• Growing demand for day-old chicks (DOCs) • Presence of institutions supporting poultry breeding research and development Availability of commercial hatcheries with export potential for DOCs
Weaknesses	• Unquantified national demand for DOCs Limited access to quality grandparent (GP) and parent stock • High cost of hatchery operations • Limited distribution networks for DOCs • Inadequate veterinary support services • Limited access to financial services

³² FW Africa, 2024

Opportunities

- Presence of informal and unregistered hatcheries, making quality control and regulation difficult
- Expanding commercial poultry farming
- Growing investment in poultry infrastructure
- Regional poultry market expansion
- Introduction of climate-resilient and improved breeds
- Digital platforms for chick distribution and traceability

Threats

- Disease outbreaks and biosecurity risks
- Unregulated imports of chicks and parent stock
- Unstable power supply and infrastructure challenges affecting hatchery operations

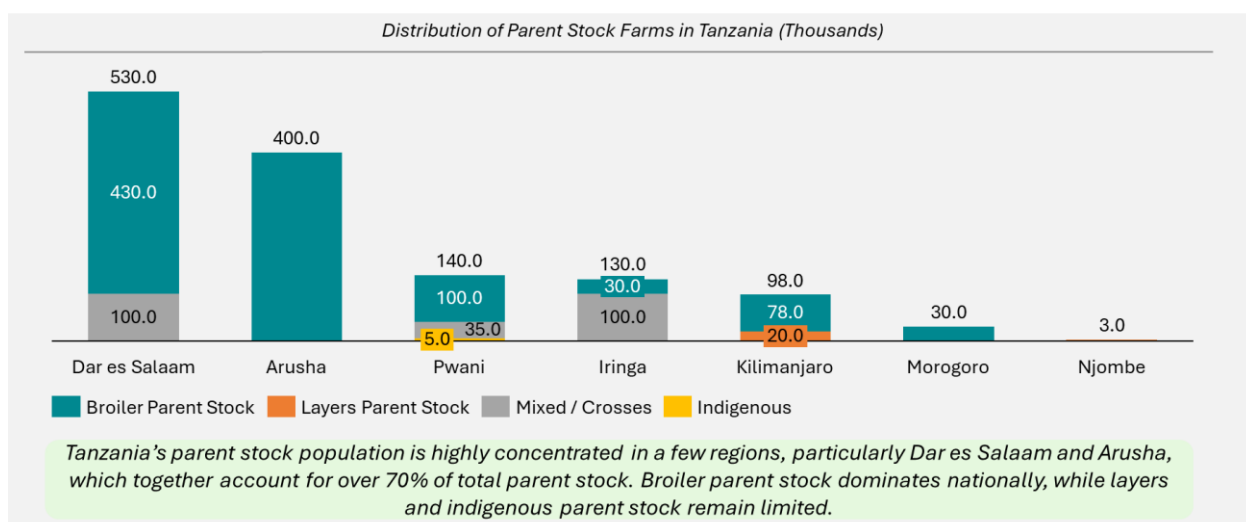


Figure 5: Regional Distribution of Parent Stock Farms in Tanzania

Hatchery and Production of Day-Old Chicks

Hatcheries play a critical role in translating breeding stock investments into farm-level productivity through the production and distribution of high-quality Day-Old Chicks (DOCs). Tanzania's hatchery sector comprises a mix of large commercial hatcheries, medium-scale private operators, and a small number of institutional hatcheries, strategically located across major poultry production zones. As of 2024, Tanzania hosts 28 operational hatcheries, supporting the rapidly expanding demand for poultry products nationwide.

Between 2019 and 2024, Tanzania experienced substantial growth in DOC production, reflecting accelerated sector expansion and rising market demand. Total DOC output increased from 50.9 million chicks in 2019 to 83.9 million in 2026, representing an 64.8%

growth over five years³³. Production in the 2025/26 period comprised 70.5 million broiler chicks, 10.3 million dual-purpose chicks (including Kuroiler, Sasso, and Tanbro), and 3.1 million layer chicks. This expansion has been accompanied by a structural shift in the DOC market driven by strengthening domestic demand, as evidenced by a decline in parent stock DOC imports from 1,371,746 in 2023/24 to 1,157,974 in 2024/25, alongside a reduction in exports from 2,701,429 to 1,909,078³⁴. The drop in exports reflects increased absorption within the domestic market, largely driven by the rapid expansion of large-scale commercial poultry farms such as Voncavy (Morogoro), Hills, Kerege, and Akaji (Bagamoyo), and Interchick, which are generating sustained demand for quality chicks.

Despite these gains, hatchery and DOC distribution continue to face significant operational and market challenges. Disease burdens, particularly Newcastle disease, coccidiosis, fowl pox, and fowl typhoid, pose persistent threats to chick survival and farm productivity. Inadequate vaccination protocols and uneven biosecurity practices at hatchery and farm levels exacerbate mortality rates, increasing production risks and operational costs. Strengthening disease surveillance, vaccination coverage, and biosecurity enforcement remains a critical priority.

Additionally, import competition and illegal poultry product inflows undermine domestic producers by exerting downward pressure on market prices, reducing profitability, and discouraging private investment³⁵. Although protective trade measures exist, continued informal cross-border trade and weak enforcement disrupt local market stability. Furthermore, high and volatile feed costs, driven by fluctuating prices of maize, soybean meal, and other key raw materials, remain a major constraint³⁶.

A further challenge within the hatchery segment is the presence of informal and unregistered hatcheries operating outside formal regulatory and quality assurance systems. These operators often lack standardized incubation practices, adequate biosecurity measures, and proper veterinary oversight, making it difficult to enforce quality control and traceability across the DOC supply chain. The proliferation of unregistered hatcheries increases the risk of distributing low-quality or diseased chicks, undermines farmer confidence, and weakens overall sector performance. Strengthening hatchery registration, inspection, certification, and compliance enforcement will therefore be critical to improving chick quality and safeguarding the integrity of the poultry value chain.

³³ MLF, 2026; 2024

³⁴ MLF, 2025

³⁵ FW Africa, 2024

³⁶ Agricultural Sector Masterplan, 2024

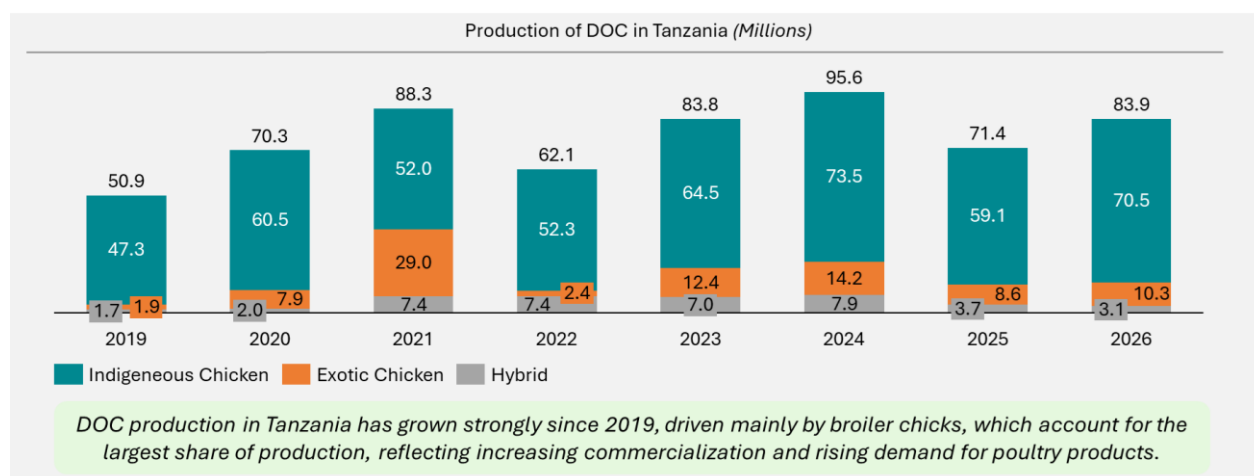


Figure 6: Number of DOC produced in Tanzania, MLF

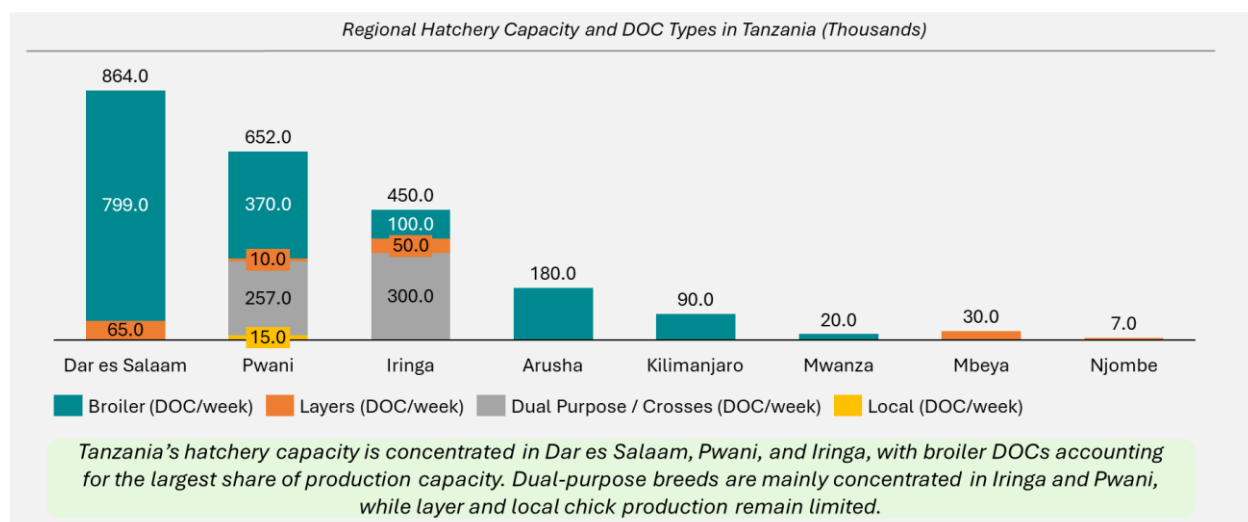


Figure 7: Regional Hatchery Capacity and DOC Types in Tanzania

Distribution and Trading of Day-Old Chicks (DOCs)

The trading and distribution of day-old chicks (DOCs) in Tanzania remain fragmented, largely informal, and characterized by weak biosecurity standards, posing significant risks to chick quality, disease control, and overall sector productivity. Distribution channels are dominated by informal market arrangements, with limited regulatory oversight, resulting in inconsistent quality assurance, poor traceability, and heightened vulnerability to disease transmission.

DOC distribution in Tanzania typically follows three primary models: agent-based distribution, direct sales to customers, and a hybrid model combining both approaches. The agent-based model is prevalent among small and medium-scale hatcheries, where agents operate across different regions, sourcing DOCs from multiple hatcheries and supplying farmers, traders, and poultry enterprises. While the Ministry of Livestock and Fisheries (MLF)

require DOC agents to be registered and comply with established biosecurity and quality standards, it is estimated that the majority of DOC trade occurs informally through unregistered agents. This high level of informality significantly undermines regulatory enforcement, compromises biosecurity protocols, and increases the risk of disease transmission, chick mortality, and market distortions.

Direct distribution models are more common among hatcheries serving customers located within close geographic proximity. This approach reduces transportation costs, minimises handling stress, eliminates agent commissions, and allows hatcheries to maintain greater control over quality assurance, delivery timelines, and biosecurity compliance. Direct sales are therefore favoured by hatcheries seeking to preserve high operational standards and ensure optimal chick survival and performance.

Large-scale DOC producers typically adopt a hybrid distribution model, combining direct customer sales with agent-based distribution to expand market coverage. This model enables producers to efficiently serve nearby markets directly while extending reach to distant production zones through agents, thereby maximising market penetration and operational efficiency. However, without strengthened regulatory oversight, digital tracking systems, and biosecurity enforcement mechanisms, this hybrid model continues to face challenges related to traceability, disease risk management, and quality control.

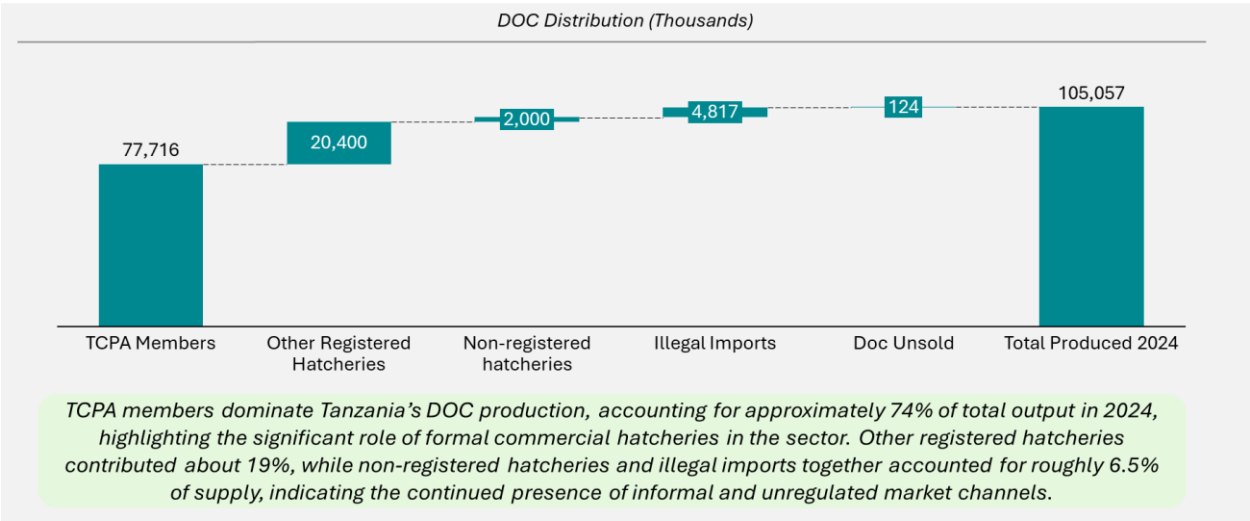


Figure 8: Day Old Chick Distribution

B. Feed Production and Supply

The current status of poultry feed production

Tanzania’s poultry feed production has experienced strong growth in recent years, reflecting the expanding scale of the poultry sector and increasing private-sector investment. According to the Ministry of Livestock and Fisheries, processed animal feed production

reached 720,000 metric tonnes (MT) in 2024/25, nearly doubling from 380,000 MT in 2023/24, an increase of 89.47%³⁷. Of this total, poultry feed accounted for 504,000 MT (70%), highlighting the dominant role of the poultry subsector in driving growth within the animal feed industry. This expansion is supported by increased feed manufacturing capacity; these investments have improved feed availability, reduced transport costs, and strengthened supply chain efficiency.

Long-term demand projections point to substantial growth potential across poultry feed, meat, and egg markets. Driven by population growth from 56.3 million in 2020 to 129 million by 2050, poultry meat demand is projected to rise from 103,000 MT to 472,140 MT, while egg consumption is expected to increase from 4.05 billion to 27.35 billion units³⁸. Poultry feed demand is estimated to grow from 1.5 million MT in 2020 to over 18 million MT by 2050, underscoring the need for large-scale investment in feed ingredient production (maize, soybeans, alternative proteins), feed milling technologies, and logistics infrastructure. In parallel, the expected rise in commercial and improved chicken breeds to 80% of the national stock by 2050 highlights opportunities in genetic improvement, breeding stock expansion, and hatchery investments. Collectively, these trends position the poultry feed and production industries as strategic growth engines for agribusiness development, rural economic transformation, and Tanzania's integration into regional and global poultry markets.

Table 2: Projection of demand of poultry meat, eggs and poultry feed 2020 – 2050 Tanzania (EKN, 2020)

Assumptions	2017	2020	2050
Human Population	54.6 million	56.3 million	129 million
Chicken Meat Production (MT) (per capita consumption 1.83kg in 2017, projected to 3.66kg in 2050)	100,000 MT	103,000 MT	236,000 MT
Projected Demand for Chicken Meat (MT)	-	-	472,140 MT
Egg Production (eggs per capita: 106 in 2017, projected to 212 in 2050)	3.58 billion	4.05 billion	27.35 billion
Number of Chickens Nationwide	-	-	-
- Indigenous (I)	38.2 million	38.77 million	111 million
- Exotic (E)	36.6 million	44.51 million	442 million
Animal Feed Demand (MT)	-	1,500,000 MT	18,114,754 MT

Despite these advances, feed quality and safety remain persistent challenges. Studies indicate that awareness and compliance with feed quality standards among farmers and small-scale feed manufacturers remain relatively low, driven by limited extension outreach, weak enforcement mechanisms, and widespread reliance on on-farm feed formulation

³⁷ MLF, 2025

³⁸ Ringo & Lekule, 2020

using inconsistent ingredient quality³⁹. These factors negatively affect poultry health, productivity, and conversion efficiency, ultimately constraining sector competitiveness.

To address these constraints, the Tanzania Veterinary Laboratories Agency (TVLA) has implemented targeted initiatives aimed at strengthening feed quality assurance systems, including mandatory sample testing, enhanced regulatory enforcement, and penalties for the sale of substandard feeds. These measures are intended to improve livestock nutrition, safeguard animal health, and promote sustainable growth across the poultry industry.

In parallel, the Livestock Sector Transformation Plan (LSTP) 2022/23–2026/27 prioritizes strategic investments in animal feed production and quality enhancement, alongside interventions in livestock genetics, animal health, extension services, research, and skills development. The plan aims to attract private investment, strengthen value addition, and modernize livestock production, positioning animal feed as a cornerstone for sustained productivity growth and sector transformation.

Raw Materials for Poultry Feeds

The primary feed ingredients used in poultry production in Tanzania include grains (mainly maize), soybean meal, oilseed cakes (such as sunflower and cottonseed cake), and fish meal. Among these, maize is the dominant energy source, but its availability is constrained by intense competition between human consumption and animal feed use, leading to periodic shortages and price volatility. Maize production is further affected by climatic variability and soil fertility conditions, which exacerbate supply instability. Recent data shows that Tanzania produced approximately 7.44 million metric tonnes of maize in the 2023/24 agricultural year, with average yields of 1.8 tonnes per hectare, indicating scope for productivity improvement⁴⁰. Despite this production base, only a portion is directed toward animal feed, limiting availability for the poultry industry and contributing to high feed costs.

Soybeans serve as the primary protein source in poultry feed, and their availability is influenced by both domestic production and trade dynamics. In 2024, Tanzania exported soybeans valued at USD 8.71 million, mainly to Kenya, Uganda, Italy, Pakistan, and China, while imports remained relatively low at USD 468,000, sourced primarily from Malawi, India, and Zambia⁴¹. These trade flows highlight the dual role of soybeans as both an export commodity and a key input for animal feed. Ensuring better alignment between soybean production, trade flows, and the requirements of the feed industry will be important for maintaining a stable and efficient supply of protein inputs for poultry production.

To unlock the potential of poultry feed markets, the strategy proposes the development of a supportive policy and investment framework to promote large-scale and commercial

³⁹ Emerald, 2019

⁴⁰ MLF, 2025

⁴¹ OEC, 2025

smallholder production of maize and soybeans targeted specifically for feed markets. There is also a critical need to diversify energy and protein sources. While maize dominates the feed mix, alternative crops such as sorghum currently produced at approximately 201,930 tonnes with yields of 0.8 tonnes per hectare remain underutilized despite their potential as climate-resilient feed ingredients. Other promising alternatives include cassava, millet, and insect-based proteins, which offer opportunities to reduce dependence on maize and imported protein sources while supporting circular economy models and climate-resilient production.

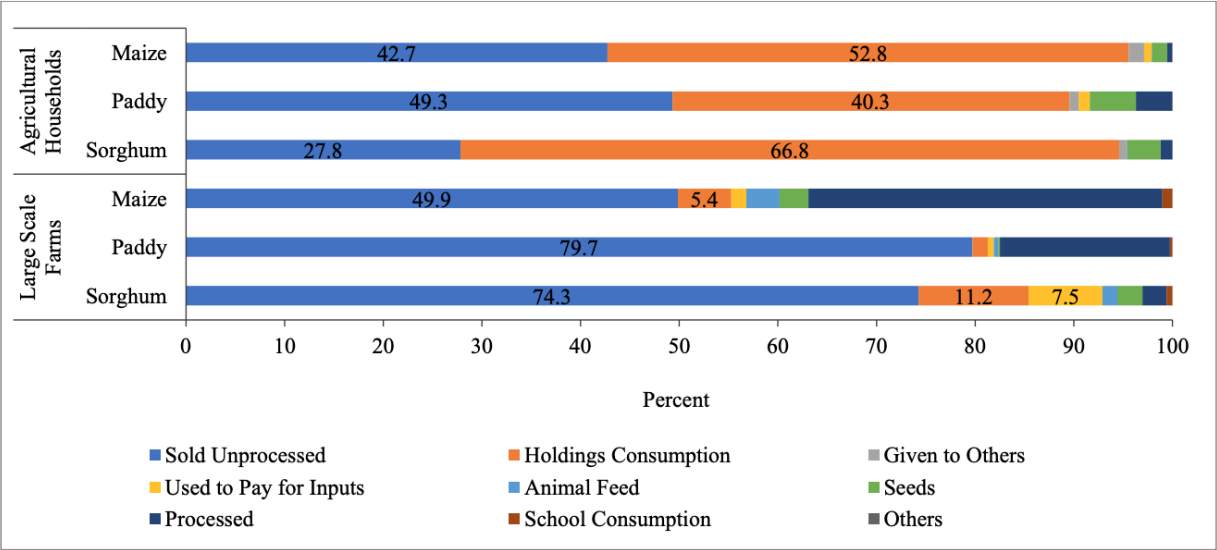


Figure 9: Percentage Distribution of Crop Harvest Uses for Cereals During 2023/24 Agricultural Year, Tanzania (MLF, 2025)

Poultry Feed Processing

Tanzania is estimated to have approximately 250 poultry feed millers, comprising a mix of registered and unregistered operators⁴². However, the majority of existing feed mills currently operate at less than 50 percent of installed capacity due to inconsistent raw material availability, limited technical capacity in formulation and quality management, and insufficient laboratories, and volatility in input prices. Although several policy measures have been introduced, such as the exemption of Value Added Tax (VAT) on locally produced poultry feeds. Structural mismatches between raw material supply and feed demand continue to exert upward pressure on feed prices. This is further compounded by

⁴² MLF, 2024

dependence on imported feed ingredients, which expose manufacturers to foreign exchange risks and global price fluctuations.

The limited supply of quality commercial feeds from registered manufacturers has created a significant market gap, which is increasingly filled by unregistered small-scale feed millers operating under weak regulatory oversight and low biosecurity standards. While these informal operators help bridge supply shortages, the variable quality of their products, inconsistent formulations, and limited quality assurance mechanisms pose risks to poultry health, productivity, and mortality rates. This dual-track feed market structure undermines overall sector efficiency and complicates regulatory enforcement.

Existing feed processing facilities, particularly among small and medium enterprises (SMEs), face significant technological and financial constraints. Many feed millers operate outdated machinery, limiting efficiency, product consistency, and quality control. The adoption of modern feed manufacturing technologies, particularly pelleting, is constrained by high capital costs, placing such technologies beyond the reach of most SMEs and farmer groups. As a result, mash feed remains the dominant product, while pelleted feeds, which offer superior feed conversion efficiency and reduced wastage, are primarily produced by large-scale manufacturers located in major urban centres and distributed nationwide through agents and vendors.

Key constraints facing feed manufacturers include the high cost of importing modern feed milling equipment, limited access to long-term financing for capital investments, and shortages of skilled technical personnel required to operate increasingly computerised and automated feed production. Addressing these challenges will require targeted investment incentives, concessional financing instruments, technical skills development, and strengthened regulatory oversight to modernise feed manufacturing, improve feed quality, reduce production costs, and enhance the overall competitiveness of Tanzania's poultry sector.

Table 3: Top 10 poultry feed manufacturers in Tanzania

SN	Animal Feed Processors	Location	Installed Capacity (MT/Day)	Actual Capacity Utilization (MT/day)
1	Silverlands Tanzania	Iringa	320	200
2	Hill Animal Feeds	Dar es Salaam/Pwani	200	150
3	Falcon Animal Feeds	Dar es Salaam	1 70	120
4	Harsho Milling Company	Kilimanjaro	250	160
5	Backbone Tanzania	Dar es Salaam/Pwani	120	100
6	Tanbreed Poultry Co./Interchick	Dar es Salaam	80	50
7	AKM Glitters Ltd	Dar es Salaam/Pwani	120	90

8	Marenga Millers	Moshi Kilimanjaro	150	80
9	Biotech Laboratories	Dar es Salaam	100	59
10	Kijenge Animal Feeds Limited	Arusha	360	70

Table 4: SWOT Analysis - Poultry Feed Production

Category	Key Points
Strengths	• Availability of key raw materials, particularly maize, despite some supply constraints • Growing demand for animal feed • Presence of local and international feed manufacturers • Support from research and development institutions • Emerging use of alternative feed ingredients • Presence of institutions regulating animal feed quality
Weaknesses	• High cost of feed ingredients • Poor feed quality and adulteration • Weak distribution networks • Lack of modern feed processing equipment • Limited farmer awareness and knowledge on feed utilization
Opportunities	• Expanding poultry farming • Investment in large-scale feed mills • Adoption of alternative protein sources • Regional market expansion through EAC, SADC, and AfCFTA • Digital platforms for feed ordering and distribution
Threats	• Climate change and unreliable weather patterns • High competition for raw materials • Weak enforcement of feed regulation and quality control • Fluctuations in global prices of key feed ingredients • Limited access to credit for feed manufacturers

Feed Quality and Control

Feed production in Tanzania continues to face significant quality and nutritional challenges, resulting in suboptimal feed formulations that constrain poultry productivity and profitability. Key issues include low nutrient density, inconsistent formulation standards, and limited access to modern feed processing technologies. Feed quality can be substantially improved through processing methods such as thermal treatment, sun drying, pelleting, and extrusion, as well as nutrient fortification using amino acids, enzymes, and

performance boosters. However, access to modern feed processing and fortification facilities remains limited, particularly among small and medium-scale manufacturers.

Most plant-based feed ingredients contain anti-nutritional factors that reduce nutrient bioavailability, while mycotoxin contamination, especially aflatoxin, poses a major risk to feed safety, poultry health, and public health. Studies in Tanzania show that over 70% of poultry feed samples exceed FAO/WHO aflatoxin safety limits of 5 µg/kg, largely due to poor harvesting, storage, and handling practices⁴³. This underscores the urgent need for systematic quality control, improved storage, and routine inclusion of mycotoxin binders.

Compliance with feed quality standards remains low, driven by limited farmer awareness, weak extension services, and reliance on informal feed formulation⁴⁴. Although the government has introduced mandatory registration and inspection of feed manufacturers, enforcement remains constrained by limited institutional capacity, particularly at the local government's authority level. Strengthening TVLA and MLF inspection systems, laboratory infrastructure, and regulatory enforcement capacity is therefore critical.

Nutritional deficiencies in commercial and farm-formulated feeds remain another critical constraint. Studies indicate that many poultry feeds lack adequate crude protein levels and essential amino acids, largely due to high costs and limited availability of quality feed ingredients, which force farmers and SMEs to adopt suboptimal formulations⁴⁵. These deficiencies contribute to poor growth rates, low feed conversion efficiency, increased disease susceptibility, and reduced farm profitability, reinforcing the urgency of strengthening feed quality assurance systems.

In response, the National Poultry Development Strategy (NPDS) prioritises strengthening industry self-regulation mechanisms through the Tanzania Animal Feed Manufacturers Association (TAFMA) to enhance standardisation, compliance, and quality assurance. The strategy also seeks to modernise feed testing laboratories, particularly TVLA facilities, through investments in advanced equipment, skilled personnel, and quality management systems. Furthermore, enhanced financing and institutional support for MLF inspectors and LGAs will be critical to ensure consistent enforcement of feed standards nationwide, thereby safeguarding poultry health, improving productivity, and protecting consumer safety.

⁴³ Mongi et al., 2018

⁴⁴ Mphuru et al., 2019

⁴⁵ Njegela & Mbaga, 2019

BOX 1: PROGRESS AND CHALLENGES ACROSS THE QUALITY AND COMPETITIVE INPUTS PILLAR

Tanzania has made notable progress in strengthening poultry input systems, including the establishment of 2 grandparent stock farms, approximately 25 parent stock farms, and 28 operational hatcheries. DOC production increased significantly from 50.9 million chicks in 2019 to 83.9 million in 2026, while processed animal feed production nearly doubled from 380,000 MT in 2023/24 to 720,000 MT in 2024/25. These trends reflect increasing commercialization, private-sector investment, and rising domestic demand for poultry products. However, significant structural, technical, and regulatory constraints continue to limit productivity and competitiveness across the poultry value chain.

1. Poultry Breeding and DOC Supply

Tanzania has expanded domestic breeding and hatchery capacity, supported by growing private-sector investment and rising demand for poultry products. **Key challenges include:**

- Limited domestic breeding capacity and continued dependence on imported GP and parent stock
- Unquantified national demand for DOCs, limiting planning and investment decisions
- High investment and operating costs for hatcheries
- Limited access to long-term financing and technical expertise in poultry genetics
- Geographic concentration of breeding and hatchery facilities

2. Hatchery Systems, Distribution, and Quality Control

The hatchery sector has grown significantly, with increasing commercial DOC production and wider distribution networks nationwide. **Key challenges include:**

- Presence of informal and unregistered hatcheries and DOC agents
- Weak quality assurance, traceability, and regulatory enforcement systems
- Fragmented and largely informal DOC distribution networks
- Weak biosecurity practices and inadequate vaccination compliance
- Persistent disease outbreaks and limited veterinary support services

3. Feed Production, Processing, and Quality

Feed production has expanded rapidly, with poultry feed accounting for 70% of total processed animal feed production in 2024/25. **Key challenges include:**

- High and volatile feed costs driven by maize and soybean supply constraints
- Poor feed quality, adulteration, and inconsistent nutrient composition
- High aflatoxin contamination, with over 70% of feed samples exceeding FAO/WHO safety limits
- Limited adoption of modern feed processing and testing technologies
- Weak enforcement of feed quality standards and limited farmer knowledge on feed utilization

Overall, despite strong sector growth, persistent gaps in breeding systems, hatchery regulation, feed quality, and access to finance continue to constrain productivity and competitiveness across the poultry value chain.

II. Productive, Resilient and Inclusive Production

A. Modes of Production

Traditional or Subsistence Poultry Farming

The traditional/indigenous family production in Tanzania is predominantly an extensive, scavenging, dual-purpose, characterised by very low productivity, averaging approximately 50 eggs per hen per year and 1.5 kg live weight at maturity⁴⁶. Despite its low efficiency, this production mode constitutes the largest share of the poultry keepers and remains central to rural livelihoods, food security, and cultural practices. Indigenous chickens account for approximately 43.8% of the total poultry population and continue to play a significant role in poultry meat and egg consumption, particularly in rural areas, with a smaller but notable presence in urban markets⁴⁷.

According to the 2019/20 Agricultural and Livestock Census, farmers account for 85.7% of poultry-producing households, with average flock sizes of 12–13 birds per household⁴⁸. Production is primarily oriented toward household consumption, contributing directly to nutrition, income smoothing, and resilience against economic shocks. Market participation remains limited and highly informal, with only a small proportion of surplus eggs and live birds entering local and peri-urban markets, and an even smaller share reaching major urban centres through informal trader networks. This limited market integration constrains income generation and value capture by rural households.

Low productivity within the indigenous production mode is driven by minimal vaccination coverage, weak access to veterinary services, poor housing and biosecurity practices, inadequate feeding, and high disease and predation pressure. Consequently, farmers favour hardy, disease-tolerant local ecotypes, prioritising survival and resilience over productivity. While these traits offer adaptive advantages under low-input conditions, they significantly limit output potential, reinforcing low-income equilibrium traps among smallholder poultry producers.

From a development perspective, the indigenous poultry system presents both a challenge and an opportunity. On one hand, its low productivity constrains sector-wide output growth and market supply. On the other hand, its wide geographic reach, strong participation of women and youth, and low entry barriers position it as a powerful platform for inclusive growth interventions.

⁴⁶ Mshanga, 2018

⁴⁷ MLF, 2025

⁴⁸ National Sample Census of Agriculture 2019/20

Table 5: SWOT Analysis - Poultry Production and Productivity

Category	Key Points
Strengths	• Existence of indigenous (local) chicken breeds that are hardy and relatively disease-resistant • Presence of research and development institutions such as SUA, TALIRI, and TVLA • Growing presence of commercial poultry farmers and emerging commercialization of the sector • Relatively stable and predictable policy environment supporting poultry sector growth
Weaknesses	• Inadequate extension and advisory services for poultry farmers • Poor husbandry and farm management practices, particularly among smallholders • Inadequate funding for research, development, and extension services • Limited access to financial services and affordable credit for poultry producers
Opportunities	• Increasing demand driven by rapid urbanization, population growth, and opportunities under AfCFTA • Rising incomes and growing awareness of the nutritional benefits of poultry products • Expanding niche markets for indigenous and organic poultry products
Threats	• Frequent disease outbreaks, including Newcastle disease and avian influenza, which threaten productivity and flock survival • High predation risks, particularly in extensive and free-range production systems • Fluctuations in poultry products and input prices, affecting profitability and investment confidence • Climate change and adverse weather conditions, which affect feed availability, water access, disease prevalence, and overall production resilience

Medium to Large Scale commercial farming

Commercial poultry farming in Tanzania has expanded rapidly over the past decade, driven by government prioritisation of agricultural commercialisation, rising urban demand, and increased private-sector investment. This segment is predominantly centred on improved dual-purpose and exotic hybrids, with production focused on broilers and layers under semi-intensive and intensive production systems. These systems are increasingly concentrated around urban and peri-urban centres, where access to markets, feed supply, veterinary services, and infrastructure is relatively stronger.

Commercial farms typically operate deep-litter or battery cage, with broiler production cycles of 4–7 weeks and layer production spans of 18–20 months. Day-old chicks (DOCs)

are primarily sourced from local hatcheries using imported parent stock, reflecting ongoing dependency on external genetic inputs. Standard health management protocols include routine vaccination against Newcastle disease, infectious bursal disease (Gumboro), and fowl pox, supported through hatchery programmes and private veterinary services. However, antibiotic usage remains widespread, particularly for respiratory and enteric infections, raising growing concerns around antimicrobial resistance (AMR).

Despite technological advances, biosecurity and management gaps persist, contributing to high mortality rates in poorly managed flocks, particularly among small and medium commercial producers. Inadequate cold-chain compromises vaccine efficacy, while inconsistent sanitation, overcrowding, and weak farm traffic controls increase disease transmission risks. Although coccidiostats, deworming regimens, and feed additives are widely used, inconsistent quality control and limited veterinary oversight undermine their effectiveness.

At the upper end of the market, large-scale commercial operators increasingly pursue vertical integration strategies, investing across breeding, hatchery operations, feed milling, commercial production, processing, cold-chain logistics, and distribution. This integrated model enables firms to reduce transaction costs, stabilise input supply, improve quality control, enhance biosecurity, and capture higher value margins across the poultry value chain. Vertical integration has also strengthened market reliability, price competitiveness, and supply consistency, particularly for formal retail and institutional markets.

However, capital intensity, high feed costs, energy prices, and disease risks continue to constrain sector expansion, especially among emerging medium-scale enterprises (SMEs). Limited access to long-term finance, modern infrastructure, skilled labour, and risk mitigation instruments further restrict scaling. Addressing these bottlenecks through targeted investment incentives, infrastructure development, regulatory strengthening, and SME support programmes will be critical to unlocking the next phase of commercial poultry sector growth, enabling Tanzania to meet rising domestic demand and position itself as a regional poultry production and export hub.

B. Health Systems (Veterinary Services, Biosecurity, Veterinary drugs, and Vaccines)

Poultry Disease Context

Poultry production in Tanzania is significantly constrained by the high burden of infectious diseases, which undermine productivity, profitability, and sector sustainability. The most prevalent and economically damaging diseases include Newcastle disease (ND), coccidiosis, fowl pox, infectious bursal disease (IBD), and fowl typhoid. Among these, Newcastle disease remains the most devastating, particularly among indigenous and smallholders, due to its high mortality rates, rapid transmission, and limited vaccine coverage. ND is recognised as one of Tanzania's 13 priority animal diseases under the

Animal Diseases Act (2003). Low vaccination rates driven by limited veterinary outreach, vaccine access, and farmer awareness result in frequent outbreaks that can wipe out entire flocks, severely affecting rural livelihoods and food security⁴⁹.

Coccidiosis represents another major constraint, particularly in low-biosecurity production environments, where poor sanitation and high moisture levels facilitate parasite transmission. The disease reduces growth rates and feed conversion efficiency, leading to substantial economic losses. While effective control requires improved hygiene, biosecurity, and anti-coccidial treatments, farmers often lack access to these inputs due to cost and weak veterinary service coverage⁵⁰. Similarly, fowl pox causes production losses through reduced growth and egg output, while IBD severely compromises immune function in young birds, resulting in high mortality and long-term productivity losses⁵¹. Limited vaccine availability, weak biosecurity, and low disease awareness contribute to the persistence of these infections.

Fowl typhoid, caused by *Salmonella gallinarum*, further exacerbates sector risks, particularly through contaminated feed, water, and equipment, increasing both animal health and public health concerns⁵². Across the poultry value chain, disease outbreaks result in direct production losses, increased input costs, disrupted market supply, and reduced farmer incomes. These challenges are compounded by gaps in the veterinary infrastructure, limited extension services, and low farmer capacity in disease prevention and biosecurity practices⁵³.

Strengthening veterinary service delivery, vaccine supply, disease surveillance, and farmer training is therefore critical. Targeted investments in biosecurity infrastructure, affordable vaccination programmes, and extension will be central to reducing disease burden, improving poultry productivity, and enhancing the resilience and competitiveness of Tanzania's poultry industry⁵⁴.

Biosecurity

Biosecurity is fundamental to maintaining poultry health, productivity, and sustainability, as it prevents the introduction and spread of infectious diseases within and across poultry farms and processing facilities. Effective biosecurity practices include controlled farm access, isolation of production units, regulated movement of birds, people, vehicles, and equipment, and strict sanitation protocols. However, despite its importance, implementation of biosecurity measures across Tanzania's poultry value chain remains weak and uneven.

In Tanzania, biosecurity challenges are particularly acute among smallholder and informal poultry producers, who constitute a large share of the sector. Limited farmer awareness,

⁴⁹ Mramba & Mwantambo, 2023

⁵⁰ Zewdu et al., 2022

⁵¹ Adebayo et al., 2020

⁵² Fahmy et al., 2020

⁵³ Kassahun et al., 2021

⁵⁴ Mwenya et al., 2020

inadequate training, weak extension services, and financial constraints significantly hinder adoption. Many farmers lack access to basic inputs such as disinfectants, protective clothing, quarantine facilities, and proper housing, increasing vulnerability to diseases such as Newcastle disease, coccidiosis, fowl pox, and avian influenza⁵⁵. The fragmented and informal nature of poultry markets, coupled with the high mobility of birds and traders, further amplifies disease transmission risks and complicates regulatory enforcement⁵⁶.

Weak veterinary infrastructure and limited disease surveillance systems, particularly in rural areas, constrain effective biosecurity management. Inadequate farmer access to veterinary advice and diagnostic services undermines early disease detection and response. Furthermore, poor regulation of poultry movement and low compliance with sanitary standards across markets and transport networks increase the risk of spreading across regional disease.

To address these challenges, the NPDS prioritises strengthening biosecurity awareness, training, and enforcement across the value chain. Key interventions include expanding extension services, improving farmer access to affordable biosecurity inputs, development of biosecurity guidelines specified to different poultry production systems, strengthening veterinary surveillance systems, formalising poultry market structures, and enforcing movement control regulations. In addition, enhanced public-private collaboration, investment in digital disease surveillance platforms, and institutional capacity strengthening for MLF and LGAs will be critical to establishing robust, cost-effective, and scalable biosecurity, thereby improving poultry health, productivity, and sector resilience.

Table 6: SWOT Analysis - Health Services

Category	Key Points
Strengths	• Presence of veterinary services and poultry health specialists • Growing awareness of poultry disease prevention and management • Availability of poultry vaccines and veterinary medications • Government support for poultry disease control and vaccination programs • Presence of research institutions supporting poultry health innovations • Emerging use of digital platforms for veterinary consultation and advisory services
Weaknesses	• Limited access to veterinary services in rural and remote areas • High cost of veterinary drugs and vaccines • Weak biosecurity practices across poultry production systems • Inadequate cold chain infrastructure for vaccine storage and distribution • Weak disease surveillance and reporting systems • Low farmer awareness and adoption of poultry health best practices

⁵⁵ Mramba & Mwantambo, 2023; Lemmon, 2020

⁵⁶ Kassahun et al., 2021

Opportunities	• Expanding poultry industry and increasing demand for quality poultry health services • Growing government and NGO support for poultry health programs • Increasing investment opportunities in poultry health infrastructure • Expanding use of digital technologies for poultry health management and disease monitoring • Potential for development of local vaccine production capacity • Opportunities for regional and international collaboration on disease control and surveillance
Threats	• Frequent disease outbreaks, including Newcastle disease and Avian Influenza, threatening flock productivity and survival • Weak regulation and circulation of substandard or counterfeit veterinary drugs • Climate change and extreme weather conditions increasing disease prevalence and heat stress • High cost and dependence on imported veterinary drugs, vaccines, and equipment • Cross-border movement of poultry and poultry products increasing risks of transboundary disease transmission

Veterinary drugs and vaccine

The poultry industry in Tanzania faces significant challenges in the availability, affordability, and quality of veterinary drugs and vaccines, which constrain effective disease control and productivity. While progress has been made in local vaccine production, the sector remains highly dependent on imported veterinary drugs, raising concerns regarding cost, supply reliability, and quality assurance⁵⁷. Studies have also reported inappropriate drug use, including the administration of human antiretroviral drugs (ARVs) in poultry, highlighting critical gaps in regulation, farmer awareness, and veterinary oversight⁵⁸.

Tanzania has achieved notable success in local production of Newcastle Disease (ND) vaccines, with over 59 million doses produced in 2024, alongside combination vaccines such as Tatu Moja that protect against ND, fowl pox, and coryza⁵⁹. However, local manufacturing of vaccines for other major poultry diseases remains limited, necessitating continued reliance on imports⁶⁰. While vaccination coverage among commercial producers approaches 100%, coverage among smallholder and rural farmers remains low at 30–50%, due to limited access, logistical challenges, and low awareness⁶¹.

Key constraints affecting veterinary drug and vaccines include limited domestic vaccine manufacturing capacity, weak cold-chain and distribution infrastructure, circulation of

⁵⁷ Mdegela et al., 2017

⁵⁸ Msoffe et al., 2024

⁵⁹ TVLA, 2024

⁶⁰ Lwelamira et al., 2023

⁶¹ Swai & Kaaya, 2021

substandard and counterfeit products, and inadequate veterinary and extension services, particularly in rural areas⁶². These challenges undermine disease prevention efforts, increase poultry mortality, and elevate production costs. Addressing these constraints will require expanded local vaccine manufacturing, strengthened regulatory oversight, improved cold-chain logistics, enhanced extension services, and targeted farmer education programmes to improve poultry health outcomes and sector resilience, and carry out continuous research to assess the compatibility of existing vaccines with circulating disease pathogens.

Veterinary services

Veterinary services in Tanzania are regulated under the Veterinary Act No. 16 of 2003 and animal disease act of 2003, which establishes the legal framework for professional licensing, disease control, veterinary practice, and regulation of veterinary drugs and vaccines. The sector is primarily delivered by private veterinary service providers, operating under the oversight of the Veterinary Council of Tanzania (VCT) and the Directorate of Veterinary Services (DVS) within the Ministry of Livestock and Fisheries (MLF). Complementing this framework, the Animal Diseases Act of 2003 provides statutory guidance on disease surveillance, quarantine enforcement, and disease control and prevention, such as vaccination programmes, while the Tanzania Veterinary Laboratory Agency (TVLA) oversees vaccine production, diagnostics, and laboratory quality assurance. Tanzania's veterinary regulatory framework is further aligned with World Organisation for Animal Health (WOAH) standards, ensuring compliance with international animal health and trade requirements.

Despite this comprehensive legal architecture, significant institutional and regulatory gaps limit effective implementation, particularly within the poultry sector. Limited enforcement of veterinary drug and vaccine regulations has enabled the circulation of counterfeit and substandard products, alongside widespread misuse of antibiotics, contributing to the growing threat of antimicrobial resistance (AMR)⁶³. Regulatory oversight is particularly limited within the informal and smallholder poultry sector, where monitoring of veterinary drug use remains weak and veterinary service coverage is insufficient.

Another critical gap relates to the absence of explicit legal provisions supporting cold-chain infrastructure for vaccines. Current legislation provides only general guidance on disease prevention and control, without mandating or financing vaccine storage, transportation, and last-mile delivery, particularly in rural areas. As a result, vaccine potency is frequently compromised due to poor handling and storage, reducing effectiveness and limiting disease prevention among farmers⁶⁴.

Furthermore, existing veterinary laws provide limited incentives for private-sector investment in veterinary pharmaceuticals and vaccine manufacturing, resulting in

⁶² Mdegela et al., 2017; Lwelamira et al., 2023

⁶³ Mdegela et al., 2017).

⁶⁴ Swai & Kaaya, 2021

continued dependence on imports and constrained domestic production capacity, particularly for vaccines beyond Newcastle disease⁶⁵. Strengthening the regulatory framework to include investment incentives, enhanced regulatory enforcement, improved cold-chain, and expanded veterinary outreach services will be critical to improving animal health outcomes and strengthening poultry sector resilience.

BOX 2: EMERGING ISSUE ON ANTIMICROBIAL RESISTANCE

Antimicrobial resistance (AMR) is an emerging and critical challenge within Tanzania's poultry value chain, with serious implications for animal health, food safety, public health, and sector sustainability. AMR arises largely from the excessive and inappropriate use of antibiotics, often administered without veterinary guidance, for disease prevention, treatment, and growth promotion. This practice accelerates the development of drug-resistant pathogens, which can spread within poultry populations and transfer to humans through the food chain, limiting treatment options and increasing public health risks.

In Tanzania, antibiotic use in poultry production is widespread, particularly among farmers, who account for the majority of producers. Studies indicate frequent use of tetracyclines, penicillins, and sulfonamides, often administered without prescriptions or professional supervision (Msoffe et al., 2022). Limited farmer awareness, poor access to veterinary services, and the availability of antibiotics over the counter contribute significantly to misuse. Inadequate regulatory enforcement further exacerbates the problem, enabling routine prophylactic use, incorrect dosing, and incomplete treatment courses, which accelerate resistance development (Mwaigwisya et al., 2021).

Evidence of AMR in Tanzania's poultry systems is growing. Studies have detected multidrug-resistant strains of *Salmonella*, including resistance to commonly used antibiotics such as ampicillin and ciprofloxacin, posing serious risks to food safety and human health (Lushasi et al., 2020). The spread of resistant pathogens also increases production costs, disease outbreaks, treatment failure, and poultry mortality, reducing farm profitability and undermining sector resilience.

Although the Government of Tanzania has developed guidelines for rational antimicrobial use, enforcement remains limited due to institutional capacity constraints, weak surveillance systems, and limited coordination between veterinary and public health authorities. Addressing AMR requires a multisectoral approach that integrates farmer education, strengthened veterinary extension services, stricter regulation of antimicrobial sales, enhanced disease surveillance, and promotion of alternative disease control strategies, including vaccination, biosecurity, probiotics, and improved husbandry practices (Rwezaura et al., 2021).

Accordingly, the National Poultry Development Strategy (NPDS) prioritises AMR mitigation as a core pillar of poultry health management, focusing on strengthened regulatory oversight, farmer capacity building, and veterinary service expansion. These interventions are essential to safeguarding poultry productivity, ensuring food safety, and protecting public health in Tanzania.

⁶⁵ TVLA, 2024

C. Extension Services

The effectiveness of Tanzania’s poultry value chain is strongly influenced by the availability, quality, and reach of extension services, which play a central role in disseminating knowledge, promoting improved production practices, introducing new technologies, and strengthening farmer capacity. However, shortages of extension personnel, limited resources, and weak infrastructure significantly constrain service delivery, particularly in rural areas.

As of 2024/25, Tanzania had approximately 4,406 livestock extension officers against an estimated demand of 13,279, representing a staffing gap of about 66.8%⁶⁶. As a result, extension coverage remains inadequate relative to the scale of farming communities, with only around 20% of smallholder poultry farmers accessing extension services⁶⁷. This limited reach is driven by staff shortages, poor coordination, and logistical constraints, leaving many farmers without essential technical support, resulting in low productivity, weak disease management, and suboptimal feeding practices.

The quality of extension services is further constrained by limited training and professional development opportunities. While many officers possess strong foundational knowledge, insufficient retraining on modern poultry practices, disease control, biosecurity, and feed limits their effectiveness in supporting sector transformation⁶⁸. Training institutions, including Livestock Training Agency (LITAs), face capacity constraints, such as shortages of qualified instructors, outdated facilities, limited teaching equipment, and inadequate student accommodation, which weaken the quality of extension training.

Infrastructure and logistical challenges further undermine extension effectiveness. Poor rural road networks, limited transport facilities, and weak digital connectivity restrict officers’ ability to reach dispersed farming communities and deliver timely advisory services. These constraints result in overburdened extension workers, reduced farmer engagement, and low adoption of improved poultry technologies.

Addressing these challenges will require scaling up extension staffing, strengthening training and continuous professional development, improving mobility and digital extension platforms, and enhancing institutional coordination. Targeted investments in transport, digital advisory tools, farmer field schools, and public–private extension delivery models will be critical to expanding coverage, improving service quality, and accelerating productivity gains across Tanzania’s poultry value chain.

⁶⁶ Performance Audit Report on Provision of Livestock Extension Services

⁶⁷ Poultry Producer, 2024

⁶⁸ Ajol, 2023

BOX 3: EMERGING ISSUE ON ANIMAL WELFARE

Animal welfare is a critical component of sustainable poultry production, with ethical, economic, public health, and productivity implications. In Tanzania, however, animal welfare standards across the poultry value chain remain weak, particularly in transport, slaughter, housing, disposal practices, and disease management, resulting in high stress, injury, mortality, and reduced product quality.

During transportation, poultry are frequently subjected to overcrowding, rough handling, inadequate ventilation, and exposure to extreme weather conditions, leading to elevated stress, physical injuries, and increased mortality rates. Poor transport practices also compromise meat quality and overall productivity. Similarly, slaughtering practices in many local facilities lack adequate stunning equipment and trained personnel, resulting in inhumane slaughter methods, prolonged suffering, inconsistent meat quality, and food safety risks.

The disposal of unsold chicks and diseased poultry remains poorly regulated, with common practices including manual neck dislocation, burying, and open burning, often conducted without adherence to environmental or animal welfare standards. These practices pose environmental hazards, disease transmission risks, and ethical concerns, undermining both public health and animal welfare objectives.

Poultry housing standards vary widely, particularly among smallholder farmers, where overcrowding, inadequate ventilation, and poor sanitation are common. These conditions significantly increase disease prevalence, mortality, and productivity losses, driven largely by limited farmer resources, weak training systems, and high costs of improved housing materials.

Access to veterinary treatment and quality medications remains constrained, especially in rural areas, leading to delayed or improper disease management and misuse of antibiotics, which exacerbates antimicrobial resistance risks. These challenges are compounded by shortages of veterinary personnel, high treatment costs, and low farmer awareness.

Addressing animal welfare challenges requires strengthening regulatory enforcement, expanding farmer training, improving transport and slaughter infrastructure, promoting affordable housing solutions, and enhancing veterinary service delivery. Integrating animal welfare standards into poultry development interventions will be essential for improving productivity, food safety, public health, and ethical livestock management in Tanzania.

BOX 4: PROGRESS AND CHALLENGES ACROSS THE PRODUCTIVE, RESILIENT AND INCLUSIVE PRODUCTION PILLAR

Tanzania's poultry production systems have expanded significantly in recent years, driven by rising domestic demand, increasing commercialization, and growing private-sector investment. The sector comprises both traditional smallholder systems and rapidly growing commercial operations, supported by expanding veterinary services, local vaccine production, and increasing adoption of improved production practices. However, major structural and institutional constraints continue to limit productivity, resilience, and inclusiveness across the production pillar.

1. Poultry Production Systems and Commercialization

Traditional indigenous systems dominate Tanzania's poultry sector, accounting for approximately 43.8% of the national poultry population, while commercial poultry farming continues to expand rapidly in urban and peri-urban areas. Despite this growth, productivity and commercialization constraints remain significant across both traditional and commercial systems. Key challenges include:

- Low productivity of indigenous poultry systems, including low egg production and low live weights
- Poor feeding, housing, husbandry, and farm management practices
- High production costs, particularly feed and energy costs, affecting commercial competitiveness
- Dependence on imported genetic material and production inputs

2. Poultry Health, Biosecurity, and Veterinary Systems

Tanzania has strengthened poultry health systems through local vaccine production, expanding veterinary services, and increasing awareness of disease prevention and management. However, major gaps in biosecurity, disease control, and veterinary service delivery continue to expose the sector to high production risks

- Frequent outbreaks of Newcastle disease, coccidiosis, fowl pox, IBD, and avian influenza
- Low vaccination coverage among rural and smallholder poultry farmers, estimated at only 30–50%
- Weak biosecurity practices across smallholder and informal production systems
- Weak disease surveillance, reporting, and diagnostic systems
- Inadequate cold-chain infrastructure for vaccine distribution
- Circulation of counterfeit and substandard veterinary drugs and vaccines
- Growing risks of antimicrobial resistance linked to misuse of antibiotics

3. Extension Services and Farmer Capacity

Extension services remain critical for improving poultry productivity and adoption of improved production practices, although Tanzania continues to face major extension staffing and service delivery gaps.

- Only around 20% of smallholder poultry farmers currently access extension services
- Weak farmer awareness and adoption of improved poultry technologies and biosecurity practices
- Limited training, mobility, equipment, and digital connectivity for extension officers
- Weak coordination and inadequate resources for effective extension delivery systems

Overall, despite rapid growth and commercialization of the poultry sector, persistent productivity gaps, disease risks, weak veterinary and extension systems, and limited access to modern production technologies continue to constrain the resilience, inclusiveness, and competitiveness of poultry production systems in Tanzania.

III. Processing, Markets and Trade

A. Slaughtering, poultry processing and packaging

Tanzania's formal poultry slaughter infrastructure consists of 1,135 facilities distributed across different administrative levels. Village and ward-level slaughter points (Makaro) account for 83% of all facilities, highlighting the dominance of decentralized and small-scale slaughter systems serving local markets. District and municipal council facilities account for 15%, while regional-level abattoirs, including larger commercial and export-oriented facilities, represent only 2% of the country's slaughter infrastructure.

Consequently, poultry slaughtering in many rural areas is still conducted under backyard conditions, often characterized by weak hygiene standards, absence of stunning, limited chilling facilities, and high contamination risks. Larger commercial slaughterhouses remain limited and are mainly linked to vertically integrated poultry operations supplying urban markets through basic dressing, cutting, and packaging services. In addition, weak cold-chain infrastructure, regulatory gaps, and shortages of skilled labour continue to constrain processing efficiency, product quality, food safety, and shelf life across the poultry value chain.

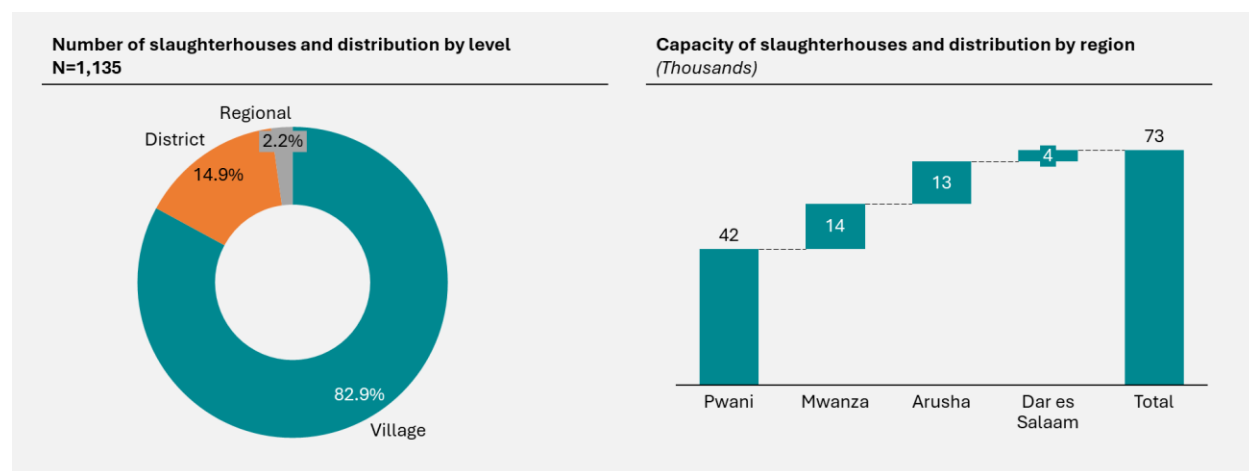


Figure 10: National Abattoir Infrastructure and Regional Distribution of Abattoir Processing Capacity⁶⁹

Despite Tanzania's comparative advantage in production costs, inefficiencies in processing and market access continue to undermine sector competitiveness. The cost of producing one chicken in Tanzania is approximately US\$2.60, compared to US\$3.20 in Kenya⁷⁰. Yet, Tanzania remains a net importer of poultry products from Kenya, including fertilized eggs and day-old chicks, highlighting significant bottlenecks in domestic processing, cold-chain logistics, and distribution. This disconnect underscores the critical importance of

⁶⁹ MLF 2026

⁷⁰ URT, 2024

strengthening poultry value addition and processing capacity to unlock Tanzania's full regional competitiveness.

The poultry processing sector is constrained by several structural and systemic challenges. First, low levels of technology adoption and inadequate infrastructure investment limit the expansion of modern slaughterhouses, processing plants, cold storage facilities, and refrigerated transport systems. Most poultry slaughtering occurs in informal markets with poor hygiene and limited quality control, restricting the supply of safe, standardized processed products and undermining consumer confidence⁷¹.

Second, consumer preferences and market behaviour continue to favour the purchase of live birds and traditional on-site slaughtering, driven by perceptions of freshness and quality. This cultural preference suppresses demand for frozen and processed poultry products, thereby weakening market incentives for large-scale processing investments⁷². However, rapid urbanisation, changing lifestyles, and the expansion of supermarkets and food service outlets are gradually shifting consumption patterns, presenting emerging opportunities for processed poultry markets.

Third, limited market access and trade barriers constrain sector expansion. Although domestic demand is rising, local processors face difficulties accessing regional and international export markets due to stringent sanitary and phytosanitary standards and limited compliance capacity. While Tanzania restricts imports of poultry meat and processed products, the country continues to import breeding inputs, primarily fertilized eggs, day-old chicks, and parent and grandparent stock, particularly from Europe⁷³. This reliance on imported inputs, alongside constrained access to export markets, highlights structural gaps across the value chain and reduces incentives for investment in domestic processing capacity⁷⁴.

Fourth, restricted access to finance significantly limits investment in value addition. Poultry processing requires substantial upfront capital for slaughterhouses, cold storage, packaging technology, and quality certification. However, financial institutions often classify poultry agribusiness as high risk, leading to limited availability of affordable long-term financing⁷⁵. This financing gap restricts both new investments and upgrading of existing facilities, particularly for small and medium enterprises (SMEs).

Finally, food safety and regulatory compliance challenges remain major barriers to sector development. Weak enforcement of hygiene standards, limited inspection capacity, and inadequate slaughtering and handling infrastructure contribute to foodborne health risks and low consumer trust in processed poultry products. Strengthening regulatory oversight

⁷¹ Lwelamira et al., 2023

⁷² Swai & Kaaya, 2021

⁷³ FAO, 2022

⁷⁴ Mdegela et al., 2017

⁷⁵ Msoffe et al., 2024

by institutions such as the Tanzania Bureau of Standards (TBS) and the Tanzania Medicines and Medical Devices Authority (TMDA), alongside targeted investments in compliant processing facilities, is essential to improve food safety, enhance consumer confidence, and unlock export opportunities⁷⁶.

Table 7: SWOT Analysis - Processing and Value Addition

Category	Key Points
Strengths	• Growing domestic demand for poultry meat and processed poultry products • Increasing availability of poultry supply driven by sector expansion • Presence of existing poultry processing facilities in major urban centres • Emergence of small-scale poultry processing enterprises and informal value addition activities • Growing awareness of food safety, hygiene, and quality standards among consumers and processors • Government support for agro-processing and livestock value addition
Weaknesses	• Limited modern poultry processing and cold-chain infrastructure • High cost of poultry processing equipment and technologies • Limited diversification of value-added poultry products in the market • Weak market linkages and distribution systems for processed poultry products • Inconsistent quality control, food safety compliance, and certification systems • Shortage of skilled labour and technical expertise in poultry processing and value addition
Opportunities	• Rising consumer demand for processed and convenience poultry products • Increasing investment opportunities in modern poultry processing facilities • Growing export market potential within EAC, SADC, and AfCFTA markets • Supportive government policies promoting agro-processing and industrialization • Expanding adoption of food safety standards, certification, and traceability systems • Growth of e-commerce, supermarkets, and online food delivery services • Opportunities for utilization of poultry by-products for feed, fertilizer, and other value-added products
Threats	• Competition from imported processed poultry products affecting local processors • High and rising electricity and water costs increasing processing expenses • Limited access to affordable financing for processing investments and working capital

⁷⁶ Swai & Kaaya, 2021

- High consumer price sensitivity limiting demand for premium processed products
- Weak enforcement of food safety and quality regulations increasing risks of unsafe products in the market
- Climate change and supply chain disruptions affecting poultry supply, storage, and distribution systems

B. Logistics and cold chain services

Inadequate cold chain infrastructure poses a major constraint to Tanzania's poultry value chain, contributing to high post-harvest losses and limiting value addition. Currently, most poultry is slaughtered locally under informal conditions, with limited adherence to proper processing standards. Only a small number of large-scale producers follow technical slaughtering and processing procedures, while existing slaughter facilities are largely public and insufficient in scale, technology, and compliance. This gap reflects limited private sector investment in modern slaughtering, processing, and cold chain systems, resulting in significant losses after slaughtering due to the absence of reliable refrigeration, cold rooms, and temperature-controlled transport. Evidence from comparable developing economies indicates that approximately 5% of poultry losses occur post-slaughter due to inadequate cold storage and refrigeration facilities, underscoring the need for integrated cold chain systems⁷⁷.

Consumer preferences further constrain cold chain development. Studies show that over 90% of Tanzanian meat consumers prefer fresh, non-frozen poultry products, driven by cultural norms and perceptions of quality and freshness⁷⁸. This entrenched preference reduces market demand for frozen poultry, limiting incentives for private investment in cold chain infrastructure. However, rapid urbanisation, expansion of supermarkets, growth in food service outlets, and rising middle-income consumption patterns present opportunities to gradually shift consumer behaviour toward acceptance of chilled and frozen poultry products, thereby strengthening the commercial viability of cold chain investments.

Transport logistics represent an additional structural bottleneck. Poultry and poultry products are commonly transported using motorcycles (boda boda), buses, and non-refrigerated vans, exposing products to heat stress, contamination, and mechanical injury. Regional evidence indicates that approximately 13% of poultry losses occur during transportation due to improper handling, overcrowding, and lack of temperature control⁷⁹. These losses directly undermine farmer incomes, raise consumer prices, and compromise food safety, highlighting the need for professionalized, temperature-controlled transport solutions.

Addressing these challenges presents significant opportunities for policy reform, infrastructure investment, and technological innovation. Investments in cold chain

⁷⁷ Snel et al., 2021

⁷⁸ Mushi, 2023

⁷⁹ Snel et al., 2021

infrastructure, particularly cold rooms, refrigerated vehicles, mobile chilling units, and decentralized cold hubs, could substantially reduce losses, improve product quality, and expand access to regional export markets. In addition, the integration of digital and Internet of Things (IoT) technologies into cold chain management systems offers potential to enhance traceability, temperature monitoring, logistics efficiency, and supply chain transparency⁸⁰. Evidence from Tanzania's public health logistics systems demonstrates that improved data visibility and supply chain digitization can significantly reduce costs and improve operational performance⁸¹. Applying these models to poultry cold chains could accelerate sector modernisation, enhance competitiveness, and strengthen food safety outcomes.

Table 8: SWOT Analysis - Logistics and Cold Storage

Category	Key Points
Strengths	• Growing poultry industry and increasing demand for logistics and cold-chain services • Presence of established logistics and transport service providers • Strategic geographic location supporting regional poultry trade • Increasing investment in agro-processing and supply chain infrastructure • Supportive government policies promoting agribusiness development
Weaknesses	• Limited cold-chain infrastructure for poultry storage and distribution • High cost of refrigerated transport and cold storage services • Poor road and transport infrastructure in key production areas • Inconsistent temperature control during transportation and storage • Weak coordination and integration among supply chain actors
Opportunities	• Rising demand for processed and frozen poultry products • Increasing investment opportunities in cold-chain infrastructure • Growth of e-commerce, supermarkets, and online food delivery services • Government and donor support for agribusiness logistics systems • Expansion of regional trade opportunities within EAC, SADC, and AfCFTA markets • Adoption of digital technologies and smart logistics systems
Threats	• High energy costs and unreliable electricity supply affecting cold-chain operations • Competition from imported frozen poultry products • Climate change and extreme weather events disrupting transport and storage systems • Biosecurity risks and disease outbreaks affecting movement and storage of poultry products

⁸⁰ Ahmad et al., 2024

⁸¹ Mwencha & Rosen, 2016

-
- | | |
|--|---|
| | <ul style="list-style-type: none">• Regulatory bottlenecks and bureaucratic procedures increasing logistics and trade costs |
|--|---|
-

C. Domestic Markets

Tanzania's domestic poultry market is expanding steadily, driven by rapid population growth, urbanisation, rising incomes, and increasing demand for affordable animal protein, particularly chicken meat and eggs. Poultry products are widely accepted across socio-economic and cultural groups, positioning the sector as a central pillar of national food and nutrition security. Demand growth is most pronounced in urban and peri-urban areas, while rural markets remain significant consumers through subsistence production and informal trade.

Consumer preferences strongly shape market structure and the organisation of the value chain. Most Tanzanian consumers prefer live birds or freshly slaughtered poultry, associating them with freshness, safety, and quality. Consequently, consumption of processed poultry products remains relatively low, particularly outside major urban centres. Urban consumers (especially middle- and high-income households, hotels, restaurants, and supermarkets) are gradually increasing their demand for chilled and frozen poultry products, but this segment remains comparatively small. As a result, live bird markets and informal slaughter channels continue to dominate poultry trade nationwide.

Poultry aggregation and marketing remain highly fragmented and weakly structured, largely due to the dominance of small and medium-scale producers who operate independently and outside organised markets. The absence of coordinated producer organisations, structured aggregation platforms, and efficient logistics networks has resulted in complex, inefficient, and predominantly informal supply chains. Market access varies significantly by producer type. Large commercial producers dominate formal markets through vertically integrated cold chains, supplying supermarkets, hotels, fast-food outlets, and institutional buyers via direct contracts supported by refrigeration and quality assurance systems. In contrast, indigenous poultry and the majority of improved and exotic birds are supplied through informal channels, primarily as live birds.

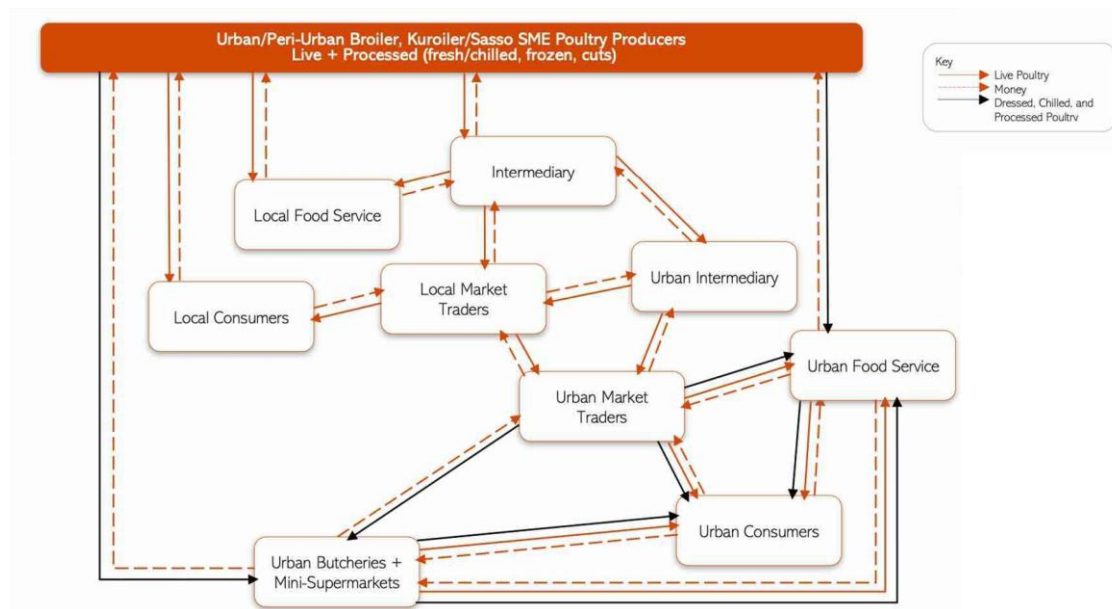


Figure 11: Overview of Domestic Market. Source: EKN, 2020

D. International Markets

Tanzania has significant potential to expand its presence in regional and international poultry markets, supported by favourable agro-climatic conditions, relatively low production costs, a rapidly growing poultry population, and strategic geographic positioning within East and Southern Africa. In recent years, the country has recorded increasing poultry production and has begun exporting poultry products, although export volumes remain modest and the sector is still at a nascent stage. Current exports primarily consist of day-old chicks (DOCs), live birds, hatching eggs, and limited volumes of poultry meat. Key export destinations include neighbouring and regional markets such as Kenya, Rwanda, Burundi, the Democratic Republic of Congo (DRC), Comoros, Madagascar. In addition to formal exports, substantial volumes of poultry products are traded informally across borders, particularly live birds and eggs, although these flows are poorly captured in official statistics.

Despite strong market potential, Tanzania's poultry exports remain constrained by several structural challenges. Weak biosecurity and recurring disease outbreaks, particularly Newcastle disease and limit the country's ability to meet international animal health standards. Limited export-grade processing facilities and underdeveloped cold-chain infrastructure restrict the production and distribution of high-quality processed poultry products. In addition, fragmented production dominated by farmers results in inconsistent volumes and quality, while gaps in traceability, certification, and laboratory testing capacity further constrain access to premium export markets. These constraints have confined Tanzania largely to low-value exports such as live birds and DOCs, limiting foreign exchange earnings and value capture.

Table 9: Poultry exports and import quantity in Tanzania

Year	Eggs Exported	DOC Exported	Meat Exported	Eggs Imported	DOC Imported
2015	—	—	—	1,750,000	—
2016	250,960	237,700	—	1,290,000	—
2017	132,717	—	—	—	2,825,480
2018	—	—	—	—	4,614,563
2019	—	—	—	—	556,616
2020	599,854	850,000	—	—	750,000
2021	—	9,420,435	110 kgs	—	2,225,112
2022	—	—	4,431 kgs	—	—
2023	4,853,152	623,093	31,246 kgs	426,920	3,259,875
2024	—	2,701,429	—	904,280	1,371,430

Regional Market Opportunities (EAC and SADC)

The EAC region presents Tanzania’s most immediate export opportunity, driven by rapid population growth, urbanisation, and increasing demand for affordable animal protein. Kenya, Rwanda, Burundi, eastern DRC, South Sudan, and Comoros periodically experience poultry supply deficits, creating strong demand for Tanzanian live birds, DOCs, and eggs. Similarly, the SADC region offers growing market potential for competitively priced poultry products, especially frozen whole birds and cuts. However, formal poultry exports remain limited, largely due to challenges related to processing capacity, cold-chain infrastructure, quality assurance systems, disease surveillance, and compliance with sanitary and phytosanitary (SPS) standards. As a result, Tanzania’s poultry exports are still dominated by low-value live birds and DOCs, rather than higher-value processed products. This constrains export earnings and limits participation in premium regional and international markets.

Middle East Export Potential

The Middle East represents a high-value growth market, particularly for halal-certified poultry meat. Countries such as the United Arab Emirates, Saudi Arabia, Oman, and Qatar import substantial volumes of poultry products to meet domestic consumption needs. Tanzania’s halal-compliant slaughter practices, proximity to Gulf markets, and expanding air and maritime logistics networks offer strategic advantages for accessing these markets. However, entry into Middle Eastern markets requires strict compliance with international biosecurity, food safety, traceability, and cold-chain standards, which currently remain underdeveloped in Tanzania.

BOX 5: PROGRESS AND CHALLENGES ACROSS THE PROCESSING, MARKETS AND TRADE PILLAR

Tanzania's poultry value chain has experienced growing domestic demand, increasing private-sector investment, and gradual expansion of processing, logistics, and trade activities. Urbanisation, rising incomes, supermarket expansion, and regional market opportunities are creating new demand for processed poultry products and strengthening the commercial potential of the sector. However, major infrastructure, market, and regulatory gaps continue to constrain value addition, market efficiency, and export competitiveness.

1. Poultry Slaughtering, Processing, and Value Addition

Tanzania has 1,135 poultry slaughter facilities, although most are small decentralized slaughter points with limited processing capacity. Commercial poultry processing is gradually expanding in urban areas, but the sector remains largely informal. **Key challenges include:**

- Limited modern slaughterhouses, abattoirs, and poultry processing facilities
- Limited diversification of processed and value-added poultry products
- High consumer preference for live bird sales and freshly slaughtered poultry products
- Weak quality grading, pricing, traceability, and certification systems
- Shortage of skilled labour and technical expertise in poultry processing

2. Logistics, Cold Chain, and Supporting Infrastructure

Demand for poultry logistics and cold-chain services is increasing alongside growth in poultry processing, urban markets, supermarkets, and food service outlets. However, logistics and supporting infrastructure remain inadequate. **Key challenges include:**

- Limited cold storage, refrigeration, and temperature-controlled transport infrastructure
- High post-slaughter and transportation losses due to inadequate cold-chain systems
- Poor road infrastructure and weak logistics connectivity in production areas
- Unreliable electricity supply and high energy costs affecting processing and cold-chain operations
- Weak coordination and integration among supply chain actors
- Limited private investment in logistics and cold-chain systems

3. Domestic and Export Market Systems

Domestic demand for poultry products continues to grow rapidly, while regional export opportunities within EAC, SADC, and Middle Eastern markets are also expanding. However, poultry markets remain fragmented, informal, and weakly integrated. **Key challenges include:**

- Fragmented markets with weak aggregation and market linkages
- Limited access to formal retail, institutional, and export markets for smallholder producers
- Weak compliance with food safety, sanitary, phytosanitary, and export certification standards
- Low export competitiveness due to weak processing and quality assurance systems
- Competition from imported poultry products and informal cross-border trade
- Limited market information, grading systems, and indicative pricing mechanisms

Overall, despite growing demand and increasing commercialization, major gaps in processing infrastructure, cold-chain systems, market organization, and standards compliance continue to constrain value addition, competitiveness, and trade expansion across Tanzania's poultry sector.

IV. Cross-Cutting Issues and Enabling Environment

I. Access to Finance

Despite being one of the fastest-growing agricultural sub-sectors in Tanzania, the poultry sector continues to face significant financing constraints. Traditional commercial banks largely perceive poultry production as a high-risk activity, mainly due to recurrent disease outbreaks, price volatility, informality of operations, weak biosecurity, and poorly structured markets. As a result, many poultry enterprises are excluded from mainstream credit markets or face unfavorable lending conditions, including high interest rates, short loan tenors, and stringent collateral requirements.

For the majority of smallholder poultry farmers, access to formal credit remains extremely limited. Commercial banks typically require land titles or fixed assets as collateral, which most poultry farmers do not possess. Most lenders require land titles or fixed assets, disproportionately excluding women and youth, who are less likely to own such assets. In addition, there are few poultry-specific financial products aligned with poultry production cycles.

Limited financial literacy and weak business management capacity among poultry farmers further constrain access to finance. Many smallholders lack adequate record-keeping systems, cash flow management skills, and bankable business plans, making it difficult for financial institutions to assess creditworthiness and increasing the perceived lending risk. Limited understanding of financial products, loan application procedures, and investment planning also reduces farmers' ability to effectively utilize available financing opportunities and manage poultry enterprises as commercially viable businesses.

Despite these challenges, several specialized financing windows and institutional initiatives have emerged to partially address the poultry financing gap. For example, Tanzania Agricultural Development Bank (TADB) offers seasonal financing products with relatively lower interest rates (approximately 8–12% for smallholders), primarily targeting purchase of chicks and feed. NMB's agribusiness schemes and CRDB's Fahari Kilimo often leverage guarantee mechanisms to reduce collateral requirements. PASS does not lend money directly but provides a 20% to 60% guarantee of loan amounts to commercial banks.

However, guarantee and de-risking mechanisms remain limited in scale and coverage relative to the financing needs of the poultry sector. Existing guarantee facilities primarily target larger or more organized agribusinesses, while many smallholder poultry farmers, youth, and women-led enterprises remain underserved. In addition, limited availability of agricultural insurance products and weak integration between insurance, guarantees, and lending systems continue to increase the perceived risk of poultry financing. Disease outbreaks, mortality losses, and climate-related shocks remain largely uninsured,

discouraging both farmers and lenders from undertaking larger-scale investments in poultry production.

Microfinance institutions and SACCOs play a more prominent role in financing small-scale poultry activities and are often the most accessible sources of credit for farmers. However, loan sizes are generally small and insufficient to support meaningful investment in improved housing, feed, or biosecurity upgrades. Consequently, informal borrowing and self-financing remain the dominant sources of capital, significantly constraining farm expansion, productivity, and commercialization. Additionally, large integrators and feed millers are increasingly providing credit in kind, supplying day-old chicks and feed to outgrowers with repayment deducted at the point of sale of mature birds.

II. Research and Development (R&D)

The research and development (R&D) ecosystem supporting Tanzania's poultry value chain has made notable progress, particularly in areas of disease surveillance, genetics, and production, but significant gaps persist in funding, infrastructure, and technology transfer. R&D efforts focus on improving productivity, strengthening biosecurity, enhancing disease management, and promoting sustainability, yet their impact remains constrained by fragmented institutional coordination, limited financing, limited research and innovation incentives and weak linkages between research and industry.

Key national institutions driving poultry R&D include the Tanzania Livestock Research Institute (TALIRI), Sokoine University of Agriculture (SUA), and the Tanzania Veterinary Laboratory Agency (TVLA), with technical support from international partners such as the International Livestock Research Institute (ILRI). TALIRI operates through seven research centres across diverse agro-ecological zones and leads livestock research, including poultry genetics and production. However, inconsistent funding and institutional instability have limited its capacity to develop locally adapted, high-yielding poultry breeds, resulting in continued reliance on low-productivity indigenous stock or costly imported genetics. The Livestock Sector Transformation Plan (LSTP 2022/23–2026/27) recognises these constraints and calls for sustained investment in livestock research systems.

TVLA plays a central role in vaccine production, disease diagnostics, and surveillance, underpinning poultry health systems nationwide. While government funding supports staffing, operational budgets remain inadequate, particularly at district and zonal levels, limiting laboratory upgrading, cold-chain development, and rapid disease response capacity. This constrains effective control of major poultry diseases such as Newcastle disease, fowl pox, and infectious bursal disease, and weakens national disease preparedness systems.

SUA contributes significantly to poultry nutrition, feed formulation, health research, and capacity building. However, funding limitations restrict applied research on affordable local feed ingredients, slowing progress in reducing feed costs, and improving feed efficiency.

Across TALIRI, TVLA, and SUA, underinvestment has constrained farmer training, extension services, innovation dissemination, and private-sector collaboration, resulting in slow adoption of improved technologies and production practices.

Strengthening poultry R&D will require substantial and sustained public investment, enhanced donor and private-sector engagement, modern laboratory infrastructure, and strengthened research–industry linkages. Priorities include genetic improvement programmes, expanded vaccine manufacturing capacity, modern disease surveillance, applied nutrition research, and scaled farmer training initiatives. Closing these investment gaps will be critical to unlocking productivity gains, strengthening food security, improving farmer incomes, and enhancing the global competitiveness of Tanzania’s poultry sector.

Table 10: SWOT Analysis - Research and Innovations

Category	Key Points
Strengths	• Presence of research institutions and universities supporting poultry development • Government support for poultry research services • Emerging digital and mobile-based advisory platforms • Strong and growing demand for poultry research, innovation, and technical solutions • Presence of development partners supporting poultry research and capacity building • Growing local innovations in poultry farming and management practices
Weaknesses	• Limited funding and inadequate infrastructure for poultry research • Weak linkages between research institutions and poultry producers • Limited availability of skilled poultry researchers and technical specialists • Limited access to reliable and up-to-date poultry sector data • Low adoption of research-based technologies and innovations among farmers
Opportunities	• Growing poultry industry and increasing demand for research and development solutions • Increasing investment opportunities in poultry research by development partners and private sector actors • Expanding use of ICT and digital knowledge-sharing platforms • Opportunities for partnerships between private sector actors and research institutions • Regional and international collaboration in poultry research and innovation • Growing focus on climate-smart poultry research and resilient production systems

Threats	• Frequent disease outbreaks disrupting poultry research activities and field trials • Climate change and extreme weather conditions affecting poultry productivity and research outcomes • Limited private sector investment in poultry research and innovation systems • Weak implementation of poultry research policies and strategies • Slow adoption of new technologies and innovations by poultry farmers
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III. Women and Youth Inclusion

In Tanzania, women and youth are the backbone of the poultry sector, especially at the smallholder and farm levels. While they represent the largest group of producers, they also face specific structural barriers as the industry modernizes. Women are the primary owners and caretakers of poultry in rural Tanzania, particularly the indigenous (Kuku wa Kienyeji) birds. Poultry is often the only livestock asset women can own outright without needing male permission for the initial purchase. Despite doing the bulk of the work, women often lose decision-making power as the scale of production increases. Large-scale commercial poultry and the high-value sale of birds are still frequently dominated by men.

With regard to youth, The Tanzanian government and NGOs (like ILRI) are positioning poultry as a solution to youth unemployment. Unlike the traditional methods favored by older generations, youth are gravitating toward brooding units and processing.

IV. Environmental Sustainability

Currently, most Tanzanian poultry farmers lack formal training in waste management. Dealing with dead birds (*mortality*) is often handled via "mortality pits," but in flood-prone areas; this poses a risk of spreading diseases like Newcastle or Avian Flu into the local ecosystem.

With regards to emissions, High ammonia levels inside poultry houses (above 25 ppm) are toxic to birds and cause respiratory issues for workers. When released into the atmosphere, it contributes to acid rain and fine particulate matter pollution.

V. Farmer Associations and Capacity Building

While efforts to enhance the capabilities of farmers and extension officers are essential, it is equally critical to strengthen the institutional capacity of poultry associations. These associations play a central role in coordinating industry stakeholders, facilitating knowledge dissemination, and providing sustainable training programs for extension officers, processors, and farmers across the poultry value chain.

Tanzania's poultry industry has experienced significant growth, leading to the establishment of 14 registered poultry associations, including the Arusha Poultry Keepers Association (APOKA), AWAN Tanzania Chapter, Tanzania Broiler Farmers Association (TABROFA), Tanzania Layer Farmers Association (TALFA), Tanzania Commercial Poultry Association (TCPA), Ufugaji Kuku Dar es Salaam (UFUKUDA), Tanzania Poultry Breeders Association (TPBA), Tanzania Veterinary Para Professionals (TAVEPA), Umoja wa Wafuga Kuku Morogoro (UWAFUKUMO), Umoja wa Wafuga Kuku wa Nyama Tanga Jiji (UWAKUNYATA), Tanzania Animal Feed Manufacturers Association (TAFMA), Usharika wa Poultry Processing Industries (PPI), Umoja wa Wajasiriamali wa Ufugaji (UWAU), and Tanzania Indigenous Poultry Association (TIPA). These associations operate under the Poultry Association of Tanzania (PAT), which serves as the umbrella organization unifying and supporting their activities. PAT is registered under the Societies Act (CAP. 337 R.E 2002) with registration number S.A. 24308 of 24th March 2026, giving it structured leadership and coordination.

However, many informal and unregistered poultry associations also exist across the country, indicating the growing interest and need for collective action within the sector.

Despite their presence, most poultry associations face several challenges that hinder their effectiveness. Many are composed of small farmer groups with weak governance structures and decision-making platforms, often concentrated in urban centers like Dar es Salaam, leaving rural poultry producers and traders underserved. Limited membership representation, fragmented regulatory requirements for registration, inadequate funding, and skills gaps further weaken their operational efficiency. Additionally, most associations lack full-time staff and institutional capacity, constraining their ability to effectively coordinate members, advocate for sector interests, deliver services, and engage consistently in policy dialogue and value chain development initiatives.

Recognizing these challenges, the Government of Tanzania and PAT members established the Tanzania Poultry Executive Compact Committee (TPECC) in 2023 as part of a Compact Agreement aimed at addressing critical policy, strategic, and operational gaps. This initiative fosters stronger collaboration between public and private sector stakeholders to drive sustainable growth and enhance the competitiveness of the poultry industry. To unlock the full potential of poultry associations, targeted interventions are required to enhance their governance, advocacy, and service delivery capacities. Strengthening these associations will enable them to effectively represent their members, advocate for policy reforms, and promote best practices, ultimately positioning Tanzania's poultry industry to be more competitive in both local and international markets. By investing in institutional development, these associations can become key drivers of industry transformation, fostering an inclusive and sustainable poultry sector.

VI. Nutrition and Other Social Inclusion Issues

Poultry products, particularly eggs and chicken meat, are important sources of affordable animal protein and essential micronutrients, with significant potential to contribute to improved household nutrition and food security in Tanzania. However, awareness of the nutritional benefits of poultry products remains limited in many communities, particularly among low-income and vulnerable households. In addition, nutrition-sensitive messaging and education are not consistently integrated into poultry extension services, farmer training programs, and value chain interventions, limiting the sector's contribution to addressing malnutrition and improving dietary diversity.

Social inclusion and health awareness issues also remain insufficiently integrated within the poultry sector. In particular, HIV/AIDS awareness and workplace sensitization are not consistently mainstreamed across poultry value chain programs, producer organizations, and extension activities. Limited integration of health awareness initiatives reduces opportunities to strengthen community resilience, support vulnerable households, and enhance the broader social impact of poultry sector development interventions.

BOX 6: PROGRESS AND CHALLENGES ACROSS CROSS-CUTTING ISSUES PILLAR

Tanzania's poultry sector is supported by a growing ecosystem of financial institutions, research organizations, farmer associations, and public sector initiatives aimed at improving sector performance and competitiveness. However, several cross-cutting institutional, financial, environmental, and social constraints continue to limit the sector's transformation and long-term sustainability.

- **Limited access to affordable finance and insurance:** Poultry producers, particularly smallholders, women, and youth, face limited access to formal credit due to high collateral requirements, perceived production risks, and limited poultry-specific financial products. Insurance coverage, guarantee schemes, and de-risking mechanisms remain limited, while weak financial literacy and business management skills constrain farmers' ability to access and effectively utilize finance.
- **Weak research, innovation, and technology transfer systems:** Tanzania has established poultry research institutions such as TALIRI, SUA, and TVLA, which support disease control, genetics, and production research. However, limited funding, weak research–industry linkages, inadequate laboratory infrastructure, and slow adoption of research outputs continue to constrain innovation, productivity improvements, and technology dissemination across the sector.
- **Gender and youth inclusion gaps in commercial poultry systems:** Women and youth remain central actors in poultry production, particularly within indigenous and smallholder systems. However, women often lose control over decision-making as commercialization increases, while youth continue to face barriers related to finance, skills, land access, and participation in higher-value segments of the poultry value chain.
- **Weak environmental sustainability and waste management systems:** Most poultry farmers lack adequate waste management systems and environmental management training. Poor disposal of poultry waste and dead birds increases disease and environmental risks, while poor ventilation and high ammonia emissions in poultry houses affect both animal and worker health.
- **Gaps in capacities of farmer associations:** Tanzania has established 14 registered poultry associations operating under the Poultry Association of Tanzania (PAT), alongside several informal producer groups. However, many associations face weak governance structures, inadequate funding, low membership representation, limited technical capacity, and lack of full-time staff, constraining their ability to provide services, coordinate stakeholders, and advocate effectively for sector development.
- **Limited integration of nutrition and social inclusion issues:** Poultry products have strong potential to improve household nutrition and food security due to their affordability and nutritional value. However, nutrition awareness, HIV/AIDS sensitization, and broader social inclusion issues remain weakly integrated within poultry extension services, training programs, and value chain interventions, limiting the sector's broader development impact.

Overall, strengthening the enabling environment through improved financing systems, stronger research and innovation capacity, inclusive participation, environmental management, institutional strengthening, and social integration will be critical to supporting sustainable growth and competitiveness across Tanzania's poultry sector.

CHAPTER 3: STRATEGIC FRAMEWORK

Scope of the Poultry Strategy

This strategy aims to transform Tanzania's poultry industry from predominantly small-scale, subsistence production into a commercially viable, competitive, and resilient industry by engaging farmers, private investors, and key stakeholders across the poultry value chain. It outlines targeted interventions to enhance production efficiency, profitability, product quality, and market competitiveness, while ensuring environmentally sustainable and inclusive growth. The strategy adopts a whole value-chain approach, addressing both supply- and demand-side constraints, with a strong focus on expanding access to domestic, regional, and international markets.

The primary beneficiaries of this strategy include smallholder poultry farmers, women and youth entrepreneurs, and agribusiness investors engaged in poultry production, processing, and marketing. Key stakeholders also include poultry input suppliers, feed manufacturers, hatcheries, farmer organizations and cooperatives, processors, traders, retailers, and consumers. In addition, the strategy integrates critical support services and ecosystem actors, including veterinary and extension services, financial institutions, research and training institutions, and regulatory and policy agencies, to create an enabling environment for sustainable sector transformation.

A central pillar of the strategy is the commercialisation of poultry farming, achieved through strengthening farmer organizations, enhancing access to finance, promoting value addition, and improving supply chain efficiency. The strategy prioritizes the adoption of modern production technologies, improved genetics, effective disease control systems, climate-smart production practices, and digital solutions to raise productivity and profitability. Furthermore, it promotes enterprise clustering and aggregation models to achieve economies of scale, improve market access, reduce transaction costs, and ensure a consistent supply of quality poultry products.

By systematically addressing production constraints, market inefficiencies, and policy and institutional gaps, the strategy seeks to unlock the full potential of Tanzania's poultry industry as a driver of employment creation, food and nutrition security, export growth, and inclusive economic development. Achieving this vision will require strong public-private collaboration, coordinated investments, and sustained stakeholder engagement to build a modern, competitive, and resilient poultry sector in Tanzania.

Vision, Mission, and General Objectives

Vision

“To establish a dynamic and sustainable poultry industry that contributes significantly to food security, economic growth, and the livelihoods of smallholders, with a particular focus on empowering youth and women.”

Mission

“To enhance the productivity, competitiveness, and resilience of the poultry sector by promoting innovative farming practices, improving access to quality inputs and markets, fostering partnerships, and ensuring inclusivity for all stakeholders.”

General objective:

“To create a comprehensive roadmap that positions Tanzania as Africa's foremost sustainable poultry producer, renowned for delivering high-quality, safe, and affordable poultry products that meet local and global market demands, while driving economic growth, empowering communities, and ensuring environmental sustainability”

Strategic Pillars

This strategy is guided by four strategic pillars that are developed and centered around development of the whole poultry value chains ensuring a holistic approach in the development of the poultry value chains and ensure Tanzania become self-sustaining and a leader within the region on poultry value chains. These strategic pillars include:

1. Quality and Competitive Inputs
2. Productive, Resilient, and Inclusive Production
3. Processing, Markets, and Trade
4. Cross-cutting Issues and Enabling Environment

Pillar 1: Quality and Competitive Inputs

This pillar focuses on strengthening the foundational building blocks of poultry production by improving feed production and breeding capacity. It prioritizes local production of inputs, private sector investment, and innovation to reduce production costs, enhance quality, and increase sector resilience. The pillar is structured around two strategic intervention areas: (i) strengthening poultry breeding and access to quality day-old chicks, and (ii) promoting poultry feed production and improving feed quality and affordability.

Strategic Objective: Ensure reliable access to high-quality, affordable, and climate-resilient production inputs, including feed, and breeding stock

Strategic Intervention Area 1: Strengthening Poultry Breeding and Access to Quality Day-Old Chicks

This strategic intervention area aims to improve poultry genetics, expand hatchery capacity, strengthen quality assurance, and improve farmer access to quality day-old chicks (DOCs) across the country.

Intervention 1: Strengthen poultry genetics and breeding through improved regulation, selective breeding, and investment in breeding infrastructure: The strategy will support development of a National Poultry Breeding Act (or Animal Breeding Act) to strengthen sector regulation and coordination. It will promote selective breeding programs targeting high-yielding, disease-resistant indigenous, hybrid, and commercial breeds while promoting the establishment of grandparent stock farms and indigenous poultry breeding centres to improve productivity, resilience, and conservation of local breeds.

Intervention 2: Expand hatchery capacity through investment and modernization. The strategy will encourage private-sector investment in establishing, rehabilitating, and upgrading hatchery facilities to ensure a reliable supply of quality DoCs.

Intervention 3: Improve farmer access to quality day-old chicks through strengthened distribution networks. The strategy will facilitate wider distribution of quality DoCs to smallholder and rural poultry farmers through the establishment of regional chick distribution centres linked to cooperatives and producer organizations to strengthen last-mile delivery. This will entail the development of structured supply chains linking breeders, hatcheries, distributors, and farmers to improve coordination and efficiency.

Intervention 4: Strengthen quality assurance and regulatory compliance across the poultry breeding value chain. The strategy will strengthen registration, certification, inspection, monitoring, and traceability of breeder farms, hatcheries, and DoC distributors to improve quality assurance, operational standards, and biosecurity compliance.

Intervention 5: Strengthen planning and market coordination through the establishment of a national DOC demand and supply database. The strategy will establish a national database for tracking demand, supply, production, and distribution of DoCs to improve sector planning, investment decisions, market coordination, and consistent availability of quality chicks across the country.

Strategic Intervention Area 2: Promoting Poultry Feed Production and Improving Feed Quality and Affordability

This strategic intervention area aims to expand local feed production, improve feed quality, strengthen feed distribution, and promote sustainable feed alternatives to reduce production costs and improve poultry productivity.

Intervention 1: Expand local poultry feed production through investment in feed processing, storage, and raw material supply: The strategy will promote large-scale feed production using locally available raw materials such as maize, soybeans, sorghum, and finger millet to reduce dependence on imported feed ingredients. It will support the development, multiplication, and adoption of maize varieties suitable for animal feed production, including high-yielding yellow maize, quality protein maize (QPM), drought-tolerant maize, and other feed-oriented varieties that improve nutritional value, grain quality, productivity, and climate resilience. The strategy will also support the establishment of feed processing facilities and feed storage infrastructure to improve feed availability, quality, and price stability.

Intervention 2: Promote sustainable and alternative feed resources to improve affordability and resilience: The strategy will encourage the use of non-conventional feed resources such as insects, worms, azolla, leaf meals, and hydroponic fodder while promoting least-cost feed formulation approaches to improve feed affordability and resilience.

Intervention 3: Strengthen feed quality assurance through improved regulation, testing, and enforcement: The strategy will strengthen enforcement of feed quality and safety standards through improved registration, certification, inspection, and monitoring of feed manufacturers and suppliers. It will also support the establishment and upgrading of feed testing laboratories to strengthen feed quality assurance.

Intervention 4: Improve feed distribution and market access through strengthened supply chains and farmer cooperatives: The strategy will support development of structured feed distribution networks targeting rural and underserved areas while strengthening cooperatives and input supply arrangements to facilitate bulk purchasing and reduce feed costs for poultry producers.

Pillar 2: Productive, Resilient and Inclusive Production

This pillar targets farm-level transformation through enhanced husbandry practices. It emphasizes building the capacity of farmers to ensure the use of climate-smart housing, quality feeding, strengthened biosecurity, and disease management. The pillar also encourages farmer transition to sustainable intensification to boost incomes, food security, and rural employment. The pillar is structured around three strategic intervention areas: (i) strengthening on-farm production and farm management, (ii) strengthening poultry extension, digital advisory, and business development services, and (iii) strengthening poultry health, biosecurity, and veterinary services.

Strategic Objective: Improve poultry productivity, efficiency, resilience, and inclusivity across indigenous, improved, and commercial farming approaches.

Strategic Intervention Area 1: Strengthening On-Farm Poultry Production and Farm Management

This strategic intervention area focuses on improving farm infrastructure, promoting adoption of improved production practices, and strengthening operational management across poultry farms.

Intervention 1: Improve poultry housing and farm infrastructure to enhance productivity and resilience. The strategy will promote adoption of improved and climate-appropriate poultry housing designs to enhance productivity, animal welfare, and disease control. It will support farmers to upgrade housing and related farm infrastructure using affordable and locally available materials while improving access to water, sanitation, waste management, storage, and energy infrastructure at farm level.

Intervention 2: Support gradual transition toward semi-intensive and intensive poultry production. The strategy will support farmers to gradually adopt semi-intensive and intensive poultry production approaches where commercially viable and environmentally appropriate. This will include provision of technical guidance and advisory support to ensure scaling aligns with farmer capacity, market demand, and available resources.

Strategic Intervention Area 2: Strengthening Poultry Extension, Digital Advisory, and Business Development Services. This strategic intervention area aims to strengthen technical advisory support, improve farmer knowledge and business skills, and leverage digital technologies to expand access to extension and poultry advisory services.

Intervention 1: Strengthen farmer technical capacity through poultry extension and training services. The strategy will strengthen farmer training and extension services on poultry health, feed management, farm management, biosecurity, and day-old chick management. It will support development of extension guidelines, farmer training materials, and practical demonstration

programs while strengthening collaboration with farmer cooperatives and producer organizations to facilitate collective learning and dissemination of best practices.

Intervention 2: Expand digital and mobile-based poultry advisory services. The strategy will develop and scale digital and mobile-based advisory platforms to provide real-time information on poultry health, feeding, breeding, farm management, disease reporting, and early warning systems. Digital platforms will also strengthen farmer access to veterinary and extension services in underserved areas.

Intervention 3: Strengthen poultry farm business management and operational practices. The strategy will strengthen farmer business and operational management capacity through promotion of record-keeping, financial management, production planning, cost tracking, and performance monitoring to support improved decision-making, profitability, and farm commercialization.

Strategic Intervention Area 3: Strengthening Poultry Health, Biosecurity, and Veterinary Services. This strategic intervention area focuses on strengthening veterinary service delivery, biosecurity, disease surveillance, vaccination programs, veterinary drug regulation, and poultry disease prevention and control.

Intervention 1: Strengthen veterinary service delivery and poultry health workforce capacity. The strategy will increase the number and capacity of veterinarians, animal health professionals, and poultry specialists through training, refresher programs, and expanded outreach services. It will also support deployment of mobile veterinary clinics to improve access to poultry health services in rural and underserved areas.

Intervention 2: Strengthen biosecurity compliance and disease prevention practices. The strategy will establish a national poultry biosecurity framework supported by biosecurity guidelines tailored to breeder farms, hatcheries, broiler farms, layer farms, dual-purpose systems, and indigenous poultry production. It will also support development of standard operating procedures for farm hygiene, waste management, bird movement control, and visitor management, alongside strengthening biosecurity inspection, certification, and compliance mechanisms across poultry farms.

In addition, the strategy will operationalize a National Poultry Inspection Framework to strengthen risk-based inspection, compliance monitoring, enforcement, and standardization of biosecurity and sanitary practices across poultry production, transport, markets, and processing facilities.

Intervention 3: Strengthen poultry disease surveillance, early warning, and outbreak response. The strategy will strengthen disease monitoring, surveillance, reporting, and emergency response mechanisms for early detection and rapid control of poultry disease

outbreaks. It will improve coordination among farmers, laboratories, veterinary officers, and government authorities while promoting use of digital disease surveillance platforms and strengthening quarantine stations, inspection points, and movement control measures.

Intervention 4: Expand vaccination coverage and preventive poultry health programs. The strategy will improve nationwide availability and accessibility of quality-assured poultry vaccines targeting priority diseases such as Newcastle disease, infectious bronchitis, infectious bursal disease, avian influenza, fowl pox, and infectious coryza. It will also support routine and mass vaccination campaigns targeting smallholder and village poultry producers while strengthening cold-chain infrastructure to maintain vaccine quality.

Intervention 5: Strengthen regulation and quality control of veterinary drugs and vaccines. The strategy will strengthen regulation, inspection, licensing, and post-market surveillance of veterinary drugs and vaccines to eliminate counterfeit, substandard, and unregistered products. It will also promote public–private collaboration to improve distribution, compliance, and quality assurance across the veterinary supply chain.

Pillar 3: Processing, Markets and Trade

This pillar focuses on strengthening poultry and egg processing, improving post-harvest handling and cold-chain infrastructure, and expanding domestic and export market access for poultry products. It prioritizes investment in processing infrastructure, market linkages, quality assurance, and trade competitiveness to increase value capture, reduce post-harvest losses, and enhance Tanzania’s position in regional and international poultry markets.

The pillar is structured around three strategic intervention areas: (i) scaling poultry processing, (ii) enhancing post-harvest management and cold-chain infrastructure, and (iii) strengthening poultry market access and trade competitiveness.

Strategic Objective: Strengthen poultry and egg processing, market access, and trade to enhance product quality, safety, competitiveness, and integration into domestic, regional, and international markets.

Strategic Intervention Area 1: Strengthening Poultry Processing and Product Diversification

This strategic intervention area focuses on expanding poultry processing capacity, promoting value-added poultry products, and improving processing efficiency to support growing domestic and regional market demand.

Intervention 1: Expand poultry processing capacity through investment in modern slaughtering and processing infrastructure. The strategy will facilitate investment in modern poultry slaughtering and processing facilities across large-, medium-, and small-scale operations (including mobile slaughtering facilities). It will also promote establishment of regional poultry processing hubs to reduce transportation costs, improve processing efficiency, and strengthen supply reliability across the value chain.

Intervention 2: Promote poultry product diversification and processing innovation to meet changing market demand. The strategy will encourage production of processed poultry products such as frozen chicken, sausages, nuggets, processed eggs, and ready-to-cook or ready-to-eat products. It will also promote diversification of poultry products to respond to changing consumer preferences and growing domestic and regional demand.

Strategic Intervention Area 2: Strengthening Post-Harvest Management and Cold-Chain Infrastructure

This strategic intervention area focuses on strengthening cold-chain infrastructure, reducing post-harvest losses, and improving handling, storage, and transportation of poultry products to improve product quality and shelf life.

Intervention 1: Expand cold-chain infrastructure and temperature-controlled logistics through increased private sector investment. The strategy will encourage private sector investment in cold storage facilities, refrigeration, cold rooms, and temperature-controlled transport systems to maintain poultry product quality from farm to market. It will also promote adoption of mobile and modular cold-chain technologies targeting remote and underserved production areas while supporting development of agro-industrial processing zones with integrated slaughtering and cold-chain infrastructure.

Intervention 2: Strengthen post-harvest handling and quality preservation through improved handling, storage, and transport practices. The strategy will strengthen capacity of traders, transporters, and processors on proper handling, packaging, storage, and transportation of poultry products to minimize spoilage and contamination. It will also promote standardized post-harvest handling protocols to improve food safety, product quality, and shelf life.

Strategic Intervention Area 3: Strengthening Poultry Market Systems, Market Access, and Trade Competitiveness

This strategic intervention area focuses on strengthening poultry market organization, improving market information and coordination, expanding domestic and export market access, and enhancing compliance with food safety and trade standards.

Intervention 1: Strengthen poultry aggregation and producer organizations to improve market participation and bargaining power. The strategy will support establishment and strengthening of poultry farmer organizations and cooperatives (AMCOS) to improve collective bargaining power, aggregation capacity, and market access for poultry producers.

Intervention 2: Develop structured poultry markets and market linkages through coordinated supply arrangements and contract farming models. The strategy will support development of structured poultry markets in key urban and peri-urban centres to strengthen engagement between farmers, processors, traders, retailers, and consumers. It will also promote stronger market linkages and coordinated supply arrangements, including contract farming models, across the poultry value chain.

Intervention 3: Strengthen poultry market information, promotion, and digital market platforms to improve market transparency and connectivity. The strategy will promote poultry trade fairs, exhibitions, poultry shows, media campaigns, and marketing initiatives to increase visibility of poultry products and innovations. It will establish market intelligence and indicative pricing systems while promoting ICT-enabled and digital platforms for market information, trading, and logistics coordination.

Intervention 4: Strengthen food safety, certification, and compliance with domestic and export market standards. The strategy will strengthen collaboration between the Tanzania Meat Board, Tanzania Bureau of Standards, and other relevant institutions to improve compliance with poultry product standards in EAC, SADC, and Middle Eastern markets. It will support alignment of national standards with international food safety, sanitary and phytosanitary (SPS), traceability, and certification requirements while providing technical assistance and capacity building to improve export readiness and facilitate cross-border poultry trade.

Pillar 4: Cross-cutting Issues and Enabling Environment

This cross-cutting pillar strengthens the policy, regulatory, institutional, financing, and governance environment needed to drive sector transformation. It focuses on access to finance for poultry investments and research and development, integrating good climate and environmental practices, institutional capacity building, inclusion of youth and women in the sector, and a strong policy and enabling environment, along with stakeholder coordination to ensure long-term sustainability, accountability, and impact. The pillar is structured around six strategic intervention areas: (i) strengthening poultry financing and

investment, (ii) strengthening poultry research, innovation, and technology transfer, (iii) promoting inclusive participation of women and youth, (iv) promoting environmentally sustainable and climate-resilient poultry production, (v) strengthening industry coordination and institutional capacity, and (vi) strengthening nutrition outcomes and social inclusion through poultry development.

Strategic Objective: Create a strong institutional, policy, financing, and coordination ecosystem that enables inclusive, sustainable, and private-sector-led poultry sector growth.

Strategic Intervention Area 1: Strengthening Poultry Financing and Investment

This strategic intervention area focuses on expanding access to finance, reducing investment risks, strengthening financial literacy, and mobilizing public and private investment across the poultry value chain.

Intervention 1: Expand tailored financial products and strengthen rural financial inclusion for poultry producers. The strategy encourages financial institutions to develop tailored poultry financing products aligned with poultry production cycles and value chain needs. It will also strengthen legally registered microfinance institutions and rural financial service delivery to improve access to finance for poultry producers across the value chain.

Intervention 2: Strengthen financial literacy and poultry agribusiness management capacity. The strategy will promote financial literacy, record-keeping, credit management, investment planning, and enterprise management training programs for poultry farmers to improve financial inclusion and bankability of poultry enterprises.

Intervention 3: Strengthen poultry market information, promotion, and digital market platforms to improve market transparency and connectivity. The strategy will promote poultry **Intervention 3: Expand poultry insurance, guarantee schemes, subsidies, and other de-risking mechanisms.** The strategy will promote insurance products protecting poultry farmers against disease outbreaks, climate shocks, and market volatility. It will also establish government-backed guarantee schemes, sector development funds, targeted subsidies, and risk-sharing mechanisms to reduce lending risks and encourage greater financial sector participation in poultry investments.

Intervention 4: Mobilize private investment and public-private partnerships across the poultry value chain. The strategy will establish investment incentives, including tax breaks and targeted investment incentives, to attract domestic and international private investment into poultry production, processing, logistics, and input supply. It will also promote clustering and block farming models among poultry producers and agribusinesses to improve economies of

scale, strengthen aggregation and input access, facilitate extension and service delivery, and increase overall investment attractiveness across the poultry value chain.

Strategic Intervention Area 2: Strengthening Poultry Research, Innovation, and Technology Transfer

This strategic intervention area focuses on strengthening poultry research capacity, promoting applied research and innovation, and improving the adoption and commercialization of research outputs.

Intervention 1: Strengthen poultry research infrastructure, institutional capacity, and applied research on poultry productivity and resilience. The strategy will strengthen the capacity of national research institutions to undertake applied poultry research in areas such as genetics, feed, animal health, climate resilience, and production systems. It will support establishment of poultry-focused academic and training units while strengthening laboratory infrastructure, innovation systems, and industry-led research programs.

Intervention 2: Strengthen research collaboration, dissemination, and adoption of poultry technologies and innovations. The strategy will strengthen collaboration between research institutions, universities, hatcheries, private sector actors, and poultry producers to improve dissemination and commercialization of research outputs. It will also strengthen farmer access to innovations, technologies, and practical research-based solutions through extension and digital platforms.

Strategic Intervention Area 3: Promoting Inclusive Participation of Women and Youth Across the Poultry Value Chain

This strategic intervention area focuses on improving economic participation, skills development, institutional inclusion, and access to productive resources for women and youth.

Intervention 1: Strengthen skills development, entrepreneurship, and incubation opportunities for women and youth. The strategy will expand vocational training programs, incubation centres, and mentorship initiatives focused on poultry production, processing, agribusiness management, and digital innovation, targeting women and youth entrepreneurs.

Intervention 2: Strengthen access to productive resources, services, and market opportunities for women and youth. The strategy will strengthen collective access to finance, extension services, inputs, technologies, and markets for women- and youth-led poultry enterprises through cooperatives and other inclusive business models.

Intervention 3: Promote gender-responsive and youth-inclusive policies and institutional participation. The strategy will support the development and implementation of gender-responsive and youth-inclusive policies and strengthen the participation of women and youth in poultry associations, cooperatives, policy dialogue, and sector decision-making. It will also promote supportive policies that enhance access to productive assets, including land, for women- and youth-led poultry enterprises.

Strategic Intervention Area 4: Promoting Environmentally Sustainable and Climate-Resilient Poultry Production

This strategic intervention area focuses on improving environmental sustainability, strengthening climate resilience, promoting resource efficiency, and supporting circular economy approaches within poultry production systems.

Intervention 1: Promote sustainable feed production and resource-efficient poultry production practices. The strategy will encourage the use of climate-resilient and alternative feed ingredients such as insect-based protein, hydroponic fodder, and agri-food by-products while promoting efficient water use and environmentally sustainable feed production practices.

Intervention 2: Strengthen climate resilience and adoption of climate-smart poultry technologies. The strategy will promote climate-resilient poultry breeds, energy-efficient poultry housing, improved ventilation systems, and renewable energy technologies such as solar-powered incubators and lighting systems. It will also strengthen farmers and stakeholder capacity on climate-smart poultry production practices.

Intervention 3: Strengthen poultry waste management and circular economy approaches. The strategy will promote sustainable poultry waste management practices, including composting, organic fertilizer production, biogas generation, and integrated poultry-crop production systems to improve environmental sustainability and resource utilization.

Strategic Intervention Area 5: Strengthening Industry Coordination and Institutional Capacity

This strategic intervention area focuses on strengthening poultry associations, improving stakeholder coordination, enhancing policy advocacy, and building institutional capacity for effective sector governance and service delivery.

Intervention 1: Strengthen governance, formalization, and operational capacity of poultry associations. The strategy will support operationalization of the Poultry Association of Tanzania (PAT) as a national apex body while facilitating registration and formalization of poultry

associations, particularly in rural areas. It will also strengthen governance, leadership, financial management, advocacy, and digital knowledge-sharing capacity within poultry associations.

Intervention 2: Strengthen institutional and technical capacity of coordinating institutions and government agencies serving the poultry sector. The strategy will strengthen the institutional, technical, and operational capacity of government institutions and coordinating bodies responsible for poultry sector development through training, staffing, digital systems, equipment, and improved coordination mechanisms to enhance service delivery, regulation, monitoring, and implementation of poultry sector interventions. This will include the establishment and operationalization of district-level poultry desks to strengthen coordination and decentralized service delivery.

Strategic Intervention Area 6: Strengthening Nutrition Outcomes and Social Inclusion Through Poultry Development

This strategic intervention area focuses on strengthening nutrition awareness, promoting consumption of poultry products, and integrating broader social inclusion and health considerations within poultry development programs.

Intervention 1: Strengthen nutrition awareness and integration of poultry products into food and community nutrition programs. The strategy will strengthen public awareness on the nutritional benefits of eggs and poultry meat, particularly for children, pregnant women, lactating mothers, and vulnerable households. It will promote integration of poultry products into school feeding programs and community nutrition initiatives while mainstreaming poultry nutrition objectives into agriculture, health, and food security policies.

Intervention 2: Strengthen integration of social inclusion and health awareness within poultry value chain programs. The strategy will mainstream social inclusion, workplace sensitization, and health awareness programs, including HIV/AIDS awareness, within poultry extension services, producer organizations, training programs, and value chain interventions to strengthen community resilience and inclusive sector participation.

CHAPTER 4: PROPOSED FLAGSHIP PROJECTS

Flagship 1: Investing in Maize and Soybeans for Poultry Feed

Context	Targets for 2036/37
Feed accounts for approximately 70% of total poultry production costs in Tanzania, making it the single largest challenge to profitability, productivity, and sector competitiveness. Within feed, maize and soybeans are the primary energy and protein sources, respectively, forming the backbone of poultry feed formulations. As a result, any inefficiencies, price fluctuations, or supply constraints in these two value chains directly translate into higher production costs and reduced sector performance. However, both maize and soybean supply chains face persistent challenges. Maize production is highly vulnerable to climate variability, leading to frequent supply and price instability, while soybean production remains limited, resulting in reliance on imports for protein inputs. This exposes the feed industry to global price volatility, foreign exchange pressures, and inconsistent input quality.	<i>Poultry feeds raw material production</i> 1. Increase current soybean production from 25K MT to 300K MT⁸², with about 20% of local production used for poultry feed processing 2. Increase current maize production for animal feed from 750K MT to 1,500K MT⁸³ <i>Poultry feed processing</i> 1. Increase total average processing utilization capacity from less than 60% to 80%⁸⁴ <i>Poultry feed market</i> 1. Reduce poultry feed cost from 70% to about 50%⁸⁵
Key Interventions 1. Strengthen soybean supply for poultry feed by improving access to quality inputs and extension services to drive increased local production. 2. Facilitate access to finance for maize and soybean value chains by engaging financial institutions to develop tailored products for input supply and feed-related infrastructure, leveraging off-take agreements where appropriate. 3. Promote contract farming models for maize (with particular emphasis on yellow maize) and soybeans production by engaging farmer organizations and commercial producers to strengthen linkages between feed millers and farmers, ensuring reliable supply for poultry feed processing.	

⁸² Estimated total animal feed demand for Soy beans as per Agricultural sector Masterplan

⁸³ Assumption made to meet animal feed production

⁸⁴ Existing top 10 feed milling companies operate at less than 60% average, see chapter 2 figures . 80% is estimated operational standard for industries

⁸⁵ Levels similar to Brazil

4. Promote the development, multiplication, and adoption of maize varieties tailored for livestock feed markets, including high-yielding yellow maize, high-energy maize, quality protein maize (QPM), drought-tolerant maize, and other feed-efficient varieties.

Key Implementing Partners

- **Government:** Ministry of Livestock and Fisheries (MLF); Ministry of Agriculture (MoA); Local Government Authorities
- **Research & Academia:** TALIRI, TARI, SUA, and other agricultural research institutions
- **Private Sector:** Feed manufacturers, agribusiness firms, insect protein producers, seed companies
- **Financial Sector:** Development banks, commercial banks, microfinance institutions, insurance providers
- **Industry Associations:** Poultry Association of Tanzania (PAT), feed miller associations, farmer cooperatives
- **Development Partners:** Donors and climate finance partners supporting food systems, climate resilience, and agribusiness development

Risks and Mitigation Measures

- **Climate shocks affecting feed crop production:** Mitigated through diversification of feed ingredients, promotion of drought-tolerant crops, and alternative protein sources.
- **High upfront investment costs for feed infrastructure:** Mitigated through blended finance, public–private partnerships, and concessional lending facilities.
- **Inconsistent poor feed quality:** Mitigated by strengthening inspection, laboratory testing capacity, and certification systems.

Summary Interventions costs

- Estimated cost for strengthening soybean production and extension services: about **TZS 200 billion** of largely private sector financing.
- Estimated cost for expanding finance for feed value chains (through a catalytic fund): about **TZS 33 billion** to establish a di-risking fund for investments in production.
- Estimated cost for promoting and enforcing contract farming agreements between farmers and feed millers; as well as promoting maize varieties tailored for feeds: about **TZS 2 billion** of largely public sector and development partners financing.

Flagship 2: Investing in Poultry Breeding, Hatcheries, and Indigenous Poultry Development

Context	Targets for 2036/37
Limited availability, high cost, and uneven quality of day-old chicks (DOCs) remain major bottlenecks to poultry sector growth in Tanzania. The country relies heavily on a small number of breeder farms and hatcheries, leading to supply gaps, high chick mortality, long transport distances, and inconsistent genetics—particularly affecting farmers. Despite these challenges, Tanzania is increasingly emerging as a net exporter of parent stock and DOCs to neighboring countries, presenting a strategic opportunity to position itself as a “regional nursery” for Eastern and Southern Africa. At the same time, indigenous poultry— which constitutes the majority of the national flock and plays a critical role in rural livelihoods, nutrition, and women’s economic participation—has remained largely excluded from formal breeding, input, and markets. Indigenous birds are valued for their adaptability, low input requirements, and resilience to local conditions; however, their productivity remains low due to high mortality rates (especially among chicks), disease prevalence, poor feeding practices, and limited access to improved genetics and veterinary services. The absence of structured breeding and distribution systems for indigenous poultry further constrains their potential to contribute meaningfully to sector growth and household incomes.	<i>Breeder Farms and Hatchery Capacity</i> 1. Increase national DOC production capacity to over 250 million DOCs per year 2. Increase farmer access to quality DOCs through formal market channels to about 80%^{86 87}
Key Interventions	
1. Organize, train, and accredit over 3,000 youth- and women-led, farmer-facing SMEs to operate as registered mothering units linked to breeder farms, providing early chick care and distribution of 1–4-week vaccinated chicks to farmers. 2. Register and certify informal hatcheries as well as strengthen monitoring and regulation to improve chick quality and supply 3. Strengthen investment and institutional support for the research, development, and multiplication of indigenous poultry breeds	

⁸⁶Existing estimates indicate that its highly informal. Thus aimed at achieving greater than 50%

4. **Establish three integrated grandparent and breeder farms** with commercial-scale capacity to address regional and zonal deficits in quality breeding stock and ensure reliable national supply of fertile eggs and chicks.

Key Implementing Partners

- **Government:** Ministry of Livestock and Fisheries (MLF); Local Government Authorities,
- **Regulatory & Standards Bodies:** TVLA and TBS
- **Research & Academia:** TALIRI, SUA, LITA and other training institutions
- **Private Sector:** Breeder farm operators, hatchery companies, DOC distributors, poultry integrators
- **Financial Sector:** TADB, NMB, CRDB, NBC, PASS Trust, insurance providers
- **Industry Associations:** Poultry Association of Tanzania (PAT), poultry cooperatives
- **Development Partners:** Donors supporting livestock development, food security, and One Health initiatives

Risks and Mitigation Measures

- **Disease outbreaks in breeder farms and hatcheries:** Mitigated through strengthened biosecurity standards, certification, and surveillance systems.
- **High capital costs for hatchery expansion:** Mitigated through blended finance, PPPs, concessional lending, and guarantee schemes.
- **Unequal access to DOCs for smallholders:** Mitigated through decentralized distribution hubs, cooperative-based models, and targeted subsidies.
- **Gaps in regulatory enforcement:** Mitigated through investment in inspection capacity, laboratory services, and digital traceability systems.
- **Market volatility and fluctuations in demand:** Mitigated through improved market intelligence, contract farming, and regional market diversification.

Summary Interventions costs

- Estimated cost for establishing breeder farms: about **TZS 15 billion** of private sector financing.
- Estimated cost for organizing training and equipping youth and women led farmers as registered mothering units to supply 1–4-week vaccinated chicks. about **TZS 20 billion** through government and development partner support.
- Estimated for Invest in indigenous poultry research and breeding is **TZS 5 billion and TZS 2 billion** for informal hatcheries registration and certification.

Flagship 3: Investing in Poultry Processing, Value Addition, and Cold Chain Infrastructure

Context Despite rapid growth in poultry production, Tanzania's poultry sector remains constrained by limited modern slaughtering, processing, packaging, and cold chain infrastructure. Most farmers prefer selling live birds, resulting in high post-harvest losses, food safety risks, low value addition, and limited access to formal domestic and export markets. Tanzania process less than 10% of poultry products, lower than peers such as Kenya with 30% of poultry product processing.	Targets for 2036/37 <i>Poultry Value Addition</i> 1. Increase the share of processed poultry products to at least 30% of total production⁸⁸. 2. Reduce poultry post-harvest losses by at least 40%. 3. Increase poultry processing capacity to at least 260K MT⁸⁹
Key Interventions	
1. Establish and promote modern poultry processing facilities in the agro – industrial parks to improve processing of poultry products and bi-products. 2. Collaborate with relevant ministries and stakeholders to strengthen and improve investment incentives (e.g., tax exemptions and zero-rated import duties) for cold storage facilities, refrigerated transport, and temperature-controlled logistics across production, aggregation, processing, and market nodes. 3. Establish a centralized market information system to improve market access, coordination, and price transparency. This also includes organizing and participating in domestic and international marketing platforms. 4. Develop market guidelines and scale training and technical support to accelerate adoption of compliance standards, including food safety standards, quality certification, traceability systems, and halal-compliant processing to strengthen consumer confidence and improve export readiness.	
Key Implementing Partners	
• Government: Ministry of Livestock and Fisheries (MLF); Ministry of Agriculture (MoA); Ministry of Industry & Trade (MIT); Ministry of Finance (MoF); Local Government Authorities • Regulatory Bodies: TBS, TMDA, TVLA, Tanzania Meat Board • Private Sector: Poultry processors, cold chain and logistics companies, retailers, exporters • Financial Sector: TADB, commercial banks, micro-finance, development finance institutions, insurers • Industry Associations: Poultry Association of Tanzania (PAT), TPECC.	

⁸⁸ Level similar to Kenya

⁸⁹ Levels stated in Agricultural Sector Masterplan

• Development Partners: Agribusiness, trade, food safety, and export development partners
Risks and Mitigation Measures
• High capital costs for processing and cold chain infrastructure: Mitigated through PPPs, fiscal incentives, blended finance, and concessional lending. • Weak compliance with food safety standards: Mitigated through strengthened inspection, certification, and capacity building. • Low consumer uptake of processed poultry products: Mitigated through market promotion, branding, and competitive pricing strategies. • Limited export readiness: Mitigated through targeted support on standards, halal certification, and export market intelligence.
Summary Interventions costs
• Estimated cost for establishment of processing facilities is about TZS 100 billion and TZS 30 billion for cold chain infrastructure, 80% of which will be contributed by the private sector. • Estimated cost for market information systems including dissemination of market information about TZS 2 billion through public and development partner support • Estimated cost for strengthening standards, certification and traceability including on training and adoption of poultry food standards about TZS 2 billion

Flagship 4: Investing in Capacity Building for Poultry Value Chain Actors

Context Low productivity, high mortality rates, and inconsistent product quality in Tanzania’s poultry sector are driven by limited technical, managerial, and market capabilities among farmers and SMEs. Existing training efforts are fragmented, supply-driven, and not delivered at scale, limiting adoption of best practices, commercialization, and integration into formal domestic and export markets. Inadequate extension coverage, weak coordination among training providers, and limited access to practical business and technical advisory services further constrain sector competitiveness and resilience.	Targets for 2036/37 <i>Poultry Value Addition</i> 1. Train at least 1 million poultry farmers and SMEs 2. Train and equip at least 6,000 extension officers and service providers. 3. Establish a national digital poultry learning and advisory platform.
Key Interventions	
1. Establish a national poultry capacity building program with standardized, modular training curricula covering technical husbandry, animal health, business management, and market readiness 2. Strengthen extension-led and last-mile training delivery systems by equipping extension officers, leveraging regional and district poultry desks, and deploying farmer field and business schools, and demonstration farms 3. Develop a certified trainer and service provider ecosystem by accrediting private trainers, veterinary service providers, and lead farmers, and embedding monitoring, certification, and quality assurance systems to track outcomes and ensure training effectiveness. This will also cover training on the requirements specified under the poultry inspection framework. 4. Leverage digital platforms for scalable learning and advisory including mobile-based training, e-extension services, and real-time advisory support for farmers 5. Promote peer learning and aggregation models through farmer groups, cooperatives, and clusters to enable knowledge sharing, collective marketing, and economies of scale	
Key Implementing Partners	
• Government: Ministry of Livestock and Fisheries (MLF); President’s Office – Regional Administration and Local Government (PMO-RALG); Ministry of Education, Science and Technology; Local Government Authorities • Training & Research Institutions: Livestock Training Agencies (LITAs), Sokoine University of Agriculture (SUA), vocational education and training institutions • Private Sector: Poultry companies, hatcheries, feed companies, veterinary service providers, digital agriculture and agri-tech firms • Industry Associations: Poultry Association of Tanzania (PAT), and cooperatives and farmer organizations • Development Partners & NGOs: Organizations supporting agricultural extension, youth employment, entrepreneurship, and digital agriculture	

Risks and Mitigation Measures
• Limited adoption of training and best practices by farmers: Mitigated through practical demonstration-based learning, farmer field schools, and peer learning approaches. • Weak extension capacity and insufficient trainers: Mitigated through training-of-trainers programs, accreditation systems, and partnerships with private service providers and universities. • Limited digital access among rural farmers: Mitigated through blended delivery models combining digital platforms with community-based extension and radio/mobile outreach.
Summary Interventions costs
• Estimated cost for the national poultry capacity building program: about TZS 20 billion through government and development partner support. • Estimated cost for strengthening extension systems and demonstration farms: about TZS 20 billion through government and development partner financing. • Estimated cost for certified trainers, digital learning platforms, and farmer aggregation models: about TZS 10 billion through government and development partner support.

Flagship 5: Strengthening Government Capability and Service Delivery Systems

Context Despite strong national strategies, Tanzania's livestock sector remains constrained by limited government execution capacity, including weak institutional performance, under-resourced extension systems, fragmented data, and limited accountability. The core bottleneck is not policy design, but the ability to deliver coordinated, data-driven, and results-oriented services at scale, limiting sector-wide impact and farmer access to critical services.	Targets for 2036/37 <i>Poultry Value Addition</i> 1. Establish and operationalize regional poultry desks in at least 50% of regions in Tanzania. 2. Train and equip at least 6,000 frontline livestock extension officers. 3. Establish a national livestock digital information and performance management system.
Key Interventions	
1. Enhance policy execution and coordination mechanisms by operationalizing national strategies, strengthening inter-agency coordination platforms, institutionalizing structured public-private engagement, and developing and implementing key regulatory frameworks including: ○ The Poultry (or Animal) Breeding Act to strengthen genetics, quality standards, and breeder certification systems. ○ The poultry inspection framework that acts as an SOP of practices in the industry. 2. Strengthen institutional performance and accountability by establishing a central delivery unit, introducing performance management systems, conducting functional reviews, and strengthening HR systems to align capacity with sector priorities. 3. Reform frontline service delivery systems by upgrading extension services (staffing and skills), establishing and operationalizing regional and district poultry desks as dedicated coordination and service hubs, standardizing livestock service packages, equipping frontline officers with tools and mobility, and leveraging private service providers to expand reach. 4. Build integrated data and digital systems including a national livestock information system, farmer registry, and real-time dashboards to support planning, coordination, and decision-making. 5. Establish robust monitoring, evaluation, and learning systems through results-based frameworks, independent verification, and regular sector performance reviews to drive accountability and continuous improvement. 6. Strengthen biosecurity and poultry health systems, including local vaccine production and cold-chain access for smallholders. 7. Enhance Public-Private Partnership (PPP) frameworks to formalize investment in breeding and hatcheries and address quality stock shortages.	

Key Implementing Partners
• Government: Ministry of Livestock and Fisheries (MLF); PMO-RALG; Ministry of Finance (MoF); President's Office – Public Service Management; Local Government Authorities • Regulatory & Research Institutions: TVLA, TALIRI, TBS, veterinary and livestock training institutions • Private Sector: Digital service providers and veterinary service providers, vaccine manufacturers • Development Partners: DPs supporting governance, public sector reform, digital systems, and livestock development
Risks and Mitigation Measures
• Limited financing for institutional reforms and service delivery: Mitigated through phased implementation, PPPs, and development partner support. • Low adoption of digital systems: Mitigated through staff training, phased rollout, and integrated technical support.
Summary Interventions costs
• Estimated cost for institutional reforms, poultry desks, and extension system strengthening about TZS 40 billion through government and development partner support. • Estimated cost for digital livestock information, monitoring, and performance management systems: about TZS 15 billion through government and development partner financing. • Estimated cost for biosecurity systems, vaccine support, and PPP coordination mechanisms: about TZS 10 billion through government and development partner support.

CHAPTER 5: INSTITUTIONS AND IMPLEMENTATION ARRANGEMENTS

The successful implementation of the Tanzania Poultry Development Strategy depends on a clear institutional framework and effective coordination among government agencies, private sector actors, poultry associations, research institutions, financial institutions, and development partners, with well-defined roles and responsibilities to ensure collaboration and accountability. The strategy adopts a multi-stakeholder and inclusive approach to address key challenges such as low productivity, market inefficiencies, disease risks, feed quality, and limited access to finance, while strengthening institutional capacity, policy coordination, and public–private partnerships. Through an integrated governance and implementation structure that actively includes small-scale farmers, women, and youth, the poultry sector is positioned to contribute more effectively to national food security, economic development, and regional and international trade.

A. Institutional Arrangement

The National Poultry Development Strategy (NPDS) will be implemented through a coordinated framework. Government institutions provide policy and regulatory oversight; research and training bodies generate and share technical knowledge; the private sector drives investment, production, processing, and markets; poultry associations represent industry interests and coordinate value chain actors; financial institutions expand access to finance and insurance; and development partners provide technical and financial support. Stronger coordination across these mandates will enable effective implementation, accountability, and sustainable transformation of the poultry sector. The key institutions in implementing this NPDS are classified in the table below:

Table 11: Key Institution for Implementation of NPDS

Organization Type	Name of Organization	Roles
Government	Prime Minister Office (PMO)	Poultry industry coordination role
	Ministry of Livestock and Fisheries (MLF)	Ministry of Livestock and Fisheries (MLF) is responsible for approving the National Poultry Development Strategy (NPDS) and preparing comprehensive guidelines for the implementation of the identified activities. MLF will also oversee, guide, and coordinate the execution of this strategy. Additional responsibilities include mobilizing resources, drafting budgets, overseeing expenditure plans, and managing procurement processes. Furthermore, the ministry will play a key role in managing the operations of thematic working groups, ensuring effective collaboration and progress within the poultry sector.
	Ministry of Trade (MIT)	The Ministry of Industry, Trade, and Investment (MIT) plays a key role in enhancing both regional and international trade by advancing the marketing of poultry products. Its primary

		focus is to foster investment opportunities in industrial growth and other essential sectors by maintaining and nurturing trade relationships with foreign nations. Additionally, the ministry develops and implements appropriate policy frameworks to ensure a conducive environment for business development and international commerce.
	Ministry of Agriculture (MOA)	To facilitate production of animal feed raw materials like maize, soybean, etc.
	Vice President Office (VPO)	To champion and ensure compliance with environmental laws, regulation and adherence to Climate Smart Agriculture (CSA)
	Prime Minister office – Regional Administration and Local Government (PMO – RALG)	PMO-RALG will oversee the coordination of intervention activities at both Regional and District levels, working closely with the Ministry of Livestock and Fisheries. At the Regional level, the Regional Secretariat (RS), through its focal person, will facilitate the coordination of key stakeholders, including the private sector and non-state actors, involved in poultry industry initiatives within the region. At the District level, these activities will be managed by the District Executive Director (DED) through a designated focal person to ensure effective implementation.
	Ministry of Finance (MoF)	In collaboration with relevant ministries, government fees related to import, export, and internal movement permits for poultry and poultry products will be established. These fees are determined collectively by the financial task force under the Ministry of Finance (MOF) and are aligned with other sectoral fees to ensure consistency. Once deliberated and harmonized, the fees are officially published within the respective ministry's regulations, such as the Animal Disease (Animal Product Movement Control) Regulations.
	Tanzania Trade Development Authority (TANTRADE)	TANTRADE will support the Tanzania Poultry Development Strategy by enhancing market access, trade promotion, and value addition. It will facilitate poultry trade through exhibitions, export linkages, and compliance with international standards. TANTRADE will also provide capacity building, policy advocacy, and investment support to boost poultry processing and competitiveness. Through these efforts, it will help transform the poultry industry into a competitive and export-driven sector.
	Tanzania Livestock Research Institute (TALIRI)	TALIRI plays a vital role the poultry sector in Tanzania through research, innovation. TALIRI's research focuses on improving poultry breeds, developing efficient feed solutions, and enhancing disease management strategies. Furthermore, TALIRI is responsible for research findings contributing to the development of regulatory frameworks that shape the sector.
	Tanzania Veterinary Laboratory Agency (TVLA)	TVLA will play a key role in implementing the Tanzania Poultry Development Strategy by strengthening disease diagnosis and surveillance, producing and distributing poultry vaccines, and ensuring the quality and safety of

		feeds, drugs, and poultry products. TVLA will also provide capacity building for veterinary professionals and farmers, enhancing disease prevention and biosecurity measures. Additionally, the agency will conduct research and innovation in poultry health to address emerging challenges and support evidence-based policy decisions. Through these efforts, TVLA will contribute to improving poultry productivity, reducing disease outbreaks, and enhancing the competitiveness of Tanzania's poultry industry in local and international markets
	Tanzania Meat Board (TMB)	Establishment of proper basis for efficient management to ensure provision of high quality and standards of poultry meat to meet export demand and furthermore responsible for registering stakeholders.
	Livestock Training Agency (LITA)	Provide training & capacity building to regional livestock stakeholders on poultry production, processing and management
	Tanzania Investment Centre (TIC)	TIC will drive poultry industry growth by attracting investment, improving access to finance, and promoting public-private partnerships. It will support market linkages, export readiness, and policy advocacy to enhance the business environment. By facilitating infrastructure development, reducing regulatory barriers, and promoting value addition, TIC will help transform the poultry sector into a competitive and commercially viable industry, boosting economic growth and food security in Tanzania.
	Tanzania Revenue Authority (TRA)	Plays a vital role for promoting business Investments, the Centre is most relevant for Commercial Farmers who wishes to conduct export business, the Centre is responsible for providing investment incentives such as tax benefits, exemptions, and deductions as well as providing important market information, Furthermore, TIC may act as a bridge for fostering partnerships between local and international investors.
	National Environmental Management Council (NEMC)	NEMC's role in implementing the Tanzania Poultry Development Strategy is critical for ensuring environmental sustainability, resource efficiency, and regulatory compliance. By enforcing environmental policies, promoting sustainable waste management, and supporting climate adaptation, NEMC helps create a resilient and eco-friendly poultry sector that contributes to Tanzania's economic and food security goals.
	Tanzania Bureau of Standards (TBS)	TBS plays a crucial role in the poultry sector by ensuring the quality and safety of poultry products through standardization and regulation. TBS is responsible for establishing and enforcing standards for poultry feed, live birds, and processed poultry products, which helps to maintain public health and consumer protection.
	Tanzania Medicines & Medical devices Authority (TMDA)	TMDA will ensure the safety and quality of veterinary medicines, vaccines, and feed additives by regulating, monitoring, and licensing their production, importation, and

		distribution. It will conduct post-market surveillance, enforce compliance, and provide training on proper drug use. Additionally, TMDA will support policy development and research to enhance poultry health, productivity, and food safety in Tanzania.
	Prime Minister's Office (Labor, Youth, Employment and Persons with Disability)	Responsible for promotion of decent self-employment, productivity and innovation in poultry Industry by teamwork, integrity, Innovation and confidentiality. Prime
Academic Institutions	1. Sokoine University of Agriculture (SUA) 2. University of Dar es Salaam (UDSM) 3. Muhimbili University of Health and Allied Sciences (MUHAS) 1. Mzumbe University 4. Nelson Mandela African Institution of Science and Technology (NM-AIST) 5. Mbeya University of Science and Technology	The involvement of academic institutions in the Tanzania Poultry Industry is vital for increasing productivity, ensuring biosecurity, controlling zoonotic diseases, improving market access, strengthening financial support, and advocating for policies that favor poultry farmers. By leveraging research, innovation, and capacity building, these institutions can drive the transformation of the poultry sector, making it more competitive, resilient, and sustainable.
Private Sector	Farmers Association	They act as an apex for all farmers (poultry farmers) in the value chain. Farmers Associations are supposed to be an association responsible for member welfare and compliance evaluation for its members; these Associations include PAT, TCPA, TALFA, and TABROFA, etc.
	Animal Feed Manufacturers	TAFMA will coordinate animal feed manufacturers to ensure compliance on quality and affordable poultry feed, promote research and innovation, train farmers, and advocate for supportive policies. It will coordinate manufacturers to boost production, enhance sustainability, and engage stakeholders, ensuring the successful implementation of the Tanzania Poultry Development Strategy for a competitive and sustainable poultry industry.
	Hatcheries & breeder farms	Hatcheries, breeder farms, and day-old chick distributors will play vital roles in implementing the Tanzania Poultry Development Strategy by ensuring a reliable supply of high-quality, disease-free chicks. They will adopt advanced breeding techniques, maintain biosecurity standards, expand distribution networks, and provide farmer training on chick management, ultimately boosting productivity and poultry sector growth.
	Veterinary centers & Agro - Dealers	Veterinary centers and agro-dealers will support the Tanzania Poultry Development Strategy by ensuring farmers have access to quality veterinary services, vaccines, and

		poultry health products. They will provide disease prevention guidance, promote biosecurity, supply essential poultry inputs, and offer farmer training, enhancing poultry productivity, health, and sustainability across the value chain.
	Vaccine producers	Production of veterinary vaccines example HESTER Bioscience, TVI
Financial Institution	1. TADB 2. NMB 3. CRDB 4. EFTA 5. PASS 6. Other Financial Institutions	Enhance access to financial resources by offering loans, savings options, and comprehensive financial management services specifically tailored for poultry farmers. These services can empower farmers to invest in essential resources such as quality feed, veterinary care, and equipment, ultimately boosting productivity and profitability in the poultry sector. By providing training in financial literacy and management, farmers can make informed decisions, optimize their operations, and achieve sustainable growth. Additionally, establishing partnerships with financial institutions can further improve the accessibility of credit and investment opportunities for poultry farmers.
Non-governmental organizations (NGOs)	1. TPSF 2. ANSAF 3. SAGCOT 4. ACT 5. Other NGOs in Promoting Poultry Industry	Policy advocacy, business linkage and other facilitation toward unlocking potential for poultry value chain in Tanzania
Media & Communication Platforms	1. TV Stations: TBCM Azam TV, ITV etc., Channel Ten 2. Radio Stations: Clouds, TBC Taifa etc. 3. Digital & Print Media: Mwananchi, Wasafi Media, Ayo TV 4. Influencers & Content Creators: Social media influencers, musicians, actors	Support awareness campaigns, promote poultry consumption, disseminate sector information, strengthen advocacy, and address misinformation and disinformation in the poultry sector.
Development Partners	1. FAO 2. Ministry of Foreign Affairs of Netherlands 3. Mastercard Foundation	Technical and Financial Support for unlocking poultry value chain potential in Tanzania

	4. Norwegian Ministry of Foreign Affairs 5. International Livestock Research Institute (ILRI) 6. AGRA 7. Other Development Partners	
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B. Coordination Structure

Coordination is essential for implementing the NPDS as it ensures efficient resource utilization, integrates efforts across the poultry value chain, and aligns stakeholders with national objectives. It improves communication, facilitates innovation, and ensures effective policy execution. Coordination also enhances monitoring, accountability, and progress tracking, while promoting sustainability and resilience in the face of challenges like climate change and disease outbreaks. Ultimately, it fosters synergy among stakeholders, ensuring the strategy’s success and long-term positive impact on the poultry industry. Central to this coordination architecture is the Tanzania Poultry Executive Compact Committee (TPECC), a Public–Private Partnership body that spearheaded the development of this National Poultry Development Strategy 2026–2036 and is mandated to oversee and drive its implementation. TPECC sits at the apex of the coordination structure, providing strategic leadership and ensuring alignment between public policy commitments and private sector investments across the poultry value chain. The coordination structure is as follows:

a. Tanzania Poultry Executive Compact Committee (TPECC) – Apex Coordination Body

TPECC is the apex body of the National Poultry Development Strategy coordination structure. Established as a formal Public–Private Partnership (PPP), TPECC brings together senior government leadership and leading private sector actors to provide strategic oversight, policy direction, and accountability for implementation of this strategy. TPECC commissioned and guided the development of the NPDS 2026–2036 and, in that capacity, holds overall responsibility for championing its execution, mobilizing resources, and ensuring that both public and private stakeholders honour their respective commitments.

TPECC interfaces directly with national and international policy forums including the Tanzania National Business Council (TNBC), Parliamentary Committee on Agriculture, Livestock and Water, and relevant bilateral and multilateral partners to ensure that the poultry sector’s strategic priorities receive sustained political and financial support. TPECC co-chairs will be drawn from the government side (Ministry of Livestock and Fisheries) and the private sector, reflecting the equal partnership at the heart of its mandate.

The roles of TPECC are to:

- i. Provide apex strategic direction and political leadership for implementation of the NPDS 2026–2036.
- ii. Champion public–private investment mobilisation across the poultry value chain, leveraging the PPP mandate to unlock both domestic and international financing.
- iii. Receive consolidated progress reports from the National Poultry Development Steering Committee (NPDSC) and make high-level decisions on strategic direction, resource allocation, and escalation of systemic challenges to relevant policy platforms.
- iv. Advocate at national and international forums (TNBC, Parliamentary Committees, AAPC, EAC, AU) for enabling policies, regulatory reforms, and trade agreements that advance the competitiveness of Tanzania’s poultry sector.
- v. Approve strategic reviews and mid-term evaluations of the NPDS and authorise revisions to strategic priorities, targets, or implementation arrangements where necessary.
- vi. Ensure mutual accountability between government and private sector partners for delivery of commitments made under the NPDS and publicly report on overall performance of the strategy on a biennial basis.

b. National Poultry Development Steering Committee (NPDSC)

The National Poultry Development Steering Committee (NPDSC) will serve as the senior operational committee directly accountable to TPECC and is responsible for overseeing day-to-day implementation of the strategy, managing emerging challenges, and unlocking opportunities in the poultry industry. Agriculture Council of Tanzania (ACT) and the Ministry of Livestock and Fisheries (MLF) will jointly lead this steering committee and present resolutions of key sector challenges to TPECC and, where necessary, to higher policy platforms such as TNBC, Parliamentary Committees, and the Annual Agricultural Policy Conference (AAPC).

Membership of the steering committee will include senior representatives from MLF, relevant agriculture sector ministries, regulatory authorities, non-state actors, development partners, and private sector organizations.

The roles of the NPDSC are to:

- i. Oversee and guide overall implementation of the NPDS.
- ii. Facilitate development and operationalization of policies, regulations, and strategic interventions.
- iii. Mobilize resources and coordinate stakeholder participation.
- iv. Monitor and evaluate progress on implementation of the NPDS.
- v. Address implementation bottlenecks and escalate strategic issues requiring policy attention to TPECC.

c. Poultry Sector Technical Working Group (PSTWG)

The Poultry Sector Technical Working Group (PSTWG) will serve as the primary technical advisory platform supporting implementation of the NPDS. The group will be responsible for analysing challenges facing the poultry industry, assessing technical performance of the sector, and presenting emerging issues and recommendations to the National Poultry Development Steering Committee (NPDSC).

The Chairperson of the Poultry Association of Tanzania (PAT) will serve as Secretary to the PSTWG, while the Chairperson of the PSTWG will be selected from among poultry stakeholders and industry experts. Membership of the PSTWG will include representatives from government agencies, research institutions, poultry associations, academia, NGOs, and development partners.

The roles of the PSTWG are to:

- i. Provide technical guidance and expertise.
- ii. Identify implementation challenges and propose evidence-based solutions.
- iii. Support policy formulation and implementation.
- iv. Facilitate knowledge sharing, innovation, and dissemination of best practices.

d. Poultry Association of Tanzania (PAT)

The Poultry Association of Tanzania (PAT) plays a central coordination role in the poultry sector and will serve as a key implementation platform for the NPDS, bringing together breeders, hatcheries, feed manufacturers, processors, and farmers' groups. PAT will promote compliance with national and international standards by advancing best practices in production, biosecurity, animal welfare, and disease management, while strengthening extension capacity through training and technical support.

PAT will also support market development by advocating for improved market access, value addition, and trade facilitation, and will provide a platform for elevating industry policy issues to national and international levels, ensuring stakeholder voices inform policies critical to the sector's growth and competitiveness.

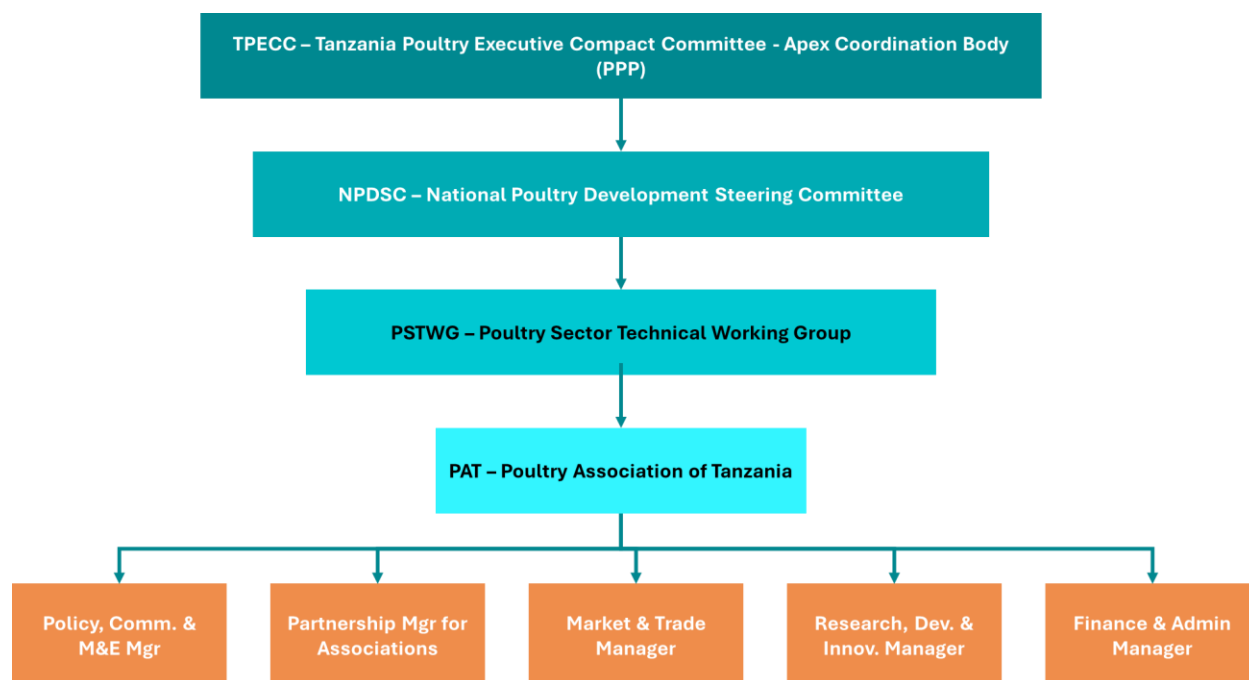


Figure 12: Proposed Coordination Structure of the National Poultry Development Strategy 2026–2036

C. Monitoring and Evaluation

The Monitoring and Evaluation (M&E) framework is essential to effective implementation of the poultry sector strategy and will be integrated across all interventions to generate timely and reliable data on progress, results, and implementation challenges. Given the current absence of a robust M&E system in poultry development, the strategy emphasizes establishment of a context-specific and integrated framework to support learning, accountability, and continuous improvement.

The Ministry of Livestock and Fisheries, in collaboration with key stakeholders, will oversee implementation of the M&E framework and use findings to inform corrective actions, policy adjustments, and strategic reviews. Technical experts from the Ministry and partner institutions will support data collection, analysis, reporting, and performance assessments to ensure effective implementation of the strategy.

Objectives of the M&E Plan

The M&E plan is designed to track implementation progress against agreed timelines and objectives, assess the effectiveness of interventions in improving productivity, market access, and disease control, and strengthen accountability among all stakeholders. It also promotes learning by generating insights to inform adaptive management and continuous improvement, while ensuring transparency through regular and accessible sharing of progress, results, and challenges. To measure the success of the strategy, specific KPIs will be established for each strategic intervention area of the strategy

D. Data Collection Methods

To track these KPIs, the following data collection methods will be used:

- i. **Field Surveys:** Regular surveys conducted with farmers, input suppliers, and market actors to gather data on productivity, market access, and disease control.
- ii. **Extension Officer Reports:** Reports from government and NGO extension officers who work directly with farmers.
- i. **Digital Monitoring Tools:** Use of mobile apps and digital platforms to collect real-time data from farmers and stakeholders.
- iii. **Stakeholder Workshops:** Periodic workshops to gather feedback, share progress, and adjust strategies as needed.
- iv. **Financial Reports:** Data from financial institutions, microfinance bodies, and investors to track investment and funding flows.

E. Roles and Responsibilities

- i. **PAT and MLF:** Lead the coordination and oversight of the M&E activities, ensuring data collection and analysis, and report on progress to key stakeholders.
- ii. **Private Sector and Farmers' Organizations:** Participate in data collection, provide feedback on the strategy's implementation, and share information on market trends and challenges.
- iii. **NGOs and Development Partners:** Support capacity-building efforts, facilitate the collection of data at the grassroots level, and offer technical assistance for the M&E process.
- i. **M&E Team/Experts:** Analyze the data collected, provide insights, and recommend adjustments to the strategy when necessary.

F. Reporting and Feedback Mechanism

- i. **Monthly Monitoring Reports:** These reports will track the progress of activities, identify challenges, and highlight any deviations from the action plan. The report will be provided by Extension officers, LGA and Regional officer's and should be compiled and analyses at the Ministry level.
- ii. **Quarterly and Annual Impact Evaluations:** These evaluations will focus on assessing the outcomes and effectiveness of the interventions in achieving the strategic objectives.

- i. **Stakeholder Meetings and Workshops Reports:** Regular meetings will be held with key stakeholders, including government bodies, the private sector, and NGOs, to review progress and discuss corrective actions.
- ii. **Online Dashboard:** A real-time online dashboard will provide stakeholders with up-to-date information on key indicators, allowing for continuous tracking and transparency.
- iii. **Project implementation reports.**

G. Financing Strategy and Investment Opportunities

I. Financing Vision and Objectives

The financing strategy aims to mobilize and align public, private, and blended capital to support the transformation of Tanzania’s poultry sector into a competitive, resilient, and commercially viable industry. The approach prioritizes:

- **Crowding in private investment** across commercially viable segments of the value chain
- **Strategic deployment of public financing** toward public goods and enabling systems
- **Use of public–private partnerships (PPPs)** to de-risk high-capital and coordination-intensive investments
- **Expanding access to finance** for smallholders, SMEs, women, and youth

This approach reflects the sector’s structure, where significant opportunities exist for private investment, but critical bottlenecks such as disease control, extension services, and infrastructure require public and blended support.

II. Investment Opportunities Aligned to Strategic Pillars

A wide range of investment opportunities have been identified across the poultry value chain through the development of this strategy. This section presents some of the key opportunities, highlighting priority areas with the greatest potential to catalyze transformation and crowd in investment across the sector. The opportunities presented are indicative and non-exhaustive, and are structured around four strategic pillars that collectively aim to position Tanzania as a competitive, resilient, and regionally leading poultry producer.

The four pillars focus on strengthening input systems (Quality and Competitive Inputs), improving farm-level productivity and resilience (Productive, Resilient, and Inclusive Production), expanding value addition and market access (Value Addition, Markets, and Trade), and reinforcing the enabling environment, including finance, research, and policy (Cross-cutting Issues and Enabling Environment).

Pillar 1: Quality and Competitive Inputs

Investor	Investment Opportunities
Private Sector	• Large-scale production of maize (including maize tailored for feeds) and soybeans for poultry feed • Contract farming schemes for maize and soybean production • Commercial feed milling and processing facilities • Production of alternative feed inputs (insect protein, oilseed by-products) • Establishment of breeder farms (GP/PS) • Expansion of hatcheries • DOC distribution and brooding enterprises
Public Sector	• Feed quality regulation, inspection, and certification systems • Investment in feed testing laboratories • R&D on alternative feeds, maize tailored for feeds and least-cost formulation • Genetic improvement programs (including indigenous breeds) • Regulatory strengthening for hatcheries and breeding systems
Development Partners (e.g., World Bank, AfDB, IFAD)	• Concessional financing for feed ingredients production (maize, soy) • Blended finance facilities for feed processing facilities • Grants for feed innovation and climate-resilient inputs • Technical assistance for feed quality systems and standards

Pillar 2: Productive, Resilient, and Inclusive Production

Investor	Investment Opportunities
Private Sector	• Expansion of commercial broiler and layer farms • Vertically integrated poultry production systems • Outgrower and contract farming models
Public Sector	• National vaccination programs and disease control • Veterinary services and mobile clinics • Disease surveillance and diagnostic systems • Extension services and farmer training programs • Digital advisory and extension platforms
Development Partners (through PPPs and blended finance)	• Delivery of extension services through private/cooperative models

	• Development of poultry insurance products Investment in veterinary infrastructure and surveillance systems • Support for scaling extension systems (including digital tools) • Grants for climate-smart poultry production models
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Pillar 3: Processing, Markets, and Trade

Investor	Investment Opportunities
Private Sector	• Poultry slaughterhouses and processing plants • Value-added poultry products (frozen, processed, ready-to-cook) • Cold storage and refrigerated transport
Public Sector	• Food safety and quality standards systems • Export certification and compliance infrastructure • Development of market infrastructure • Trade promotion and market intelligence systems • Strengthening regulatory enforcement
Development Partners (through PPPs and blended finance)	• Blended finance for processing and cold chain infrastructure • Co-financing agro-industrial parks and value chain hubs • Support for export readiness and standards compliance • Technical assistance for food safety, traceability, and certification

Pillar 4: Cross-cutting Issues and Enabling Environment

Investor	Investment Opportunities
Private Sector	• Poultry-focused financial products (credit, leasing, input finance) • Digital platforms for finance, extension, and markets
Public Sector	• Loan guarantee schemes to de-risk lending • Financial literacy and capacity building programs • Strengthening research institutions and funding R&D
PPPs / Blended Finance	• Blended finance facilities for poultry sector investment • Risk-sharing mechanisms with financial institutions (e.g., guarantees) • Incubation and acceleration programs for SMEs • Strengthening poultry associations and coordination platforms
Development Partners (through PPPs and blended finance)	• Capitalization of blended finance and guarantee facilities • Support for financial sector deepening in agriculture • Development of insurance products (climate, disease)

	• Incubation and acceleration programs for SMEs • Strengthening poultry associations and coordination platforms
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CHAPTER 6: PERFORMANCE FRAMEWORK AND INVESTMENT PLAN

Introduction

This chapter presents the implementation of arrangements for achieving the objectives of the National Poultry Development Strategy (NPDS). It outlines priority strategic objectives, key activities and sub-activities, performance indicators, responsible institutions, indicative budgets, and implementation timelines for the period 2026/27–2036/37. The implementation plan is designed to be results-oriented, realistic, and aligned with existing institutional mandates across government, private sector, and development partners.

This chapter presents the Performance Framework and Investment Plan for implementation of the National Poultry Development Strategy (NPDS) 2026–2036. It outlines the sector impact metrics, strategic performance indicators, implementation targets, indicative budgets, and responsible institutions that will guide implementation and performance monitoring over the ten-year strategy period. The framework is designed to strengthen accountability, support evidence-based decision-making, and ensure alignment between strategic priorities, institutional responsibilities, and investment requirements across the poultry value chain.

The chapter is structured around two key components. The first component presents the sector impact metrics and strategic performance indicators that will be used to monitor progress toward sector transformation objectives, including productivity growth, commercialization, competitiveness, food security, investment mobilization, and inclusion. The second component presents the indicative investment plan, including priority interventions, implementation targets, responsible institutions, and estimated resource requirements to support implementation of the strategy.

Sector Impact Metrics and Strategic Performance Indicators

This section presents the sector impact metrics and strategic performance indicators that will be used to monitor progress and assess performance of the National Poultry Development Strategy (NPDS) 2026–2036. The framework includes long-term sector transformation metrics, strategic performance indicators linked to each intervention area, implementation targets, baselines, and responsible institutions. Together, these indicators provide a structured basis for tracking productivity growth, commercialization, investment mobilization, competitiveness, food security, inclusion, and institutional performance across the poultry value chain.

I. 2036 Impact Metrics Framework

Impact Area	Indicator	Current Value / Baseline	2036 Target
Sector Growth and Economic Contribution	Poultry contribution to livestock GDP	~30%	≥40%
	Poultry contribution to national GDP	1.8%	≥3%
	Poultry sector GDP value	TZS 3,705,236.88 million	TZS 9,034,436.85 million
	Private investment mobilized in the poultry sector	~TZS 350 billion	TZS 2.14 trillion
Production and Productivity	Poultry meat production	156,000 MT	380,373 MT
	Poultry egg production	7.1 billion eggs	17.31 billion eggs
	Annual DOC production	104.8 million DOCs	250 million DOCs
	Poultry feed production	504,000 MT	3 million MT
Commercialization and Industrialization	Share of poultry products processed/value-added	<10%	30%
Food Security, Nutrition, and Inclusion	Per capita egg consumption	107 eggs/person/year	210 eggs/person/year
	Per capita poultry meat consumption	2.07 kg/person/year	15 kg/person/year
	Women and youth participation in poultry value chain	Women: 51.3%; Youth: 65%	>70% participation

II. Strategic Performance Indicators

Strategic Intervention Area	KPI	Baseline	10-Year Target	Responsible Institutions / Organizations
Pillar 1: Quality and Competitive Inputs				
Strengthening Poultry Breeding and Access to Quality Day-Old Chicks	Annual volume of quality DOCs produced locally	104.8 million DOCs	≥250 million DOCs annually	MLF, TVLA, TALIRI, Private Sector, PAT
	Number of operational GP and PS farms	2 GP farms and ~25 PS farms	≥10 GP & ≥30 PS farms	MLF, TALIRI, SUA, Private Sector
	Number of operational and registered hatcheries	28 hatcheries	≥100 hatcheries	MLF, TVLA, Private Sector
	Number of farmers accessing quality DOCs annually from registered hatcheries	N/A	≥3 million farmers	MLF, PAT, LGAs, Cooperatives
	Percentage of hatcheries certified and compliant	N/A	≥90% certified	TVLA, TBS, MLF
Promoting Poultry Feed Production and Improving Feed Quality and Affordability	Total annual poultry feed production	504,000 MT	≥3 million MT	MLF, MoA, Private Sector, TAFMA
	Average poultry feed cost as % of production cost	~70%	≤50%	MLF, MoA, Private Sector
	Percentage of feed samples meeting national quality standards	>70% exceed aflatoxin limits	≥80% compliant	TVLA, TBS, TAFMA
	Number of operational feed millers	~250 feed millers	≥350 feed millers	MLF, TAFMA, TIC
	Average feed mill utilization rate	<50%	≥80% utilization	Private Sector, TAFMA
Pillar 2: Productive, Resilient, and Inclusive Production				
Strengthening On-Farm Poultry Production and Farm Management	Average eggs produced per indigenous hen per year	~50 eggs/hen/year	≥120 eggs/hen/year	MLF, TALIRI, Extension Services

	Average indigenous chicken live weight at maturity	~1.5 kg	≥2.5 kg	MLF, TALIRI, Farmers
	Average flock size per household	12–13 birds	≥50 birds	MLF, LGAs, PAT
	Percentage of farmers adopting improved poultry housing and husbandry practices	N/A	≥80%	Extension Services, PAT, LGAs
	Number of farmers transitioning to semi-intensive/intensive systems	N/A	≥500,000 farmers	MLF, PAT, Private Sector
Strengthening Poultry Extension, Digital Advisory, and Business Development Services	Number of livestock extension officers	4,406 officers	≥10,000 officers	MLF, PMO-RALG, LGAs
	Percentage of poultry farmers accessing extension services	~20%	≥80%	MLF, LGAs
	Number of poultry farmers trained annually	N/A	≥500,000 annually	Extension Services, PAT, NGOs
	Percentage of poultry farmers accessing digital advisory platforms	N/A	≥60%	MLF, Agri-tech Firms
	Percentage of poultry farmers maintaining production and financial records	N/A	≥70%	PAT, Extension Services
Strengthening Poultry Health, Biosecurity, and Veterinary Services	Local Newcastle disease vaccine production	>59 million doses	≥250 million doses	TVLA, MLF
	Vaccination coverage among smallholders	30–50%	≥90%	TVLA, LGAs, PAT
	Number of major poultry disease outbreaks annually	N/A	≥70% reduction	MLF, TVLA
	Percentage of poultry farms complying with biosecurity standards	N/A	≥80%	TVLA, MLF
	Percentage reduction in counterfeit/substandard veterinary drugs	N/A	≥90% reduction	TMDA, TVLA

Pillar 3: Processing, Markets, and Trade				
Strengthening Poultry Processing and Product Diversification	Share of poultry products processed/value-added	<10%	≥30%	MLF, Private Sector, TMB
	Number of formal poultry slaughter and processing facilities	1,135 facilities	≥2,500 facilities	MLF, LGAs, Private Sector
	Annual poultry processing capacity	N/A	≥100,000 MT	Private Sector, TIC
	Number of operational poultry processing hubs	N/A	≥20 hubs	MLF, MIT, Private Sector
	Value of private investment mobilized in poultry processing	N/A	≥TZS 601 billion	TIC, Private Sector
Strengthening Post-Harvest Management and Cold-Chain Infrastructure	Post-slaughter poultry losses	~5%	<2%	MLF, Private Sector
	Poultry losses during transportation	~13%	<5%	Private Sector, LGAs
	Number of cold-chain facilities and refrigerated transport units	N/A	≥300 facilities/units	Private Sector, TIC
	Percentage of poultry products transported under temperature control	N/A	≥60%	Private Sector
	Percentage adopting standardized post-harvest handling practices	N/A	≥80%	MLF, TBS
Strengthening Poultry Market Systems, Market Access, and Trade Competitiveness	Annual DOC exports	2.7 million DOCs	≥20 million DOCs	TANTRADE, PAT
	Annual poultry meat exports	31 MT	≥2,000 MT	TANTRADE, MLF
	Annual egg exports	4.85 million eggs	≥50 million eggs	TANTRADE
	Number of poultry cooperatives and producer organizations	14 associations	≥200 organizations	PAT, Cooperatives
	Percentage of exporters compliant with international standards	N/A	≥90%	TBS, TMDA, TMB
Pillar 4: Cross-cutting Issues and Enabling Environment				

Strengthening Poultry Financing and Investment	Total private investment mobilized	>USD 133 million	≥USD 2.1 trillion	TIC, TADB, Private Sector
	Value of TCPA member investments	USD 208 million	≥USD 500 million	TCPA, Private Sector
	Percentage of poultry enterprises covered by insurance/guarantees	N/A	≥50%	PASS, TADB, Insurance Providers
	Total value of poultry loans disbursed annually	N/A	≥TZS 800 billion	TADB, Commercial Banks
	Number of poultry farmers trained in financial literacy	N/A	≥2,000,000 farmers	MLF, NGOs, Banks
Strengthening Poultry Research, Innovation, and Technology Transfer	Number of TALIRI research centres	7 centres	≥15 centres/labs	TALIRI, SUA
	Number of poultry research outputs and technologies developed	N/A	≥240 outputs	TALIRI, SUA, TVLA
	Percentage of farmers adopting research-based technologies	N/A	≥70%	Extension Services, TALIRI
	Number of upgraded poultry laboratories and facilities	N/A	≥50 facilities	TVLA, TALIRI
	Number of research-private sector partnerships	N/A	≥50 partnerships	TALIRI, Private Sector
Promoting Inclusive Participation of Women and Youth Across the Poultry Value Chain	Women participation in poultry sector	51.3%	≥70%	MLF, NGOs
	Youth participation in poultry sector	65%	≥70%	MLF, Youth Programs
	Number of women and youth trained annually	N/A	≥1,000,000 trained	VETA, NGOs
	Percentage of women and youth accessing poultry finance and markets	N/A	≥60%	TADB, PAT
	Number of women- and youth-led poultry enterprises	N/A	≥8,000 enterprises	MLF, LGAs

Promoting Environmentally Sustainable and Climate-Resilient Poultry Production	Percentage of poultry farms adopting climate-smart technologies	N/A	≥70%	MLF, REA
	Percentage of poultry farms applying improved waste management practices	N/A	≥40%	NEMC, LGAs
	Number of farms using renewable energy technologies	N/A	≥1,000 farms	REA, Private Sector
	Percentage of farmers using alternative/sustainable feed resources	N/A	≥50%	TALIRI, TAFMA
	Reduction in poultry-related waste and emissions	Ammonia >25 ppm harmful	≥50% reduction	NEMC, MLF
Strengthening Industry Coordination and Institutional Capacity	Number of registered poultry associations	14 associations	≥200 associations	PAT, MLF
	Number of district-level poultry desks operational	N/A	≥40 desks	MLF, PMO-RALG
	Number of policy coordination platforms operational	N/A	≥10 platforms	TPECC, NPDSC
	Number of poultry stakeholders participating in associations	N/A	≥ 3 million actors	PAT
Strengthening Nutrition Outcomes and Social Inclusion Through Poultry Development	Per capita egg consumption	107 eggs/person/year	≥210 eggs/person/year	MoH, MLF
	Per capita poultry meat consumption	2.07 kg/person/year	≥15 kg/person/year	MoH, MLF
	Number of schools/institutions integrating poultry into feeding programs	N/A	≥1,000 institutions	MoEST, LGAs
	Percentage of poultry programs integrating nutrition/social inclusion objectives	N/A	≥80%	MLF, NGOs
	Number of poultry programs integrating HIV/AIDS awareness initiatives	N/A	≥100 programs	MoH, NGOs

Investment Plan

This section presents the indicative investment plan and resource requirements for implementation of the National Poultry Development Strategy (NPDS) 2026–2036. It outlines estimated investment needs across the strategic pillars, intervention areas, and flagship programs, providing an indicative framework for mobilizing public financing, private sector investment, public–private partnerships, and development partner support. The investment plan is intended to guide prioritization of resources and strengthen coordination of financing toward achievement of the Strategy’s long-term objectives.

I. Investment Requirements by Strategic Pillar

Pillar/Strategic Intervention Area	Intervention	Budget (TZS Billions) Over 10 years
Pillar 1: Quality and Competitive Inputs		
Strengthening Poultry Breeding and Access to Quality Day-Old Chicks	Strengthen poultry genetics and breeding through improved regulation, selective breeding, and investment in breeding infrastructure	89.5
	Expand hatchery capacity through investment and modernization	118.8
	Improve farmer access to quality day-old chicks through strengthened distribution networks	23.8
	Strengthen quality assurance and regulatory compliance across the poultry breeding value chain	23.8
	Strengthen planning and market coordination through the establishment of a national DOC demand and supply database	23.8
	Subtotal	279.7
Promoting Poultry Feed Production and Improving Feed Quality and Affordability	Expand local poultry feed production through investment in feed processing, storage, and raw material supply	1050
	Promote sustainable and alternative feed resources to improve affordability and resilience	108.7
	Strengthen feed quality assurance through improved regulation, testing, and enforcement	108.7

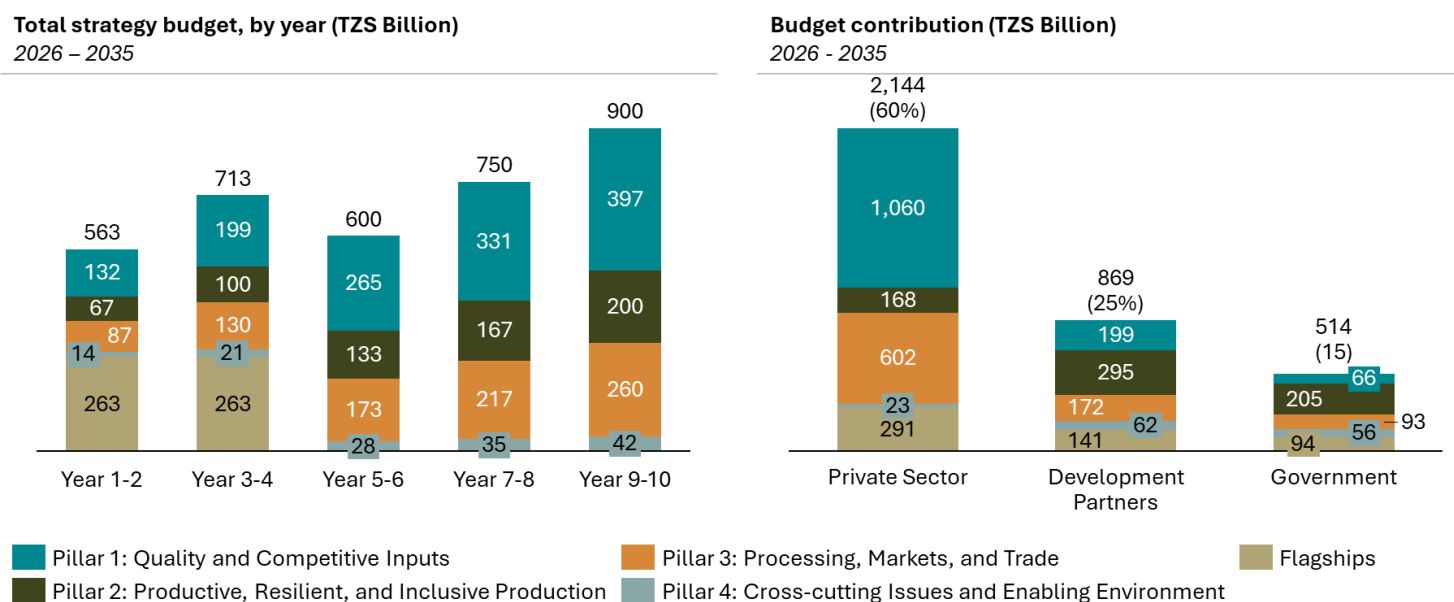
	Improve feed distribution and market access through strengthened supply chains and farmer cooperatives	54.3
	Subtotal	1321.7
Sub-Total - Pillar 1		1601.4
Pillar 2: Productive, Resilient and Inclusive Production		
Strengthening On-Farm Poultry Production and Farm Management	Improve poultry housing and farm infrastructure to enhance productivity and resilience	242.2
	Support gradual transition toward semi-intensive and intensive poultry production	60.5
	Subtotal	302.7
Strengthening Poultry Extension, Digital Advisory, and Business Development Services	Strengthen farmer technical capacity through poultry extension and training services	89.4
	Expand digital and mobile-based poultry advisory services	13.6
	Strengthen poultry farm business management and operational practices	16.3
	Subtotal	119.3
Strengthening Poultry Health, Biosecurity, and Veterinary Services	Strengthen veterinary service delivery and poultry health workforce capacity	31.1
	Strengthen biosecurity compliance and disease prevention practices	31.1
	Strengthen poultry disease surveillance, early warning, and outbreak response	46.6
	Expand vaccination coverage and preventive poultry health programs	186.3
	Strengthen regulation and quality control of veterinary drugs and vaccines	15.5
	Subtotal	310.6
Sub-Total - Pillar 2		732.6
Pillar 3: Processing, Markets and Trade		
Strengthening Poultry Processing and Product Diversification	Expand poultry processing capacity through investment in modern slaughtering and processing infrastructure	696.2
	Promote poultry product diversification and processing innovation to meet changing market demand	149
	Subtotal	845.2

Strengthening Post-Harvest Management and Cold-Chain Infrastructure	Expand cold-chain infrastructure and temperature-controlled logistics through increased private sector investment	39.7
	Strengthen post-harvest handling and quality preservation through improved handling, storage, and transport practices	2.4
	Subtotal	42.1
Strengthening Poultry Market Systems, Market Access, and Trade Competitiveness	Strengthen poultry aggregation and producer organizations to improve market participation and bargaining power	55
	Develop structured poultry markets and market linkages through coordinated supply arrangements and contract farming models	22
	Strengthen poultry market information, promotion, and digital market platforms to improve market transparency and connectivity	18.5
	Strengthen food safety, certification, and compliance with domestic and export market standards	18.5
	Subtotal	114
Sub-Total - Pillar 3		1001.3
Pillar 4: Cross-cutting Issues and Enabling Environment		
Strengthening Poultry Financing and Investment	Expand tailored financial products and strengthen rural financial inclusion for poultry producers	7.1
	Strengthen financial literacy and poultry agribusiness management capacity	5.3
	Expand poultry insurance, guarantee schemes, subsidies, and other de-risking mechanisms	14.2
	Mobilize private investment and public–private partnerships across the poultry value chain	8.8
	Subtotal	35.4
Strengthening Poultry Research, Innovation, and Technology Transfer	Strengthen poultry research infrastructure, institutional capacity, and applied research on poultry productivity and resilience	11.7
	Strengthen research collaboration, dissemination, and adoption of poultry technologies and innovations	11.7
	Subtotal	23.4

Promoting Inclusive Participation of Women and Youth Across the Poultry Value Chain	Strengthen skills development, entrepreneurship, and incubation opportunities for women and youth	4.6
	Strengthen access to productive resources, services, and market opportunities for women and youth	4.1
	Promote gender-responsive and youth-inclusive policies and institutional participation	2.9
	Subtotal	11.6
Promoting Environmentally Sustainable and Climate-Resilient Poultry Production	Promote sustainable feed production and resource-efficient poultry production practices	10.5
	Strengthen climate resilience and adoption of climate-smart poultry technologies	14
	Strengthen poultry waste management and circular economy approaches	10.5
	Subtotal	35
Strengthening Industry Coordination and Institutional Capacity	Strengthen governance, formalization, and operational capacity of poultry associations	4
	Strengthen institutional and technical capacity of coordinating institutions and government agencies serving the poultry sector	54
	Subtotal	58
Strengthening Nutrition Outcomes and Social Inclusion Through Poultry Development	Strengthen nutrition awareness and integration of poultry products into food and community nutrition programs	18.1
	Strengthen integration of social inclusion and health awareness within poultry value chain programs	9.8
	Subtotal	27.9
		191.3
GRAND TOTAL		3526.6

II. Investment Phasing and Financing Structure

Investments are expected to increase progressively over the ten-year implementation period as implementation momentum, market opportunities, and private-sector participation expand across the poultry value chain. The financing structure reflects the strategy's largely private-sector-led approach, with the private sector expected to contribute approximately 60% of total financing, while the government and development partners play a catalytic role. Higher spending during the early years of implementation reflects front-loaded investments in flagship initiatives such as feed systems, hatchery development, processing infrastructure, capacity building, and government service delivery systems, which are critical for unlocking productivity gains, strengthening sector coordination, and crowding in long-term private investment across the poultry industry.



Investments increase steadily over time to build implementation momentum, while higher spending in Years 1–4 reflects front-loaded flagship investments. The strategy is largely private sector-led, with the private sector contributing ~60% of total financing, while government and development partners play catalytic roles.

Figure 13: Investment Phasing and Financing Structure

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ANNEX 1: LIST OF STAKEHOLDERS CONSULTED

Technical Committee Meeting: National Poultry Development Strategy (NPDS) Draft Review

Date: 5th–6th March 2026

Venue: Morena Hotel, Morogoro

Organiser: Ministry of Livestock and Fisheries

#	Full Name	Organisation / Institution	Position / Title	Phone & Email
1	Elizabeth Swai	AKM Glitters	Chair TPECC	0685 83 3335
2	Dorien Rutta	AGCOT	Policy Support	0754688298
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4	Wambura Messo	MLF	Livestock Officer	0756282167
5	Veronica Massawe	MLF	Senior Economist	0784292044
6	Alpha Ngunyale	TCPA		0752204916
7	Dioniz Ibrahim	MLF	Veterinary Officer	0759516516
8	John T. Kanyage	AAP's	Consultant	07545320
9	Faustin P. Lekule	TANFEEDS	CEO	0715692023
10	Edwin P. Chang'a	TALIRI	Director	0710495933
11	Said H. Mbaga	SUA		0784521628
12	Abdulrazak N. Ambali	MLF	RMO	0677078295
13	Theodata B. Salema	MLF	AD-AF	0714508320
14	Edina Mwampulo	MLF	Economist	0713366652
15	David R. Masawe	MOF		0712884091
16	Werner Hillary	ANSAF		0737956006
17	Dominic Nibunguru	PAT	Vice-Chair	0713669044
18	Tabitha B. Kintingu	MLF	Livestock Officer	0652117700
19	Stephen Michael	MLF	DPMD	0716777730
20	Steve Kisakye	Consultant	Consultant	0767409028
21	Malik Nkoba	Consultant	Consultant	0712070173

22	Esther Mndeme	Consultant	Consultant	0671387346
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Zonal Validation Workshop on the Development of the National Poultry Development Strategy (NPDS) 2026–2036

Date: 29–30 April 2026

Venue: Morogoro

#	Full Name	Organisation / Institution	Position / Designation	Mobile No.
1	Lilian M. Msigala	MLF	Market Officer	013645450
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3	Neema Raphael	VEIA	Tutor	0652827462
4	Rashid Suleiman	SUA	Senior Lecturer	0678989338
5	Christophe M. Diour	Tushimike Dodoma	CEO	072350862
6	Geoffrey Aron	MLF	SLO	0758510654
7	Adam Mlela		Managing Director	0613804001
8	Raymond Wigenge	Consultant	Consultant	0734286974
9	Richard Vedasto	Poultry Farmer	Poultry Farmer	0758419891
10	Moses Kabogo	LWR	County Director Agriculture Advisor	0764576045
11	Mikidadi Ally		Agriculture Advisor – EKN	0786822999
12	Zidihery Mhando	RAS–Katavi	—	0626564999
13	Elizabeth Swai	TPECC	Chair	0685833325
14	Costa E. Mrema	WAKUKI	Committee Member	0713317262
15	Birore Matu	MPUT	PUT	07446289403
16	Nadhiru Katakweba	UWAKUNYATA	Secretary	0718998523
17	Happy Mussa	Microfiance	Manager	0624106663
18	Ally Moi	Livestock Keeper	—	069857649
19	Dr. Fadhili Guni	TALIRI	Zone Director–SZ	0713432102
20	Dr. Charles Lyimo	SUA	Senior Lecturer	0752441788

21	Judith Voluvion	SUA	Lecturer	0758151082
22	Esther Mndeme	Consultant	Consultant	0711884346
23	Steve Kisakye	Consultant	Consultant	0769704078
24	Malik Nkoba	Consultant	Consultant	0712070173
25	Malietha Kabulo	SIDO Dodoma	Training Officer	0722228473
26	Marcel William	Vonkavy	Feed Manager	0744769288
27	Wambura Messo	MLF	Livestock Officer	0756822167
28	Pheneas Ochilo	TBS	Standards Officer	0685855449
29	Nadhiru Hussein	The Mobile Vet Co	CEO	0655890192
30	Neno Omary	Mifugaji Smart ID	MD	0799208999
31	Andrea A. Asenga	Youth Coordinator	MD	0602489782
32	Amigo Temba	Animal Care Co	Technician	0652614494
33	Veronica Joseph	Ikam Integrated Farm	CEO	0766876431
34	Alloyce K. Makoye	TABROFA	Secretary	0759029830
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36	Mary C. Nyalubu	USGBEC	TZ Representative	0680882958
37	Simbah Mfaume	Silverlands Tz Ltd	Manager	0757900800
38	Msafiri S. Kalloha	TVLA	SLRO	0754312493
39	Happyness Limo	DPMD	PO	0654406050
40	Stephen Michael	MLF	DPMD	0716777730

Zonal Validation Workshop on the Development of the National Poultry Development Strategy (NPDS) 2026–2036

Date: 4th–5th May 2026

Venue: Malaika Beach Resort Hotel, Mwanza

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4	Ramadhan N. Shaban	UWAU	Livestock Keeper	0788842222
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6	Venitha C Kalugendo	MLF	Livestock Keeper	0742309359
7	Flora J. Limbu	Mfugaji	Livestock Keeper	0752778009
8	Mathius Lusheleja	RS-Mara		0783385730
9	Nemesius Mukalaza	Bon ya Nyama Tz Africa (TAPA)	Officer	0766758923
10	Peter Siau	Jaymo Feed		0754317246
11	Jandwa Simon	Simyu Region	Livestock Officer	—
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15	Augustine L. Lukoa	UWAU	Livestock Keeper	0784801736
16	Rivinius M. Mchunguzi	UWAU	Livestock Keeper	0752909896
17	Regina Denu	Mara	Livestock Keeper	0766301174
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19	Lucu R Isaro	UWAU- MWANZA	Livestock Keeper	0754094470
20	Acres Abraham	Geita	Livestock Keeper	0746383844
21	Dr. Wilbard Muhandiki	UWAU-Geita	Livestock Keeper	0759678881
22	Carlos Leonard	Kairuki- agrovet	Livestock Keeper	0747297493
23	Curthbert .J. Materu	Geita	Investor	0754307584

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26	Husnam Ramadhan	Bukombe DC	Livestock Officer	0666922956
27	Fransisca Temu	TBS	PAO	0714738948
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29	Nasma Ally	TMB	Food Technologist	0686366030
30	Sarah D. Anyosisye	ZVC	Animal Healtj	0755896090
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32	Ally Matu	Livestock Keeper	Livestock Keeper	0776901808
33	Edina Kamkulu	Livestock Keeper	Livestock Keeper	0780441411
34	Regina Godfrey	Livestock Keeper	Livestock Keeper	0783568106
35	Wakirya Nyagibo	Livestock Keeper	Livestock Keeper	0760808201
36	Elizabeth Swai	AKM Glitters	Chair TPECC	0685 83 3335
37	Alexander Stewart	AGRA	Senior Poultry Expert	—
38	Steve Kisakye	Consultant	Consultant	0767409028
39	Malik Nkoba	Consultant	Consultant	0712070173
40	Esther Mndeme	Consultant	Consultant	0671387346