NATIONAL POULTRY DEVELOPMENT STRATEGY (NPDS)

2026-2036

Building a Competitive, Inclusive and Sustainable Poultry Industry for Food Security, Nutrition, Jobs and Prosperity

Abridged Version

Ministry of Livestock and Fisheries

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EXECUTIVE SUMMARY

01 EXECUTIVE SUMMARY

National Poultry Development Strategy (NPDS) 2026–2036

The National Poultry Development Strategy (NPDS) 2026–2036 provides a comprehensive roadmap for transforming Tanzania's poultry industry into a competitive, resilient, commercially viable, and inclusive sector that contributes significantly to food security, nutrition, employment creation, and economic growth. The strategy responds to the growing importance of poultry within Tanzania's agricultural transformation agenda and recognizes the sector's potential to become a major driver of industrialization, private investment, and regional trade.

The Strategy was developed through a highly consultative process led by the Ministry of Livestock and Fisheries (MLF) in collaboration with the Poultry Sector Technical Working Group (PSTWG), Tanzania Poultry Executive Committee (TPEC), Poultry Association of Tanzania (PAT), private sector actors, development partners, researchers, financial institutions, and poultry value chain stakeholders. The process included technical working sessions, stakeholder consultations, and zonal validation workshops in Morogoro and Mwanza to ensure the strategy reflects the realities, opportunities, and priorities of Tanzania's poultry industry.

The Strategy adopts a whole-of-value-chain approach, addressing constraints and opportunities across poultry breeding, feed production, farming, animal health, processing, markets, trade, financing, research, and institutional development. Through coordinated public and private investment, the Strategy aims to position Tanzania as a leading poultry producer and exporter within Africa while improving livelihoods, strengthening food systems, and creating opportunities for women and youth.

2036 Impact Metrics

Poultry contribution to national GDP: **1.8% → 3%**

Poultry contribution to livestock GDP: **30% → 40%**

Poultry sector GDP: **TZS 3.7 trillion → TZS 9.0 trillion**

Poultry meat production: **156,000 MT → 380,373 MT**

Egg production: **7.1 billion → 17.3 billion eggs**

Private investment mobilized: **TZS 350 billion → TZS 2.14 trillion**

Per capita egg consumption: **107 → 210 eggs/ person/ year**

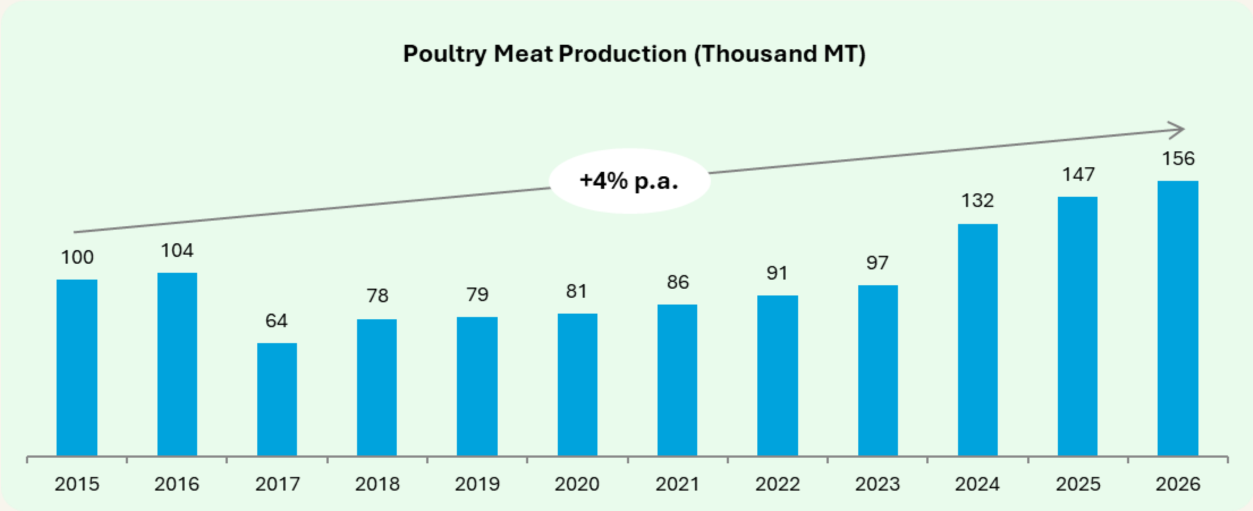
Per capita poultry meat consumption: **2.07 kg → 15 kg/ person/ year**

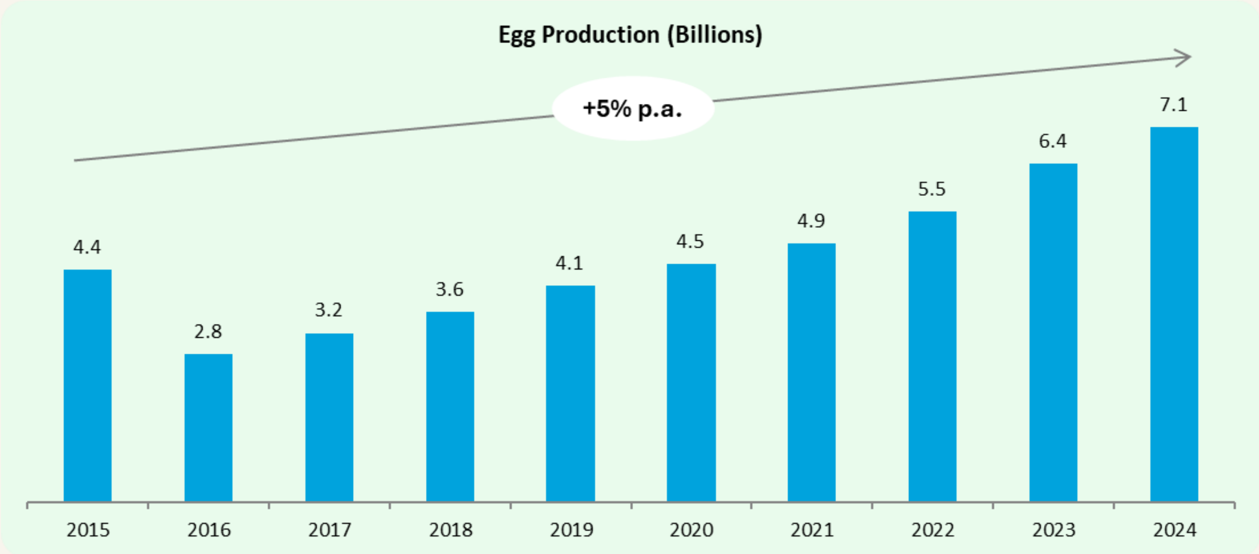
02

SECTOR SNAPSHOT

02 SECTOR SNAPSHOT

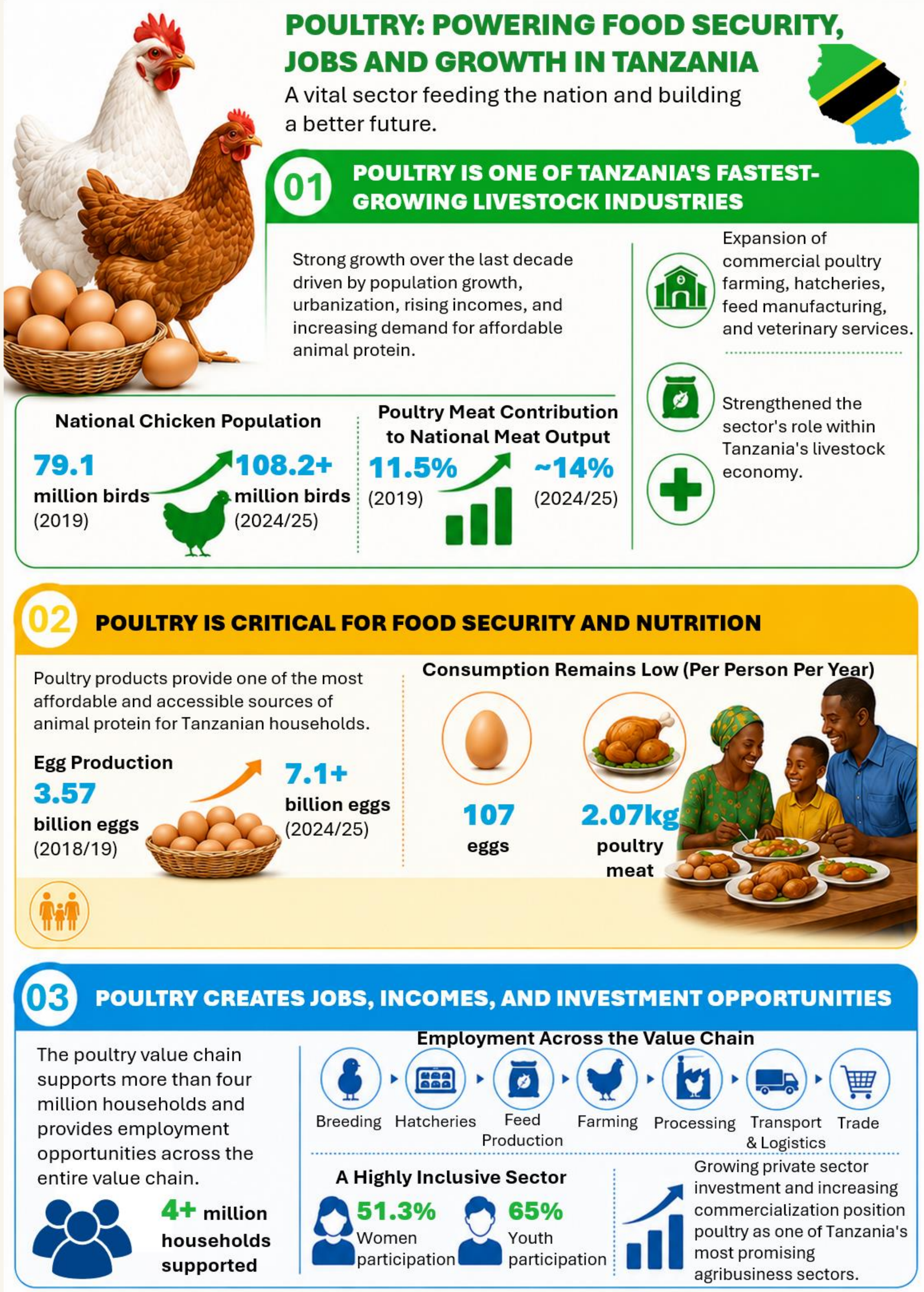
Tanzania's Poultry Sector at a Glance





Key statistics

- National chicken population: 108.2 million (2024/25)
- Households engaged in poultry farming: Over 4 million households (2024/25)
- Contribution to national GDP: 1.8% (2024/25)
- Contribution to livestock GDP: 30% (2024/25 estimate)


POULTRY: POWERING FOOD SECURITY, JOBS AND GROWTH IN TANZANIA
A vital sector feeding the nation and building a better future.
01
POULTRY IS ONE OF TANZANIA'S FASTEST-GROWING LIVESTOCK INDUSTRIES
Strong growth over the last decade driven by population growth, urbanization, rising incomes, and increasing demand for affordable animal protein.
Expansion of commercial poultry farming, hatcheries, feed manufacturing, and veterinary services.
Strengthened the sector's role within Tanzania's livestock economy.
National Chicken Population
79.1 million birds (2019)
108.2+ million birds (2024/25)
Poultry Meat Contribution to National Meat Output
11.5% (2019)
~14% (2024/25)
02
POULTRY IS CRITICAL FOR FOOD SECURITY AND NUTRITION
Poultry products provide one of the most affordable and accessible sources of animal protein for Tanzanian households.
Egg Production
3.57 billion eggs (2018/19)
7.1+ billion eggs (2024/25)
Consumption Remains Low (Per Person Per Year)
107 eggs
2.07kg poultry meat
03
POULTRY CREATES JOBS, INCOMES, AND INVESTMENT OPPORTUNITIES
The poultry value chain supports more than four million households and provides employment opportunities across the entire value chain.
4+ million households supported
Employment Across the Value Chain
Breeding
Hatcheries
Feed Production
Farming
Processing
Transport & Logistics
Trade
A Highly Inclusive Sector
51.3% Women participation
65% Youth participation
Growing private sector investment and increasing commercialization position poultry as one of Tanzania's most promising agribusiness sectors.

03

CURRENT STATE OF THE POULTRY SECTOR

03 CURRENT STATE OF THE POULTRY SECTOR

The National Poultry Development Strategy assesses the poultry industry through four interconnected strategic pillars that collectively capture the entire poultry value chain and enabling environment. These pillars provide the basis for understanding the sector's strengths, opportunities, and constraints, and form the foundation for the strategic interventions proposed under the Strategy.

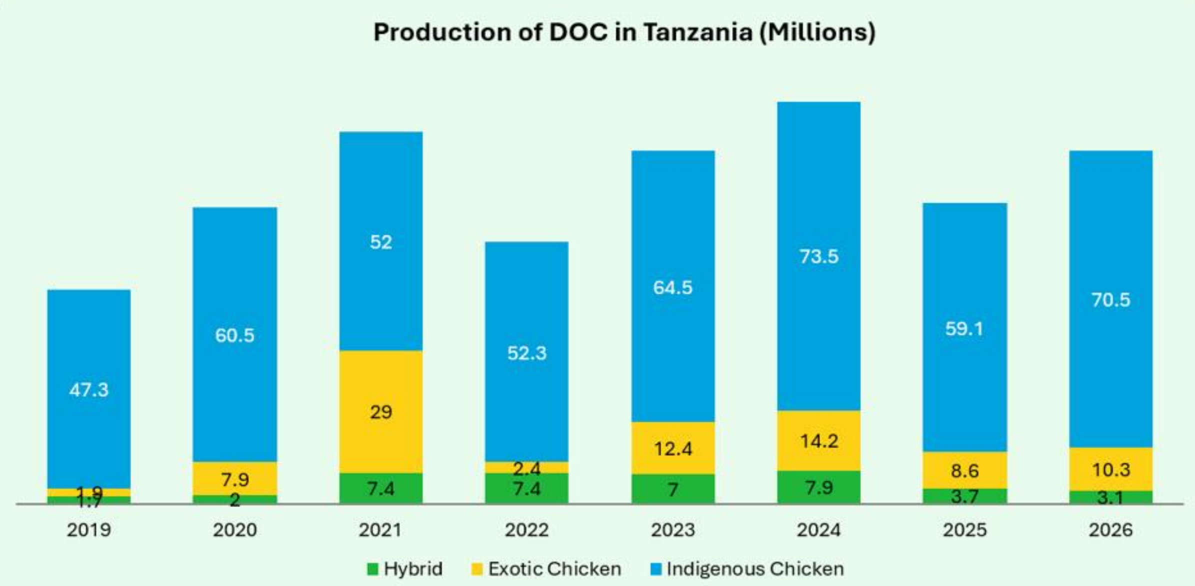
Pillar 1: Quality and competitive inputs

Current status

Tanzania has made significant progress in strengthening poultry input systems. The country currently hosts **2 grandparent stock farms, approximately 25 parent stock farms, and 28 operational hatcheries,** while day-old chick production increased from **50.9 million chicks in 2019 to 83.9 million chicks in 2025/26.** Feed production has also expanded rapidly, with processed animal feed production increasing from **380,000 MT in 2023/24 to 720,000 MT in 2024/25,** reflecting growing private sector investment and rising demand for poultry products.

Key challenges

- Limited breeder and hatchery capacity
- Informal and unregistered hatcheries
- High feed costs (~70% of production costs)
- Feed quality concerns and aflatoxin contamination
- Limited access to finance for breeding and feed investments



DOC production in Tanzania has grown strongly since 2019, driven mainly by broiler chicks, which account for the largest share of production, reflecting increasing commercialization and rising demand for poultry products.

Pillar 2: Productive, resilient and inclusive production

Current status

Tanzania's poultry production systems continue to expand, driven by increasing commercialization, rising domestic demand, and growing private sector participation. Indigenous poultry still account for approximately **43.8% of the national flock**, while commercial poultry production is growing rapidly in urban and peri-urban areas. The country produced more than **59 million doses of Newcastle disease vaccine in 2024**, and vaccination coverage among commercial poultry farms is close to 100%.

Key challenges

- Low productivity of indigenous poultry systems
- Weak biosecurity practices
- Frequent disease outbreaks
- Low vaccination coverage among smallholders (30–50%)
- Extension staffing gap of 66.8%

Pillar 3: Processing, markets and trade

Current status

Growing urbanization, rising incomes, and expanding regional markets are driving increased demand for poultry products. Tanzania currently has **1,135 poultry slaughter facilities**, while exports of day-old chicks reached **2.7 million chicks in 2024** and egg exports reached **4.85 million eggs in 2023**. However, poultry processing remains limited, with less than **10% of poultry products processed or value-added**.

Key challenges

- Limited modern slaughtering and processing infrastructure
- Weak cold-chain systems
- Fragmented markets and weak aggregation
- Limited compliance with export standards
- High post-harvest losses

Pillar 4: Cross-cutting issues and enabling environment

Current status

The poultry sector benefits from a growing ecosystem of research institutions, poultry associations, financial institutions, and development partners. Tanzania currently has **14 registered poultry associations**, approximately **4,406 livestock extension officers**, and a network of research institutions led by **TALIRI, SUA, and TVLA** that support poultry development, disease control, and innovation.

Key challenges

- Limited access to finance and insurance
- Weak research–industry linkages
- Inclusion barriers facing women and youth
- Weak environmental and waste management systems
- Limited institutional capacity and coordination

04

STRATEGIC FRAMEWORK

04 STRATEGIC FRAMEWORK

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.

Strategic 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

The Strategy is structured around four strategic pillars and thirteen strategic intervention areas that collectively address constraints and opportunities across the poultry value chain.

Pillar 1: Quality and competitive inputs

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

Key interventions

- Strengthen poultry genetics and breeding through improved regulation, selective breeding, and investment in breeding infrastructure
- Expand hatchery capacity through investment and modernization
- Improve farmer access to quality day-old chicks through strengthened distribution networks
- Strengthen quality assurance and regulatory compliance across the poultry breeding value chain
- Strengthen planning and market coordination through the establishment of a national DOC demand and supply database

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

Key interventions

- Expand local poultry feed production through investment in feed processing, storage, and raw material supply
- Promote sustainable and alternative feed resources to improve affordability and resilience
- Strengthen feed quality assurance through improved regulation, testing, and enforcement
- Improve feed distribution and market access through strengthened supply

chains and farmer cooperatives

Pillar 2: Productive, resilient and inclusive production

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

Key interventions

- Improve poultry housing and farm infrastructure to enhance productivity and resilience
- Support gradual transition toward semi-intensive and intensive poultry production

Strategic Intervention Area 2: Strengthening Poultry Extension, Digital Advisory, and Business Development Services

Key interventions

- Strengthen farmer technical capacity through poultry extension and training services
- Expand digital and mobile-based poultry advisory services
- Strengthen poultry farm business management and operational practices

Strategic Intervention Area 3: Strengthening Poultry Health, Biosecurity, and Veterinary Services

Key interventions

- Strengthen veterinary service delivery and poultry health workforce capacity
- Strengthen biosecurity compliance and disease prevention practices
- Strengthen poultry disease surveillance, early warning, and outbreak response
- Expand vaccination coverage and preventive poultry health programs
- Strengthen regulation and quality control of veterinary drugs and vaccines

Pillar 3: Processing, markets and trade

Strategic Intervention Area 1: Strengthening Poultry Processing and Product Diversification

Key interventions

- Expand poultry processing capacity through investment in modern slaughtering and processing infrastructure
- Promote poultry product diversification and processing innovation to meet changing market demand

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

Key interventions

- Expand cold-chain infrastructure and temperature-controlled logistics through increased private sector investment
- Strengthen post-harvest handling and quality preservation through improved handling, storage, and transport practices

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

Key interventions

- Strengthen poultry aggregation and producer organizations to improve market participation and bargaining power
- Develop structured poultry markets and market linkages through coordinated supply arrangements and contract farming models
- Strengthen poultry market information, promotion, and digital market platforms to improve market transparency and

connectivity

- Strengthen food safety, certification, and compliance with domestic and export market standards

Pillar 4: Cross-cutting issues and enabling environment

Strategic Intervention Area 1: Strengthening Poultry Financing and Investment

Key interventions

- Expand tailored financial products and strengthen rural financial inclusion for poultry producers
- Strengthen financial literacy and poultry agribusiness management capacity
- Expand poultry insurance, guarantee schemes, subsidies, and other de-risking mechanisms
- Mobilize private investment and public–private partnerships across the poultry value chain

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

Key interventions

- Strengthen poultry research infrastructure, institutional capacity, and applied research on poultry productivity and resilience
- Strengthen research collaboration, dissemination, and adoption of poultry technologies and innovations

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

Key interventions

- Strengthen skills development, entrepreneurship, and incubation opportunities for women and youth
- Strengthen access to productive resources, services, and market opportunities for women and youth
- Promote gender-responsive and youth-inclusive policies and institutional participation

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

Key interventions

- Promote sustainable feed production and resource-efficient poultry production practices
- Strengthen climate resilience and adoption of climate-smart poultry technologies
- Strengthen poultry waste management and circular economy approaches

Strategic Intervention Area 5: Strengthening Industry Coordination and Institutional Capacity

Key interventions

- Strengthen governance, formalization, and operational capacity of poultry associations
- Strengthen institutional and technical capacity of coordinating institutions and government agencies serving the poultry sector

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

Key interventions

- Strengthen nutrition awareness and integration of poultry products into food and community nutrition programs
- Strengthen integration of social inclusion and health awareness within poultry value chain program

05

FLAGSHIP INVESTMENT PROGRAMS

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To accelerate implementation and address the most critical bottlenecks across the poultry value chain, the Strategy prioritizes five flagship investment programs. These flagship programs focus on areas with the greatest potential to unlock productivity gains, crowd in private investment, strengthen institutional capacity, and accelerate commercialization across the sector.

Flagship	Context and Key Interventions	Budget (TZS Billion)	Key Targets / Outcomes
Flagship 1: Investing in Maize and Soybeans for Poultry Feed	• Feed accounts for approximately 70% of poultry production costs. • The flagship focuses on expanding maize and soybean production, strengthening feed value chains, promoting contract farming, and improving access to finance for feed production and processing	**235**	Soybean production increased to 300,000 MT; maize for feed increased to 1.5 million MT; feed costs reduced from 70% to 50% of production costs
Flagship 2: Investing in Poultry Breeding, Hatcheries, and Indigenous Poultry Development	• Tanzania continues to face shortages of quality DOCs and limited breeder capacity. • The flagship focuses on breeder farms, hatchery expansion, indigenous poultry improvement, registration of hatcheries, and establishment of mothering units for chick distribution	**42**	DOC production increased to 250 million chicks annually; 80% of farmers accessing quality DOCs through formal channels
Flagship 3: Investing in Poultry Processing, Value Addition, and Cold-Chain Infrastructure	• Processing remains limited, with less than 10% of poultry products processed. • The flagship focuses on processing facilities, cold-chain infrastructure, market systems, food safety standards, and export readiness	**134**	Processing increased to 30% of poultry products; post-harvest losses reduced by 40%; processing capacity increased to 260,000 MT
Flagship 4: Investing in Capacity Building for Poultry Value Chain Actors	• Limited technical and business skills constrain productivity and commercialization.	**50**	1 million farmers and SMEs trained; 6,000 extension officers and service providers

Flagship	Context and Key Interventions	Budget (TZS Billion)	Key Targets / Outcomes
	• The flagship focuses on farmer training, extension systems, digital advisory platforms, and strengthening service providers		trained and equipped; national digital poultry learning platform established
Flagship 5: Strengthening Government Capability and Service Delivery Systems	• Weak institutional capacity, fragmented coordination, and limited data systems constrain implementation. • The flagship focuses on poultry desks, digital systems, performance management, extension systems, and sector coordination	**65**	Poultry desks established in at least 50% of regions; 6,000 frontline extension officers trained and equipped; national livestock information system established

06

IMPLEMENTATION AND COORDINATION

06 IMPLEMENTATION AND COORDINATION

Implementation of the National Poultry Development Strategy will be coordinated through a multi-stakeholder governance framework that brings together government institutions, poultry associations, private sector actors, research institutions, financial institutions, and development partners. The framework is designed to strengthen accountability, improve coordination, and ensure effective delivery of strategic interventions across the poultry value chain.

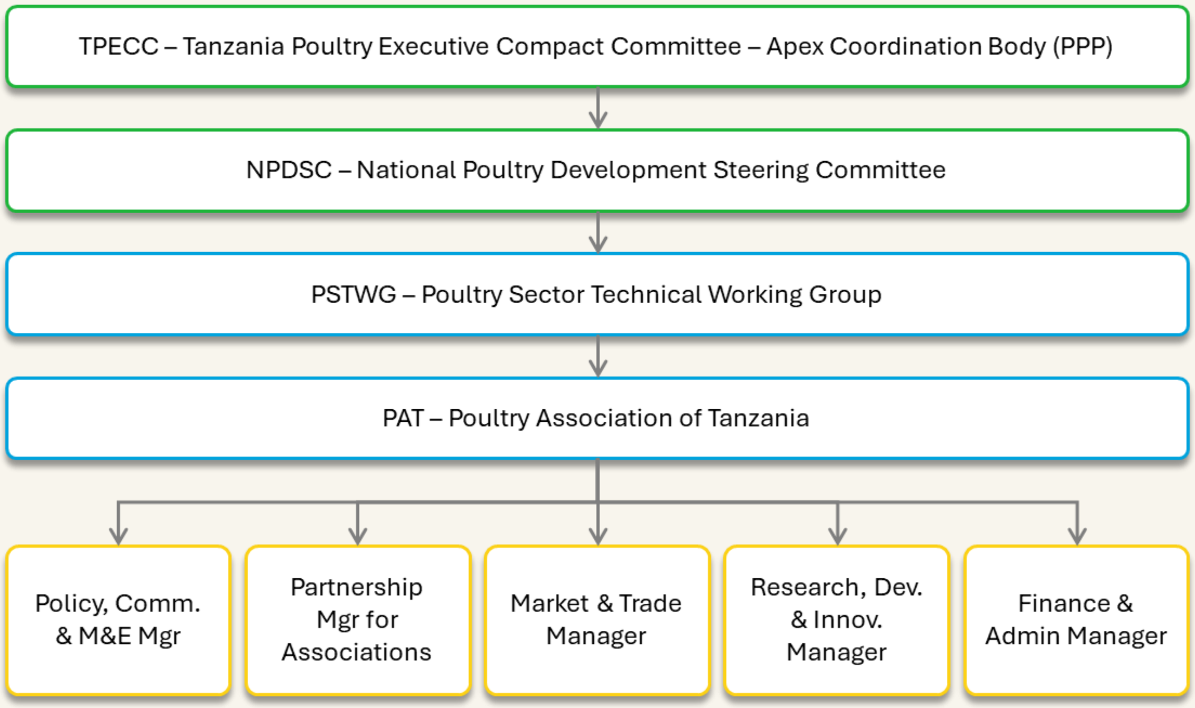

Figure 1: Proposed Coordination Structure of the National Poultry Development Strategy 2026–2036

- Tanzania Poultry Executive Compact Committee (TPECC): TPECC serves as the apex coordination and oversight body for the Strategy. It provides strategic leadership, mobilizes resources, champions policy reforms, and ensures alignment between public and private sector commitments.
- National Poultry Development Steering Committee (NPDSC): The NPDSC oversees implementation of the Strategy, coordinates stakeholders, monitors progress, and addresses implementation bottlenecks.
- Poultry Sector Technical Working Group (PSTWG): The PSTWG serves as the technical advisory platform for the Strategy, providing technical guidance and supporting problem-solving during implementation.
- Poultry Association of Tanzania (PAT): PAT represents poultry value chain actors and promotes industry coordination,

standards compliance, and stakeholder advocacy.

- Government Institutions: Government institutions provide policy leadership, regulation, public services, research, and oversight of implementation.
- Private Sector, Financial Institutions, and Development Partners: These actors drive investment, expand access to finance, and provide technical and financial support for implementation of the Strategy.

07

2036 TARGETS AND RESULTS FRAMEWORK

07 2036 TARGETS AND RESULTS FRAMEWORK

The Strategy establishes a set of long-term impact metrics that will be used to measure transformation of Tanzania's poultry sector over the period 2026–2036. These metrics track progress in sector growth, productivity, commercialization, investment mobilization, food security, nutrition, and inclusion. Together, they provide a high-level measure of the Strategy's contribution to national development objectives and Tanzania Development Vision 2050.

In addition to these impact metrics, the Strategy includes a comprehensive Performance Framework comprising Strategic Performance Indicators (SPIs) linked to each strategic intervention area. These indicators provide a structured mechanism for monitoring implementation progress, tracking results, strengthening accountability, and ensuring that interventions contribute directly to achievement of the Strategy's long-term targets.

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

08

INVESTMENT PLAN

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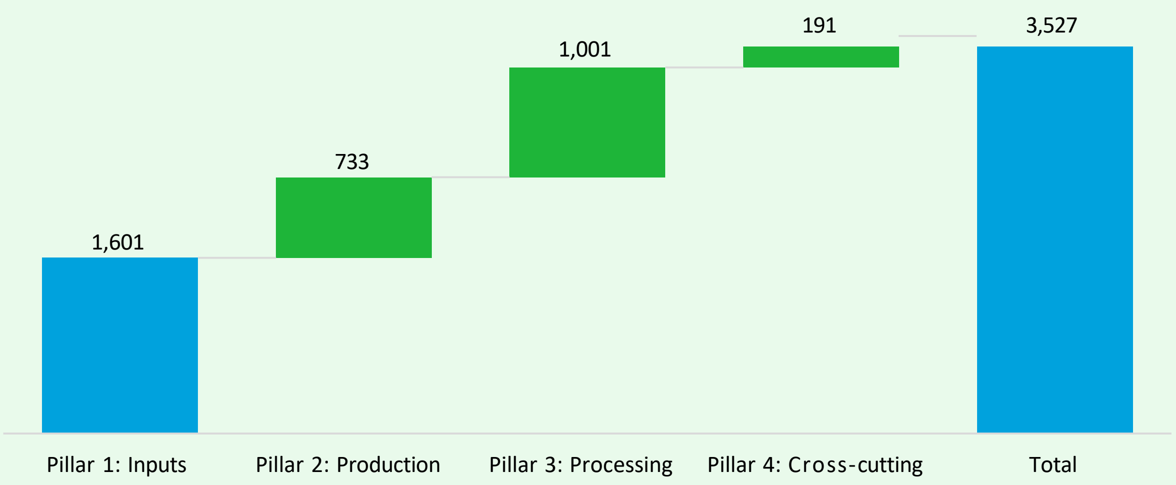
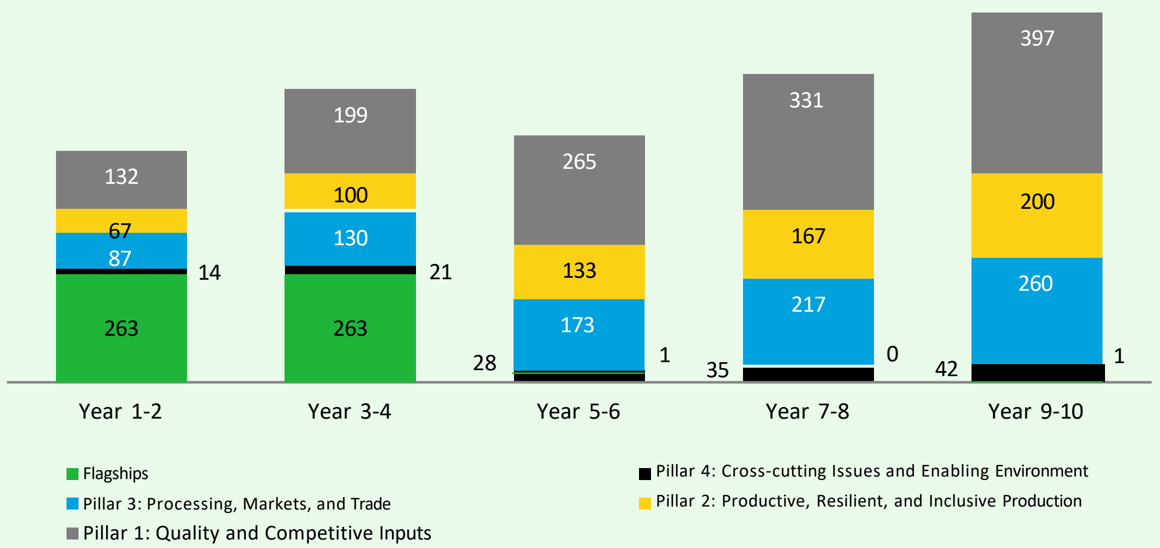
Investment Requirements

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. As illustrated in the figure, **Pillar 1: Quality and Competitive Inputs** accounts for the largest share of investment requirements (**45%**), followed by **Pillar 3: Processing, Markets and Trade (28%)**, **Pillar 2: Productive, Resilient and Inclusive Production (21%)**, and **Pillar 4: Cross-cutting Issues and Enabling Environment (5%)**.

Total strategy budget, by pilar (TZS Billin) 2026-2035

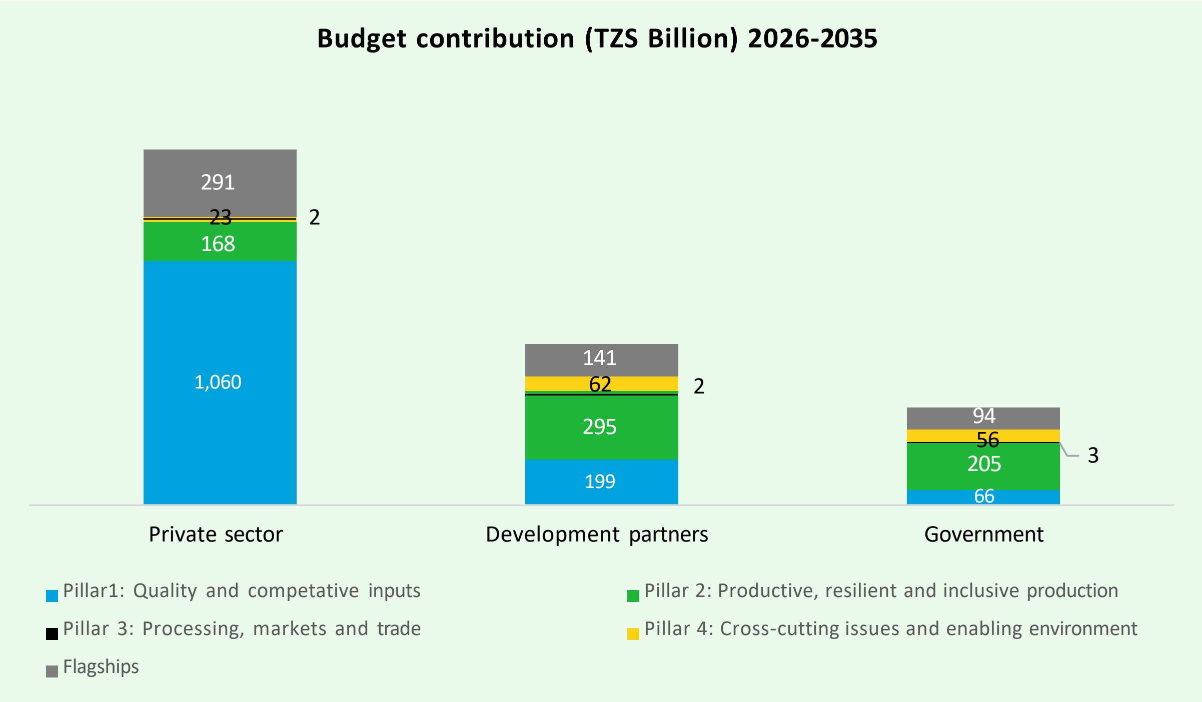


Total strategy budget, by year (TZS Billion) 2026–2035



Sources of Financing

The financing structure reflects the Strategy's private sector-led approach to sector transformation. Approximately **60% of total financing (TZS 2.14 trillion)** is expected to come from private sector investment, particularly in commercially viable areas such as feed production, breeding, hatcheries, commercial farming, processing, logistics, and market infrastructure. Development partners are expected to contribute approximately **25%** of total financing through grants, concessional finance, technical assistance, and blended finance facilities. Government is expected to contribute approximately **15%**, primarily financing public goods, including disease control, research, extension services, regulation, coordination, and institutional strengthening.



09

CONCLUSION

09 CONCLUSION

The National Poultry Development Strategy presents a bold and practical pathway for transforming Tanzania's poultry industry into a modern, competitive, resilient, and inclusive sector. By addressing constraints across breeding, feed production, animal health, processing, markets, financing, research, and institutional systems, the Strategy provides a comprehensive framework for unlocking the sector's full potential.

Successful implementation will require strong collaboration between government, private sector actors, poultry associations, financial institutions, research organizations, and development partners. Through coordinated investment, institutional strengthening, and effective implementation, the Strategy will contribute to improved food security and nutrition, increased employment and incomes, expanded private investment, and enhanced competitiveness of Tanzania's poultry industry in regional and international markets.

The Strategy therefore positions the poultry sector as a strategic driver of economic growth, industrialization, rural development, and inclusive prosperity for Tanzania.

Ministry of Livestock and Fisheries

THANK YOU