



TERMS OF REFERENCE FOR A DETAILED MEAT MARKET SYSTEMS ANALYSIS- Mapping of Butcheries and Abattoirs in Zimbabwe.

1. INTRODUCTION

The livestock sector in Zimbabwe contributes significantly to the growth and development of the national economy, providing livelihoods for small to large scale farmers and many others involved in the value chains. However, the sector faces a number of challenges limiting its contribution to the Gross Domestic Product (GDP). The challenges include funding unavailability, cyclical droughts, weak regulatory framework, inadequate farming practices, inefficient farming practices, insufficient extension services and poor coordination among stakeholders. The Zimbabwe Agricultural Growth Programme (ZAGP) is a response to tackle these challenges through financial support from the European Union (EU) amounting to €40 million.

The ZAGP has as its overarching objective to contribute to the development of a diversified and efficient agriculture sector that promotes inclusive green economic growth.

Covering Zimbabwe's 10 provinces and 42 districts, the programme will address the weaknesses and gaps in livestock value chains that have prevented the sector from increasing productivity, production, and incomes, to their full potential. Focus will be on building the capacity of farmers, service institutions, and private sector through increased investment, institutional reforms and policy alignment.

The ZAGP consists of five outcomes each addressing key constraints:

1. Increased production and productivity of the livestock sector
2. Livestock products have better access to markets and are more competitive
3. Increased public and private investment in targeted livestock value chains
4. Improved agricultural education systems and extension services
5. Institutions strengthened to develop and implement institutional and regulatory framework

The programme has grants that have been awarded for working on different value chains and projects within Zimbabwe's livestock sector. The actions under the ZAGP are promoting strategic alliances between integrators and Value Chain (VC) core actors to create opportunities for employment creation, better labour conditions and increased opportunities for women and youth through market-based solutions to enhance VC performance. Measures for coordinating commercially driven small to medium livestock farmers and independent butcherries offering value-adding services to low-income market segments are set to transform Zimbabwe's livestock and meat industry, improving its business structure, market conduct and socio-economic performance.

2. SCOPE AND PURPOSE TO THE DETAILED MEAT MARKET SYSTEMS ANALYSIS

Four consortia namely the Value Chain Alliance for Livestock Upgrading and Empowerment (VALUE), the Inclusive Poultry Value Chain (IPVC), the Beef Enterprise Strengthening and Transformation (BEST) and the SAFE Consortium intend on jointly conducting a detailed meat market systems analysis for the goat, pork, beef and poultry value chains in the 42 districts including the urban markets in these provinces (Gweru, Masvingo, Mutare,



Chinhoyi, Marondera, Bindura, Gwanda and Norton as well as the large markets of Harare, Bulawayo and Chitungwiza. The different projects are developing strategies for creating sustainable linkages between producers, abattoirs, retail outlets including large chain supermarkets and licensed independent butcheries as well creating a conducive policy environment for all VC actors on a win-win basis. The qualitative and quantitative data from the study will inform the consortia on the viable options for improving the performance of the different value chains at the marketing, processing as well as the consumption nodes.

The detailed Market Study seeks to investigate the current operations of the independent butcheries and large chain supermarkets as conduits for meat products to the low-income as well as high income consumers in all the participating districts in Zimbabwe including the urban areas which are the end markets for livestock meat and related products from the small to medium producers.

3. THE PURPOSE OF THE STUDY

The study objectives will be as follows;

- To understand the relationship between the independent butcheries and large chain supermarkets with private abattoirs and individual suppliers of meat (poultry, goat, beef and pork)
- To identify potential blockages or bottlenecks to supply of meat to licenced independent butcheries and final delivery to the end consumers.
- To map out the major players, challenges, power dynamics and how farmer managed enterprises and other private sector players can play a part in transforming the meat market system.
- Understand the services needed by independent butcheries and large chain supermarkets for sustained supply of meat to the end consumers.
- Assess the policy and regulatory constraints facing independent butcheries and supermarkets in stocking and sale of meat to the low-income market segment.
- To analyze and document the demand side conditions in the low-income meat market segment and ascertain the consumption patterns and opportunities for each market segment.
- Define actions that need to be implemented to tackle opportunities and constraints in the market system of a particular commodity.
- Determine the key vulnerabilities in the meat value chains for purposes of building resilient Market Systems for all the value chain actors.
- Benchmark the Fair Value Farming Brand parameters for application by the independent licenced butcheries, large chain supermarkets and the consumers
- Analyse the key Gender issues around meat purchase and consumption (ownership, control, decision-making systems, gender and market dynamics, gendered access to financing and budgeting etc.)
- Establish the current and potential capacity utilization levels for the abattoirs, meat processors and butcheries.

4. EXPECTED OUTCOME OF THE ASSIGNMENT

The consultant firm will furnish ZAGP consortia with a comprehensive meat market study report having disaggregated data including the following, but not necessarily limited to;

- Detailed analysis of the meat market with quantitative & qualitative description and the incremental values at each level/node from the abattoirs to the final consumer.



- Economic profile, analysis and market costs and revenues, value additions and profit margin at these nodes in meat value chains (poultry, beef, goat and pork) including income and employment, trade volume and sales trends over the past 5 years, current bio-security measures and other Green Economy practices and technologies. This should also include detailed demand and supply core functions of the meat market systems.
- **Profile of Independent butcheries and large chain supermarkets:** Work with the teams to identify the key characteristics of the independent butcheries and large chain supermarkets that will inform the marketing components of the different actions.
- **Meat Market actors / stakeholders:** Support the ZAGP partners to identify relevant meat market actors and other stakeholders, and map the relationships between them (meat market actors map) including the end consumers;
- **Capacities, constraints and incentives:** Comprehensive assessment and understanding of the existing cold chain capacities and constraints, and also develop/ estimate the additional capacity requirements for increased transactions with the producers. Identify constraints and incentives including an analysis of rules and norms that constitute the enabling environment for the meat markets to properly function such as taxes, regulations, certification etc.
- **Stakeholder analysis:**
- Power economy Analysis: Power analysis within the meat market to understand forms and causes of exclusion in the supply and consumption of meat and related products at different levels. Power analysis should be carried out at least at the following levels: abattoirs, independent butcheries, large supermarket chains, meat producers such as Colcom, Surrey etc. This should include key actors that have influence and interaction within the meat market system either positively or negatively.
- Gender analysis of the supply and consumption of meat and related products. Clearly indicate the constraints/barriers affecting women in participating at these nodes.
- Recommend areas of interventions to increase the volume and value of transactions in the meat market as well as improving the product quality.
- List of potential agribusiness entities interested in collaborating with the different VC through contractual arrangements and their contact details, including useful policy advice for their involvement in the meat supply chains.
- List of stakeholders/actors consulted and list of References (studies and other literature used)

5. DELIVERABLES

The consultant is expected to deliver the following listed deliverables:

- **Inception report** (digital and hard copies of the assignment. The inception report should cover the methodologies and work plan.
- **Interim report:** Raw Data entered, Digital and hard copy of the data collected and analysed, models, diagrams including photographs & contact list of interviewees and workshop participants and key value actors.



- **Draft report and Presentation:** Market Study/Mapping Reports covering pork, goat, beef and poultry for Harare and Bulawayo meat markets. The Market Study Report should detail backward and forward linkages with margins of all the suppliers, distributors and consumers of meat indicating the bottlenecks, opportunities and key advantage points where the project could intervene for maximising returns to all actors.
- **Final report incorporating the comments** (digital and hard copies) for pork goat, beef and poultry meat market and the report should have the following format;
 - i. Executive Summary
 - ii. Background
 - iii. Methodology
 - iv. Findings and Analysis
 - v. Recommendations
 - vi. Conclusion
 - vii. Annexes

Delivery Schedule

Deliverable	Submission Timelines	Payment Schedule
Inception report	1 week	20%
Interim report.	5weeks	20%
Draft Final Report and Presentation	2weeks	20%
Final Report	1weeks	40%

6. DURATION OF ASSIGNMENT

The assignment will be carried out for a period of 8 weeks from the date of signing the award contract.

7. ZAGP COVERAGE

The ZAGP is covering the following provinces and districts

Province	District and Residential Area
Harare	Harare
Bulawayo	Bulawayo
Manicaland	Chipinge, Buhera, Makoni, Mutare, Mutasa, Nyanga
Mashonaland East	Marondera, Seke, Goromonzi, Murehwa, Chikomba, Mudzi,
Mashonaland West	Kadoma, Chegutu, Mhondoro Ngezi, Zvimba, Makonde
Mashonaland Central	Rushinga, Mbire, Mount Darwin, Bindura, Muzarabani
Masvingo	Chiredzi, Bikita, Zaka, Gutu, Masvingo, Mwenezi, Zvishavane,
Midlands	Gokwe South, Gokwe North, Kwekwe, Shurugwi, Chirumhanzu, Gweru,
Matabeleland North	Binga, Nkayi, Lupane, Umguza, Tsholotsho, Bubi,
Matabeleland South	Beitbridge, Gwanda, Matobo, Bulilima, Umzingwane



8. REPORTING OBLIGATIONS

The Inception Report, Interim Report, Draft Final report, Presentation and final Report will be submitted to Mercy Corps and copied to COSPE as per the schedule mentioned above. The reports shall be submitted in both hard and soft copies.

9. TASK FORCE TO MONITOR CONSULTANT WORK

The ZAGP Consortia representatives will form a Task Force (TF) co-chaired with COSPE and VALUE project. BEST and SAFE will be part of the Task Force. The TF will facilitate the interaction and exchange of information between the Consultant and the participating consortia. The consultant should make use of Open Data Kits (free and open-source software) that will allow timely and efficient data collection and consolidation from remote locations along the corridors.

10. OWNERSHIP

This project is funded by EC through the ZAGP and therefore the consultancy output will be jointly owned by the participating consortia. The Consultant will have no right of claim to the assignment or its outputs once completed. Any reports / research outputs /process documents produced as a part of this assignment shall be deemed to be the property of the ZAGP and the consultant will not have any claims to, and will not use or reproduce the contents of the above documents without the written permission of the ZAGP consortia.

11. QUALIFICATION AND EXPERIENCE THE AGENCY SHOULD HAVE:

- At least 5 years of experience in value chain, sub sector analysis, good understanding of private sector and trade policies including market dynamics so as to make the study sufficiently private sector oriented. This should include very good understanding of market systems development and how to apply the approach in assessments and analysis.
- Experience in working with various Government organizations, NGOs, Donors (USAID, DFID, EU, and UN Agencies) as a technical resource person as well as consultant.
- Experience of working in the livestock sector in Zimbabwe.
- Expertise in designing and executing high quality documentation and knowledge sharing initiatives and products.
- The Consultant should have professional staff and technical experts with knowledge and experience in value chains and other Market Systems Development studies.

12. APPLICATION PROCESS

Firms and Consultant(s) who meet the qualifications above should submit an expression of interest, which should include the following:

- A narrative/technical proposal (max 8 pages).



- A financial proposal indicating fees for the consultancy, cost per major activity and VAT following the format provided below

Financial Proposal Guidelines

Cost Item	Unit	Quantity	Unit Price Euros	Total Price Euros	Notes
1. Personnel/labor					
2. Materials and supplies					
3. Ground Transportation					
4. Communications					
5. Services					
7. Other Direct Costs					
TOTAL BUDGET					

- CVs of consultant(s) who will work on the assignment.
- Contacts of at least two referees who can vouch for the quality of the consultant's work

SUBMISSION OF APPLICATIONS & CLOSING DATE

Consultant/consulting teams are required to submit expression of interest including the following: A narrative/technical proposal (max 8 pages), a financial proposal indicating fees for the consultancy, cost per major activity and VAT, CVs of consultant(s) who will work on the assignment and at least contacts of two referees who can vouch for the quality of your previous work. Completed bids must be enclosed in sealed envelopes or sent by e-mail in PDF format to: zw-procurement@mercycorps.org and copied to: ipvc@cospe.org on or before Tuesday 19 November 2019, at 1700hrs with heading **ZAGP MEAT MARKET MAPPING**. Hard Copies of the same documents in a sealed envelope can be hand delivered to: Mercy Corps Zimbabwe, 13 Brentwood Road, Mt Pleasant, Harare