# GOVERNANCE AND STANDARDS: SHAPING TANZANIAN HORTICULTURAL EXPORT MARKET ACCESS

**FOSTA-HEALTH | EVIDENCE BRIEF 1 | JANUARY 2026**

## TANZANIA POLICY CONTEXT

In Tanzania, the horticultural sector is a key driver of economic growth, job creation, and foreign exchange earnings, and poverty eradication. The sector has expanded significantly, with exports rising from USD 64 million in 2004 to USD 417.7 million in 2023- up 43.9% from the previous year (USD 290.01 million) – and aims to reach USD 2 billion by 2030. Since 2014, exports have grown consistently, and the sector's share of agricultural exports reached 38% in 2022. Growth is supported by national policies such as Tanzania Agriculture Master Plan 2050, Agriculture Sector Development Programme (ASDPII), Export Processing Zone Act 2006, Cooperative Societies Act 2013, and Agricultural Marketing Policy (2008). Horticultural crops are recognized as 'Priority Commodity Value Chains' (CVC) for their role in food security, nutrition smallholder livelihoods and industrialization. Alongside production expansion, the Government of Tanzania prioritizes horticulture as a strategic export sector and seeks to boost competitiveness in international markets.

For instance, Tanzania launched a TSh4 trillion National Horticulture Development Strategy and Action Plan 2021-2031 (HDSAP) to guide the sub-sector towards being "*vibrant and sustainably competitive in the domestic, regional and international markets*" (ppV). Additionally, the 'Horticulture Exports Accelerator Programme' (HEAP) - a collaboration between the Tanzania Horticultural Association (TAHA) and the Tanzanian High Commission in the UK - aims to increase horticulture exports to the UK and Europe, targeting USD 2 billion export value by 2030.

## FOSTA-HEALTH FOCUS

**Despite policy commitment** and widespread implementation of export-oriented programmes, **access to export markets is constrained by strict sanitary and phytosanitary (SPS) regulations on pesticide residue limits, and an expanding set of private standards** (e.g., GlobalGAP, BRC, SMETA) required by large retailers. **Navigating these trade regulations is challenging** for producers, exporters, and regulators. **Smallholder farmers, who dominate the sector, often fail to meet these demanding requirements due to limited capacity and weak enforcement standards.**

**The FoSTA-Health project examined the effectiveness and equity of food safety and quality regulations within Southern Africa and with key partners, specifically the EU.** The goal was **to understand the complex governance landscape across international, regional, and national levels, identifying opportunities, risks, and challenges in food safety, quality, and trade regulatory frameworks.** We focused on mechanisms of equivalence, harmonisation, and enforcement of global standards that influence Tanzania's competitiveness in global horticultural trade.

## RESEARCH CONDUCTED

**METHODS:** This brief draws on an extensive review of food safety and quality regulations governing trade in Southern Africa and the EU, focusing on Tanzania and Zambia. Using a multi-sited, multi-disciplinary approach, we mapped the regulatory landscape and analysed its impact on regional food systems.

A comprehensive review of national (e.g., TPHPA, ZABS), regional (EAC, SADC, AfCFTA), and international (EU) standards, combined with stakeholder consultations involving smallholder farmers, private exporters, and regulatory bodies (e.g., TARI, TBS, TOAM, ZABS) to identify implementation gaps. Pesticide regulation served as the entry point for cross-country comparison.

Field work was based in Tanga, Kilimanjaro and Mbeya Regions covering multiple wards and included:

- 162 interviews with producers, intermediaries/buyers, and exporters

- 15 interviews with local leaders (Village and Ward Executive Officers)

- 12 focus group with smallholders

- Photovoice activities with 10 smallholder farmers in Tanga

- 76 key-informant interviews with government officials, private sector, academia, and international/bilateral development agencies.

**ANALYSIS:** All transcripts were transcribed into English and analysed thematically using NVivo software.

## STUDY CONTEXT

This research focused on horticultural value chains undergoing rapid export-oriented transformation in Tanzania – spice, citrus, avocados and snow peas – and on soya beans in Zambia. Data collection was concentrated in the East and West Usambara Mountains of Tanga Region, Kilimanjaro, and Mbeya Regions - areas undergoing significant agricultural and trade shifts.

The FoSTA-Health project explored the risks and rewards in engaging in export-oriented horticulture and examined the relationship between women's empowerment and market engagement. Findings provide insights into opportunities and challenges posed by food safety regulations in export production. See Evidence briefs No2 and No3 for detailed analysis of risks and rewards in export-oriented horticultural value chains and women's empowerment and smallholder farmer aspirations, respectively.

## KEY FINDINGS

Key cross-cutting challenges identified by the FoSTA Health project include **high compliance costs disproportionately affecting smallholder farmers; weak institutional capacity and coordination causing bureaucratic duplication; and gender disparities**, where women provide much agricultural labour yet are often excluded from training, contracts, and decision-making – undermining food safety initiatives. Key findings are outline below:

**The research reveals structural trends in regional food system transformation**: As food systems become more market-oriented, benefits (profits and financial security) are increasingly pushed up the supply chain, while costs and risks (non-compliance risk, waste, food affordability issues, and exposure to unsafe food) are pushed down onto resource-poor producers and consumers. Notably, middlemen, cooperatives and farmer groups are taking on the role of enforcing governance and standards.

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**Limited regional harmonisation of standards**: The research found that efforts to streamline regional trade are hindered by gaps between agreed regional frameworks and national implementation at the national level, as well as equivalence gaps among member states. For example, EAC has 642 standards, including 44 standards for horticultural products (fruits, vegetables, herbs, and spices), yet Tanzania has adopted only three, creating friction and adding costs for exporters. These standards focus mainly on quality, not food safety, allowing sale of unsafe fruits and vegetables across the EAC. SADC faces even greater challenge, lacking any harmonized standards, leaving states to apply their own. These limitations restrict trade. To address this, the Regional Economic Communities (EAC, COMESA, and SADC) have formed a Tripartite Sanitary and Phytosanitary (SPS) Measures sub-committee to harmonize measures and boost inter-regional trade.

**Overlaps within national food safety bodies:** The research shows that Tanzania's regulatory framework is complex, involving five ministries and multiple agencies, including the Tanzania Bureau of Standards (TBS) and the Tanzania Plant Health and Pesticides Authority (TPHPA). Poor coordination leads to duplication, bureaucratic hurdles, and confusion for exporters seeking compliance and certification.

**Implementation of standards in practice**: The research found that enforcement of food safety and quality standards is largely driven by private exporters through field officers and out-grower schemes, ensuring farmers meet international requirements. This highlights a gap in public service delivery, as government enforcement focuses mainly at export handling centres (ports/borders) rather than production, leaving a major regulatory gap at farm level.

**Case Study Highlight - Regulatory Environment Challenges:**

- **Over regulation and high compliance burden:** Multiple overlapping food safety and quality standards - national, regional, and international - create high compliance burdens, particularly for smallholder farmers, aggregators and cooperatives, and exporters. While exporters/processors cover certification costs, farmers indirectly pay this cost through lower prices, reducing profitability.
- **Need for farm-level integration:** Research highlights the importance of linking regulatory promotion efforts (from TARI/TBS) with farm practices to improve compliance with EU import standards, focusing particularly on women farmers' market access.
- **Pesticide regulation:** Analysis shows a major disconnect between policy and practice, creating barriers to trade compliance and risks to environmental and human health.
- **Lack of incentives for organic production:** Avocado and spice farmers with 'organic by default' practices rarely receive higher prices than conventional produce, limiting motivation for formal organic certification.
- **Gender equity and information access**: Effective governance depends on stakeholder capacity and access to information, yet training and contracts mainly target men, who are perceived as the landowners, assuming they share knowledge with spouses. This exclusion limits women's access to food safety information, rules and skills and financial benefits.
- **Risk from new EU organic rules:** EU Organic Regulation 2018/848 (effective December 2024) requires direct compliance with complex EU rules. Farmer associations must be legally registered, organized, and accountable – posing major governance and capacity challenges.

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**Addressing regulatory gaps within domestic production and supply chains:** Our research found a stark regulatory gap between the stringent export requirements and minimal oversight of the domestic market. While processed foods have detailed safety standards, fresh food faces weak regulation and enforcement of safety standards and SPS measures. This exposes consumers to food safety risks and misses opportunity to build a national baseline of quality. It also fails to help smallholders build capacity and practices needed to transition into higher-value export markets.

## FINAL REFLECTION

Addressing the issues outlined requires a multi-pronged approach focused on strengthening domestic regulations, enhancing regional harmonization, building institutional and farmer capacity, and promoting gender-inclusive policies.

## QUESTIONS FOR STAKEHOLDERS

1. How can food safety regulations be reformed to reduce compliance costs for smallholders while addressing social and gender inequality?
2. What strategies can harmonize pesticide regulations across EAC and SADC, strengthen enforcement, and support smallholder compliance with export standards?
3. What policy levers and incentives can ensure private-sector actors share benefits and absorb more compliance costs for smallholders?
4. How can government bodies improve capacity, make compliance information accessible in local languages, and guarantee women equal access to training and food safety knowledge?
5. What approaches can help smallholder organic producers adapt to the EU's new compliance rules

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