

*Consultancy Services for the Design
and Operationalization of an Export
Development Programme for
Meat and Meat Products in Kenya*

TERMS OF REFERENCE

1. BACKGROUND INFORMATION

1.1 Beneficiary country

Kenya.

1.2. Contracting authority

Ministry of Agriculture and Livestock Development – State Department for Livestock Development (SDLD).

1.3 Background

The Fourth Medium Term Plan (MTP IV) 2023-2027 implements the Bottom-Up Economic Transformation Agenda (BETA), which is geared towards economic turnaround and inclusive growth through a value chain approach. BETA targets sectors with high impact to drive economic recovery. Within most African countries, the livestock sector has the potential to contribute considerably more than one third of the national GDP with pastoralists as the main source of livestock products. In 2019, Africa imported nearly one million metric tons of beef. In Kenya alone, the national demand for red meat stands at approximately 800,000 metric tons, while production is 607,000 metric tons. This is from an animal herd population of approximately 22 million cattle, 23 million sheep, 35 million goats, and 4.3 million camels.

Since 2015, the livestock industry in Kenya has suffered a serious decline with a loss of almost 40% of the total production volumes. Furthermore, the sector faces systematic inefficiencies that limit the potential of the sector. These include:

1. Difficulty in assuring consistent supply levels to meet client orders.
2. Feeding and breeding systems that are not well integrated, leading to high costs of animal nutrition and misalignment of production cycles to market demand cycles.
3. Insufficient cold storage supply chain, affecting slaughterhouses, domestic transport, and port facilities.
4. Expensive and insufficient airfreight to key markets, with indirect routes raising costs and compromising cold storage requirements.
5. Insufficient product development and market development for meat and meat products.
6. Insufficient attention to meeting compliance requirements for documentation and certification.

1.4 Rationale

Route-to-market studies prepared with the State Department for Livestock Development have confirmed sustainable demand in the United Arab Emirates (UAE) and Saudi Arabia, for HALAL-certified red meat export, recommending quick action to turn study findings into pilot shipments and long-term supply agreements. These studies highlight the importance of consolidating pastoral production, meeting Gulf Cooperation Council (GCC) buyer standards for quality and safety while improving logistics and adopting Information Technology (IT) tools for livestock identification and/or traceability.

Also, Kenya and the UAE have recently finalized a Comprehensive Economic Partnership Agreement (CEPA) in 2025, enhancing market access for Kenyan goods and reducing trade barriers. However, recent results from the Mid-Term Review (MTR) undertaken on the DRIVE project show that, despite positive market conditions and complete feasibility studies, implementation has fallen behind leaving export opportunities largely untapped.

In line with the Agriculture Sector Transformation and Growth Strategy, the Livestock Policy, the National Trade Policy and the Integrated National Export Development and Promotion Strategy (INEDPS), the World Bank funded De-risking, Inclusion, and Value Enhancement (DRIVE) Project now seeks to structure and outline practical guidelines to effectively design and operationalize the recommendations gathered so far for concretely improving export performance of Kenyan meat and meat products.

This short and medium-term effort intends to expand business opportunities among regional and global markets. In this framework, SDLD through DRIVE is recruiting a consulting firm that is expected to undertake the right steps to incentivize production in line with market requirements by putting in place all necessary measures for export development as part of the initial implementation of the INEDPS.

The assignment aims to activate more opportunities through buyers' engagement, compliance assistance, logistics coordination, and performance tracking using de-risking tools and other complementary programs (e.g. feedlots, abattoir improvements).

2. OBJECTIVES

2.1 Overall objective

The overall objective is to:

- i. Transform Kenya's livestock sector to a key contributor to the country's export performance.
- ii. Create Kenya's livestock brand in external markets.
- iii. Improve livelihoods and create jobs.

2.2 Specific objectives

The specific objectives are:

- i. Enhance Kenya's visibility and reputation in the global meat industry.
- ii. Increase stakeholders' knowledge and familiarity with breeding, feed production, market trends, purchase decision making patterns and export procedures within target markets.
- iii. Explore potential business-to-business networking and strategic alliances with national and international players in the livestock sector.
- iv. Institutionalize capabilities within participating Kenyan suppliers (abattoirs, feedlots, exporters) through Standard Operating Procedures (SOPs) and coaching to sustain export operations.
- v. Stimulate investment into the livestock sector (including, among others, ranching, abattoirs, logistics and cold chain storage, export management, distribution and other related parts of the meat and meat products value chain).
- vi. Increase knowledge and familiarity with export procedures, distribution and other essential aspects of meat exports trade.
- vii. Support aggregation systems and supply chains for livestock supply into meat value chains

2.3 Results

These expected key results are to be achieved:

- ❖ Market facilitation of export-quality meat and meat products through abattoirs and export slaughterhouses.
- ❖ Identification and creation of aggregation and supply chain systems in selected counties connected to export channels.
- ❖ Create safe transactions between Kenyan exporters and markets abroad, aligning with CEPA instruments.
- ❖ Rapid, relevant and consistent market information on the meat and meat products global supply chain available to Kenyan producers and exporters.
- ❖ Improved supply chain infrastructure for preparation, storage and regulatory compliance for meat and meat products in the export supply chain.
- ❖ Increased investments in critical aspects of the meat and meat products supply chain including ranches, feedlots, abattoirs, cold chain storage and other investments.
- ❖ Enhanced capabilities for foreign commercial representation in the livestock sector.
- ❖ Design of a unique Kenyan brand identity to be recognized globally.

3. SCOPE OF WORK

This assignment will entail the design, organization, mapping, and capacity building activities as part of an interactive and continuous process for selected livestock and meat stakeholders in Kenya who are interested and willing to improve their operations through export development.

3.1 Specific work

Two (2) main components and related activities are envisaged and summarized below:

Component 1 – Supply Chain Modernization and Aggregation

Design and create solutions for a market-responsive supply chain for meat and meat products. This entails mapping of aggregation infrastructure and the supply chain for livestock, adopting livestock traceability tools and information shared and available.

Stimulate adoption of modern meat processing practices to meet export standards, reviewing suitability of export logistics infrastructure for the meat and meat products supply chain. Adopting technology, digital platforms and providers available among key players in Kenya that link farmers, agricultural insurers and other aggregators in the livestock and meat value chain with selected exports.

Component 2 – Market and Product Development

Review Kenya's brand positioning in export markets for meat and meat products and propose recommendations for establishment of a globally recognized meat and meat products brand.

Propose and implement, with the required actors, an effective, private sector-led model for commercial diplomacy to support Kenyan exports of meat and meat products. This will facilitate buyer discovery, B2B matching and pilot purchase order negotiations.

Structure and create accountability for various transactions to be exchanged between aggregators/farmers and potential buyers to be facilitated by using agri-tech platforms that offer better access to information and financial services that can better position meat and livestock products into new markets abroad.

4. DURATION

The assignment is expected to be completed within nine (9) months from contract signature.

5. DELIVERABLES

The consulting firm shall deliver the following technical outputs within related timeframes to be agreed with the Client upon contract signature, as indicated below:

N.	Deliverable	Timelines for submission from contract commencement
1	Submission and approval of an Inception Report with an analysis of the existing situation, a revised work plan and final methodology for the entire project	1 month
2	Interim Report with short description of progress (including problems encountered on the production side in Kenya) and solutions (including increased orders and commercial partnerships created with selected importers) for export	4 months
3	Draft Final Report with description of main findings, accomplishments, including problems encountered and recommendations	7 months
4	Final Report with proposed way forward and handover notes for full implementation of an Export Development Programme	9 months

6. PAYMENTS SCHEDULE

The contract will be a lumpsum with milestone payments tied to deliverables that must be approved by the Contracting authority in writing. Their proposed payment schedule is indicated below:

N.	Deliverable	Percentage of contract amount
1	Submission and approval of an Inception Report with an analysis of the existing situation, a revised work plan and final methodology for the entire project	15%
2	Submission and approval of an Interim Report with short description of progress (including problems encountered on the production side in Kenya) and solutions (including increased orders and commercial partnerships created with selected importers) for export	30%
3	Submission and approval of a Draft Final Report with description of main findings, accomplishments, including problems encountered and recommendations	40%
4	Submission and approval of a Final Report with proposed way forward and handover notes for full implementation of an Export Development Programme	15%

7. LOCATION

The primary location is Kenya with other in-person engagements in selected markets abroad for buyers' meetings, expo participation, and logistics coordination.

The consulting firm will also closely work with relevant Government Departments and interact with various County governments and private processors/exporters, leveraging the programmatic platforms referenced in DRIVE materials and reports.

8. REQUIREMENTS FOR THE CONSULTING FIRM AND KEY PERSONNEL

The consulting firm shall have the following minimum qualifications and experience:

- a. Minimum of ten (10) years' consecutive experience in supporting the private sector and providing technical assistance to public Institutions on market development and export in the agriculture sector.
- b. Demonstration by the consulting firm of having successfully completed at least five (5) assignments related to business linkages, trade in services, and investment promotion in agriculture over the last five (5) years. Details of the assignments (name of the Client, scope, value, and period) shall be provided.
- c. Demonstrated experience over the last 3 years in assessing market requirements and market access options for Kenyan agricultural products for priority markets.
- d. At least three (3) similar assignments successfully completed that entailed the assessment of livestock and meat value chains over the last seven (7) years.
- e. Demonstrated familiarity with import channels and buyers in priority markets will be an advantage.
- f. Providing technical and managerial capability of the consulting firm supported by detailed company profile and organogram. Key Experts will not be evaluated at the shortlisting stage.
- g. Registration and establishment of the consulting firm in Kenya is preferable.

To adequately undertake all activities and services in this Terms of Reference, the consulting firm shall mobilize a team of senior and highly qualified Key Experts comprising the following:

Key Experts

The CVs of these experts will be evaluated according to the criteria indicated in the Request for Proposal.

Team Leader

- Master's degree in economics or business management.
- More than 20 years of experience in marketing and export.
- Strong familiarity with sales and retail industry for FMCG categories.
- At least 10 years of experience in leading market campaigns and export strategies.
- Previous experience in the Middle East is highly preferred.

Export Manager

- Master's degree in economics, business or relevant field.
- At least 10 years of experience in export strategy design and management, preferably in the Middle East.
- Previous experience leading similar export strategy projects.

Trade and Logistics Expert

- Master's degree in trade or business administration.
- At least 15 years of experience in planning and budgeting any kind of logistics for exports.
- Strong knowledge of Kenya's trade dynamics and logistics operations.

Meat Expert

- Master's degree in veterinary, animal husbandry and related fields.
- At least 20 years of experience in livestock management and value chain development in Kenya.
- Strong knowledge of meat processes and food safety and security procedures.

Marketing Specialist

- Bachelor's degree in marketing.
- At least 15 years of experience in developing marketing, commercial and sales strategies.
- Having developed and implemented marketing and sales strategies in the livestock industry is highly preferred.

Non-Key Experts

To ensure the timely implementation of the numerous parallel activities and specialized inputs required, the consulting firm can select and hire other Non-Key experts who will be mobilized intermittently.

The CVs for these experts should not be submitted, but the consulting firm will have to demonstrate in the offer that they have full access also to such required profiles.

9. REPORTING

The consulting firm contracted will follow directions from the DRIVE Project Implementation Unit (PIU) under the State Department for Livestock Development, which will provide stakeholders' management, coordination and contractual approval for all expected deliverables.

The consulting firm is also expected to work closely with several Ministries, Departments and Agencies in the export, agriculture and cooperatives sectors. A Steering Committee, comprising the Client's main representatives and public and private stakeholders, will convene monthly to review progress, identify and address bottlenecks, and approve key outputs.

All data, certificates, and logs must be handled confidentially, using secure repositories and access controls. Data ownership will vest in the Client, with rights to use, reproduce and adapt World Bank Standard SOPs, training materials, and dashboard for non-commercial program purposes. The publication or disclosure of sensitive information requires the Client's approval.

All deliverables shall be submitted to the Contracting authority in English in one (1) hard and one (1) soft copy.

10. RISK MANAGEMENT

Key risks in the assignment include certification delays, fieldwork activities, veterinary/SPS non-compliance, buyer acceptance thresholds, and financing timing for equipment.

The consulting firm will maintain a project risk register to promptly escalate issues to the Contracting authority. Where feasibility requires procurement adjustments or financing alignment, the consulting firm will propose solutions that are fit-for-purpose, consistent with agreed-upon public programs and finance facilities.

11. EVALUATION CRITERIA

Technical and Financial Proposals will be evaluated based on:

1. Qualifications of the consulting firm.
2. Proposed methodology, rationale and detailed work plan.
3. Team composition and CVs.
4. Experience in implementing similar activities among similar contexts.
5. Clarity and relevance of the budget offered with cost breakdowns by workstream and deliverables.

The DRIVE PIU reserves the right to accept or reject any proposal and is not bound to select the lowest-priced proposal.