Tanzania: Southern Highlands Food Systems

White Meat (Pig and Poultry)
Value Chain Analysis (Publication Version)

Consultant’s Report ( Annexes)
R. Trevor Wilson
25 October 2013
ANNEX 1
DOCUMENTS CONSULTED


SAGCOT. 2010. Supplying the southern corridors. Southern Agricultural Growth Corridor of Tanzania: Dar es Salaam (mimeo)


Silverside D and Pritchard M. 2009. Report on a visit to Tanzania, Malawi and Namibia to identify possibilities for the application of the technologies of hot boning, electrical stimulation and plate freezing to local meat production (Report No R2119 (S). Marketing Research Systems Section, Natural Resources Institute: Chatham UK. http://www.dfid.gov.uk/r4d/PDF/Outputs/R5176b.pdf


ANNEX 2
SUMMARY OF ITEMS EXAMINED IN THIS STUDY

1. Meat production, meat markets and meat processing
   - Overview of production and marketing of meat and processed products
   - Analysis of current meat production, domestic markets, exports and imports, cost structure (purchase price, sales price, wholesale and retail prices by meat grade), overall meat supply balance
   - Profit and loss accounts of meat production by type of production
   - Review of regulatory framework including aspects of food safety, welfare, animal identification and traceability
   - Directions and effectiveness of measures of government support.

2. Production structure
   - Dynamics of livestock population over time
   - Organizational structure of production, profit and loss account of production enterprises
   - Technology in livestock production
   - Production and productivity parameters
   - Livestock breeding situation (performance monitoring systems, station research, role of private sector and producers’ association)

3. Feed resources
   - Rangelands and pastures
   - Fodder and forage
   - Concentrates (including quality control and regulation systems for processed feed, import and export of processed feed and associated quality and customs and tariffs)

4. Animal health and veterinary organization
   - Review of public and private veterinary services
   - Evaluation of situation on production, notifiable and trade diseases including transboundary diseases
   - Effectiveness of prevention and control measures
   - Capacity of medical products industry and provision of vaccines and pharmaceuticals, manufacture of diagnostic preparations and disinfectants, constraints to imports of animal health products
   - Safety level of food and raw materials of animal origin at all stages of lifecycle and level of food safety guarantee measures

5. Analysis of meat processing and consumer goods industry
   - Existing processing enterprises and overview of current situation
   - Dynamics of meat processing by type
   - Volume of consumption by type by season, in rural and urban areas and by ethnic group
   - Dynamics of import and export by type of meat and product
   - Analysis of meat prices and analysis of factors influencing changes in prices
   - Identification of existing barriers (tax, customs, administrative) and shortcomings in development of consumer goods industry
   - Determination of main factors influencing competitiveness; breakdown of costs and analysis of product quality, profit and loss account of processing enterprises
   - Determination of main trends in sector development
   - Analysis of distribution channels on internal and external markets
6. Market analysis

- International experience in meat production and processing, global trends, main factors affecting competitiveness, main trends in import and consumption of meat, determination of main factors influencing competitiveness of production and processing
- Potential markets and niche markets for meat and meat products
- Analysis of prevailing domestic quality and safety standards for meat and meat products, capacity of national producers and processors to comply with such standards, capacity of veterinary and public health services to oversee and enforce regulations

7. Value chain development options (policy, strategy, implementation)

- Analysis of the subsector strengths, weaknesses, opportunities and threats (SWOT)
- Recommendations for improvement of regulatory framework, tariff settings and national standards for meat and meat products
- Required policy support
- Development options for small-, medium- and large-scale livestock enterprises
- Options for development of organizational arrangements
- Recommendations for introduction of modern technology and upgrading of machinery and equipment
- Options for development of a domestic breeding programme.
- Recommendations for establishment of a sustainable feed base based on improved pasture management, preservation and quality systems, options for a compound feed industry
- Review of animal health and food safety measures, compliance with OIE standards, veterinary sanitary and disease prevention measures, diagnosis and treatment of diseases, development of system of livestock identification, establishment of veterinary inspection units and veterinary subsidiaries in local authorities, options for abattoir system and network (with infrastructure for meat cutting, hanging, storing, transport and marketing)
- Options for development of processing industry, viability of meat processing enterprises
- Options for development of the value chain along intermediary sections from production to processing and marketing
- Identification of scientific, human resource and information support requirements
ANNEX 3
STAKEHOLDERS MET

FAO Resident Representative

Nsanya E Ndanshau: National Programme Officer, FAO. Nsanya2002@gmail.com; 0784 359 703

Halifa M Msami: Director of Surveillance and Diagnostic Services, Tanzania Veterinary Laboratory Agency. hmmsami@gmail.com 0754 360 104/0713 847 199

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Ali Munge: Medium Scale Livestock Entrepreneur, Kimbiji, Temeke, Dar es Salaam. 0713 443 786

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Mr X: Owner, Fast Food Outlet, Msasani

Mr Y: Owner, Fast Food Outlet, Msasani

Mr Z: Operator, Fast Food Outlet, Msasani

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Allen Katyale: Medium scale private poultry farmer, Iringa Urban.  akatyale@yahoo.com 0754 444 131/0784 997 448

Bibi Titi Kalange: Traditional smallholder poultry producer, Iringa Urban

Linus Mbiliiny: Medium scale private poultry farmer, Iringa Urban. 0755 006 924

Ahmed H Lulanga: Small scale traditional poultry farmer, Iringa Suburban.  
ahmad.lulanga@gmail.com 0652 310 025

Michael Chonga: Small scale traditional pig producer, Iringa Urban.

Juma Abdallah: Small scale traditional poultry producer, Iringa > Dodoma Road

Julius Kalange: Small scale traditional poultry/pig producer

Martin Magagura: Regional Veterinary Officer, Singida Region.  
mmagagura@yahoo.com 0756 177 081

Richard David: District Veterinary Officer, Singida District Council. 0784 603 884

Madoi Njou: Founder/Leader, Mkombozi Poultry Group, Singida District. 0755 702 585

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Salumu Mugea: Member, Mkombozi Poultry Group, Singida District. 0762 533 647

Josephati Lida: Member, Mkombozi Poultry Group, Singida District. 0763 879 127

Paulina Lumdeay: Member and Community Vaccinatrix,, Mkombozi Poultry Group, Singida District.  
0762 109 929

Alexander Itaeli: Smallholder pig producer

Ivone Tlemai: Smallholder poultry farmer

J Sultan: formerly Livestock Coordinator FarmAfrica Babati Project; independent Consultant to  
Mifugo and animal health advisor to farmer groups associations

Anna Moshi: Professional exotic goat breeder, treasurer Toggenberg Breeders Association

Silvia Mjengo: Member, Toggenberg Breeders Association
Margrit Kijenge: Member, Toggenberg Breeders Association

Saleh S Bathawab: Chairman, Tanzania Poultry Farms Ltd, Momella, Arusha. Tanpoultry@hotmail.com 0784 326 177

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Elirehma Kiangi: Agriculture Field Officer. 0714 121 722

James Mjata: Pig rearer, Lewa Village, Korogwe

Theresa Mjata: Pig rearer, Lewa Village, Korogwe

Charles Kileo: Pig rearer, Lewa Village, Korogwe

Daniel Whiyo: Pig rearer, Lewa Village, Korogwe

Herbert Martini: Pig rearer, Lewa Village, Korogwe

Togolai Shekilenko: Pig rearer, Lewa Village, Korogwe

Justice Mtata: Pig rearer, Lewa Village, Korogwe

Sara Julius: Poultry producer, Lewa Village, Korogwe

Zubeda Julius: Poultry producer, Lewa Village, Korogwe

Rehema Hashimu: Poultry (duck) producer, Lewa Village, Korogwe

Mzee Antony Mdeme: Pig breeder, Weles Village, Korogwe

Mama Kristina Mdeme: Pig breeder, Weles Village, Korogwe

Mzee Deves Kihiyio: Pig breeder, Weles Village, Korogwe

Ibahati Kihiyio: Pig breeder, Weles Village, Korogwe

Several poultry dealers/traders: Korogwe/Chalinze road
The following people were met during the course of the Red Meat Study and have relevance to the White Meat Study

WCH Mleche: Director of Veterinary Services, Ministry of Livestock Development and Fisheries. dvs@mifugo.go.tz, wcmlleche@gmail.com, 0784 358 549

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Aaron PB Luziga: Assistant Director, Livestock and Marketing Information, Ministry of Livestock Development and Fisheries. Aaron7 lz@yahoo.co.uk

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Suzana Kiango: Registrar, Tanzania Meat Board. Suzykiango@hotmail.com, 0713 412 756

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Numerous Butchers and Input Suppliers in Dar es Salaam suburbs

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Judith E Sanga: Office Manager, GS1 (TZ) National Limited. dajudy@gs1tz.org, 0779 62116

Said M Sood: Managing Director, Energy Millers and Animal Feeds, Morogoro Road, Kibaha. 0783 888 888

Yolande du Plessis: Managing Director, Butcher Shop Limited, Masaki, Dar es Salaam. yolande@butchershop.co.tz, 0754 680 660
## ANNEX 4

**POULTRY FEED MANUFACTURING ENTERPRISES IN TANZANIA**

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<tr>
<th>No</th>
<th>Region</th>
<th>Name of animal feed plant</th>
<th>Type of animal feed(s) produced</th>
<th>District</th>
<th>Production capacity (Tons/day)</th>
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<td>VETA Singida</td>
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ANNEX 5
BUSINESS PLAN – MAZIMBU AGRO ENTERPRISES

This Annex is contained in a separate Adobe acrobat file = Tanzwhannex5mazimubusinessplan.pdf
ANNEX 6
PICTORIAL PRESENTATIONS ON PIG AND POULTRY STATISTICAL DATA

Figure Anx7.1 Total number of pigs in Tanzania, 1995-2008

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Figure Anx7.2 Annual growth rate of pigs in Tanzania by period, 1995-2008

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Figure Anx7.3 Numbers of pig in Tanzanian regions, 2008
Figure Anx7.4 Density (number/km$^2$) of pigs in Tanzania regions, 2008
Figure Anx7.5 Total number of domestic fowl in Tanzania, 1995-2008

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</tr>
<tr>
<td>2008</td>
<td>41,895,605</td>
</tr>
</tbody>
</table>

Figure Anx7.6 Annual growth rate of domestic fowl in Tanzania by period, 1995-2008

<table>
<thead>
<tr>
<th>Period</th>
<th>Percent increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995-1999</td>
<td>0.13</td>
</tr>
<tr>
<td>1999-2003</td>
<td>4.32</td>
</tr>
<tr>
<td>2003-2008</td>
<td>5.76</td>
</tr>
<tr>
<td>1995-2008</td>
<td>3.56</td>
</tr>
</tbody>
</table>
Figure Anx7.7 Numbers of domestic fowl in Tanzanian regions, 2008
Figure Anx7.8 Density (number/km²) of domestic fowl in Tanzania regions, 2008
Figure Anx7.9 Total number of broilers in Tanzania, 1995-2008

<table>
<thead>
<tr>
<th>Year</th>
<th>Broiler Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td>184,002</td>
</tr>
<tr>
<td>1999</td>
<td>517,147</td>
</tr>
<tr>
<td>2003</td>
<td>565,712</td>
</tr>
<tr>
<td>2008</td>
<td>584,028</td>
</tr>
</tbody>
</table>

Figure Anx7.10 Annual growth rate of broilers in Tanzania by period, 1995-2008

<table>
<thead>
<tr>
<th>Period</th>
<th>% Growth rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995-1999</td>
<td>29.48</td>
</tr>
<tr>
<td>1999-2003</td>
<td>2.27</td>
</tr>
<tr>
<td>2003-2008</td>
<td>0.64</td>
</tr>
<tr>
<td>1995-2008</td>
<td>9.29</td>
</tr>
</tbody>
</table>
# ANNEX 7

## VERTICALLY INTEGRATED POULTRY PRODUCTION ENTERPRISES IN TANZANIA

<table>
<thead>
<tr>
<th>Company</th>
<th>Location</th>
<th>Products</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mkuza Chicks Ltd</td>
<td>Kibaha (Pwani)</td>
<td>Broiler DOC/a, Layer DOC, Chicken Meat</td>
<td>Broiler Parent Stock 41,000; Layer Parent Stock 24,000; Broiler birds 35,000 per batch; Hatchery capacity 520,000 per month; Broiler processing plant 24,000 birds per day [would not allow consultant to visit]</td>
</tr>
<tr>
<td>Kibaha Education Centre</td>
<td>Kibaha (Pwani)</td>
<td>Broiler DOC, Layer DOC, Poultry feeds</td>
<td>Broiler Parent Stock 16,400; Layer Parent Stock 4,600; Hatchery capacity 240,000 per month [no poultry activities in January 2013]</td>
</tr>
<tr>
<td>Ruvi JKT Poultry Farm</td>
<td>Bagamoyo (Pwani)</td>
<td>Broiler DOC, Layer DOC</td>
<td>Broiler Parent Stock 3800; Hatchery capacity 20,000 per month; Indigenous fowl (Kuchi and Vishingo) 5,400</td>
</tr>
<tr>
<td>Euro Poultry(T) Ltd</td>
<td>Mkuranga (Pwani), Temeke (Dar es Salaam)</td>
<td>Broiler DOC, Layer DOC, Hatching eggs, Table eggs, Poultry feeds</td>
<td>Layer Parent Stock 65,000; Broiler Parent Stock 48,000; Hatchery capacity 460,000 per month. Hatching eggs supplied to Interchick 20,000 per week and Twiga 8,000 per week; Commercial layers 40,000</td>
</tr>
<tr>
<td>Tomatho Holdings Ltd</td>
<td>Kibaha (Pwani)</td>
<td>Broiler DOC</td>
<td>N/A</td>
</tr>
<tr>
<td>Visiga</td>
<td>Kibaha (Pwani)</td>
<td>Hatching eggs, Table eggs</td>
<td>Layer Parent Stock 19,116; Broiler Parent Stock 28,109; Hatchery capacity 62,000 per batch</td>
</tr>
<tr>
<td>Ideal Chicks Ltd</td>
<td>Kinondoni (Dar es Salaam)</td>
<td>Broiler DOC, Layer DOC</td>
<td>Broiler Parent Stock 32,000 [not operating in January 2013]</td>
</tr>
<tr>
<td>Twiga Feeds</td>
<td>Kinondoni (Dar es Salaam)</td>
<td>Broiler DOC, Layer DOC, Poultry feeds</td>
<td>Broiler Parent Stock 52,000; Hatchery capacity 80,000 per month, Broiler processing plant</td>
</tr>
<tr>
<td>Interchick Co Ltd</td>
<td>Kinondoni (Dar es Salaam)</td>
<td>Hatching eggs, Chicken meat</td>
<td>Broiler Parent Stock 14,000; Layer Parent Stock 2500; Hatchery capacity 120,000; 54,000 chicks per week</td>
</tr>
<tr>
<td>Kiluvya Chick Company</td>
<td>Kinondoni (Dar es Salaam)</td>
<td>Broiler DOC, Layer DOC</td>
<td>N/A</td>
</tr>
<tr>
<td>Tanzania Poultry Farms Ltd</td>
<td>Momella (Arusha)</td>
<td>Broiler DOC, Layer DOC</td>
<td>N/A</td>
</tr>
<tr>
<td>Kijenge Animal Products Ltd</td>
<td>Arusha municipality</td>
<td>Broiler DOC, Poultry Feeds</td>
<td>N/A</td>
</tr>
<tr>
<td>Kibo Poultry Products Ltd</td>
<td>Moshi municipality</td>
<td>Broiler DOC, Layer DOC, Spent layers</td>
<td>N/A [allowed visit but refused to provide information in January 2013]</td>
</tr>
<tr>
<td>Missenani Agri-Services</td>
<td>Ilemela (Mwanza)</td>
<td>Broiler DOC, Layer DOC</td>
<td>Broiler Parent Stock N/A; Layer Parent Stock 5,500; Hatchery capacity 82,000 per month</td>
</tr>
<tr>
<td>Mama Vero Mushi Farm</td>
<td>Mwanza municipality</td>
<td>Table eggs</td>
<td>Commercial layers 5,800; Egg production 45,000 per month</td>
</tr>
<tr>
<td>Songwe Poultry Farm</td>
<td>Mbeya</td>
<td>Broiler DOC, Layer DOC</td>
<td>N/A</td>
</tr>
<tr>
<td>Mateka Poultry Farm</td>
<td>Songea Ruvuma</td>
<td>Table eggs</td>
<td>Commercial layers 6,000; Egg production 135,000 per month</td>
</tr>
<tr>
<td>Peramiho Poultry Farm</td>
<td>Songea Ruvuma</td>
<td>Table eggs</td>
<td>Commercial layers 12,000; Egg production 225,000 per month</td>
</tr>
</tbody>
</table>

**Note:** a: Day old chick
Vision:
To be the leader in Poultry Industry in the region and expand the business locally and export outside the country.

Core Business and Values:
Meet our client expectations, by producing the highest quality frozen and chilled chicken in a highly hygienic environment.
As always, we ensure our client with quality, and the attachable standards services, that consists transparency, honesty, fairness and customer’s confidentiality in our day to day responsibilities.

Mission:
We are committed to provide the highest quality of frozen/chilled chicken and excellent service to our clients.

Contact Us:
Kiliagro & Livestock Products Limited
P.O. Box 336
Arusha - Tanzania.
Cell: +255 732 071742
+255 732 977763
Email: info@kiliagro.com
Web: www.kiliagro.com

K.L.P Background:
Kiliagro & Livestock Products Limited (K.L.P), is under the umbrella of Bafunabs Investments Group which is a private business company dealing with both locally and internationally. K.L.P aims to be the number one producer of chicken products in Tanzania under the recognition of TSC.

Management:
We have dedicated management team, who are highly experienced in poultry industry. Most of the management personnel are in middle age, thus ensuring the efficiency, teamwork, activism and goals orientated. K.L.P also incorporates a training and support scheme to improve the level of local growers of chicken in the industry.

Location:
K.L.P is located in Arusha Region at Mbuguni/Meremans road, which is approximately 37 Kms away from Arusha Town. The location is the most appropriate area to conduct poultry business as it guarantees the most hygienic and pollution free environment in order to grow healthy chicken.

Our Motto:
We are about the CHICKEN.
ANNEX 8
INVESTMENT OPPORTUNITIES IN THE LIVESTOCK SECTOR IN TANZANIA

BACKGROUND

Policy and Legal Framework
Tanzania has an open market economy. Government’s role remains to formulate conducive policies and enabling legal frameworks which pave the way for private sector growth and development. In the process of implementing these policies, among other things, Tanzania has launched ‘kilimo kwanza’. This initiative aims at facilitating involvement of the Private Sector in agricultural activities which includes livestock farming. Thus, ‘kilimo kwanza’ is government’s commitment in promoting investment in the livestock sector.

In order to promote private investment Tanzania Investment Centre (TIC) has been established. TIC is the focal point for all investors’ inquiries and facilitation of project startups, encourage joint venture investment and dissemination of investment information. It also serves as a one-stop centre for providing information about land acquisition, taxes, exemptions and other investment incentives packages.

National Livestock Policy
The National Livestock Policy (2006) aims at stimulating development of livestock industry in order to exploit the available potentials to increase its contribution to the national economy while ensuring environmental conservation. Secondly, it recognizes the importance of the private sector in promoting a commercialized livestock industry. In addition, the policy is amongst many of the initiatives that invite and open wide the door to the private sector investments. Various acts have been enacted for effective policy implementation and regulation of the industry; these include Veterinary Act No. 16 of 2003; Animal Diseases Act No. 17 of 2003; Dairy Industry Act No. 8 of 2004; Meat Industry Act No. 10 of 2006; Hides and Skin Act No. 18 of 2008; Animal Welfare Act No. 19 of 2008; Livestock Identification, Registration and Traceability Act No. 12 of 2010 and Grazing-land and Animal Feed Resources Act No. 13 of 2010.

INVESTMENT ENVIRONMENT

Political Stability and Related Factors
Tanzania has enjoyed political stability for about half a century since independence. This is due to the existence of democratic institutions which have contributed effectively towards good governance, human rights observance, rule of law and ethnic and diversity stability. Tanzania is, also, a signatory to various international conventions and protocols which, among others, call for observance of issues on human rights, good governance, gender and environment.

Market Access
With the estimated 40 million people, Tanzania offers sufficient market for agricultural products and in particular livestock and livestock products. The national economy has been growing steadily at around 5–6 per cent annually between 2005 and 2009. In addition to the domestic market, the East African Community (EAC), comprising Kenya, Uganda, Rwanda, Burundi and Tanzania offers potential markets for investors. Beyond the EAC there are at least three other markets to which investors in Tanzania have access. One is the Southern African Development Community (SADC)
with its 215 million consumers; another is the European Union, to which Tanzanian exports have access arrangement under the EU’s Everything But Arms (EBA) initiative; and the third is the United States, to which Tanzania has access under the provisions of the African Growth and Opportunity Act (AGOA). Also, Tanzania has seaport, inland water ports; land and air links which provide it with reliable access to export markets.

**AREAS OF INVESTMENT**

**Pig Production**
More than 90% of the 1.9 million pigs in Tanzania are kept by small scale farmers mostly in the Southern and Northern Highlands under traditional production system. In addition, pork demand is increasing in urban and periurban areas due to the increasing customer’s preference for its delicacy. However, the current production does not suffice the increasing demand for the domestic and export markets. Therefore, pigs production can be improved through proper husbandry practices, adequate support services, diseases control and appropriate slaughter and marketing infrastructure. Intensive pig production for commercial purposes is limited to very few farmers with a regular income, mainly to meet the high cost of concentrate feeds among other requirements.

Areas for investment in pig industry include:

- Establishment of breeder’s farms
- Establishment of commercial farms
- Establishment of slaughter and processing plants.

**Poultry Production**
The poultry production system in Tanzania is of two type’s i.e. traditional and commercial production. The current production is estimated at 58.0 million chickens (indigenous 23.0 and commercial 35.0) and 1.2 million ducks. Poultry production has a lot of opportunities for the private sector investment. The Small and Medium Enterprises have managed to increase numbers of local chicken from 27 million in 2001 to 30 million in 2006 while the commercial stock increased from 20 million to 25 million. On average 5.5 million hatching eggs and 1 million day-old parent chicks are imported annually to produce a total of 25 million day-old chicks for commercial purposes. This figure is low compared to the current requirement of 60 million day-old chicks per year. Egg production has increased from 2.4 million in 2007/2008 to 2.9 billion in 2009/2010. The observed increase is due to sensitization on good poultry husbandry practices and use of thermostable New Castle Disease vaccine. The per capita consumption of eggs has increased from 50 eggs to 75 eggs per person per year. The rising demand for day-old chicks, meat and eggs calls for more investments.

The areas for investment in poultry industry include:

- Establishment of breeders farms for grand and parent stock
- Establishment of commercial layers and broiler farms

**Animal Feeds**
Animal feed are important inputs in livestock production which counts more than 70 per cent of the production costs. The main types of animal feed resources available in Tanzania are pastures, fodder crops, crop residues and compounded feeds. However, ruminants in the country depends on natural pastures for about hundred percent. The area for grazing and pasture production is dwindling due to increased land requirement for crop production and climatic change, this has lead to a seriously shortage of the pastures during dry season and conflicts between livestock and crop farmers. In observance of this the government decided to demarcate land area specifically for livestock grazing and pasture production. Land demarcated for pasture development for livestock is about 1,890,419.19 ha in 17 regions of Tanzania Main Land. Potential areas for investing for pasture production are southern, central, lake and western zones.
Compounded Animal Feeds
Compounded feedstuffs production is estimated at 800,000 tons per annum while the potential demand stands at 2.5 million tons. There are about 57 animal feed mills/plants in the country which are not operating to their optimal capacity and most of them are located in Dar es Salaam, Coast, Arusha and Mwanza regions.²

Existing Potentials

- Skilled and experienced human resource in animal feed production;
- Availability of feed ingredients: main ingredients are cereals and their byproducts, seed cakes (sunflower, cotton), fish meal, limestone, bone meal, blood meal are abundantly found in the country easily;
- High demand for compounded animal feeds for the emerging commercial livestock production;
- Potential for own cereal and soya beans production³;
- Minimal imposed tax for packing bags; and
- Available land for building factories/industries.

² See Annex 5 for a partial list of feed mills

³ A very rough estimate of the requirement of yellow maize and soya bean supplied as a supplement (not as a complete ration) at 1 kg per day of each commodity for pigs and 50 g per day for poultry for the 1.5 million pigs and 45.5 million poultry (see Section 1.3 Brief Overview of the Value Chain, page 2 of the main text) in the country would be 3875 tonnes per day or 1.41 million tonnes per year each of yellow maize and soya bean. The maize requirement represents about 30 per cent of Tanzania’s average annual maize production in the period 2002-2011 and it would therefore be necessary to plant an additional area in excess of 1 million hectares (current maize area 3.29 million ha) to supply this amount of feed to pigs and poultry. Soya production in the period 2002-2011 averaged about 3000 ha at a yield of 800 kg/ha for a total production of about 2500 tonnes per year: to supply home grown soya bean to livestock would require almost 2 million ha of soya to be grown.