



# Cooking Ingredients and Meals in Tanzania

December 2025

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## Cooking Ingredients and Meals in Tanzania

### EXECUTIVE SUMMARY

Growth in retail current value sales moderates in 2025

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Government seeks to reduce dependence on imported palm oil

Affluent consumers drive growth in demand for sweet spreads

Health and wellness claims increasingly prominent

#### WHAT'S NEXT?

Sweet spreads to be the most dynamic category

Innovation will focus on health and wellness

Government looks to excise duties to stimulate domestic production

#### COMPETITIVE LANDSCAPE

Meli Group leads thanks to the enduring popularity of Mo Safi

#### CHANNELS

Small local grocers remain dominant

Affluent, urban consumers increasingly prefer supermarkets

E-commerce an emerging distribution channel

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Key Data Findings

2025 Developments

Palm oil dominates, with sunflower oil accounting for most of the remainder

Industry Performance

Palm oil dominates, with sunflower oil accounting for most of the remainder

Imports account for half of consumption

What's Next?

Rising local production will help keep palm oil affordable

Sunflower oil output to expand

Health and wellness will grow in importance

Competitive Landscape

Hill Group Tanzania Ltd gains ground on incumbents

Small-scale, artisanal manufacturers remain key

## Channels

Small local grocers remain dominant

Supermarkets appeal to high-income consumers in urban areas

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#### 2025 Developments

Dry soup remains dominant

#### Industry Performance

Availability remains very limited

No culture of consuming ready meals

Dry soup increasingly used as a base for home-made soups

#### What's Next?

Accelerating urban consumer lifestyles will buoy growth

Products with health-and-wellness positioning will see increased demand

Rising tariffs could provide a growth opportunity for local manufacturers

#### Competitive Landscape

Unilever Group remains dominant

Local brands proliferate

## Channels

Small local grocers remain dominant

## Category Data

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### Key Data Findings

#### 2025 Developments

Price-sensitive consumers prefer small pack sizes and dried or powdered offerings

#### Industry Performance

Urbanisation and rising disposable incomes support robust growth

Tomato pastes and purées the most popular category

Stock cubes and powders widely used

#### What's Next?

Increased demand for convenience will be a key growth driver in urban areas

Consumers shifting towards natural and organic flavour enhancers

Local brands will grow in prominence

Competitive Landscape

Leader Darsh Industries Ltd's Red Gold benefits from widening distribution

Competitive landscape remains highly fragmented

American Garden Products and Unilever the leading international brands

Channels

Small local grocers remain dominant

Supermarkets gain ground

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Key Data Findings

2025 Developments

Peanut butter increasingly seen as a tastier and healthier alternative to margarine

Industry Performance

Nut and seed based spreads dominate

Peanut butter widely popular

Honey remains a niche

What's Next?

Nut and seed based spreads will remain dominant

Increased awareness of health and wellness represents a growth opportunity for honey

Introduction of excise duty on imported margarine could boost demand for peanut butter

Competitive Landscape

GFP Ltd and Darsh Industries strong in jams and preserves

Rosho gains traction with locally produced cashew butter

Channels

Small local grocers the dominant, and most dynamic, channel

Imported sweet spreads mainly distributed through supermarkets

E-commerce an emerging channel

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