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Terms of Reference for the Market Characterization Study for the Women and Youth Economic Empowerment  
in Fisheries through Inclusive Market Access Programme.

## 1. Background:

Africa's fisheries sector plays an important role in food security, equitable livelihoods creation, and poverty alleviation. According to the FAO women play an important role along the fish value chain, making up almost 50 percent<sup>1</sup> of employment in the sector, mainly in downstream activities of processing and trade, with young women dominating informal cross-border trade. Women account for approximately 43% of the workforce in marine industrial fisheries, 27% in inland fisheries, 24% in marine artisanal fisheries and 5% in aquaculture<sup>1</sup>. The proportion of women working in fisheries and aquaculture systems, relative to the total workforce, varies among African nations. Within East Africa, 60% of aquaculture jobs are in farming/harvesting, and 40% in processing and trade for instance scaling, sorting, value-addition activities such as drying and frying, freight, storing, trading, and moving goods across borders. However, many roles for youth and especially young women in East Africa are in post-harvest activities or trade.

Currently 90% of processing and trade is carried out by women and youth. Youth participation in fish farming/ harvesting is limited, while they contribute significantly to the post-harvest and the trading stages as these tend to be less capital intensive. Approximately 90% of young people are concentrated in trade. The main opportunities for youth today are in trade and brokerage as this does not require access to land or capital (e.g., drivers to transport produce, brokers, handlers to prepare and package fish). Despite the important role women and youth play in fisheries, and the potential of the sector to unlock even more work opportunities for young women, women face disproportionate barriers that limit their full participation in aquatic food systems. These include gender-based discrimination, Safeguarding, and sexual harassment; poor access to Information and inadequate skills; poor access to finance and business development services and limiting infrastructure and Logistics. Specifically, the participation of women and youth to actively participate in cross border fish trade is hampered at production, aggregation, retail, sorting & processing, cross border trading and at the agency (Association & Cooperative) levels.

Despite high proportion of women and youth (90%) participating in fish processing and trade, they are exposed to significant risks as they are vulnerable to the power dynamics inherent in engagement with officials as they pass through borders.

## 2. About the Program

The Women and Youth Economic Empowerment in Fisheries through Inclusive Market Access program is a five years (2024-2029) regional program implemented in Kenya, Uganda, Tanzania (including Zanzibar), DRC, Zambia, and Nigeria. The program is a collaborative initiative between the African Continental Free Trade Area (AfCFTA) Secretariat, Mastercard Foundation, TradeMark Africa and implementing partners including Kilimo Trust, Lattice Aquaculture limited and MSC Global Consulting Limited. Primary Kilimo Trust, focus on strengthening market linkages, aggregation, and logistics, directly supporting women and youth to enhance their skills and participation in fisheries value chains. Lattice is responsible for boosting the availability and trade of fish feed and inputs into aquaculture, while the -MSC Global Consulting Limited handles access to finance, ensuring that women and youth in the fisheries sector can secure necessary financial resources to grow their businesses. This program is designed to empower women and youth in the fisheries sector by improving access to opportunities and addressing economic inequalities through creation of inclusive, resilient, and sustainable intra-Africa fish trade. Successful implementation of the program will be reflected by an increase in household income and increased food security and nutrition for marginalised and vulnerable households, especially young women, alongside greater trade volumes in fish. The program

will achieve this by addressing systemic constraints at structural, relational, and transformative levels to the enhanced economic participation of youth, especially young women in the cross-border trade of fish feed, and fish and fish products.

The program emphasizes training, access to finance, and linkages with the digital economy to unlock more lucrative markets for these target groups, as well as addressing logistical challenges. The program is comprised of multiple projects and interventions, and it will be implemented through three main workstreams which include.

- i) Greater inclusion of youth and young women in cross-border fish trade- This workstream is designed to bolster the capacity of Cross-Border Traders (CBTs) within the fish sector, with a goal of enhancing trade within the East Africa region. The program will build the capacity of youth cross-border traders involved in the fish trade to ensure they receive the full benefits of this amplified trade.
- ii) Improved aquaculture inputs supply and distribution across borders- Which focuses on strengthening the competitiveness of traders in the fish sector, particularly those led by women and youth. This workstream 2 focuses on improving aggregation and logistics of fish feed and fish feed inputs across borders, which are essential to allow MSMEs to compete in the fish sector, as well as being critical in generating jobs for young people.
- iii) Improved trading environment for fish trade- Which aims seek to ease trading across borders because of reduced barriers to trade for women and youth, especially young women because of reduced barriers to trade.

The overarching result of the program is an increase in income and employment, which will be measured by the number of waged and self-employed jobs created. The program targets to generate 242,573 jobs for the women and youth and an increase regional fish trade

### 3. Goals and Objectives of the Study:

The main goal of the market characterization study is to assess the structure, dynamics, and opportunities and barriers within the fish value chain across multiple countries, with a particular focus on cross-border fish, fish products and inputs trade in Uganda, Kenya, DRC, Zambia and Tanzania. The study aims to identify opportunities for women and youth to engage in dignified job creation and job enhancement by analyzing trade flows, market access, and investment potential. Additionally, it will examine the availability and trade of fish feed inputs, assess access to finance and financing gaps for women and youth entrepreneurs, and provide insights to enhance market participation, value addition, and sustainability in the fisheries sector

Specifically, the study will:

- a) Identify and analyze key actors, processes, and linkages in the fish value chain from production to consumption across target countries (Uganda, Kenya, Tanzania, and others where applicable) by June 2025. The study will quantify value chain participants, trade flows, and market linkages, providing data-driven insights to enhance market access and participation of women and youth.
- b) Evaluate and document viable value addition opportunities in the fish value chain, including processing, packaging, and branding. The assessment will quantify post-harvest losses, analyze profitability margins, and identify investment opportunities to enhance fish product competitiveness in local, regional, and international markets.
- c) Identify and assess the availability, trade, and supply chain dynamics of key fish feed inputs (e.g., soybean, maize, and BSF) in the region by mid-2025. The study will map production hubs, distribution networks, and market gaps, offering actionable recommendations for improving sustainable feed input access and affordability to boost aquaculture productivity.
- d) Determine public and private investments in cross border trade in fish trade by women and youth.

- e) Establish the potential of fish trade to create meaningful and design self and wage employment among women and youth
- f) Financing: Assess the financing landscape within the fish value chain, identifying existing financial products, services, and gaps in services. Analyze the demand and supply dynamics of financial products, repayment behaviors, and financial literacy levels.
- g) Categorize women, men and youth MSMEs with respect to:
  - i. Operational capacity of the business in cross border fish trade
  - ii. Level of organizational development and participation in relevant platforms that support cross border fish trade
- h) Characterize cross border fish trade across in the countries with respect to:
  - i. Fish product trade flow channels, product types, volumes and values; including feed, value added fish products.
  - ii. Meeting AFCFTA Quality Standards and market opportunities value chain actors involved, their roles, capacity to manage cross-border business relations and contracts, level of business organization and compliance to best business practices etc.
  - iii. Gross margins at the different nodes of the value chains
  - iv. Levels of investment in the cross-border trade business by private sector
  - v. Tariff and non-tariff barriers specific to women in youth in fish cross border trade
  - vi. Other support services within cross border fish trade ecosystems including digital services, market information
- i) Establish leadership and governance gaps that women and youth cross border traders experience in their businesses.
- j) Assess the accessibility and utilization of financial and business development services for women and youth engaged in cross-border fish trade by mapping existing financial products and services, identifying gaps in access, and analyzing demand-supply dynamics, repayment behaviors, and financial literacy levels. The study will provide data-driven recommendations to enhance financial inclusion and sustainable business growth within the fish value chain
- k) Determine if youth cross border traders' networks are in existence; how they are organized, how they conduct business and engage with their members and other networks and or platforms.
- l) Determine if women cross border fish trade dialogues exist; how they are organized, their modus operandi and how they engage with their members and other similar dialogues and or platforms.
- m) Review existing policies, regulations, and standards affecting the fish value chain across target countries. Identify policy gaps, regulatory barriers, and compliance challenges, particularly for women and youth. Provide evidence-based recommendations to enhance market access and streamline trade regulations.
- n) Assess the penetration and adoption of digital technologies in the fish value chain, including mobile money for trade, digital platforms for market access, blockchain for traceability, e-commerce, and fintech solutions. Identify opportunities to leverage these technologies to enhance efficiency, financial inclusion, and market accessibility for women and youth in the sector.
- o) Assess the alignment of program design and partnership strategies with market realities, youth employment trends, and thematic priorities by June 2025. Evaluate the scalability, sustainability, and contextual relevance of program structures, identifying internal and external factors influencing youth employment outcomes. Provide strategic recommendations to enhance program impact, refine targets, and optimize partnership approaches for greater effectiveness and long-term sustainability.
- p) Make recommendations for the Program to focus on to enhance fish cross border trade with regards to:



- i. What and where in the fish cross border trade can investments be made to generate the most jobs for women and youth
  - ii. What challenges and threats prevent women and youth participation in fish cross border trade
  - iii. Options to address capacity and knowledge gaps of youth and women to participate in cross border fish trade
  - iv. Options to improve and enhance MSME cross border fish trade
  - v. Access to finance for women and youth cross border traders
  - vi. Increasing voice and participation of women and youth in cross border fish trade
- q) Collect baseline data for the overall project indicators to establish benchmarks for tracking progress in enterprise development, youth employment, financial access, policy influence, market accessibility, knowledge sharing, and resilience. The study will ensure all relevant indicators are integrated into the data collection process, eliminating the need for additional objectives while providing a comprehensive foundation for measuring project impact and guiding future interventions

#### 4. Scope of Work:

The study will focus on the program coverage countries, with particular attention to Kenya, Tanzania (incl. Zanzibar), Uganda. Data collection in Zambia and DRC will focus mostly on the program identified borders. It will consider cross-border trade and regional integration across all applicable borders in the covered countries. The study will focus on key commercially viable fish species, including Nile perch, tilapia, and sardines, while also identifying other potential species in both fresh and marine water environments. It will assess the trade of fish feed inputs such as maize and soybean, while exploring other viable options. The study will cover all stages of the fish value chain, from production and post-harvest handling to distribution, marketing, consumption, and export. Additionally, it will engage key stakeholders, including value chain actors, government agencies, development partners, and private sector players, with a strong emphasis on women and youth-led enterprises.

#### 5. Methodology

The study will employ a mixed-methods approach, combining qualitative and quantitative data collection and analysis. Key methodologies will include:

##### 5.1. Desk review

This will involve:

- Literature review: Review of existing literature, studies, reports, and data on the fish and feed inputs value chain in the region as well as collect and analyze secondary data from government agencies, industry reports, trade statistics, and academic publications.
- Policy Review: Analyze national and regional policies, strategies and frameworks related to the fisheries and aquaculture sector.

##### Primary data collection

Data will be collected using a mix of approaches including, but not limited to:

- Surveys and interviews with value chain actors (fishers, processors, traders, etc.).
- Focus group discussions with community members and stakeholders.
- Key informant interviews with policymakers, industry experts, and development partners.
- Market observations by conducting visits to key sites to observe operations and interactions
- Sampling especially in the case of scientific testing.

- Use participatory tools such as SWOT, gender mapping, capacity mapping, seasonal calendars, and Venn diagrams to engage communities in the analysis.

The study team is expected to conduct the following activities:

- Review the Literature review report and provide thorough feedback and ensure all critical aspects of the study are addressed.
- Review the list of potential stakeholders to be interviewed and make suggestions on others to be included.
- Develop a comprehensive report outline.
- Review the data analysis, research plan and tools to ensure they are robust enough to generate relevant data and information.
- Develop study slide report ready for validation by relevant stakeholders
- Utilize study validation inputs to finalize report for submission to project funder

## 6. Expected Deliverables

Under the direct supervision of the KT Program Team Leader and support from the KT's Senior Management Team (CEO and Country/ Program Team Leaders), the study team will provide the following deliverables to project management in a timely manner:

- Inception Report and data analysis plan:** The study team is expected to submit a detailed report on how the market characterization study will be carried out from his/her point of view. The report will outline a detailed description of the methodology, expected output and format of the final report. The inception report will also have a detailed data analysis plan clearly showing what data will be generated by the study. The report outline, data analysis plan and suggested methodology will be submitted at this stage.
- Preliminary slide deck/ Report:** A stakeholders' validation workshop will be organized to present the preliminary findings. The workshop report will be shared with the study team to finalize the report. The draft study slide report will be submitted at this stage.
- Final Report:** This will entail a detailed report of the study that incorporates feedback from stakeholders. The report should clearly identify the opportunities in cross border fish trade that can be harnessed for women and youth job creation as wage earners or self-employment. This report should incorporate specific simple and achievable recommendations and more specifically for quick successes once implemented by the program team.

## 7. Estimated Timeframe

The study is expected to run between the months of January to June 2025.

Phase	Activity	Timeline/Date
Phase 4: Survey and Interview Design (After Stakeholder Identification)	Harmonizing ToRs, Tools, Study Areas, Methodology and approach	Feb 10th to 6 <sup>th</sup> March 2025
	Identify literature and secondary data gap based on the harmonised study ToRs	Feb 10th to 6 <sup>th</sup> Mar 2025
	Develop data analysis plan for the fish market characterization study based on the identified data gap	Feb 10th to 6 <sup>th</sup> Mar 2025
	Study Areas Harmonisation	Feb 10th to 6 <sup>th</sup> March 2025

	Finalise the harmonised data collection tools	Feb 10th to 6 <sup>th</sup> March 2025
	Consultants and Enumerators recruitment and onboarding	10 <sup>th</sup> – 21 <sup>st</sup> March 2025
Phase 5: Data Collection	Automating tools under ODK	17th - 21st March 2025
	Conducting Individual interviews, FGDs and Key informants' interviews in all countries	24 <sup>th</sup> Mar – 4 <sup>th</sup> April 2025
Phase 6: Data Analysis and Reporting	Data Cleaning, Analysis	7th - 17 <sup>th</sup> April 2025
	Drafting report (Combining Secondary and Primary data)	21 <sup>st</sup> Apr – 9 <sup>th</sup> May 2025
Phase 7: Feedback Loop and Adjustments	Designing of draft report	21 <sup>st</sup> Apr – 9 <sup>th</sup> May 2025
	Presentation of Study findings to WYEEF project team	15th May 2025
	Adoption of inputs into the report	16 <sup>th</sup> – 23 <sup>rd</sup> May 2025
	Validation meetings in implementing countries	27 <sup>th</sup> May – 6 <sup>th</sup> Jun 2025
Phase 8: Final Report Submission and Dissemination	Incorporating feedback from the validation workshop & finalization of market characterization report	9 <sup>th</sup> – 13 <sup>th</sup> June 2025
	Development of abridged report	16 <sup>th</sup> – 27 <sup>th</sup> June
	Final design and artworks for the report	16 <sup>th</sup> – 27 <sup>th</sup> June
	Submission of final report	June 30th 2025

## 8. Budget:

The study team professional fees, depending on workload and all field costs will be paid directly by the implementing partners.

## 9. Rights and Confidentiality

The partners reserve the right to reject or cancel any proposal without showing any reason. During this assignment, all materials produced shall remain the property of Kilimo Trust and cannot be used by the service provider for a purpose other than agreed upon by both parties. The developed materials cannot be sold or used in any case without the prior permission of partners.

## 10. Intellectual Property

All information pertaining to this assignment (tools, interview guides, data, reports and others) which the Consultant may come into contact within the performance of his/her duties under this consultancy shall remain the property of the programme and the implementing partners shall have exclusive rights over their use. Except for the purposes of this assignment, the information shall not be disclosed to the public nor used in whatever way without the written permission of the programme management team.

## 11. Safeguarding:

The study team members are expected to follow Kilimo Trust safeguarding policies which include but not limited to integrity, accountability, ethical data collection processes, respect for beneficiary's privacy and protection.

## 12. Application Procedure

Application documents are required to be submitted online via email to: [recruitment@kilimotrust.org](mailto:recruitment@kilimotrust.org) before 5pm of 17<sup>th</sup> March 2025

Application documents MUST include the following:

- i) A letter stating why you consider yourself or your firm suitable for the assignment.
- ii) Brief technical proposal which includes methodology on the approach and implementation of the assignment, and the work plan for implementation of the assignment.
- iii) Financial proposal indicating professional fee.
- iv) Personal CVs of technical personnel proposed for this assignment highlighting qualifications and experience in similar projects; and
- v) Work references - contact details (email addresses) of referees (firms for whom you've produced similar assignments).