



**Standards and Trade
Development Facility**

MOBILIZING AID FOR TRADE FOR SPS-RELATED TECHNICAL COOPERATION IN EAST AFRICA

SPS BALANCE SHEET FOR TANZANIA

Research work for the Standards and Trade Development Facility

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This report reflects the views of the author alone and does not represent the views of the STDF or any of its partner agencies or donors.

1. Introduction

1. The objective of this STDF research work is to further strengthen the linkage between "supply" and "demand" of technical cooperation in the area of food safety, animal and plant health (collectively known as sanitary and phytosanitary or SPS) requirements. As such, this research is being carried out in the framework of the broader Aid for Trade initiative. The work builds on existing capacity assessments in the SPS area – including Diagnostic Trade Integration Studies (DTIS) developed under the Integrated Framework (IF), capacity evaluation tools developed and applied by international organizations such as the Food and Agriculture Organization (FAO) and the World Bank, as well as other studies and reports. It is not a new capacity evaluation, but rather an attempt to consolidate the results of previous studies.

2. This report presents a balance sheet of needs and supply in the SPS area for Tanzania. Similar balance sheets are being developed for Kenya and Uganda, as well as at a regional level. The aim of the report is to strengthen the supply and demand for SPS-related technical cooperation by:

- acting as a focus for information sharing of needs evaluations and ongoing and planned activities; and
- identifying gaps where they exist and further mobilizing the provision of capacity building resources as necessary.

2. Overview of priority action areas

3. As Tanzania seeks to expand and diversify its food and agricultural exports, in line with its National Strategy for Growth and the Reduction of Poverty ("Mkukuta"), so it will have to deal increasingly with food safety, animal and plant health requirements imposed by its trading partners.¹ These constraints will become more visible as export growth and diversification occur and barriers are encountered.

4. Tanzania has encountered SPS restrictions in the past. A well documented case is the EC bans on fish export from Tanzania due to concerns over cholera and pesticide residues in fishery products. SPS problems are also a break on the development of the livestock sector. Beyond the East Africa region, there is virtually no trade in Tanzanian livestock and livestock products, due to the presence of several endemic OIE-notifiable animal diseases.

5. SPS-related market access constraints are of particular importance for Tanzania's non-traditional agricultural commodity exports, of which 80% are estimated to be directed towards OECD markets.² In the trade of fresh fruit and vegetables, increasing attention has been given to appropriate use of pesticides and presence of residues in fresh produce. In this trade, and that of cut flowers, there are also concerns over international transmissions of plant pests (notably fruit fly) and the weak phytosanitary control system.

6. Exports of traditional agricultural commodities (mainly coffee, tobacco, cotton, cashew and tea) have declined or stagnated for non-SPS reasons: falling international prices, growing international competition, and various supply-side factors. Trade in these commodities has also shifted to developing country markets (with the notable exception of coffee). Constraints are more related to quality, climatic conditions or to institutional factors.

¹ A similar strategy was recently developed for Zanzibar, i.e. the Zanzibar Strategy for Growth and Reduction of Poverty (ZSGRP). The focus of the various capacity assessments and evaluations, and hence the focus of this report, is primarily on mainland Tanzania. A separate Zanzibar Trade Integration Study (ZTIS) will be developed under a planned IF Window II project.

² It is to be noted that there is substantial "informal" cross border trade in livestock, fruits and vegetables exceeding officially recorded values.

7. Several studies have emphasized the importance of Tanzania's tourism sector. Annual tourist food expenditure (approximately US\$76m) is close to the total value of all other non-traditional food exports combined (not including fish and fishery products). From general awareness building about food safety risks to developing surveillance/monitoring systems and strengthening inspectorate capacities, the tourism sector has a number of key SPS-related capacity building needs.

8. Tanzania has the necessary basic framework for SPS management in place but the overall level of SPS and quality management remains weak. *The current preparedness in complying with the international requirements for market access and share is clearly inadequate as viewed from regulator's technical capacity, competence and resource allocation.. Other various factors include: lack of an umbrella policy, coherent legal institutional framework, focused organizational oversight, coordination, harmonization and rationalization of activities and allocation of adequate resources, making Tanzania lag behind competitors.* To better mainstream SPS issues into broader Government frameworks and supply chains, remove overlapping mandates and make better use of limited resources, the establishment of a national level coordination mechanism involving all key relevant stakeholders has been recommended. This body would raise awareness and recognition of the importance of SPS management capacity to Tanzania's competitiveness in international markets.

9. Based on existing capacity assessments and evaluations, the following priority areas emerge as not being currently addressed by existing or planned donor programmes. Addressing these areas would assist poverty alleviation and increase small farmer income, foster increasing market access for Tanzania's leading non-agricultural products, and stimulate tourism development.

- Tackle pest problems limiting expansion in the floriculture and horticulture sectors, in particular due to fruit fly, and design programmes to assist SPS compliance by smallholders;
- Address disease problems limiting the export of livestock, meat and dairy products through a focused programme of public-private investment and strengthening the performance of Tanzania's veterinary services;
- Maintain SPS compliance capacity in the inland fisheries sector through continued investment and training in the public and private sector *on aquaculture as well as fish farming*;
- Provide food safety training in the tourism sector and examine ways to integrate local suppliers into hotel supply chains, as part of a comprehensive evaluation of food safety needs;
- Offer training for trade associations on SPS compliance strategies relevant to their member companies; and
- Establish a national council involving all key relevant stakeholders which will promote integration of SPS issues into planning and budgetary frameworks and raise the profile of SPS issues nationally;

3. Overview of ongoing and planned donor assistance

10. The Joint Assistance Strategy of Tanzania (JAST 2006-10) establishes a medium-term framework for managing development cooperation. The Tanzania Development Partners Group (DPG) coordinates activities and improves internal coherence.³ Three key trends in bilateral donor support can be identified:

³ As of January 2007, membership comprised Belgium (Embassy and BTC), Canada (CIDA), Denmark, European Delegation, Finland, France, Germany (GTZ, Embassy and KfW), Ireland (DCI), Italy, Japan (Embassy and JICA), Netherlands, Norway, Spain, Sweden (SIDA), Switzerland (SDC), UK (DFID), US (USAID and MCC), UN

- (a) Move to general budget support. On 1 January 2006, a new Partnership Framework Memorandum governing general budget support for implementation of “Mkukuta” came into force, signed by the Government and fourteen bilateral development partners.⁴ To mobilize capacity building resources in the SPS area, it is imperative that Tanzanian politicians and high level decision-makers are convinced of the importance of trade and SPS capacity building to the country's competitiveness in *international* markets.
- (b) Within the rubric of general budget support, specific sector budget support is another modality being used. Efforts could be made for trade and SPS capacity building to figure more prominently in basket programmes focusing on *inter alia* food and agriculture, private sector development, etc. Another possibility currently being considered is establishing a specific basket programme for trade and development linked to the IF DTIS action matrix (including its SPS component).
- (c) Continuation of donor support for specific project initiatives, whether at national, regional, ACP or all developing country level. Many donor funding cycles finish in 2007/2008. An overview of on-going and future planned donor programmes is provided in **Annex I**.

(UNDP, UNICEF, ILO, UNFPA, UNIDO, UNAIDS, UNCDF, WFP, UNHCR, FAO, UNESCO, WHO, UN-Habitat, IFAD), AfDB, IMF, and World Bank

⁴ AfDB, Canada, Denmark, EC, Finland, Ireland, Japan, Germany, Netherlands, Norway, Sweden, Switzerland, United Kingdom and the World Bank.

4. Specific SPS market access constraints

Products/markets	SPS compliance constraints	Ongoing and planned assistance	Recommended actions/gaps	Priority
Horticulture and floriculture products				
<p>Sector with good growth potential. Small number of companies exporting cut flowers and specialty vegetables to Europe from medium and large scale farms, mostly through Kenyan marketing channels. Integration of smallholders into marketing chain (following Kenyan model) may raise SPS compliance issues currently not encountered, in particular certification to private standards.</p> <p>Diversification possible into niche markets, notably cuttings, seeds and soft fruit.</p> <p>Regional trade (mostly to Kenya) in oranges, onions, tomatoes and potatoes. Opportunities to expand mango trade to Middle East and Asian markets.</p> <p>Key constraints include climate, airfreight, investment incentives, pesticide registration, shortage of skilled middle management and little momentum to integrate smallholders into supply chains</p> <p>Industry organized in Tanzania Horticulture Association (TAHA) and Association of Mango Growers</p>	<p>Plant pest situation (in particular fruit fly) and shortcomings in pest surveillance and monitoring system are key constraints. Pests reduce productivity and limit trade possibilities (regionally and internationally)</p> <p>For the EU market specific challenges include:</p> <ul style="list-style-type: none"> - Official regulations on pesticide residues - Compliance with private standards (more stringent pesticide requirements and certification costs, more evident if expansion sought through smallholder farms) - Concerns over air freight may impede EU market access long-term <p>Challenges for regional markets vary greatly. Some higher-income markets (South Africa, Gulf countries or markets with large fresh produce export sectors) are more demanding, particularly on pest risk analysis (PRA). Access conditions for some neighbouring countries less stringent, with much trade taking place on an informal basis</p>	<p>Specific ongoing and planned activities identified include:</p> <ul style="list-style-type: none"> - Netherlands (WSSD) – supporting TAHA through various projects (e.g. training for industry workers, pesticide registration) - IF Window II – SPS training for horticulture industry - FAO - supporting establishment of phytosanitary control and surveillance system (possibly also including revision of legislation) (supported by Norway and UN fund) and addressing fruit fly infestation (regional programme seeking funding) - USAID – supporting TAHA through Tanzania Air-freight Program (TAP) for horticulture and integration of small growers into value chains - USDA/USDA – PASA projects (see Annex I) including creation of phytosanitary information system and addressing fruit fly infestation - STDF – Eastern Africa Centre of Phytosanitary Excellence - including establishment of regional PRA Unit - EC - Capacity Building on Maximum Residue Levels (MRLs) (SADC, 2006-2010) - EC – 10th EDF (2008-2013, with one focus on capacity building for companies and farmers on food safety issues, including SPS) 	<p>Outstanding issues include:</p> <ul style="list-style-type: none"> - regional programme to control fruit fly infestation (DTIS) and examine possibility of establishing pest free places of production and areas of low pest prevalence - as part of efforts to expand the supply base of the horticulture and floriculture sectors to smallholder production, consideration should be given to issues of SPS compliance, in particular reducing certification costs e.g. through group schemes. - continuation of support to upgrade phytosanitary services (budgetary support, legislation, surveillance, pest control programmes and upgrading Horticultural Tengeru Research Station into high value crop research and training - support for establishment of Horticulture Development Council of Tanzania (HODECT) and to TAHA on specific issues. 	<p>1</p> <p>2</p> <p>2</p> <p>2</p>

Products/markets	SPS compliance constraints	Ongoing and planned assistance	Recommended actions/gaps	Priority
Fish and fishery products				
<p>Fish sourced from coastal fisheries, inland fisheries (around Lake Victoria) and aquaculture. Sector estimated to employ 2 million people either directly and indirectly. Concerns about sustainability of fisheries in Lake Victoria. Inland fisheries sector undergoing rationalization with facilities closing or operating at low capacity.</p> <p>Main export is Nile perch (approx. 80% by value), shrimp, octopus, lobster, squid and crab to Europe and East Asia. EU export authorized from 16 land based establishments and 25 prawn trailers. Fish products also sold to hotels/restaurants.</p> <p>Processing sector expanding into value-added food preparation processes and new fish farming techniques. Significant potential for development of coastal fisheries (including Zanzibar) and aquaculture in shallow waters surrounding offshore islands and in Zanzibar (seaweed).</p> <p>Two industry organizations, TFPA and LVFPAT, have been instrumental in enhancing hygiene controls and promoting best practice. They have merged to form the Tanzania Fish Processors Association (TIFPA)</p>	<p>Three fish export bans were imposed by the EC between 1996 and 1999 due to cholera and pesticide residue concerns. Subsequent actions were taken by Government and industry to address shortcomings in sanitary conditions on boats, at landing sites, and in fish processing facilities</p> <p>Focus of assistance has been on fisheries management (decline in Nile perch landings and over-capacity) and post harvest practices around Lake Victoria. Relatively less attention has been given to the development of coastal fisheries and aquaculture.</p> <p>Outstanding constraints relate to:</p> <ul style="list-style-type: none"> - continuing capacity building in public/private sector (training, adherence to regulations) to prevent capacity developed from being lost during industry consolidation - Investment in infrastructure, boats and landing sites - high transport costs - development of coastal fisheries and aquaculture industry (notably Zanzibar) 	<p>Following the EC bans, support was offered by inter <i>alia</i> Switzerland, Norway, UNIDO, EC, FAO/CFC and the World Bank.</p> <p>Specific ongoing and planned activities identified include:</p> <ul style="list-style-type: none"> - EC - Implementation of Fisheries Management Plan for Lake Victoria (ending in 2008) - EC/Indian Ocean Tuna Commission - Indian Ocean Tagging Project (2004-2009) - EC (Strengthening Fishery Product Health Conditions in ACP countries (SFP, extended until 2010) - EC/IOC Secretariat – Regional Sustainable Management of Coastal Resources (2005-2010) - EC - 10th EDF (2008-2013, with focus on capacity building for fishery organizations on food safety issues, including SPS) 	<p>Consolidation in inland fisheries is creating concerns over potential loss of compliance capacity developed in the wake of EU export restrictions.</p> <p>Outstanding gaps include:</p> <ul style="list-style-type: none"> - update standards applicable to EU export (see FVO report 2006) - upgrade competent authority/ fisheries inspection capacity (staff, training, etc.) (FVO) - continuing assistance to industry associations to train member companies in Good Manufacturing Practice (GMP) - address continued poor hygienic conditions in some handling and processing facilities and upgrade basic infrastructure at some landing sites (cold storage, electricity, etc.) (DTIS) - evaluation of SPS issues in coastal fisheries and aquaculture (e.g. new sanitary requirements for fish products (including private standards being developed for aquaculture) 	<p>1</p> <p>2</p> <p>2</p> <p>1</p> <p>2</p>

Products/markets	SPS compliance constraints	Ongoing and planned assistance	Recommended actions/gaps	Priority
Livestock and poultry products				
<p>Tanzania has Africa's third largest cattle herd and large populations of sheep and goats. Livestock is predominantly used for supporting rural households (food, manure, savings, etc.). Trade in live cattle is cross-border and mostly informal.</p> <p>Shortcomings exist in sanitary controls at slaughterhouses, meat processing plants and milk collection centres.</p> <p>Poultry industry is undeveloped with a traditional sector (80% of production in rural areas) and nascent commercial operations with some interest in exploring export possibilities. There is increasing demand for high-quality poultry products from hotels/restaurants/supermarkets</p> <p>Limited trade in wildlife (including ornamental birds, export to zoos, etc). Export constraints due to bans imposed by trading partners related to Avian Influenza reported</p> <p>Trade in hides and skins is limited to the region. Some official trade is reported to China (raw hides) and India (skins)</p>	<p>Various fundamental constraints including:</p> <ul style="list-style-type: none"> - Animal health status (presence of several endemic OIE notifiable diseases) - Shortcomings in animal disease monitoring/management system - Low quality and productivity (by regional and international standards). Only few commercial operations apply improved technologies and management practices - Poor hygienic conditions in slaughterhouses, handling and processing facilities for meat, dairy and poultry products - Absence of standards and low quality of animal feed (poultry) <p>Problems related to the export of wildlife could be addressed through SPS diplomacy.</p> <p>Tanzanian raw hides are reportedly banned in China due to disease concerns.</p> <p>A comprehensive analysis of the veterinary services in Tanzania is lacking. The OIE PVS tool will be applied in June 2008. It is recommended that actions to strengthen the performance of veterinary services should be designed on the basis of this analysis</p>	<p>Tanzania has benefited from support from regional and national projects implemented by <i>inter alia</i> the EC (e.g. Pan-African Program for the Control of Epizootics), FAO and IFAD</p> <p>Specific ongoing and planned activities identified include:</p> <ul style="list-style-type: none"> - EC - SADC Foot and Mouth Disease (FMD) project (2006-2011) - EC - Promotion of Regional Integration in the Livestock Sector (PRINT) (2004-2009) - USAID – small integrated beef project involving a feedlot, abattoir and cold chain for storage, transport and marketing (2007-2008) - USAID/USDA – PASA projects to conduct animal disease risk assessments (not yet started) - FAO – strengthening disease information networks and diagnostic capacity, and improving disease surveillance management system (funded by Norway and UN fund, 2008- 2010) 	<p>Prime constraint is Tanzania's animal health status. Actions to address the disease situation depend greatly on the capability of the national veterinary service. Results of the OIE evaluation of veterinary services should be used to identify actions to strengthen veterinary services.</p> <p>Areas identified by other studies for attention include:</p> <ul style="list-style-type: none"> - promoting public-private investment to meet growing (domestic) demand for high quality meat, dairy and poultry products (in particular from the tourist sector) - devising a set of workable measures balancing considerations of animal disease control and trade facilitation at regional level; - raising Tanzania Wildlife Association problems in wildlife trade with trade partners; and - examining SPS constraints for hides and skins. 	<p>2</p> <p>2</p> <p>1</p> <p>1</p>

Products/markets	SPS compliance constraints	Ongoing and planned assistance	Recommended actions/gaps	Priority
Traditional commodities				
<p>Tanzania's main traditional commodities in order of export value include coffee, cashew, cotton, tobacco and tea.. Coffee provides employment for some 400,000 families, tea to 50,000. Cashew employs some 250,000 smallholder farmers and cotton nearly half a million.</p> <p>Over the last two decades, exports have declined or stagnated due to non-SPS factors such as falling international prices, growing international competition and various supply-side factors. Trade in these commodities (with the exception of coffee) has shifted to developing country markets. In 2003, India was the single largest importer of Tanzanian agro-food products (17%).</p>	<p>Constraints in Tanzania's traditional sub-sectors are primarily related to quality, either due to climatic conditions institutional factors and other supply-side constraints.</p> <p>At present, there are no constraints reported which relate to food safety, pests or diseases.</p> <p>Opportunities exist for market differentiation, particularly in OECD markets, notably through fair trade, organic and other labelling schemes adding value to basic traditional commodities.</p> <p>Concerns have been raised internationally on pesticide residues in tea or ochratoxin contamination of coffee, but no problems have been reported to date.</p>	<p>Various donors have provided general agricultural support or support related to upgrading the quality of specific commodities - including <i>inter alia</i> the World Bank, EC (coffee), USAID (cashew, coffee) and Switzerland (cashew, coffee). Production and marketing of organic Tanzanian produce has been supported by SIDA (Export Promotion of Organic Products from Africa, EPOPA).</p> <p>Specific ongoing and planned activities supporting agricultural export crops and/or specific sub-sectors are included in Annex I</p>	<p>The market for traditional commodities is increasingly dominated by private standards. Further promotion of Good Agricultural Practice (GAP) is recommended - as well as investigating opportunities for organic produce of spices, honey and safflower.</p> <p>Several non strategic interventions for cashew, coffee and cotton are proposed in the gap analysis of the DTIS</p>	<p>2</p> <p>2</p>
Spices				
<p>The spice industry is based on smallholder production. Current export is small, with estimated annual export levels of less than US\$5m (excluding Zanzibar cloves amounting to US\$11m in 2003). Most production of spices occurs in Zanzibar. Export levels and market destinations vary from year to year (East African region, Middle East and Asia). Potential has been identified to increase exports of a limited range of crops – vanilla, cardamom, pepper and</p>	<p>Constraints in the spice sector are numerous including low levels of production, lack of irrigation infrastructure, restricted access to micro-finance, weak organization of industry, low skills at various levels (growers, senior/middle management, spice production and processing), weak understanding and fragmentation of marketing chains, high transport costs, excessive export procedures, etc.</p>	<p>Several donors have implemented programmes in the spice sector including <i>inter alia</i> USAID, Switzerland as well as some NGOs. There are no known existing or planned activities in the sector.</p>	<p>No immediate gaps related to food safety or plant health are observed.</p> <p>Support for spice research activities and strengthening of institutions are proposed as strategic interventions in the gap analysis of the DTIS</p>	<p>3</p>

Products/markets	SPS compliance constraints	Ongoing and planned assistance	Recommended actions/gaps	Priority
<p>ginger – to around US\$15-20m per year.</p> <p>A spice export strategy has been developed but not yet implemented. Industry is organized in Spice Exporters Association</p>	<p>Constraints are not related to food safety or plant health issues, though improvement of post harvest practices (with particular attention to drying systems) is an issue for certain spices.</p>			
Tourism				
<p>Tanzania's tourism sector is attracting a growing number of foreign visitors each year. Estimated annual tourism expenditure on food are estimated to amount to approximately US\$76m – close to the total value of all other non-traditional food exports combined (not including fishery products).</p> <p>Tourism's backward linkages are spread out over many sectors including <i>inter alia</i> horticulture (fruits and vegetables), livestock (meat and dairy products), poultry (meat and eggs) and fisheries (fish and seafood).</p>	<p>Local supplies of agriculture, livestock, poultry and fisheries products to hotels/restaurants (and supermarkets) are generally of low quality. Meat products often sourced from other countries (notably South Africa and Kenya). Specific constraints mentioned relate to:</p> <ul style="list-style-type: none"> - Lack of awareness about food safety risks in tourist industry - Lack of training on good hygiene practices - Inadequate surveillance/monitoring system - Incomplete hotel classification and grading exercise (including SPS component) - Weak inspectorate capacities 	<p>In the past, several donor initiatives have supported the tourism sector</p> <p>Specific ongoing and planned activities identified include:</p> <ul style="list-style-type: none"> - EC - Institutional Strengthening of the Tanzania Tourism Sector – follow-up (2006-2011) - IF Window II (classification and grading in Dar es Salaam area) 	<p>The main gap observed is a thorough baseline evaluation outlining the status in terms of current practices and management systems, hotel/restaurant inspection, and needs for training and technical assistance. A “quality vendor” programme could be developed on a pilot basis linking local fresh produce and meat and poultry suppliers with hotels/restaurants (DTIS)</p>	1

5. Food safety

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
Awareness				
<p>- Limited awareness and low priority given to food safety by politicians and other senior decision-makers. National Food Safety Action Plan has been drafted (FAO) but not widely known. There is no national policy statement on food safety.</p> <p>- Limited awareness of basic food safety issues at all levels (farmers, slaughterhouses, processors and manufacturers, street vendors, tourist sector, general public etc. (exception: export fish and fishery products)</p> <p>- Awareness raising and training activities of Tanzania Bureau of Standards (TBS) and Tanzania Food and Drugs Authority (TFDA) are limited due to lack of resources.</p>	<p>- Develop national policy statement, integrate food safety into national development plans and organize symposium for politicians and senior decision-makers</p> <p>- Increase regular training courses on GAP (farmers), GMP and GHP (smaller processors and street vendors) and HACCP (larger and medium-sized processors)</p> <p>- Develop education programme for food science and technology professionals at university/ colleges</p> <p>- Strengthen capacity of TFDA (training, developing and disseminating information, etc.) and promote consumer organizations</p>	<p>Previous assistance offered by FAO, DANIDA, Switzerland and UNIDO (improving TBS laboratory infrastructure and accreditation)</p> <p>Future donor programmes focus increasingly on private sector and business development - but relatively less on public sector capacity building; Several donor (basket) programmes in place including schemes/facilities for upgrading food safety/quality in small and medium enterprises (SMEs) through training, loans, partial subsidies, etc. (see Annex I)</p> <p>A diagnostic evaluation of Tanzania's food safety and agricultural health system recently undertaken by Natural Resources Institute (NRI) for Tanzania's Better Regulation Unit (funded by the BEST Programme)</p>	<p>The current situation is characterized by limited awareness of food safety issues at all levels, weak capacity of TFDA, and limited coverage and uptake by private sector of existing schemes/facilities for SMEs</p> <p>Recommended actions include:</p> <p>- raise awareness of food safety issues (or importance of SPS issues in general) at political level</p> <p>- increase food safety awareness at all other levels through training, dissemination of general information, etc.</p> <p>- strengthen TFDA (budgetary and technical support) so it can take a leading role</p>	<p>1</p> <p>2</p> <p>2</p>
Institutional and regulatory framework				
<p>Food control system involves multiple institutions:</p> <p>- TFDA (Ministry of Health, unified food agency created in 2003)</p> <p>- TBS (Ministry of Industry, Trade and Marketing, standards development/testing/training)</p> <p>- Directorate of Veterinary</p>	<p>Food control system not fully coordinated and not fully addressing export sector (with exception of Fisheries Department). Recent efforts to address overlapping mandates (Taskforce, MoUs) have reportedly not been sufficient. Overlaps include interface</p>	<p>Other relevant existing and planned projects include:</p> <p>- UNIDO – regional EAC project currently under formulation</p> <p>- EC - Capacity Building on Maximum Residue Levels (MRLs) (2006-2010)</p> <p>- EC - Support for Standards, Quality Assurance, Accreditation and Metrology (SQAM) (SADC, 2006-2011)</p>	<p>Undertake strategic and detailed review process of existing institutional arrangements led by external body (for reasons of transparency and avoidance of bias)</p> <p>- Update fisheries legislation</p> <p>- Develop implementing regulations (general food safety, additives, foods of animal origin, MRLs, etc)</p>	<p>1</p> <p>2</p> <p>2</p>

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
<p>Services (Ministry of Livestock Development and Fisheries (MLDF), products of animal origin)</p> <p>- Fisheries Department (MLF, fishery products)</p> <p>- Tropical Pesticides Research Institute (TPRI, monitoring pesticide residues)</p> <p>- Tanzania Atomic Energy Commission (TAEC, irradiated food)</p> <p>- Local Government Authorities (LGAs, i.e. district and municipal councils)</p> <p>Tanzania's basic food law and legislation on livestock/dairy products is generally sound and in alignment with international requirements (although a wide range of implementing regulations have to be developed).⁵ Legislation on fish and fishery products is generally considered at least equivalent to EC requirements (FVO report 2006).⁶</p>	<p>between food safety and livestock/dairy production, monitoring pesticide residues and enforcing MRLs, and food inspection by TFDA and TBS.</p> <p>Challenge is to further increase coordination and reduce overlaps.⁷ Lack of implementing regulations also has to be addressed. Although generally equivalent, fisheries legislation needs upgrading to ensure equivalence with EC standards on contaminants, additives, potable water, hygiene and official controls (FVO).</p> <p>One additional area could be development of specific aquaculture legislation (including food safety issues but also fish health, feed, environment protection etc.).</p>	<p>- EC - Strengthening Food Safety Systems through sanitary and phytosanitary (SPS) measures (ACP, 2008 – 2012)</p> <p>- EC - Strengthening Fishery Products Health Conditions in ACP countries (SFP, extended until 2010)</p> <p>- USAID/USDA –PASA projects focusing on food safety (2006-2011, see Annex I)</p> <p>Draft gap analysis of the DTIS (IDMC) identifies several strategic intervention projects including:</p> <p>- support for strengthening consumer advocacy organizations</p> <p>- creation of mini-laboratories and field test kits</p> <p>- support for development of implementing regulations in the livestock and tourism sector</p>	<p>- Raise budgetary and technical support to implement and enforce legislation (including support to LGAs)</p> <p>- Develop mechanism for Fisheries Department to share experience and provide support in food safety and quality control</p> <p>- Study need for specific aquaculture legislation</p>	<p>2</p> <p>2</p> <p>1</p>
Enforcement				
<p>Most food inspection conducted by LGAs (health and veterinary officers with limited training); TFDA employs several national auditors for supervising</p>	<p>Outstanding needs related to inspection are numerous including regular training programmes and inspection manuals for local inspectors on</p>		<p>The following main gaps need to be addressed:</p> <p>- Removal of overlapping inspection procedures (strategic review process,</p>	<p>1</p>

⁵ Tanzania Food, Drugs and Cosmetics Act (TFDCA) (2003), Animal Diseases Act (2003), Dairy Industry Act (2004) and Meat Industry Act (2006)

⁶ Fish (Quality Control and Standards) Regulations (2000), Fisheries Act (2003), Fisheries Regulations (2005)

⁷ FAO National Action Plan recommends to revise the TFDCA *inter alia* to 1) assign clear responsibility for food safety and quality to producers and processors (and recognize intrinsic Right to Food); 2) abrogate food inspection responsibilities of other institutions and assign sole responsibility to TFDA (excluding export fisheries) (with delegation to district and municipal councils); 3) abrogate standard-setting functions of TFDA; and 4) create an effective food safety/ quality coordinating board with Secretariat in TFDA

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
<p>inspection; Inspection of <u>export</u> fish and fishery products exclusively by Fisheries Department (zonal and district fish inspectors); Inspection at major entry points by TFDA, TBS (mandatory food standards) and TAEC (irradiated food)</p> <p>Numerous laboratories are in place with limited ability to undertake microbiological/chemical analyses but overall diagnostic capacity is weak; Very limited capacity to analyze pesticide and veterinary drug residues, mycotoxins, heavy metals and microbial food contaminants; Exporters often use services of foreign laboratories; Several TBS laboratories in process of accreditation; As yet, no private food control laboratories in place.</p> <p>Very limited monitoring of pesticide and veterinary drugs residues in export and local markets (fresh fruit and vegetables, livestock, dairy and poultry products, fish and fishery products); Fisheries Department is implementing a monitoring programme for fish, water and sediments.</p>	<p>GAP, GHP, GMP and HACCP (see also FVO report for fisheries), removal of multiple inspection procedures, better communication facilities, field test kits, etc. Smaller processors and street vendors should register with TFDA</p> <p>Diagnostic capacity should be improved starting with the preparation of a national food control laboratory plan (needs assessment, locations, etc.) followed by targeted capacity building efforts (equipment, reference materials, staff training etc.); Accreditation process should be speeded up and private food control laboratories promoted</p> <p>Design monitoring programmes for pesticide and veterinary drug residues, mycotoxins and heavy metals (see fisheries) including creation and management of database (for future risk assessment)</p>		<p>see above)</p> <ul style="list-style-type: none"> - Raise budgetary allocation and increase assistance and training for TFDA, food inspection by LGAs, and for Fisheries Department - Prepare national food control laboratory plan and build further laboratory capacity (including field test kits, etc.) - Design monitoring programmes for pesticide and veterinary drug residues, mycotoxins and heavy metals (equally important for export commodities and domestic consumption) 	<p>1</p> <p>2</p> <p>2</p>

6. Animal health

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps,	Priority
Awareness				
<p>- Growing awareness is observed (at least at technical level) of current animal disease status restricting access to international markets (and negatively affecting backward linkages with tourism sector); Policy of establishing disease free zones is envisaged</p> <p>- Low awareness of good animal husbandry and animal health issues among herders, in slaughterhouses (also negatively affecting exports of hides and skins).</p>	<p>- Further increase awareness of crucial importance of animal health status for Tanzania's livestock and meat export potential</p> <p>- Increase general awareness-raising and training activities among herders and in slaughterhouses</p>	<p>The following existing and planned projects are relevant in the animal health sector:</p> <ul style="list-style-type: none"> - EC - SADC Foot and Mouth Disease (FMD) project (2006-2011) - EC - Promotion of Regional Integration in the Livestock Sector (PRINT) (2004-2009) - FAO – strengthening disease information networks and diagnostic capacity, and improving disease surveillance management system (funded by Norway and UN Fund 2008-2010) - USAID/USDA – PASA project on animal health issues (not yet started, see Annex I) 	<p>- Increase awareness and training activities</p> <p>- Lack of a public-private sector investment programme for meat export from Tanzania e.g. through creation of disease free zones considering all technical and commercial constraints</p>	<p>2</p> <p>1</p>
Institutional and regulatory framework				
<p>Directorate of Veterinary Services (DVS) is responsible for animal health matters, while the Veterinary Council regulates the veterinary profession; Weak communication reported between locally and centrally based staff.</p> <p>Basic animal health legislation generally sound and aligned with international requirements, but lack of implementing regulations⁸; Inadequate legislation on animal feed/animal breeding; No information available on veterinary drug legislation or aquatic health (Fisheries Department)</p>	<p>- Assistance in the drafting of implementing regulations and revision/drafting of animal feed/animal breeding legislation;</p> <p>- Possibly draft/ update legislation on veterinary drugs and aquaculture/aquatic animal health (no information available)</p>	<p>Draft gap analysis of the DTIS (IDMC) identifies several strategic intervention projects including:</p> <ul style="list-style-type: none"> - Development of implementing regulations - Promoting private sector investment in commercial livestock keeping including disease free zones and compartments - strengthen extension services to promote good animal husbandry practices among herders 	<p>- Lack of implementing regulations</p> <p>- Inadequate budgetary and technical support to implement and enforce legislation (including by LGAs). -Developing animal diseases regulations</p>	<p>2</p> <p>2</p>

⁸ Animal Diseases Act (2003), Veterinary Act (2003) and Beekeeping Act (2002)

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps,	Priority
Enforcement				
<p>Animal trade and movement (including wildlife) across borders difficult to control; No declared disease free zones or compartments; Activities of DVS normally dictated by disease outbreaks (reactive) and often dependent on donor support Outbreak of RVF reported in 2007 (followed by control measures)</p>	<p>The following outstanding needs are reported:</p> <ul style="list-style-type: none"> - Enhance effectiveness of surveillance for animal diseases and strengthening laboratory diagnostic capacity; - Develop a programme (including manuals and procedures) for disease eradication and establishment/maintenance of disease free zones 		<p>The FAO project and some of the regional programmes are expected to address some of the most critical and urgent issues related to animal disease control, surveillance and monitoring;</p> <p>However, in order to access regional and international markets, much more investment will be needed. The challenge ahead is to attract such additional private sector investments.</p>	2
<p>Disease surveillance and monitoring (regional and national) systems and networks in place - but in need of upgrading; Weak diagnostic capacity to perform risk assessment; Rinderpest, CBBP and FMD prioritized in surveillance programmes and international collaboration;</p>	<ul style="list-style-type: none"> - Establish "Emergency Fund" for disease eradication - Increase the number of veterinarians at central and local level performing animal health and inspection services and train additional veterinary personnel at village level; Develop and improve inspection manuals/guidelines 		<p><i>-Developing/establishing Disease Free Compartments (DFC)</i></p> <p><i>-Strengthening Quarantine facilities and Borderpost checkpoints</i></p>	1 2
<p>Inspection and surveillance by approximately 170 veterinarians at central and local level; Inspectors present at some 22 entry points; Inspection manuals and guidelines rudimentary and acute shortage of trained veterinary personnel</p>	<ul style="list-style-type: none"> - Improve capacity to perform risk assessment 		<p><i>-Capacity bulding for Inspectors aand stakeholders through training</i></p> <p><i>-Strengthen Laboratory diagnostic capabilities at National and Zonal levels</i></p>	1 1

7. Plant health

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
Awareness				
<ul style="list-style-type: none"> - Limited awareness and low priority given to plant health issues - Limited awareness among farmers/private sector of plant health issues, Good Agricultural Practice, and safe use of pesticides 	<ul style="list-style-type: none"> - Intensify efforts to build political, farmer and private sector awareness of plant health matters, GAP, and safe use of pesticides through regular awareness programs and training courses - Increase stakeholder consultation and participation (including private sector) 	<p>Relevant in the plant health sector are several projects supported by the Dutch Government under the WSSD programme (and involving TAHA) including:</p> <ul style="list-style-type: none"> - development of pesticides manual and general publicity campaign - development of industry-driven training programme for export horticulture - improving phytosanitary system for horticulture exports (including development of operational procedures manual) - pesticide registration arrangements <p>FAO supports several interventions in the plant health area through the TCP project (focusing on training , surveillance and legislation in 2008)</p> <p>At national level, USAID implements several projects in the horticulture sector (involving airfreight, incorporating small holders in value chains, etc.). At regional level, the USAID/USDA PASA projects are highly relevant (2006-2011, see Annex I)</p> <p>Also at regional level, STDF is</p>	<ul style="list-style-type: none"> - Development of modern horticulture research and training institute (Horti Tengeru) - Development of structured and costed national farm-level training programme with appropriate budgetary support - Support for Horticulture Development Council 	<p>2</p> <p>2</p> <p>2</p>
Institutional and regulatory framework				
<ul style="list-style-type: none"> - There is duplication of functions (inspection, issuance of import permits and phytosanitary certification) between the Plant Health Service (PHS, Ministry of Agriculture and Food Security, MAFS) and the Tropical Pesticides Research Institute (TPRI). Both PHS and TPRI have additional functions - Plant protection legislation is deficient in many aspects and not in alignment with IPPC requirements;⁹ - High cost and delay in registration of pesticides. 	<ul style="list-style-type: none"> - Review of existing institutions for plant protection management and pesticides control (including designation of NPPO and cost recovery system) - Investigate creation of semi-autonomous agency (TAPHIS) for phytosanitary matters - Development of new plant protection legislation (including implementing regulations) and improve arrangements for pesticide registration.¹⁰ 	<p>Issues of pesticide registration (WSSD) and phytosanitary legislation (FAO) being resolved; Outstanding issues remain:</p> <ul style="list-style-type: none"> - review of existing institutions (including considering creation of TAPHIS) - lack of budgetary and technical support to implement and enforce legislation (including support to local government authorities) 	<p>2</p> <p>1</p>	

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
<p>Enforcement</p> <p>Historically, budgetary resources for phytosanitary services have been very limited (though have slightly improved in recent years); Generally, activities in the plant health area are dictated by pest outbreaks (reactive) and often dependent on donor support.</p> <p>PHS has approximately 165 inspectors at 28 entry points. Assessments of training level of PHS staff vary from well-trained (NRI, 2006) to only generalist (DTIS, 2005); Inspectors of TPRI are reportedly well trained (NRI). There is need to upgrade border inspection posts (FAO, 2008).</p> <p>There is general access to standard laboratories for plant pest diagnostics but laboratories are constrained by lack of standards and documented procedures; Plant health staff is trained in conducting pest risk analysis (PRA) but tools are inadequate; TPRI has important research functions but lacks necessary resources</p> <p>There is lack of a computerized reporting and information management system (including export documentation) and lack of</p>	<ul style="list-style-type: none"> - Regular courses for inspectors on GAP, pest surveillance, diagnosis and eradication, pest free areas, data collection, export certification, etc. - Provision of basic working tools for inspectors (computers, internet access, microscopes, test kits, small incinerators, etc) and resources for TPRI research (diagnostic lab) - Preparation of inspection and export certification manuals and guidelines - Development of accreditation and internal auditing scheme for inspectors - Strengthening targeted entry points (staff and equipment) - Develop inventory of laboratory diagnostic services (both PHS and TPRI) and standards and procedures - Develop updated and consolidated pest list - Develop strategic and costed plan for PRA activities - Develop pest surveillance programme (perhaps initially focused on selected pests) - Develop programme (including manuals and procedures) for pest eradication and establishment/ maintenance of pest free areas - Establish Pest Eradication 	<p>financing a project creating an Eastern Africa Centre of Phytosanitary Excellence including a pest risk analysis (PRA) unit (implemented by CABI, KEPHIS and University of Nairobi and involving NPPOs of neighbouring countries)</p> <p>Draft gap analysis of the DTIS (IDMC) identifies several strategic intervention projects including <i>inter alia</i> support for HODECT, development of strategies for diversification of horticulture areas, and creation of training and research institute</p>	<p>Some immediate outstanding issues are being addressed by FAO/STDF/USAID. However, the list of outstanding needs is long and more support (budget and technical assistance) is needed to enhance field inspection (capacity, training, equipment and infrastructure, internal auditing procedures) and to develop proper pest surveillance, pest risk analysis and reporting/data management systems</p>	

⁹ Plant Protection Act (1997) and Regulations (1999)

¹⁰ A comprehensive study by the Natural Resources Institute (NRI) provides detailed recommendations on key elements and provisions to be incorporated of the new institutional and regulatory framework for plant protection and pesticides.

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
standards and documented procedures for pest surveillance, eradication and establishment/maintenance of pest free areas	Fund - Develop export certification system (including manuals and procedures) - Develop pest reporting system (in line with international standards)			

8. Institutional SPS capacity

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
<p><i>Institutional clarity</i> Food safety and agricultural health system comprises multiple institutions,. Little progress has been made in removing overlapping mandates between the various SPS enforcement agencies. There is little strategic planning.</p>	<ul style="list-style-type: none"> - Establishment of coordination mechanism - Strategic and detailed review towards rationalization of institutions and functions - More integration of SPS issues in planning and expenditure frameworks 	Draft gap analysis of the DTIS (IDMC) identifies establishment of national council as a strategic intervention project	Establish national co-ordination mechanism	1
<p><i>Private sector</i> - Limited basic awareness of GAP, GHP, GMP, HACCP and pest and disease control measures among private sector/farmers - Trade and industry associations weak and not generally supportive in promoting SPS improvements - Limited dialogue between Government and private sector on resolving SPS management capacity issues e.g. private food control laboratories, etc.) - Inadequate financial and regulatory framework for private investment in meat and dairy processing facilities</p>	<ul style="list-style-type: none"> - More support for private sector/farmer basic awareness and training programmes in food safety, animal and plant health - Additional support to strengthen capacity of trade and industry associations - Strengthen dialogue through creation of mechanism such as National SPS and TBT Council, HODECT, etc. (<i>see above</i>) - Improve financial and regulatory investment framework 	Several donors (notably Denmark, DFID, Netherlands, Sweden and World Bank) increasingly promote private sector and business development (often through basket funds, including food safety and quality)	Assistance to trade associations to advocate the importance of SPS compliance and provide training to their members	1
<p><i>Research capacity</i> - Some progress has been made in upgrading SPS laboratory capacity with accreditation of two TBS laboratories but overall diagnostic capacity is weak - Centralization of laboratory services denies access to remotely located/rural population (need for test kits, etc.)</p>	<ul style="list-style-type: none"> - Gradual upgrading and accreditation of other laboratories and development of SPS laboratory plan (including needs assessments in terms of equipment, considering remote areas, and considering promotion of private laboratories) 	Several donors have provided assistance including DANIDA, Switzerland and UNIDO. UNIDO is currently finalizing a regional (EAC) project which will focus <i>inter alia</i> on laboratory aspects	Upgrade laboratory and surveillance system	2

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
<p><i>International participation</i> SPS National Enquiry Point and Codex, OIE, IPPC Focal Points in place</p>	<p>Additional support to enhance capacity to attend and play more active role in meetings of SPS Committee, Codex, OIE and IPPC</p>	<ul style="list-style-type: none"> - WTO regular training programme - Codex, OIE and IPPC Trust Funds - EC- (PAN-SPSO project) - USAID/USDA – PASA project focusing on participation in international standard setting 	<p>Establish national coordination mechanism</p>	<p>1</p>

ANNEX I

Ongoing and planned SPS-related technical assistance in Tanzania (2008 and beyond)

Donor	Project title	Short description	Budget (US\$)	Duration
National				
EC	10 th European Development Fund (EDF)	Country Strategy Paper and National Indicative Programme (2008 – 2013) signed (9 December 2007); Within area of Trade and Regional Integration (€55 million or 10% of total assistance) food safety capacity building will be priority area. Draft concept paper (November 2007) indicates that €6m would be available for capacity building in food safety and standards (provision of technical and business training to producers of export commodities).	9,000,000 (to be confirmed)	2008-2013
EC	Institutional Strengthening of the Tanzania Tourism Sector – follow-up	The project aims to raise the standard of tourism by strengthening training programmes to enhance human and institutional capacity within the tourism sector. Tourism backward linkages includes SPS issues. Total budget US\$3m	Allocation to SPS issues not known	2006-2011
IFAD	Rural Micro, Small and Medium Enterprise Support Programme (MUVI)	The programme will assist targeted entrepreneurs (e.g. rural micro enterprises, smallholder farmers and fishers with potential to produce and sell to processors) in improving skills and knowledge to better access to markets, amongst others. Total budget US\$25.3m (made up of grants, loans and contributions from IFAD, Government and Irish Aid)	Allocation to SPS issues not known	2008-2011
Netherlands	WSSD Partnership on Market Access	Six projects, including three specifically related to SPS issues: 1) Industry driven horticulture training 2) Registration of pesticides 3) Training programme on phytosanitary system	1,200,000	2005-2010
USAID	USAID support to agriculture in Tanzania	Bilateral USAID support amounts to US\$4.5m over 2007-08 (projections for 2009 and beyond not known) including several small pilot projects related to : - integration of small growers into value chains - promoting conservation ranching in Manyara and including a feedlot, abattoir and cold chain for storage - promoting domestic cashew processing - increasing quality of coffee	Allocation to SPS issues not known	2007-2008
Switzerland/ UNIDO	Enhancing the Capacity of Tanzania Quality Infrastructure and TBT/SPS Compliance Systems for Trade	Project aims at enhancing the capacities of the Tanzania Bureau of Standards (TBS) to deliver metrology and testing services to exporters in order to facilitate exports in sectors with important trade potential. Outputs include improved TBS management system, accreditation of TBS metrology and testing laboratories	3,000,000	2004-2008
UNDP, ILO, UNIDO	Support to Private Sector Development	Project will focus on enterprise development. Project budget to be determined.	Allocation to SPS issues not known	2005-2009
IF Window II	Capacity Building for Trade and Integration in Tanzania	Support implementation of several priority activities of TTIS. Total budget US\$1m. One component involves training horticulture producers and exporters in compliance with SPS standards.	40,000	2008-2010
MCC	MCC Compact	Focus areas of the MCC Compact (signed on 17 February 2008 and worth US\$698m) are to improve the country's transportation	Allocation to SPS issues not	2008-2013

		network, secure reliable supplies of energy and expand access to clean and safe water for domestic and commercial use.	known	
DANIDA, Netherlands, SIDA, DFID and World Bank	Business Environment Strengthening for Tanzania (BEST)	Multi-donor basket fund aimed at improving in various areas including regulations and private sector advocacy. Implemented by BEST - Better Regulation Unit (BRU) and Best - Advocacy Center (AC). Total budget US\$135m.	Allocation to SPS issues not known	2006-2011
DANIDA	Business Sector Programme Support III (BSPS III)	BSPS III is funded at a level of approximately US\$100m. One sub-component of the programme (US\$15m) will support the SME Competitiveness Facility (SCF), with a focus on SMEs involved in food processing (i.e. sorting and bundling, dairy processing, safety and quality standards, packaging, traceability, etc.). Support will also be provided to the Enterprise Development basket Programme (EDP) led by the World Bank (see below).	Allocation to SPS issues not known	2008-2012
World Bank	Private Sector Competitiveness Project	US\$85m programme, part of which allocated to BEST, part to Financial Sector Deepening Trust (FSDT) and part to EDP Programme (US\$33m)	Allocation to SPS issues not known	2008-2012
SIDA, DANIDA, Switzerland (others to be confirmed)	Support to implementation of Tanzania Trade Integration Study (TTIS)	TTIS Multi-Donor Basket Fund aimed at supporting the implementation of the TTIS Framework Programme. Planned focus includes <i>inter alia</i> capacity building in SPS issues. <u>Under formulation</u> . Tentative initial resources amount to US\$25m.	Allocation to SPS issues not known	2009-2013
Enhanced IF - Tier 1 and 2	Tier 1 and Tier 2 projects	Tier 2 will focus on support to product and service sectors (estimated US\$6.5m); Tanzania will need to apply for Tier 1 and Tier 2 funding.	Allocation to SPS issues not known	2009-2013
World Bank	Scaling up Trade Activities for Competitiveness and Growth in Tanzania	Tanzania was recently selected as a pilot country under the World Bank African-wide Multi-Donor Trust Fund (MDTF) for Trade and Development. A first project (US\$300,000) would provide support for establishing a Trade and Competitiveness Strategy with focus on <i>inter alia</i> new markets in fast growing regions (East Asia, South Asia and the Gulf) and improving quality as a way of increasing value added and diversification (tourism, agro-processing, cash crops, etc.). One key output would be development of project components, projects and technical assistance activities (including on agriculture standards compliance).	Allocation to SPS issues not known	2008-?
Regional (EAC)				
EC	Lake Victoria Fisheries Management Plan (LVFMP) project	The purpose of developing a Fisheries Management Plan is to sustain the livelihoods of the communities who depend on fishery resources of Lake Victoria and to reduce poverty, food insecurity and unemployment. Includes component on fish handling and storage and upgrading of landing sites. Total budget US\$36m.	Allocation to SPS issues and country allocation not known	2003-2008 (extended for landing site upgrading)
FAO	Management of <i>Bactrocera invadens</i> and other target pests that constrain production and export of fruits and vegetables in East Africa	The project aims to develop and implement in collaboration with international and national partners effective approaches to reduction of fruit and vegetable losses due to fruit fly and MSW infestation. Target countries: Kenya, Tanzania and Uganda.	7,500,000 (seeking funding)	2008-2012
UNIDO/ Norad	Trade Capacity Building in Agro	Project aims to enhance the capacity of enterprises to produce according to international market requirements. Project being	4,000,000 (TBC)	2008-2010

	Industry Products	reformulated to incorporate participation of Rwanda and Burundi.		
Bill and Melinda Gates Foundation	Support to Small-Scale Coffee Farmers in East Africa	Programme will work with approximately 180,000 coffee farmers earning less than US\$2 a day with goal of improving income through improvement in quality. Implemented by TechnoServe. Regional budget US\$47m. Tanzania budget US\$15m.	Allocation to SPS issues not known	2008-2011
STDF	East African Centre of Phytosanitary Excellence	The objective of the project is to develop a model regional training centre on phytosanitary issues – including creation of a regional pest risk analysis (PRA) unit. Project implemented by CABI, KEPHIS and University of Nairobi (PMU to include regional stakeholders)	800,000	2008-2010
Germany/PTB	Establishment of a Regional Quality Infrastructure in the East African Community (2 nd phase)	The focus of the project is on regional standards harmonization (mainly ISO and TBT-related) including <i>inter alia</i> mutual recognition of conformity assessment procedures and setup of accreditation capacities, strengthening the SQMT coordination function of the EAC Secretariat and revision of the SQMT protocol regarding compatibility with the SQMT Act.	Allocation to SPS issues not known	2007-2010
Germany, Finland, Norway, Sweden and Denmark	EAC Partnership Fund	Budget for 2007/2008 amounting to US\$3.5m. Canada and DFID expected to join in 2008 taking funds up to US\$5m. Reportedly, SPS capacity building could be one focus of future activities to be funded if identified as priority by EAC Secretariat. Proposals for funding to be made by late April 2008.	Allocation to SPS issues not known	2007-2010
Regional (SADC)				
EC	SADC Foot and Mouth Disease (FMD) Project	Activities aim at reducing spread of FMD and its negative impact on livestock producers and intra/extra regional trade of livestock and livestock products. More specifically, activities focus on reviewing national regulations for livestock traceability, veterinary drugs, registration procedures, and training in export establishments for veterinary staff (total budget US\$15m).	Country allocation not known	2006-2011
EC	Capacity Building on Maximum Residue Levels (MRLs)	Improving market access of SADC farmers and exporters of food products to EU and global markets (areas of assistance include pesticides and veterinary drugs information systems, registration procedures, quality control, enforcement, traceability, etc.). Total budget €7.5m.	Country allocation not known	2006-2010
EC	Promotion of Regional Integration in the Livestock Sector (PRINT)	Activities are aimed at increasing productivity and trade flows in the traditional livestock sector; defining a regional framework towards the development of the livestock sector in the SADC region. Total budget US\$9.5m.	Allocation to SPS issues and country allocation not known	2004-2009
EC	Support for Standards, Quality Assurance, Accreditation and Metrology (SQAM)	Development of SQAM infrastructure in SADC region (includes support to Tanzania Bureau of Standards). Total budget US\$17m.	Allocation to SPS issues and country allocation not known	2006-2011
DFID	Regional Standards Programme (RSP)	The programme aims to assist emerging farmers in SADC countries to access supermarkets in the EU (focus on meeting private quality standards). Implemented by Commark Trust. Total budget US\$ 8,320,000.	Allocation to SPS issues and country allocation not known	
Regional (other)				
USAID/USDA	Support to key SPS policy	The objective of PASA is to build capacity of African countries to export plant, horticultural, and animal products	11,500,00 allocated to	2006-2011

	objectives ("PASA") under the African Global Competitiveness Initiative (AGCI)	internationally (including US). PASA amounts to US\$11.5m over 5 years. Assistance is primarily implemented through USAID's regional trade hubs – including Gaborone (Botswana) and Nairobi (Kenya) (including regional SPS advisors). PASA projects for East Africa include: <ul style="list-style-type: none"> - develop regional phytosanitary information system - develop appropriate phytosanitary mitigation options for trade - conduct pest risk analyses - facilitate COMESA's activities to build SPS infrastructure - identify and manage SPS problems in East Africa (including fruit fly) - strengthen participation in international standard setting - conduct animal disease risk assessments and identify mitigation measures - identify products with high export potential for which food safety compliance is main barrier 	SPS issues Country allocations not known	
USAID	Regional Agriculture Trade Expansion Support (RATES)	Objective is to increase the value and volume of agricultural trade within the East and Southern Africa region and between the region and the rest of the world. Total budget US\$26m. Among the deliverables are: <ul style="list-style-type: none"> - regional dairy and maize standards adopted by key countries involved in 80 percent of the regional trade - COMESA Dairy SPS protocol adopted by the COMESA Council of Ministers meeting in April 2008 and adopted by at least five dairy producing countries by September 2008 	Allocation to SPS issues and country allocations not known	Extension until 2008
Regional (ACP)				
EC	Programme Initiatives Pesticides (PIP-COLEACP)	Project objectives are 1) to enable ACP companies to comply with European food safety and traceability requirements and 2) to consolidate the position of small scale producers in the ACP horticultural exporters sector. Includes in-depth study of the impact of for ACP countries of the new European SPS regulations on official feed and food controls. Total budget €9.1m. A second phase of PIP is being considered.	Allocation to SPS issues and country allocations not known	Extension until 2008
EC	Strengthening Fishery Products Health Conditions in ACP countries	Focus areas are competent authorities, test laboratories, the fish industry and small-scale fisheries. AIDCO is currently preparing tenders for full implementation during extension period. Four teams are expected to be in place by April 2008; Total value €46m. <i>The Ministry of Livestock Development and Fisheries (MLDF) has not yet received official communication on the extension of the project. The first project of 2005-2007 did not run well because out of the 24 planned activities, only 2 took off and even these could not be completed.</i>	East Africa allocation 10,000,000. Individual country allocations not known	Extension until 2010
EC	Trade.com	Support for EPA negotiations and integration of ACP states in world economy. One component focuses on implementation of WTO Agreements and preparation of pilot projects with special attention to SPS and TBT issues. Total budget €50m.	Allocation to SPS issues and country allocations not known	2004-2009
EC	Participation of African Nations in Sanitary and Phytosanitary Standard setting Organizations (PAN-SPSO)	More effective participation of African countries in the activities of OIE, IPPC and Codex Alimentarius Commission during formulation of international standards on food safety, animal, and plant health. Project implemented by AU-IBAR and AU-IAPSC. Total project budget €3.85m. Project to start in November 2008.	Country allocations not known	2008-2010
EC/FAO, ITC,	Support Programme on	Strengthen capacities to develop and implement sustainable commodity strategies that improve farmers' productivity and	Allocations to SPS issues and	2008-2011

UNCTAD, World Bank	Agricultural Commodities (including cotton)	their rural livelihoods and reduce income vulnerability (including <i>inter alia</i> elaborating strategies covering critical parts of the commodities chain; supporting diversification; helping integrate commodities dependent countries in the international trading system). <u>Still under negotiation</u> . Total estimated budget US\$54m.	country allocations not known	
EC	Strengthening Food Safety Systems through sanitary and phytosanitary (SPS) measures	The objective of the programme is to improve the contribution of food and feed trade to poverty reduction in beneficiary countries. The aim is to establish risk-based food and feed safety systems for export products ACP countries that are in line with regional, international and EU SPS standards. Tendering process on-going.	45,000,000 (<u>estimated budget</u>). Country allocations not known	2008-2012
EC/AU- IBAR	Support Programme to Integrated National Action Plans for Avian and Human Influenza (SPINAP-AHI)	The project aims to contribute to the socio-economic impact of AHI and the potential loss of human lives and to strengthen national capacities to prevent and control AHI. Expected outcome include strengthened capacity for early detection and rapid response to AHI at national levels, information and awareness raising activities. Total budget amounts to €22.5m.	Allocations to SPS issues and country allocations not known	2007-2010
Regional (Africa-wide)				
SIDA	Trade Policy Training Centre in Africa (TRAPCA)	TRAPCA is attached to the Eastern and Southern Africa Management Institute (ESAMI) in Arusha and will provide training through an Executive Masters Programme in Trade Policy and shorter courses, seminars, and workshops (including training on SPS). Total budget amounts to US\$14m.	Allocation to SPS issues not known	2006-2010

ANNEX II

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ANNEX III

Notes to the balance sheet:

The tables presents for each area of food safety, animal and plant health (sections 5-7) the current status and needs of SPS capacities (in general terms), assistance provided by donors and identified gaps with priorities. For each area, there are three sub-components: awareness, regulation and enforcement. In addition to the three areas, there are separate parts for market access (section 4) and overall institutional capacity (section 8). The columns are explained below. The top of the table (section 1-3) is an introduction and summary of the gaps identified - including those gaps that are of most and immediate concern – and a brief note on trends in donor assistance.

Columns	Notes
Status	The capacities are based on existing capacity assessments and evaluations and other available studies (see references in Annex II) and updated in interviews with stakeholders in government, private sector, donor and international agencies (see list of contacts in Annex IV).
Needs	Obtained from the same sources.
Assistance	Donor activities are taken from the projects identified in the research work prepared for the Dar es Salaam Aid for Trade workshop (see references, Annex II) and updated in interviews with donor agencies. A full list of the main planned SPS projects and programmes is included in Annex I.
Gaps	These are needs that have not been addressed by present or forthcoming donor work. The gaps have been discussed and verified in interviews and meetings.
Priorities	Priority scales used: 1 – high and immediate priority; 2 – medium-term priority; and 3 – low and long-term priority
Principles used for prioritization:	<ul style="list-style-type: none">• Impact• Costs and benefits• Sequencing• Rule of law: major investment in diagnostics and inspection has to be preceded by legal framework and risk management

ANNEX IV

List of persons met/contacted in Tanzania

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