



Protecting Livestock – Improving Human Lives

# ESTABLISHMENT OF AN ANIMAL HEALTH INDUSTRY ASSOCIATION (AHIA)

## TANZANIA



*A SCOPING STUDY REPORT*

*MARCH 2021*

Undertaken by:



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## ACRONYMS

AHI	Animal Health Industry
AHIA	Animal Health Industry Association
AI	Artificial Insemination
ASPA	Arusha Society for the Protection of Animals
AU-IBAR	African Union Inter-African Bureau for Animal Resources
CBPP	Contagious Bovine Pleuropneumonia
CCPP	Contagious Caprine Pleuro-Pneumonia
CVO	Chief Veterinary Officer
DVO	District Veterinary Officer
DVS	Director of Veterinary Services
EMAi	Event Mobile Application
FAO	Food and Agriculture Organization of the United Nations
FMD	Foot and Mouth Disease
GALVmed	Global Alliance for Livestock and Veterinary Medicines
GDP	Gross Domestic Product
ILRI	International Livestock Research Institute
IMF	International Monetary Fund
LGA	Local Government Authority
LITA	Livestock Training Agency
LSD	Lumpy Skin Disease
MLF	Ministry of Livestock and Fisheries
NGO	Non-Governmental Organization
OIE	Office International des Epizooties

PAT	Poultry Association of Tanzania
PINGO	Pastoralists Indigenous Non-Governmental Organization
PO-RALG	Presidents Officer Regional Administration and Local Government
RST	Rangeland Society of Tanzania
RVO	Regional Veterinary Officer
SPS	Sanitary and Phytosanitary
SUA	Sokoine University of Agriculture
TAMPA	Tanzania Milk Processors Association
TAMPRODA	Tanzania Milk Producers Association
TAPA	Tanzania Animal Production Association
TAPI	Tanzania Association of Pharmaceutical Industry
TAPMA	Tanzania Pharmaceutical Manufacturers Association
TASAVO	Tanzania Small Animal Veterinary Organisation
TAVEPA	Tanzania Veterinary Paraprofessionals Association
TFA	Tanzania Farmers Association
TFDA	Tanzania Food, Drugs and Cosmetics Act
TLMP	Tanzania Livestock Master Plan
TMDA	Tanzania Medicines and Medical Device Authority
TNBC	Tanzania National Business Council
TPBA	Tanzania Poultry Breeding Association
TSAP	Tanzania Society of Animal Production
TVA	Tanzania Veterinary Association
URT	United Republic of Tanzania
VCT	Veterinary Council of Tanzania
VISAT	Veterinary Input Suppliers Association
VL	Veterinary Laboratories
WB	World Bank
WTO	World Trade Organization

## EXECUTIVE SUMMARY

This scoping study report gives detailed insights into the Tanzania livestock industry and informs the need for and modality of establishment of an Animal Health Industry Association (AHIA) in the country. The report is based on a desktop review of animal health industry (literature, policy and legislation) and feedback from key industry stakeholders (including the ministry of livestock and veterinary officials, animal health input traders, livestock keepers, livestock industry association representatives, private animal health service providers etc.), obtained through key informant interviews and structured questionnaires. The key highlights of the report include history and evolution of animal health industry in Tanzania, the current content, structure, function, and size of the industry as well as the case for establishment of Animal Health Industry Association (AHIA).

Despite having the third largest livestock population in Africa (30.5m cattle, 18.8m goats and 5.3m sheep, 1.9m pigs, 38.2m local chickens, and 36.6m improved chickens) and numerous governments led transformations in the policy, legislative and trade frameworks, the livestock sector contributes dimly to the entire economy of Tanzania. The industry suffers numerous challenges including poor coordination of key stakeholders, inadequate regulation of livestock health trade leading to substandard products in the market. Besides, turf wars in the service industry and minimal sharing of industry information slows down service delivery and efficiency in trade and distribution of livestock inputs.

The establishment of an AHIA in Tanzania is seen as a sustainable remedy that will bring together players in the industry to communicate, identify challenges, co-create solutions, including how stakeholders can work collectively towards solutions that deliver benefits to all industry actors. This platform will also act as a unifying voice of industry players. Indeed, stakeholders consider that the association would contribute to vibrancy and sustainability of the animal health industry by strengthening collaboration between the public and private sector players, and in this way has potential to address the current supply chain issues which are responsible for the high transaction costs that make inputs unaffordable to farmers and also reduce profit margins for traders along the supply chains.

There is a consensus amongst the key industry stakeholders that a strong umbrella AHIA that will effectively coordinate the animal health industry and further leading ethical veterinary practice and fair-trade thereby enhancing the industry's contribution to national economy. Broadly, two options have been suggested towards formation of an AHIA: one is to start the association from scratch; and two, to build on an existing association. Whereas some stakeholders proposed that The Veterinary Input Suppliers Association of Tanzania (VISAT) could be strengthened to form the anchor for the AHIA, the majority preferred that an entity should be established from scratch. Stakeholders also suggested that the proposed apex AHIA learn some lessons from existing umbrella associations such as the Tanzania Association of Pharmaceutical Industry (TAPI) and the Tanzania Pharmaceutical Manufacturers Association (TAPMA). The preferred form of the association is a legally registered, independent apex body with strong membership, voice and recognition so that it can have influence at the highest possible level of government.

## 1. History and evolution of animal health industry

The livestock industry in Tanzania has undergone numerous transformations both on the regulatory and trade fronts. The key motivation for the series of structural transformation (government and private sector) has been to uplift the low-income livestock producers to transition into high-income levels. During the first two decades after Tanzania gained independence in 1961, livestock production was stagnant and unstable. The livestock industry was at that time characterized by state-controlled input and output markets and pan-territorial livestock prices that brought low prices for farmers, especially the nomadic communities. In 1973, the ujamaa villagization programme gathered peasants into nucleated settlements, often to practice collective farming of both crops and livestock, and this programme (unpopular among farmers) is considered as one of the major causes of agricultural decline in the early 1970s.

The government responded to the resulting shock with a major focus on increasing access to social and technical services by facilitating autonomy of local governments in discharging their functions towards service delivery and local economic development. Between 1962 and late 1980s, the veterinary services administration and governance was in the public sector domain. The administration component of veterinary services was under a Director of Veterinary Services (DVS) appointed by the Minister responsible for livestock services. Animal health services were provided with government subsidies and active veterinary clinics, animal health centers and livestock development centers were maintained in some areas down to the lowest level (Ward). These centers and clinics, manned by diploma or certificate holders were used as reporting points for farmers, drug distribution points as well as farmer training centers. However, in the course of empowering local authorities, weakening of the powers of the DVS was observed especially where the Regional Veterinary Officers were not answerable to the DVS. This problem worsened during the Decentralization by Devolution era (1983 – 2019), which called for the ongoing review of the livestock policy and the legal framework to rectify the problem.

In the 1980s, structural adjustment policies were introduced to transition from a socialist to a market economy and reduce barriers to domestic and international trade (Cooksey, 2011; 2012). The Economic Recovery Program opened space for the private sector in service delivery. By the late 1980s, delivery of veterinary services was moved from the public domain to private sector. Free dipping ceased from 1983, and government veterinary stores and clinics were abolished in 1994 and 1997 respectively (Malewas and Lengisuji 2001). These developments were accompanied by several reviews in the policy, legal and regulatory framework, current policies and legislation.

The resultant effect is that state corporation, which previously acted as a monopoly in the purchase and distribution of disease control products, was replaced by private traders, and livestock input markets opened to private suppliers. The transformation has since then seen the birth of multiple players> Unfortunately this has been accompanied by weaker control over the trade, manufacture and distribution of animal health inputs.

## 2. Current content and context of the industry

### **2.1 Actors and services offered**

The Tanzania Livestock industry is characterized by heterogeneity of actors both in the private and public sectors. At the regulatory level, the representatives of the Department of Veterinary Services (DVS), the Veterinary Council of Tanzania (VCT) and pharmacy board are most prominent.

There are multiple professional associations for instance Tanzania Veterinary Association (TVA), and Veterinary Input Suppliers Association of Tanzania (VISAT). The trade industry is majorly run by private companies, both international and national level traders providing both animal health products and services and feed. There are multiple levels of animal health service providers in public and private sectors and these mainly include veterinary doctors, technicians and community-based animal health workers. These players interrelate in multiple ways through a distribution system often terminating at the agro-veterinary retail shops. The following sections summarize the key sector players.

**Regulation:** The Veterinary Council of Tanzania (VCT) is the national Veterinary Statutory Body, regulating the veterinary profession and practice in the country. VCT is the sole authority effecting registration, enrolment and enlistment under the Veterinary Act powers and monitoring the performance of veterinarians Veterinary of the specialists, Paraprofessionals and Paraprofessionals Assistants. Detailed functions of the Council are stated in the Veterinary Act No. 16 of 2003 (<https://www.mifugouvuvu.go.tz/publications/30>). The Council has a chairperson appointed by the Minister and a registrar who leads the executive arm of the council. At District level, the Minister appoints a registered veterinarian to be an assistant registrar and, in designated areas, the minister appoints inspectors who are delegated to do registrars' roles. For a number of years, the government supported veterinarians in the public sector to participate in their annual conferences and general meetings. In 2014, VCT released ministerial guidelines for monitoring continuous professional development for the professionals in various associations in animal health provision for the purpose of ensuring continuous professional improvement and creating collegial working relationships. Another key role of the VCT is to link and represent the nation at the OIE and other regional organizations with the aim of ensuring the Tanzania livestock industry is compliant with global and regional statutory requirements and ratifications.

**Professional associations:** There are multiple associations at various nodes of livestock value chain, especially in provision of animal health. The associations can be categorized as: professional, producer/commercial, agribusinesses, input suppliers, processors, manufacturers associations and apex organizations. The Tanzania Veterinary Association (TVA) and Tanzania Veterinary Paraprofessional Association (TAVEPA) are the most prominent and both associations allow for membership from other professions as well as corporate organizations. Other key associations include Tanzania Veterinary Pharmaceuticals Importers, Manufacturers and Distributor Association, Tanzania Small Animal Veterinary Organization (TASAVO), Tanzanian society of animal production (TSAP), Association of Veterinary Medicine & Devices Importers & Distributors, Tanzania Milk Processors Association (TAMPA), Tanzania Milk Producers Association (TAMPRODA). The key and common feature of these associations is that they provide platforms for members to share knowledge, experiences and discuss challenges of the industry through their general meetings as well as in national and international scientific conferences. There is, however, little coordination between them hence their limited ability (beyond what they do for their

members) to effectively play advocacy and lobbying roles and engagement of policy makers for the benefit of the whole industry.

**Private sector:** The private sector plays the key role in trade of animal health inputs through importation, manufacture and distribution of animal health products. The 1997 National Agricultural and Livestock Policy provided for privatization of veterinary services and drugs supply gradually, starting with urban and peri-urban areas. This initiative included promotion of private veterinary practices, stimulation of government veterinarians to set up private practices and self-financed para-vets working under supervision of qualified veterinarians. **Table 1** below shows the number of registered practitioners, facilities and distributors of animal health inputs. Distribution of the veterinarians in the 26 administrative regions is highly skewed, with over 40% of them in urban and peri-urban areas of Dar es Salaam and Morogoro. Arusha, Mwanza, Mbeya, and Kilimanjaro regions have another 4% each, while the remaining regions have less than 3%. The distribution of the veterinarians can be attributed to business prospective, demand for inputs and services as well as livestock farmers' willingness to pay for the services.

**Table 1: Number of professionals and veterinary facilities registered, enrolled or listed by VCT**

Professional/Facility	Number
Veterinarians	848
Paraprofessionals	1752
Professional Assistants	2085
Veterinary Hospital	1
Veterinary Clinics	18
Veterinary Centers	1709
Veterinary Service Companies	12
Importers and wholesale dealers	7
Manufactures	4
Vaccine production	2

*Source: Ministry of Livestock Agriculture and Fisheries 2019*



## **2.2 Current policies and legislation**

The animal health and input industry policy and regulatory framework has undergone major reviews and transformation since 2019. The reforms have been inspired by government initiatives to transform the livestock sector as prescribed in the Livestock Master Plan<sup>1</sup> and the Blueprint for Regulatory Reforms to improve the Business Environment<sup>2</sup>. New regulations of 2019 aim at rectifying some of the weaknesses in the structure under the Decentralization by Devolution policy. Central to these reforms is alignment to the One Health concept. The concept addresses collaborations between animal health and human health particularly focusing on management of zoonotic diseases such as rabies. The Animal Diseases (Vaccines and vaccination) Regulations 2020 enforcing mandatory vaccination for all priority diseases was also recently enacted. Similarly, the Animal Diseases (Acaricide Application and Management) Regulations 2020 enforcing mandatory dipping has been released. These new regulations are linked to marketing and movement of livestock through use of vaccination and dipping cards for marketing and movement permits in the Animal Diseases (Animal and Animal Products movement) Regulations 2020.

Additionally, there are ongoing efforts to establish disease-free zones with biosecurity measures in compliance to OIE and WTO regulations to open Tanzania livestock markets to international trade. Other reviews are in hatcheries and breeding farms, artificial breeding to incorporate use of embryo transfer and animal welfare regulation (2020), for animal rights and humane handling of animals on transit and in slaughtering. Enforcement of these new regulations is supported by the Livestock Identification, Registration and Traceability Act No. 12 of 2010 by mandatory identification of all livestock and the recently introduced digital recording using the Event Mobile Application (EMAI).

Another important legislation relevant for the animal health industry is the Tanzania Food and Drugs Authority (TFDA) Act 2003, which provides for the efficient and comprehensive regulation and control of food, drugs, medical devices, cosmetics, herbal drugs and poisons. TFDA Act, 2003 repealed the Food Act, 1978 and the Pharmaceuticals and Poison Act, 1978. Recent reviews moved food regulation to Tanzania Bureau of Standards and vested other functions stipulated in the Act to Tanzania Medicines and Medical Devices Authority (TMDA).

Table 2 provides a summary important policies and legislation directly affecting the animal health industry.

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<sup>1</sup> <https://core.ac.uk/download/pdf/132697826.pdf>

<sup>2</sup> <https://www.mit.go.tz/uploads/files/BLUEPRINT-BOOK-compressed.pdf>

**Table 2: Summary of important policies and legislation directly affecting the animal health industry**

Legislation	Functions
Tanzania Food Drugs and Cosmetics Act 2003, which repealed the Pharmaceuticals and Poisons Act, 1978	<ul style="list-style-type: none"> <li>• Registration of manufacturers of pharmaceuticals</li> <li>• Registration of premises for manufacturing of pharmaceuticals</li> <li>• Regulation of the manufacture, importation, labelling, marking or identification, storage and sale of pharmaceuticals.</li> <li>• Prescription of minimum standards of quality with respect to pharmaceuticals manufactured or imported into the United Republic of Tanzania</li> <li>• Approval and registration of products regulated under the Act, manufactured within or imported into and intended for use in URP</li> </ul>
Veterinary Act No 16 of 2003:	<ul style="list-style-type: none"> <li>• Registration of veterinarians, enrollment of paraprofessionals and enlisting of paraprofessional assistants.</li> <li>• Registration of veterinary practice facilities</li> <li>• License issuing for artificial insemination.</li> <li>• Issuing of a certificate of recognition for companies undertaking veterinary services</li> </ul>
Animal Diseases Act No. 17 of 2003:	<ul style="list-style-type: none"> <li>• Appointment of the Director of Veterinary services to exercise powers and functions conferred upon him/her pursuant to the Act.</li> <li>• Appointment of veterinarians or paraprofessionals as inspectors for specific areas for the purpose of enforcing the Act.</li> <li>• Formulation of regulations spelling out measures for checking livestock diseases and diseases of animals other than livestock.</li> <li>• Powers of inspectors</li> <li>• Disposal of animal carcasses</li> <li>• Compensation</li> </ul>
The Livestock Identification, Registration and Traceability Act No. 12 of 2010	<ul style="list-style-type: none"> <li>• National livestock identification.</li> <li>• Registration and traceability system.</li> <li>• Livestock recording system</li> </ul>
The animal diseases (animal and animal products movement control) (amendment) regulations, 2020	<ul style="list-style-type: none"> <li>• Control movement of animals within localities and outside the country.</li> </ul>
The Animal Diseases (Vaccines & Vaccinations) Regulation, 2020	<ul style="list-style-type: none"> <li>• Control of vaccine and vaccination management</li> <li>• Handling, storage, and transportation of veterinary vaccines.</li> <li>• Monitoring vaccines and vaccination. At least 70% coverage of national herd. A national vaccination calendar for the 13 priority diseases is to be followed.</li> <li>• Vaccination certificates to be used in livestock movements and markets.</li> </ul>
The Animal Disease (Acaricide application and management), Regulations 2020	<ul style="list-style-type: none"> <li>• General acaricide application and management</li> <li>• Compulsory application of all livestock and penalties for not doing so including dipping cards to be used in livestock markets and movement.</li> <li>• Roles &amp; responsibilities of all key players from national level to dip tank defined</li> <li>• Establishment of dip catchment areas</li> </ul>

Legislation	Functions
The Animal Diseases (Hatcheries and Breeding Flock Farm) Regulations 2019	<ul style="list-style-type: none"> <li>• General operations and management of hatcheries and poultry breeding flock farms</li> <li>• Disease monitoring, surveillance, and controls in these farms</li> <li>• Handling, transportation and of hatching eggs and day-old chicks</li> <li>• Prevention and compensations against Pullorum, Marek's and avian Encephalomyelitis diseases</li> <li>• Offenses and penalties</li> </ul>
Animal Diseases (Regional Veterinary Officers and District Veterinary Officers) Notice, 2019 GN. No.66	<ul style="list-style-type: none"> <li>• Reinstating powers of RVOs and DVOs in enforcing the Act</li> </ul>
The Animal Welfare (Impounded Animal) Regulations, 2020	<ul style="list-style-type: none"> <li>• Handling of livestock held for trespassing e.g. to nature reserves</li> </ul>
The Animal Welfare (Humane Slaughter and Killing of Animals) Regulations, 2020	<ul style="list-style-type: none"> <li>• Humane handling and slaughter of animals</li> </ul>

It is evident that these livestock and agricultural policy and legislation transformation in Tanzania has long been characterized by tension between faith in the input market system and in the state, and this endures to this day. The government's major agricultural policy of the 20th century is the Agricultural Sector Development Programme, (encompassing both livestock and crops) and which has occurred in two phases (ASDP-I, from 2006 to 2013, and ASDP-II, from 2018 to 2025). Despite this being framed as a private sector-focused initiative, Cooksey (2012) describes ASDP-I as primarily a state-centric development strategy with a secondary role for markets and private sector actors.

**2.3 Challenges and Opportunities**

**2.3.1 Challenges**

- The livestock industry suffers poor collaboration and coordination among key stakeholder groups, both in the private and public sectors. At trade level mainly (private sector driven) reference has been made to unhealthy competition among business service providers and input suppliers. This is worsened by weak regulations for various animal health input products including drugs, vaccines, feeds just to mention a few. The inadequate collaboration, coordination and inadequate information sharing. was identified as the key reason for overlapping roles of various agencies.
- At service level, turf wars between veterinary associations in their dealings with other stakeholders; particularly the veterinary para-professionals, the resulting lack of collaboration was mentioned as a major hindrance towards provision of services.
- High cost of registering drugs and vaccines coupled with stringent regulations by the registrar of veterinary pharmaceuticals, especially for new entrants in the industry.
- Inadequate staffing of animal health programs.

- Disease control programs tend to be reactive – for example, vaccinations being done when outbreaks have occurred. This is a consequence of the staffing challenge.
- Lack of timely reliable data to inform matching of demand and supply of drugs and vaccines.

### 2.3.2 *Opportunities*

- In 2019, Tanzania launched the Tanzania Livestock Masterplan (TLMP) to guide livestock-sector investments in improving genetics, feed and water resources, health services, industry and factory and to improve the business environment. New regulations of 2019 and 2020 aim at rectifying some of the weaknesses in the structure under the Decentralization by Devolution policy.
- Recent regulatory reforms emanating from the Blueprint for Regulatory Reforms to improve the business environment. These reforms are being credited with significant increase in growth of the livestock sector. In the last three years, the sector has grown faster than in previous years with a rate of 5% in 2019 relative to 2.6% in 2017. Private sector investment in large scale beef and dairy farms has increased. The establishment of a private sector desk at the Ministry level is one of the interventions which has created an opening for increased public-private sector dialogue and partnerships.
- The livestock identification, registration, and traceability regulations and the introduction of registration of industry practitioners makes it possible to better monitor disease outbreaks and industry efficiency; increased use of mobile communication is also improving disease reporting.
- Other positive developments in the national livestock industry related to delivery of animal health services include: Establishment of guidelines for delivery of AI services, compulsory vaccination, and dipping, the review of the role of central government in provision of extension services, reinstating public control on dipping and reducing land use conflicts between crop farmers and livestock keepers, and the VCT enrollment of paraprofessionals and paraprofessional assistants.

## 3. The case for Animal Health Industry Association

### 3.1 *Relevance*

The majority of stakeholders agree that there is a compelling need for the establishment of an AHIA in Tanzania, as a platform that brings together players in the industry to communicate, identify challenges, co-create solutions, including how stakeholders can work collectively towards solutions that deliver benefits to all industry actors. This platform will also act as a unifying voice of industry players. Indeed, stakeholders consider that the association would contribute to vibrancy and sustainability of the animal health industry by strengthening collaboration between the public and private sector players, and in this way has potential to address the current supply chain issues which are responsible for the high transaction costs that make inputs unaffordable to farmers and also reduce profit margins for traders along the supply chains.

Majority of these stakeholders would like to have a strong AHIA that will be able to promote ethical veterinary practice and enhance the animal health industry value chain and its contribution to national economy. Indeed, the prevalence of counterfeit and sub-standard illegal products currently being sold in the market and the fact that the current legislative framework has not adequately addressed the ills, call

for the intervention of an umbrella organization with a strong voice and adequate influence both in the private and regulatory sectors

The majority of stakeholders expressed dissatisfaction with the levels of efficiency and effectiveness of the current levels of industry regulation particularly in regard to impacts on availability, accessibility and compliance to quality and safety. Details of the findings are presented in **Annex 2**.

### ***3.2 Collaboration and Partnerships***

The new AHIA is viewed as the organization that is likely to effectively champion collaborations amongst the different sectors in Tanzania including service provision industry (mainly private and public sector veterinarians and livestock production experts and the paraprofessionals), government sector (including both national and devolved veterinary functions in the regions of the country, parastatals and government institutions charged with formulation and dissemination of livestock policies), existing associations including Tanzania Veterinary Association, Veterinary Input Suppliers Association of Tanzania (VISAT) among others. The stakeholders believe that in order to ensure effective collaboration, a framework agreement detailing the type of membership, corresponding roles and the responsibilities (e.g., the frequency and amount of contribution) be put in place by an interim steering committee. The proposed structure would for instance need to also take care of individual practitioners e.g., veterinarian as well as paraprofessionals and prescribe corresponding fees for each category.

The Veterinary Council of Tanzania (VCT), being the principal registrar of veterinarians and veterinary paraprofessionals would play a vital role in convening the initial meetings. Care would however need to be taken to ensure that the potential members do not get the impression that the upcoming association is a wider part of government (control) initiative.

### ***3.3 Governance and Management***

Whereas it is not yet clear how a management structure of the proposed AHIA would look like at this stage, there is an agreement amongst the stakeholders that the new AHIA should be an all-inclusive independently registered organization with voice and influence to effectively engage policy custodians. A key consideration in ensuring effective governance is to ensure that the value proposition of the new AHIA is clearly farmed with input by members and the roles or obligations of each party clearly articulated to minimize the risk of existing association seeing the apex association as a competitor.

Key priorities for consideration include stakeholder ownership, a compelling value proposition and a membership structure that is informed by a deep understanding of the current and emerging institutional landscape in Tanzania, including distinction between institutions that are members and those which are critical partners but not members. For instance, government affiliated agencies.

Initial steps towards the establishment of the AHIA would include in-depth consultation and securing the buy-in of Tanzania Veterinary Council (TVC). Subsequent steps would include mapping and mobilization of member organizations and individuals to a round table to ensure broader consultation in a participatory process that would ensure a good understanding of issues, including a sense of institutional and individual dynamics which could undermine the process. The founding stakeholders could then proceed to form an interim steering committee (ISC) which would be instrumental in the initial running of the association

including mobilization of potential members and engagement of industry players in tackling the aforementioned challenges.

### **3.4 Sustainability**

Pursuing multiple options for resource acquisition including membership fees (immediate and short-term option), organizing awareness and sensitization campaigns or events /exhibitions, funding from donors are some of the options suggested for ensuring financial sustainability. Additional suggested options include anchoring the new AHIA to an existing association to initiate the mobilization of the other stakeholders while others believe strengthening an existing umbrella association could minimize the hustles of initiating an umbrella association from scratch. Some stakeholders believe that that new AHIA could pick a few lessons from existing umbrella associations from apex organizations in Tanzania like the Tanzania Association of Pharmaceutical Industry (TAPI) or the Tanzania Pharmaceutical Manufacturers Association (TAPMA). On the other hand, majority of the key informants do not believe that support from the government quarters would be a sustainable option. **Annex 3** captures the details of in-depth feedback from the stakeholders on the sustainability question.

## **4. Summary and conclusions**

This study found a high prospect for establishment of Animal Health Industry Association in Tanzania. Key reasons given for the need for an association in Tanzania include the need to initiate, influence and police the national policies and legislation on animal health products and services. According to our analysis of the responses from the key stakeholders, the animal health input industry in Tanzania seem to lean towards the need for formation of an umbrella body that would unite the already fragmented industry. These stakeholders agree that the proposed association can be national level organ and a critical link between the public and the private sectors.

An existing association, Veterinary Input Suppliers Association of Tanzania (VISAT) has been proposed by a few stakeholders as an umbrella association whose capacity could be further built. The key informants from various animal health industry sectors interviewed believe that VISAT could pick a few lessons from existing umbrella associations for human pharmaceuticals including Tanzania Association of Pharmaceutical Industry (TAPI) and the Tanzania Pharmaceutical Manufacturers Association (TAPMA). Majority of the respondents, however, think there is need for a fresh association devoid of organizational wrangles and poor management foundations.

The process of formation of a sustainable animal health industry association ought to start with a roundtable discussion amongst the diverse stakeholders in the animal input industry with a two-fold objective; first to enable the members fully understand the blue-print of the association and secondly to define the roadmap towards strengthening the association. The in-depth understanding of the position and role of the association will serve to allay the fear that the proposed umbrella organization has competing interests.

Sensitization and mobilization campaigns with an agenda of getting the buy-in of other industry stakeholders should precede the formation of an industry association in Tanzania. The proposed roadmap towards the establishment of an AHIA in Tanzania includes: The involvement of Tanzania Veterinary Council (TVC) is critical at this stage.

Clearly determining the operational milestones including the financial resources, human resources etc. and refining the roadmap for obtaining these resources.

As part of jumpstarting the of the envisioned AHIA, setting up a preliminary Interim Steering Committee (ISC) to oversee establishment and operationalization of the new organization is a critical milestone.

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## 6. Annexes

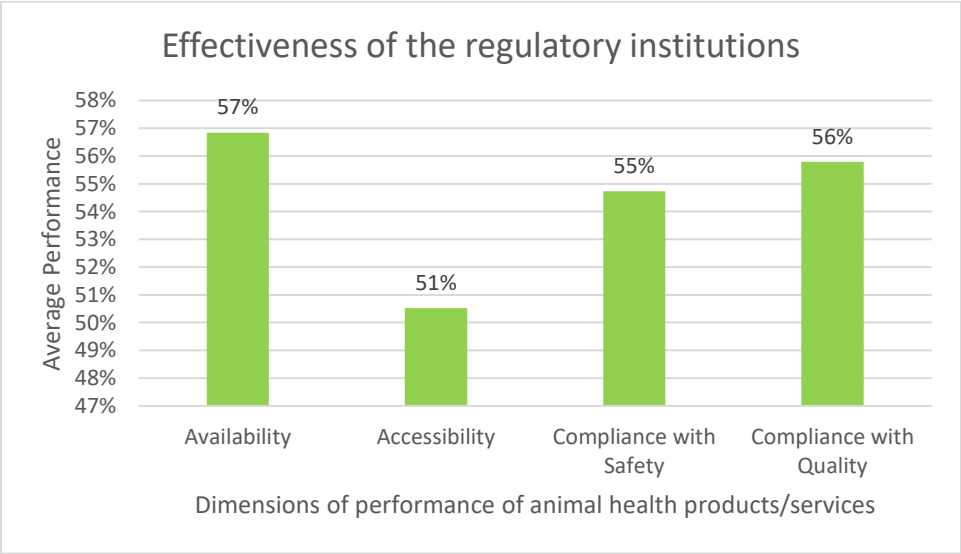
### *Annex 1: Key informant interviewees*

<b>Name</b>	<b>Affiliation</b>
Dr. Elisante Nderingo Ngowi	Private Practitioner
Dr. Gabriel Shirima	Nelson Mandela University – Former in-charge Officer of Government Vaccination Unit
Dr. Joseph I Kitalyi	Former National Coordinator CBPP
Dr. Yusuf Sinare	VETCARE
Dr. Niwael Mtui Malamsha	FAO
Prof. Dominic Kambarage	TVA Chairman
Prof. Kimera	SUA – Epidemiologist
Mr. Zacharia Daudi	Paraprofessional -
Dr. Henry Mbwire	Ronhean International Co. & VISAT
Ms. Bertila Elias Lyimo	Paraprofessional and District PLO
Dr. Theresia Ponela Mlelwa	Former VCT Registrar
Ms. Christina Lyimo	Farmer
Dr. Abdul Wakil	Drug Manufacturer – Farm Base
Dr. Hezron Nonga	DVS
Dr. P. Njau	Practitioner and former Asst. Director Vet. Services
Dr. Rogers Mark	Veterinarian Practitioner
Dr. Lwitiko Mwakalukwa	Veterinarian Practitioner
Dr. Henry Ruhinguka	Veterinarian and Practitioner – Input distributor
Mr. Harish Dhutia	Chairman Croplife Tanzania & Former Chairperson of TAPI



Prof. Ludovick Kazwala	VCT Chairman, Prof. SUA
Dr. Bedan Masuruli	VCT Registrar
Dr. H. Msami	Delta Veterinary Services
Dr. Jonas Melewas	Former PS and Livestock keeper
Dr. Mary Mashingo	Former PS – Livestock
Dr. Emanuel Swai	Secretary – Ranches Association
Dr. Leonard Mboera	OneHealth Tanzania
Dr. Alex Chang’ a	TASAVO
Dr. Bonaventura J Mtei	Veterinary Practitioner & Consultant
Dr. Mohamed Bahari	Veterinary Practitioners
Mr. Chiwaligo	Chairman TAVEPA

**Annex 2: Levels of effectiveness of the regulatory institutions in ensuring different functions.**



**Annex 3: Stakeholder perspectives on options for sustainable resourcing of an AHIA (from survey)**

