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VANILLA FACT SHEET FOR TANZANIA

DECEMBER, 2024

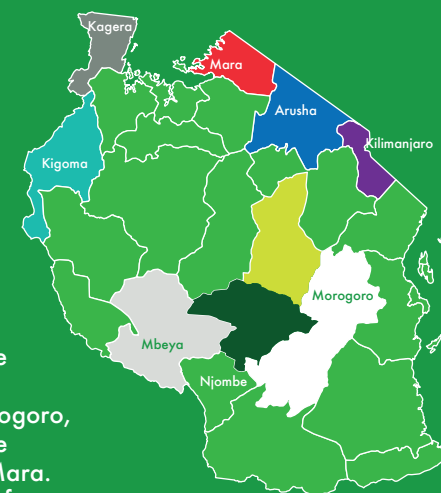
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VANILLA PRODUCTION IN TANZANIA

1. OVERVIEW

Tanzania is one of the key producers of vanilla in Africa, particularly known for its high-quality vanilla beans of about 2.8 vanillin content in average. It is primarily cultivated for export selling. The country's vanilla industry is characterized by smallholder farmers who cultivate vanilla and sell green vanilla beans to buyers that export cured vanilla. This crop is grown by about twelve thousand (12,000) farmers mainly in three (3) regions which are Kagera, Kilimanjaro and Morogoro, other potential regions across the country include Arusha, Mbeya, Tanga, Njombe, Kigoma and Mara. Tanzania is the 12th largest exporter of vanilla after Rwanda, Uganda and Madagascar in Africa. Tanzania's vanilla is commonly produced organically which provides its most competitive advantage.



2. KEY PRODUCTION AREAS

The total area dedicated to vanilla production in Tanzania is estimated to be close to 1500 hectares with an estimate potential production of up to 300 tons per year of green vanilla. Most vanilla is grown in smallholder farms, where farmers typically cultivate vanilla alongside other crops such as banana, coffee and cloves. The area can fluctuate based on market demand, climatic conditions, and farmers' choices regarding crop diversification. There are three (3) major regions in the country where vanilla is produced as follows:

Kagera Region

One of the most famous vanilla growing regions in Tanzania due to its fortunate climate nature favored by diverse agricultural practices. The average production volume of green vanilla is approximately 73.347 MT annually.

Kilimanjaro Region

Also known for its diverse agricultural practices. Kilimanjaro has a growing vanilla sector which is supported by both local and international investors. Production volume is approximately an average of 8.471 MT annually.

Morogoro Region

This region is marked as a prominent area for spices production in Tanzania's mainland with a vast agricultural potential. Morogoro is seeing increased vanilla farming also supported by both local and international markets. Production volume is approximately 42.4 MT annually.



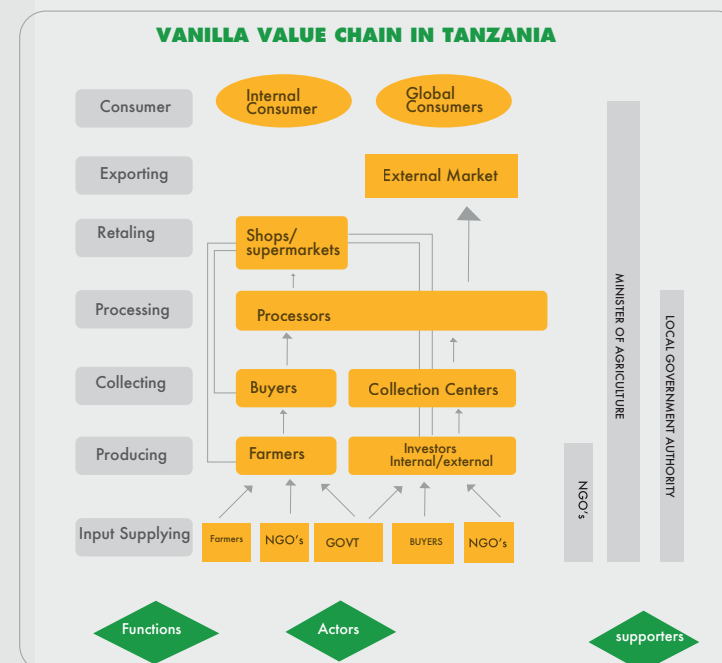
Tanga, Arusha, Mbeya, Njombe, Mara and Kigoma regions are also potential areas for vanilla production due to its suitable climate.

Region	2020/2021	2021/2022	2022/2023	2023/2024
Kagera	39.57	77.30	10.08	75.71
Morogoro	33.4	31	51	54.2
Kilimanjaro	1.50	5.44	10.33	16.62
	74.47	113.74	71.41	146.53

Source: Vanilla Production and Market Assessment in Tanzania October 2024

3. VANILLA PRODUCTION VALUE CHAIN IN TANZANIA

The whole value chain of vanilla production in Tanzania includes several stages from production to consumers as shown in figure 1 below.



Source: Vanilla Production and Market Assessment in Tanzania October 2024

World vanilla markets affect annual production as shown above. Price stabilization and market assurance will further motivate farmers to increase production as all regions haven't even attained half of their potential. The regions predict to produce almost the same quantity in the season as shown in the table below.

No.	Region	MT
1	Kagera	110.87
2	Morogoro	27.10
3	Kilimanjaro	8.30
4	Tanga	0.09
Grand Total		146.36

Source: *Vanilla Production and Market Assessment in Tanzania October 2024*

The price of natural vanilla has been going up and down dramatically in many areas worldwide, affecting market stability. Tanzania not excluded from being affected with the situation, this has led to a drop in demand for natural vanilla, thus retaining many of the unpurchased cured vanilla in major producing areas within the country as shown in the table below.

No.	Region	Cured vanilla (Tonne)
1	Kilimanjaro	20.58
2	Morogoro	0.75
3	Kagera	17.45
4	Tanga	0.013
Grand Total		38.79

Source: *Vanilla Production and Market Assessment in Tanzania October 2024*

Note: Approximately 38.79 tons of cured vanilla stocks were reported until 10th October 2024. However, the reported quantity is subject to change from time to time because farmers will continue to sell upon the availability of buyers at any particular time.

4. PRODUCTION PRACTICES

In Tanzania, vanilla is commonly cultivated in banana fields which are practically for producing shade and jatropa trees are commonly used for providing support. Few are cultivated under the screen houses. Vanilla is a labor-intensive crop, requiring careful pollination which is done by hand.

Harvesting: In Tanzania harvesting season starts in late May and marks its peak in June to July and it ends in September depending on the ecology of an area.

Vanilla farmers in Tanzania are organic producers by default. This may serve as an opportunity to access high end markets in the EU, Japan, US and UK. Modern post-harvest handling technologies especially dryers is another area of investment where farmers may be able to access this service externally for available lucrative markets.

5. CURRENT POTENTIAL MARKET

The market potential for Tanzania's vanilla is promising due to several key factors, including increasing global demand, favorable growing conditions, and the country's efforts to improve production. Vanilla is primarily exported to South Africa, Madagascar, the United States, France, Germany, Australia, Denmark, India, Russia, United Kingdom. Also, vanilla has a potential market which includes China and India. Very little amount is consumed locally through direct selling to processors and/or supermarkets.

6. QUALITY AND VARIETIES

Quality: Tanzanian vanilla is prized for its rich, creamy flavor and aromatic profile. The beans are typically characterized by their high vanillin content ranging from 2.6 to 3, which contributes to their quality.

Varieties: The most commonly cultivated variety in Tanzania is Bourbon or Madagascar Vanilla (*Vanilla planifolia*) which is known for its premium quality (high vanillin content and its pure vanilla flavor. There are also efforts to cultivate other varieties such as Tahitian Vanilla (*Vanilla tahitensis*).

7. CHALLENGES

Market Competition: Tanzanian vanilla faces competition from other producing countries like Madagascar, which is the world leader in vanilla production.

Labor Issues: Limited skills for value addition which is critical factors in quality of cured vanilla.

Organic Certification: Increasing demand for organic vanilla presents the need for Tanzanian farmers to be organically certified to access premium markets.

8. OPPORTUNITIES

Sustainability Initiatives: Due to farming practices of vanilla (organic production) programs of none chemical application this aimed at improving sustainable farming practices that can enhance both yield and quality while preserving the environment.

- ✓ **Value Addition:** There is potential for local processing of vanilla products, such as extracts and oils, which can increase profitability for farmers.

However, this opportunity can best be tapped by supporting Agricultural Marketing Cooperative Societies (AMCOS) and farmer's groups. Also, there is potential for investing on warehouse and its facilities.

- ✓ **Land Availability:** Availability of suitable land in area with potential for vanilla cultivation that are characterized by suitable weather and soil conditions for quality vanilla production.
- ✓ **Favorable growing conditions:** The country's elevation, rainfall patterns, and temperature ranges are well-suited to growing high-quality vanilla, similar to other major producers like Madagascar.

9. GOVERNMENT INITIATIVES FOR IMPROVING THE VANILLA INDUSTRY

- ✓ Developed the National Vanilla Strategic Plan (2024-2030) which serves as a roadmap for ensuring proper supervision, monitoring and provide the necessary regulatory requirements for the entire value chain.
- ✓ The Tanzanian government has been working to promote high-value crops like vanilla through various agricultural development initiatives. Vanilla is among other crops outlined in the National Horticulture Development Strategy and Action Plan (2021-2031) as a strategic crop due to its economic importance in terms of export revenue.
- ✓ There have been efforts to improve farmers' knowledge of vanilla cultivation techniques to increase yield and post-harvest handling which are crucial for maintaining quality yields.

10. CONCLUSION

Overall, there is untapped potential for developing the Tanzania's vanilla industry. With its unique geographical advantages and commitment to quality, the industry plays a significant role in the global vanilla market. While prices can vary year to year, the market for Tanzanian vanilla remains strong, particularly with ongoing trends toward organic and sustainable products. If the Government can target investments in production quality, infrastructure, and market access, Tanzania can become a major competitive player in the global vanilla market, contributing to rural development and export diversification. By addressing challenges and leveraging opportunities, the sector can continue to thrive and contribute to the livelihoods of many Tanzanian farmers.