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Report Highlights:

Zanzibar presents strong potential for U.S. food and beverage exports, driven by tourism, urbanization, and demand for quality products. With over 80 percent of food imported, key opportunities include beverages, wheat, poultry, oil, confectioneries, and rice. The U.S. can leverage its quality advantage amid strong competition to expand its market share.

Executive Summary:

Zanzibar, recognized as a lower-middle-income economy, has demonstrated steady growth driven by tourism, trade, agriculture, and infrastructure development. In 2024, the region recorded a 6.2 percent economic growth rate, contributing to Tanzania’s overall GDP of \$79.2 billion, although it is not ranked separately in global indices. Its economy remains closely tied to agricultural exports and tourism, solidifying its role as a regional trade hub with growing economic potential. Zanzibar is a leading global producer of spices, including cloves, nutmeg, cinnamon, and black pepper, alongside seaweed, coconuts, and tropical fruits, which constitute a substantial portion of its exports. Additionally, its beverage industry produces carbonated soft drinks, juices, and bottled water, benefiting from investments in food processing and packaging.

Consumer-Oriented Agricultural Imports

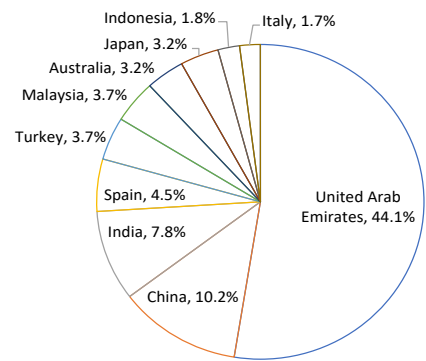


Figure 1: Top Exporting Countries to Zanzibar
Source: Zanzibar National Bureau of Statistics

Food Retail Industry:

With a population of approximately 1.85 million people, Zanzibar’s food retail sector is supported by traders, supermarkets, and grocery stalls, providing access to a diverse range of consumer products, including internationally imported food brands. In 2022, the total import value of consumer goods recorded a substantial increase, reflecting heightened demand for processed foods, beverages, and household essentials. The sector’s expansion is driven by urbanization, tourism growth, and rising consumer purchasing power, contributing to increased market activity and product availability.

Food Processing Industry:

Zanzibar’s food processing industry is a key driver of economic growth, supported by agro-processing, seafood processing, and spice production. Dominated by SMEs, the sector has expanded with modern facilities and packaging technologies, boosting efficiency. In 2022, food and beverage imports reached \$43.5 million, reflecting rising demand. Growth is fueled by tourism, population increase, and consumer spending.

Food Service Industry:

Zanzibar’s food service industry is growing, fueled by tourism, urbanization, and rising consumer demand. In 2024, the island welcomed 736,755 tourists, which led to expansion in the hotel, restaurant, and institutional (HRI) sector over five years. In 2022, food and beverage imports totaled \$43.5 million, reflecting demand for diverse products. The sector blends local ingredients with imported goods to meet evolving consumer preferences.

Table 1: Strengths/Weaknesses/Opportunities/Threats

Category	Strengths	Weaknesses	Opportunities	Threats
Market Access	Established trade ties and demand for U.S. poultry and processed foods.	Regulatory hurdles, including import duties and compliance requirements.	Strengthening trade partnerships to improve market entry and distribution.	Competition from dominant regional exporters such as India, Indonesia, and the UAE.
Consumer Demand	Expanding luxury hospitality and retail sectors raise demand for premium products.	Limited consumer awareness of U.S. brands and products.	Growing preference for health-conscious and specialty foods creates new market openings.	Economic fluctuations impacting import demand and pricing stability.
Supply Chain & Logistics	Growth in food processing supports demand for imported ingredients and additives.	Limited cold chain infrastructure affects perishable food imports.	Investments in storage and transport improvements can enhance supply chain efficiency.	Environmental and resource management challenges affect trade and distribution
Regulatory & Trade Policies	Government-backed foreign investment initiatives support trade expansion.	Bureaucratic processes and import restrictions create barriers to entry.	Policy reforms and trade agreements could ease market access for U.S. exporters.	Changing trade policies and tariffs introduce uncertainties in market stability.
Agricultural & Food Trends	Strong demand for high-quality processed foods and specialty agricultural products.	Local food processing capacity remains underdeveloped, limiting production efficiencies.	Innovation in sustainable agriculture and food processing presents growth potential.	Climate change and environmental factors influence long-term agricultural stability.

Quick Facts CY 2024

Imports of Consumer-Oriented Products (US \$1.08 billion)

Top 10 consumer-oriented products imported from the U.S. to Zanzibar

1. Frozen Chicken
2. Dairy Products (Milk Powder, Cheese, Yogurt)
3. Processed Foods (Snacks, Canned Goods, Packaged Meals)
4. Edible Oils (Soybean, Sunflower Oil)
5. Beverages (Soft Drinks, Juices, Alcoholic Drinks)
6. Wheat Flour & Grains
7. Seafood (Frozen Fish, Shrimp)
8. Spices & Condiments
9. Confectionery (Chocolate, Sweets, Baked Goods)
10. Health & Specialty Foods (Organic, Fortified Products)

Food Industry by Channels (U.S. Million)

Retail Food Industry	\$43.5
Food Service-HRI	\$54.2
Food and Agriculture Exports	\$21.41

Top 10 Host Country Retailers

1. Darajani Bazaar
2. Emirates Leisure Retail Zanzibar
3. Suvacor Ltd
4. Zanj Spice LTD
5. Radha Vegetarian Food House
6. Zuhura Food Stuff
7. Zanzibar Sea Food
8. ZMMI Wines & Spirits
9. Zanchick Maruhubi
10. Drop of Zanzibar

GDP/Population

Population (millions):1.85
GDP (billions USD):2.32
GDP per capita (USD):1,265

Sources:

National Bureau of Statistics Tanzania
Zanzibar National Bureau of Statistics

Section I: Market Overview

Zanzibar's Key Economic Trends

Table 2: Zanzibar Key Economic Trends, 2019-2024

Economic Trends	2019	2020	2021	2022	2023	2024
Population (millions)	1.63	1.67	1.71	1.76	1.8	1.85
Informal Sector Employment (thousands)	1,330	1,365	1,391	1,430	1,470	1,510
Public Sector Employment (thousands)	39	42	45	49	53	57
Nominal GDP (in billion USD)	1.775	1.806	1.878	1.974	2.15	2.32
GDP per capita (USD at PPP)	1,115	1,099	1,098	1,115	1,194	1,265
Real GDP growth rate (%)	7	1.3	4	5.1	5.8	6.2
Inflation (%)	2.7	3.4	3.2	3.4	3.9	4.1

Source: Zanzibar Bureau of Statistics

Zanzibar's economy has maintained consistent growth, with real GDP rising to 6.2 percent in 2024, driven by tourism, trade, and infrastructure development. Inflation has remained controlled, while employment in both informal and formal sectors has continued to expand. The nominal GDP shows a positive trajectory, underscoring the region's economic resilience and diversification.

The business climate reflects steady progress, supported by key sectors such as tourism, trade, and agriculture. By the end of 2024, the population had reached 1.85 million, with a growing middle class significantly influencing consumption patterns and driving demand for diverse food products. With an economy valued at USD \$2.32 billion in 2024, purchasing power and consumer behavior, particularly in urban areas, are evolving. While formal employment remains concentrated in the public sector, the informal sector continues to dominate labor opportunities.

Recent trends highlight diversification beyond traditional industries, with marked improvements in trade, financial services, and infrastructure development. In the food sector, investments in modern processing facilities and packaging technologies have enhanced local production, while food and beverage imports, valued at USD 43.5 million in 2022, continue to meet growing consumer needs. Future growth is anticipated in Agro-processing and seafood production, propelled by tourism, and urbanization. Strategic initiatives aimed at sustainable development are set to bolster Zanzibar's position as a key player in regional trade and food markets.

Table 3: Advantages and challenges faced by U.S. exporters in Zanzibar's market

Advantages	Challenges
Zanzibar's growing urban population and expanding middle class create demand for premium imported food products.	Imported goods are often perceived as luxury items, making affordability a challenge for lower-income consumers.
The tourism sector drives demand for high-quality and diverse food products, offering opportunities for U.S. exporters.	Strong competition from European suppliers, who are often associated with sophistication and tradition.

Importers actively seek new-to-market products to cater to evolving consumer preferences and niche markets.	Importers may purchase small quantities to test the market, which can conflict with U.S. exporters' bulk-selling practices.
Zanzibar's focus on agro-processing and food sector development aligns with U.S. expertise in food technology and innovation.	Regulatory hurdles and tariffs can pose barriers to entry for U.S. exporters in Zanzibar's market.
Rising demand for non-GMO, organic, and plant-based products provides a competitive edge for U.S. suppliers.	Perceptions of U.S. food products as overly processed or less healthy compared to local or traditional options.
U.S. exporters benefit from advanced logistics and supply chain capabilities, ensuring timely delivery of goods.	Limited infrastructure in Zanzibar can increase costs and complicate distribution of imported products.

Section II: Exporter Business Tips

Market Research

Comprehensive market research is crucial for exporters seeking to establish a presence in Zanzibar. The island's growing urban population and expanding middle class provide substantial opportunities for high-quality imported food products. Identifying consumer preferences, evaluating competitive landscapes, and understanding regulatory frameworks will equip exporters with the knowledge needed to succeed. Reliable resources such as GAIN Reports offer valuable insights into trade patterns, agricultural production, and evolving market dynamics. Additionally, engaging with local stakeholders and distributors can refine strategies for market entry.

Local Business Customs and Trends

Business in Zanzibar is relationship-driven, emphasizing trust and collaboration. Exporters must prioritize building long-term partnerships through active engagement with local distributors, retailers, and institutions. Face-to-face meetings and community involvement are integral to fostering meaningful connections. Trade fairs and exhibitions provide opportunities for exporters to network and showcase their products. Additionally, understanding local customs—such as the preference for culturally relevant packaging and branding—can significantly enhance a product's marketability.

Business Customs and Cultural Considerations

Zanzibar has a long-standing tradition of trade and commerce, deeply rooted in its Swahili culture. While the island is welcoming to tourists and international investors, the local community remains highly conservative, adhering to religious and cultural practices in daily life. Businesses seeking to establish operations in Zanzibar must be mindful of these customs to foster positive relationships and avoid alienation. Key considerations include:

- **Respect for Religious Observances:** Businesses should accommodate prayer breaks, allow modest dress codes, and ensure cultural sensitivity in workplace policies.
- **Scheduling Considerations:** Meetings should not be scheduled between 12:00 PM and 2:00 PM, as this period is designated for prayer and lunch breaks in many offices.

- **Patience in Business Negotiations:** Trade and investment agreements often require extended timelines, with progress occurring after multiple demonstrations of goodwill and trust-building efforts.
- **Local Talent Development:** Investing in in-house training and apprenticeships is essential for integrating into the local economy. The Zanzibar Association of Tourism Investors (ZATI) continues to lead skills development programs to support the hospitality sector.

Consumer Trends and Market Shifts

Zanzibar’s tourism industry has evolved significantly, influencing consumer preferences and market demand.

- **Tourism Accommodation Preferences:** While Stone Town remains a popular destination, there is increasing demand for homestays and beach hotels in the North and Southeast of Unguja, reflecting a shift toward experiential travel.
- **Changing Visitor Demographics:** The typical international visitor profile has shifted from an older male to a middle-aged female from Europe over the past five years. This change has led to new menu preferences and hospitality adaptations to accommodate diverse cultural and dietary needs.
- **Luxury Real Estate Expansion:** The development of private residences and high-end real estate projects continues to attract consumers with high purchasing power. Areas such as Fumba Town are experiencing rapid growth, driven by recent changes in land laws that facilitate foreign property investment.

General Consumer Tastes and Trends

Zanzibar’s consumer landscape is undergoing rapid transformation due to urbanization, tourism, and income growth. There is a rising demand for non-GMO, organic, sustainably sourced, and plant-based products, driven by health-conscious consumers. Foreign consumers value quality, innovation, and unique branding. At the same time, affordability remains a critical factor for segments of the population. Exporters should focus on tailoring their offerings to align with these diverse consumer needs.

Section III: Import Food Standards, Regulations and Procedures

Customs Clearance

For detailed information on customs clearance procedures in Zanzibar, refer to [the Tanzania Revenue Authority Import Procedures](#) and [the TRA Customs Regulations Guide](#). These resources outline the steps required for clearing goods, including the use of the Tanzania Customs Integrated System.

Documents Generally Required by the Country Authority for Imported Food

Importing food into Zanzibar requires specific documentation, such as final invoices, import permits, packing lists, and transport documents. For comprehensive details, visit the [Tanzania Import Requirements and Documentation Guide](#) and [the TBS Guidelines for Food Importation](#).

Country Language Labeling Requirements

The labelling of food products shall be in accordance with the provisions of the Codex Committee on Food Import and Export Inspection and Certification System, and the Zanzibar Food, Drugs and Cosmetics Act, No 2/2006 and its Amendment Act No. 3/2017. In summary, the primary packaging of imported food must be clearly labelled in English or Swahili, or both. The labelling information should include the trading name, ingredients or composition, dates of manufacture and expiry (including day/month/year), net weight in kilograms or metric tons, storage conditions and the name of the manufacturer including their physical address. Any evidence of alteration, tampering or use of misleading labelling information may lead authorities to declare the product as substandard, and for its importation to be rejected. For more detailed information, see the latest [FAS Tanzania Food and Agricultural Import Regulations and Standards \(FAIRS\) report](#), [Tanzania Labeling/Marking Requirements Guide](#) and the [TMDA Labeling Guidelines](#).

Tariffs and FTAs

Tanzania applies the East African Community (EAC) Common External Tariff, with rates ranging from zero percent for raw materials to 25 percent for consumer goods. For specifics on tariff structures and exemptions, refer to the [TRA Common External Tariff Document](#) and [the Tanzania Import Tariffs Guide](#).

Trademarks and Patents

Trademark and patent registration in Zanzibar is governed by the Business Registration and Licensing Agency (BRELA). For details on intellectual property protection, visit [the Tanzania Intellectual Property Guide](#) and [the WIPO Tanzania Country Profile](#).

Section IV: Market Sector Structure and Trends

Current Trends of Food and Beverage Sectors in Zanzibar

Zanzibar's food and beverage sectors are expanding, driven by tourism, urbanization, and rising consumer demand for diverse, high-quality products. The hospitality industry has experienced a 37 percent increase in hotel and lodging facilities over the past five years, increasing demand for imported food and beverages. Although U.S. exports currently account for less than one percent of Zanzibar's imports, there is significant potential for consumer-oriented and agricultural goods, particularly frozen poultry, dairy, processed foods, and specialty ingredients. The retail sector is also evolving, with supermarkets, convenience stores, and liquor outlets expanding their offerings.

In 2024, Zanzibar imported food and beverages valued at approximately USD 650 million, reflecting a 9.8 percent increase from 2023. This growth highlights rising demand for imported food products, driven by expanding tourism, urbanization, and evolving consumer preferences. The rising demand for natural food additives, premium beverages, and packaged goods presents opportunities for U.S. exporters to enter this dynamic market.

Market Sector Structure of Food and Beverage in Zanzibar

Zanzibar's food sector remains highly dependent on imports, particularly for staple items like rice, wheat flour, sugar, and cooking oil. Limited domestic agricultural production necessitates sourcing from key suppliers such as India, Brazil, Turkey, Pakistan, and Vietnam. This import-driven market supports food security and sustains retail and hospitality businesses catering to both residents and tourists.

For U.S. exporters, this reliance presents opportunities in grains, processed foods, and consumer-oriented products. Demand is rising for condiments, sauces, packaged foods, and beverages, while the tourism industry fuels consumption of frozen poultry and processed meat. Additionally, Zanzibar's agribusiness sector requires imports of animal feed, seeds, and food additives, further expanding export potential. With a strategic location and growing food demand, U.S. exporters can establish partnerships with local distributors, hotels, and food processors to tap into this market.

The beverage sector is also shaped by imports, local production, and tourism-driven demand. A significant portion of supply comes from imports, including carbonated drinks, juices, alcoholic beverages, and bottled water, sourced from Tanzania's mainland, Kenya, South Africa, and other international suppliers. Local production is expanding, with manufacturers offering fruit juices, bottled water, and traditional beverages such as sugarcane juice and spiced tea. The hospitality sector drives demand for premium beverages, including wine, spirits, and specialty drinks, catering to international visitors.

Distribution Channels for Food Retailers and Food Processors in Zanzibar

Zanzibar's food and beverage distribution network relies heavily on imports, primarily entering through the port and airport before being handled by wholesalers who store products in bonded warehouses for further distribution. Retail operations are dominated by small shops and informal markets, while high-end supermarkets cater to expatriates and tourists, presenting opportunities for premium U.S. products. Local food processors depend on imported raw materials due to limited domestic agricultural production, creating demand for U.S. suppliers of ingredients and additives.

However, several challenges impact market entry, including regulatory compliance requirements such as import duties, labeling standards, and food safety regulations. Additionally, logistical constraints, particularly cold chain limitations, affect perishable goods, while the prevalence of informal trade necessitates flexible and adaptable distribution strategies for effective market penetration.

Section V: Agricultural and Food Imports

Zanzibar's agricultural import market has seen notable growth in several key sectors, driven by urbanization, rising incomes, and evolving consumer preferences. The fastest-growing sectors, based on import volume and value over the past five years, include:

- **Edible Oils** – Imports of palm and sunflower oil have surged due to increased demand for cooking and food processing.
- **Dairy Products** – Rising consumption of milk, cheese, and yogurt has fueled import growth, particularly among urban consumers.

- Processed Foods – Packaged and ready-to-eat foods are increasingly popular, reflecting changing lifestyles and convenience preferences.
- Seafood – Imports of frozen fish and shrimp have expanded, driven by demand from the hospitality sector and limited local production.
- Poultry Products – Zanzibar relies heavily on imported frozen chicken, with demand growing due to affordability and availability.

Table 4 provides the latest data on Zanzibar’s top imported agricultural products, highlighting notable growth between 2020 and 2024. Spices (pepper & cardamom) saw the highest increase at 250 percent, followed by vegetables (onions & potatoes) at 185 percent and fruits (apples & oranges) at 150 percent, reflecting rising demand for specialty and fresh produce.

Poultry products expanded by 129 percent, processed foods by 100 percent, and dairy by 94 percent, driven by evolving consumer preferences and increased hospitality demand. Staple commodities maintained steady growth, with edible oils increasing by 88 percent, wheat flour by 65 percent, sugar by 56 percent, and rice by 19, reinforcing Zanzibar’s reliance on imports for food security.

Recent market trends indicate strong demand for high-value agricultural imports, creating opportunities for exporters. Citrus fruits, particularly oranges and lemons, are valued for their nutritional benefits and beverage applications. Urban consumers are driving demand for cheese and yogurt, supporting growth in retail and hospitality. Specialty spices, such as high-quality pepper and cardamom, align with Zanzibar’s culinary traditions and export potential. Additionally, plant-based products, including alternative proteins and non-dairy milk, are gaining popularity among health-conscious consumers.

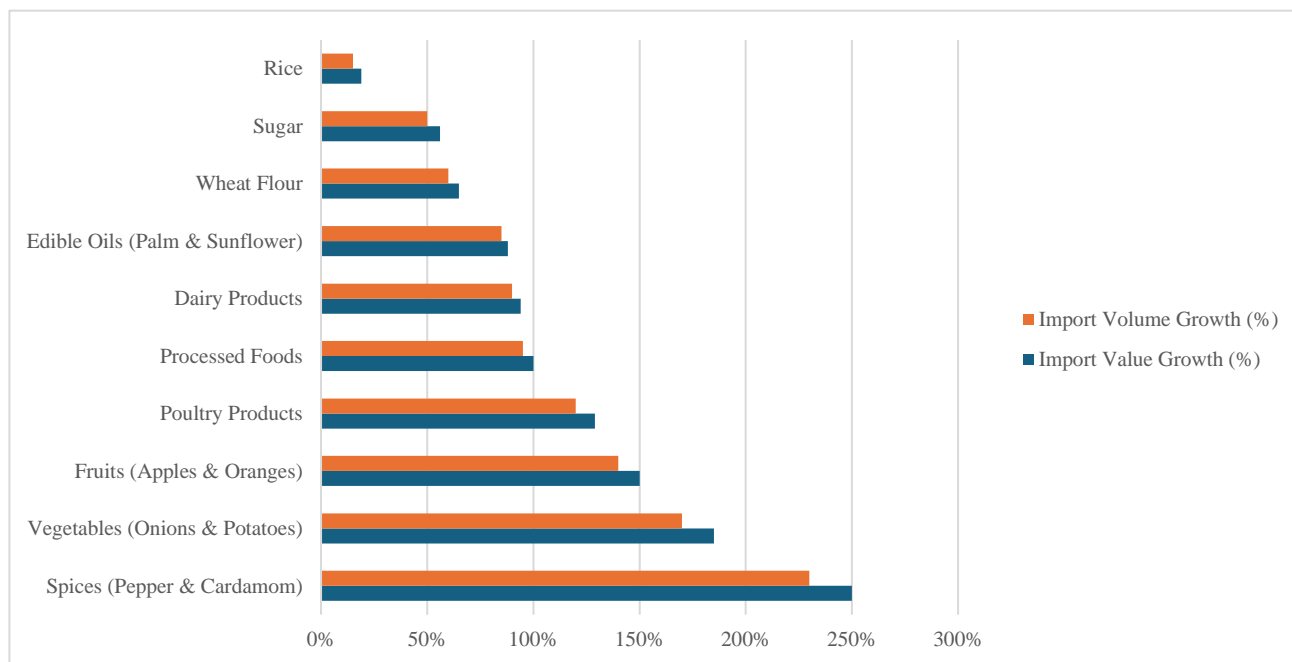
Zanzibar’s continued reliance on imported agricultural products presents significant prospects for exporters, particularly in essential and high-value food categories.

Table 4: Top Imported Agricultural Products in Zanzibar, 2020-2024, and Growth Rates

Product	2020	2021	2022	2023	2024	Rate
Rice	\$47.45M	\$52.31M	\$56.78M	\$60.12M	\$62.85M	19%
Wheat Flour	\$11.94M	\$14.67M	\$16.89M	\$18.45M	\$19.72M	65%
Edible Oils (Palm & Sunflower)	\$9.32M	\$12.45M	\$14.89M	\$16.23M	\$17.56M	88%
Sugar	\$8.76M	\$10.12M	\$11.45M	\$12.89M	\$13.67M	56%
Dairy Products	\$6.45M	\$8.23M	\$9.89M	\$11.34M	\$12.56M	94%
Processed Foods	\$5.89M	\$7.45M	\$8.92M	\$10.23M	\$11.78M	100%
Poultry Products	\$4.56M	\$6.12M	\$7.89M	\$9.23M	\$10.45M	129%
Fruits (Apples & Oranges)	\$3.78M	\$5.23M	\$6.89M	\$8.12M	\$9.45M	150%
Vegetables (Onions & Potatoes)	\$2.89M	\$4.12M	\$5.67M	\$6.89M	\$8.23M	185%
Spices (Pepper & Cardamom)	\$1.45M	\$2.23M	\$3.12M	\$4.23M	\$5.67M	250%

Source: Office of The Chief Government Statistician (Zanzibar in figures 2024)

Figure 2: Top Ten Fastest Growing Imported Consumer-Oriented Agricultural Products (2020-2024)



Source: Zanzibar National Bureau of Statistics

As shown in Table 5 below, in 2024, rice remained the leading imported consumer-oriented agricultural product, with an import value of US \$62.85 million and a volume of 180,000 metric tons. Wheat flour followed, contributing significantly to US \$19.72 million and 450,000 metric tons. Essential commodities such as edible oils (palm & sunflower), sugar, dairy, and processed foods also saw notable import levels, supporting Zanzibar's food supply needs.

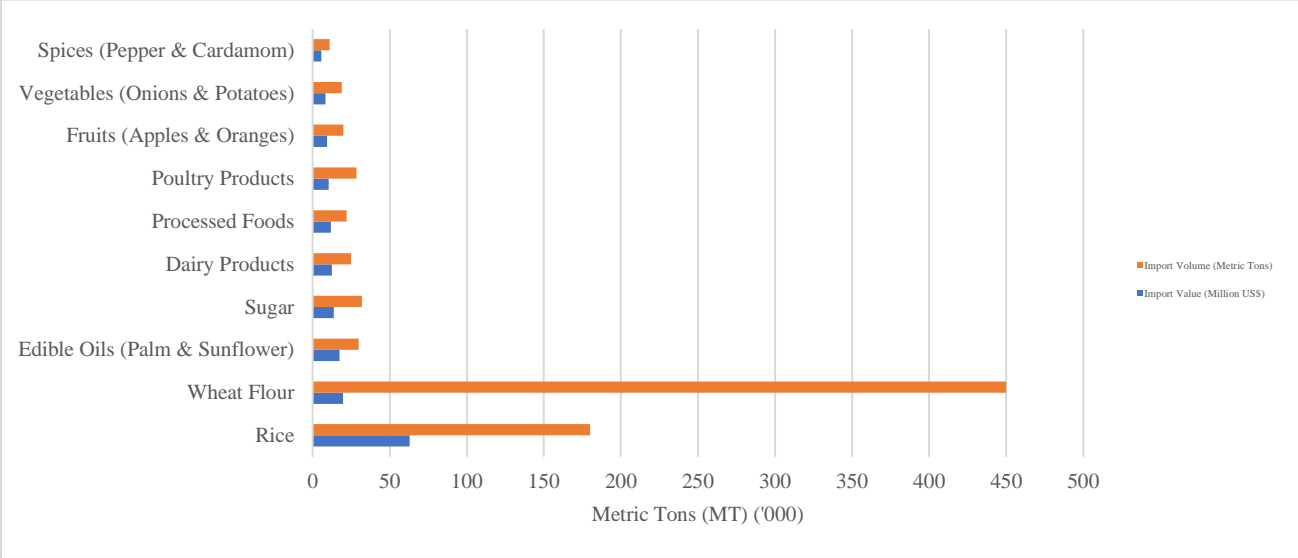
Poultry products, fruits (apples & oranges), and vegetables (onions & potatoes) continued to register strong demand. Specialty spices, including pepper & cardamom, ranked lower in total value and volume but remained relevant in niche markets. This data underscores the importance of staple imports in sustaining Zanzibar's food security while highlighting opportunities for exporters targeting high-demand commodities.

Table 5: Top Ten Imported Consumer-Oriented Agricultural Products in 2024

Product	Import Value (Million US\$)	Import Volume (Thousand Metric Tons)
Rice	62.85	180
Wheat Flour	19.72	450
Edible Oils (Palm & Sunflower)	17.56	30
Sugar	13.67	32
Dairy Products	12.56	25
Processed Foods	11.78	22
Poultry Products	10.45	29
Fruits (Apples & Oranges)	9.45	20
Vegetables (Onions & Potatoes)	8.23	19
Spices (Pepper & Cardamom)	5.67	11

Source: Zanzibar National Bureau of Statistics

Figure 3: Top Ten Imported Consumer-Oriented Agricultural Products in 2024



Source: Zanzibar National Bureau of Statistics

Current Food Exporters to Zanzibar

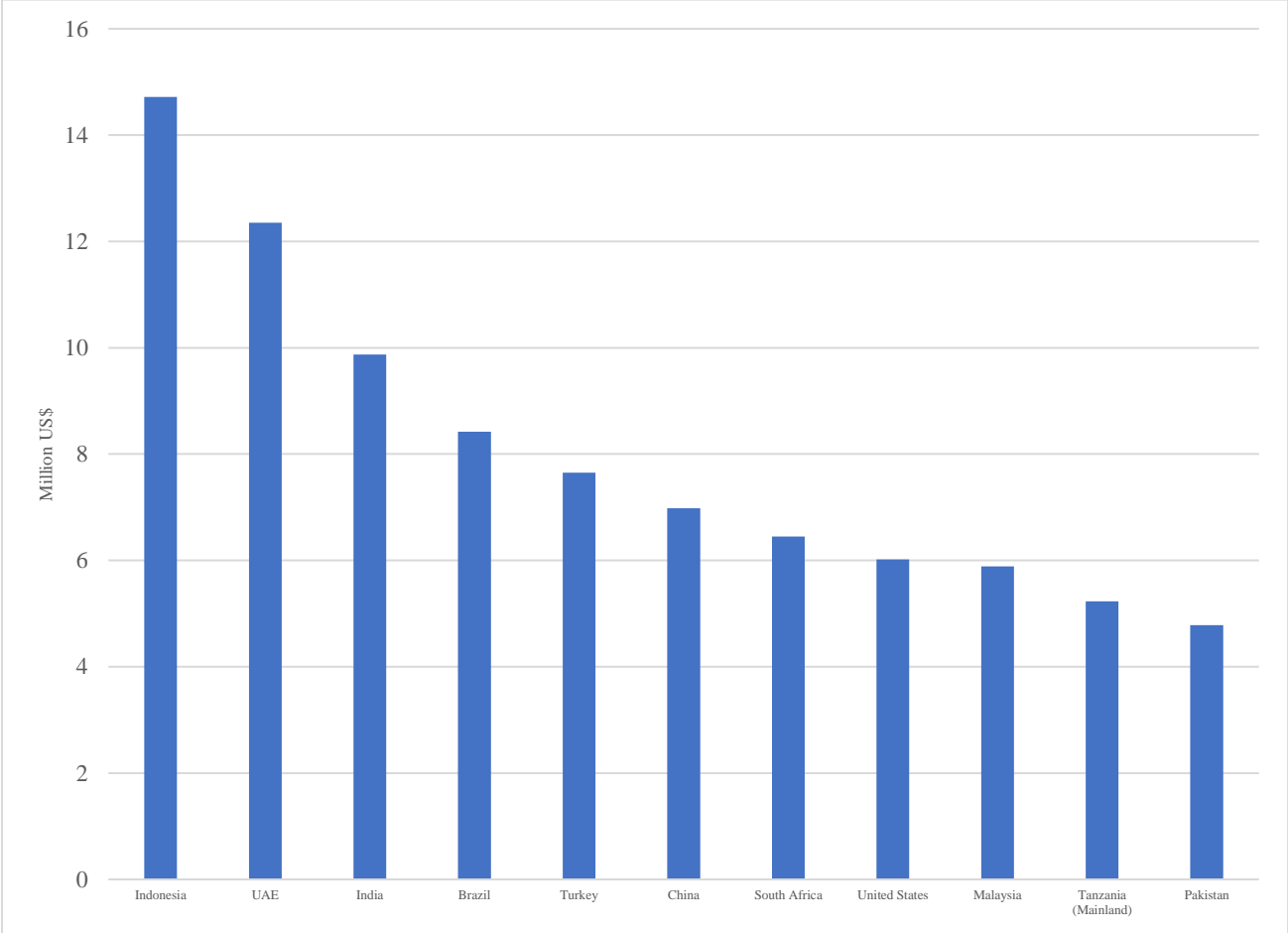
Zanzibar’s food and beverages imports have steadily increased from US \$60.57 million in 2020 to US \$63.8 million in 2024, reflecting growing demand and market expansion. U.S. food exports fluctuated between US \$0.74 million and US \$1.02 million, with recent growth indicating a potential recovery and increased market penetration. In 2024, Indonesia led food exports to Zanzibar, with US \$14.72 million in shipments, primarily consisting of rice, palm oil, and processed foods. The United Arab Emirates followed closely, contributing US \$12.35 million, mainly in dairy products, edible oils, and packaged foods. India ranked third with US \$9.87 million, supplying wheat flour, spices, and pulses. Brazil and Turkey were notable exporters of poultry and beef products, while China specialized in seafood, canned goods, and specialty food items. South Africa and Malaysia provided fresh produce, beverages, and palm oil, whereas Tanzania (Mainland) exported grains, fresh produce, and dairy. Pakistan rounded out the top ten, focusing on rice and pulses.

Table 6: Top food exporters to Zanzibar in 2024, based on trade data:

Country	Key Food Exports	Export Value (US \$ M)
Indonesia	Rice, palm oil, processed foods	14.72
United Arab Emirates	Dairy products, edible oils, packaged foods	12.35
India	Wheat flour, spices, pulses	9.87
Brazil	Poultry products, beef	8.42
Turkey	Poultry, processed foods	7.65
China	Seafood, canned goods, specialty food items	6.98
South Africa	Fruits, vegetables, beverages	6.45
USA	Poultry, processed foods	6.02
Malaysia	Palm oil, processed foods	5.89
Tanzania (Mainland)	Fresh produce, grains, dairy	5.23
Pakistan	Rice, pulses	4.78

Source: Zanzibar National Bureau of Statistics, Tanzania National Bureau of Statistics

Figure 4: Top Food Exporters to Zanzibar, 2024



Source: Zanzibar National Bureau of Statistics, Tanzania National Bureau of Statistics

The United States, though not among the top food exporters to Zanzibar, remains a significant trading partner, contributing approximately USD \$6.02 million in food imports in 2024. A substantial portion of these imports consists of frozen chicken, which plays a crucial role in meeting local demand. The U.S. supplies between 42 and 47 percent of Zanzibar’s total chicken consumption, highlighting its importance in the country’s poultry market.

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Section VI: Key Contacts and Further Information

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Attachments:

No Attachments.