**CALL FOR EXPRESSION OF INTEREST**

**(CONSULTANT SERVICES** **– SELECTION OF FIRMS)**

**Study of the potential of international markets for aquaculture products**

**« Making Aquaculture Work for Market and Social Inclusiveness »**

**N° 01/MAR1049/ANDA/2025**

**Terms of reference**

Context

The Moroccan aquaculture sector is establishing itself as a strategic pillar of economic development and competitiveness in the maritime industries. With its exceptional natural potential and steadily growing national production, Morocco, through the National Aquaculture Development Agency (ANDA), is implementing an ambitious strategy aimed at simultaneously intensifying production and diversifying the aquaculture supply.

This national dynamic is part of a particularly favorable international context, marked by sustained expansion of global seafood trade. Aquaculture markets are characterised by remarkable vitality, with constantly increasing demand and growing diversification of distribution channels and consumption patterns.

Given this favorable economic climate, Morocco must consolidate its presence in traditional markets while identifying and conquering new emerging markets with high potential. This study, conducted under the MAR1049 program, aims specifically to provide industry professionals with the tools and strategic analyses they need to:

* Identify and evaluate the most promising commercial opportunities;
* Understand and anticipate regulatory and standars constraints ;
* Develop an export approach that is competitive, sustainable, and adapted to the specificities of each target market.

This approach is fully in line with the desire to position Morocco as a major player in global aquaculture, capable of meeting the qualitative and quantitative requirements of the most demanding international markets.

**Aims of the Service**

This strategic study aims to establish a comprehensive operational framework for developing the export of Moroccan aquaculture products to international markets. It will revolve around an in-depth analysis of commercial opportunities, export mechanisms, and the steps required to capture new market shares.

The study will systematically examine international demand for Moroccan aquaculture products while analysing the supply strategies of the main importing countries. Particular attention will be paid to evaluating the market's key components, including demand dynamics, competitive intensity, product characteristics, specific regulatory environments, and distribution structures unique to each target market.

The research will precisely identify potential buyers for Moroccan products, while mapping the conditions of access to the various markets, whether administrative, technical, or sanitary. Logistics aspects will be analysed in detail, covering the entire export chain from Moroccan aquaculture farms to the final customer in each destination country.

The study will result in the production of a practical guide for exporters, incorporating all the elements needed to develop a successful export strategy. This reference document will be complemented by a program of training workshops aimed at strengthening the capacity of national operators in mastering export processes and optimizing their presence in international seafood markets.

**Specific Objectives**

This study aims to establish a strategic roadmap for the competitive development of Moroccan aquaculture exports through the following operational objectives:

1. **Market Identification and Segmentation** :
* Identify priority international markets with the best growth potential;
* Draw up a precise mapping of high-value added market segments;
* Analyse the evolving dynamics of target markets.
1. **Competitive Analysis and Positioning**:
* Evaluate the competitive offer in each market (price/quality advantages);
* Determine the optimal positioning of Moroccan products;
* Identify differentiation levers.
1. **Optimising Export Channels**:
* Mapping all regulatory requirements per market;
* Analysing tariff and non-tariff barriers;
* Modelling the most efficient logistics schemes.
1. **Integrated Commercial Strategy**:
* Develop marketing plans adapted to each consumption area;
* Design customized commercial tools;
* Establish optimised distribution channels.
1. **Export Operationalisation**:
* Produce a comprehensive export guide incorporating:
	+ Administrative procedures and certifications ;
	+ Technical and normative requirements ;
	+ Best logistics practices.
* Implement an exporter support program via:
	+ Thematic sectoral workshops;
	+ Practical training modules;
	+ Digital operational support.

**Methodology**

To achieve these objectives, a structured two‑phase approach is proposed:

**Phase I : Mapping Potential Markets and Studying Target Markets**

This first phase is divided into two missions, detailed below.

**Mission 1 : Identifying High-Potential Markets**

The aim of this assignment is to draw up an initial list of target markets for Moroccan aquaculture operators.

To compile this list, the service provider will be required to prepare and organise individual interviews with professionals from the marine aquaculture sector in Morocco. These interviews will cover key aspects related to seafood exports in general, and aquaculture products in particular, including:

* Operators’ vision for the seafood market, including aquaculture products;
* The role of the export market in operators’ commercial strategies;
* The main markets targeted by exporters;
* Emerging markets and those to monitor by exporters;
* Risks and constraints associated with export operations;
* Exporters' recommendations for export market support.

These interviews will target at least ten (10) established producers, five (5) producers in the process of installation and five (5) seafood exporters.

The list of producers and operators will be subject to review and validation by the contracting authority.

Following these interviews, the service provider will be required to communicate to the contracting authority two lists identifying target markets and growth markets by aquaculture product exporters based on a well-defined scoring system.

This list will be subject to review and validation by the contracting authority, with the aim of establishing a target of ten (10) markets to be analysed subsequently.

The second step will allow for an analysis covering the markets identified within the geographical scope of the selection.

The data and indicators analysis will focus particularly on the following aspects:

* Market trends for imports of aquaculture products into Morocco (sea bass, sea bream, shrimp, meagre, oysters, mussels and clams);
* Price trends for these species;
* Average consumption of these species in the target countries;
* Competitive analysis of suppliers in these countries for these aquaculture species;
* Constraints related to exporting these species to these markets.

This mission should also provide key indicators on the development prospects of these target markets, based on the socio-economic and demographic dynamics of these countries, strategic consumption trends, and commercial partnerships, etc. The service provider could draw on studies conducted in these countries to identify these key indicators.

Thus, following this analysis, the service provider will be required to analyse these ten (10) target markets.

This list will be subject to validation by the contracting authority.

This mission will also involve drawing up a full analysis of the conditions of access to priority markets, including a detailed assessment of the non-tariff barriers and sanitary requirements affecting Moroccan aquaculture exports.

The study includes a comparative evaluation of sanitary and regulatory requirements for validation of priority market choices and prioritization of export opportunities through:

* + Benchmarking of standards in priority markets;
	+ Gap analysis with national standards;
	+ Cross-referencing sanitary constraints with commercial potential;
	+ Identification of markets with the best requirements/opportunities ratio.

**Mission 1.1 Deliverables:**

* A summary of interviews conducted with different operators;
* A photo library of the interviews conducted;
* A report analysing target markets and markets to monitor for aquaculture product exports, combining economic and sanitary aspects.

**Mission 1.2 : Detailed Study of a Group of Target Markets**

During this mission, the service provider will have to carry out an in-depth analysis of the target markets identified in the first mission.

The service provider's approach should be based on individual interviews conducted with professional buyers identified in target markets (wholesalers, seafood importers, supermarkets, HORECA operators, e-commerce platforms, seafood processing industries, etc).

In order to better target professional buyers in different target markets, the service provider may call on the following :

* Chambers of commerce of countries that exist in Morocco;
* Trade promotion agencies of target markets;
* International trade advisors from Embassies of target markets…

The list of professional buyers will be subject to validation by the contracting authority. This list will identify a minimum of 20 qualified buyers for target countries.

The questions that will be administered during these interviews will target the following main areas:

* Consumption trends of aquaculture products;
* Mechanisms and procedures governing aquaculture product import operations;
* Technical, sanitary, tariff, fiscal, administrative and customs requirements, as well as different standards established to authorise aquaculture product import operations;
* Trends in certification and labeling of aquaculture products;
* Trends in the promotion and packaging of aquaculture products;
* Factors relating to logistics and transport of aquaculture products;
* Distribution channels and supply chains related to aquaculture product import operations.

The service provider must design and submit to the contracting authority, for validation, a questionnaire integrating the main points discussed above.

**Mission 1.2 Deliverables:**

* A database of professional buyers with their contacts (telephone, email, address, website, etc.);
* The interview guide for professional buyers (initial version in french and translated versions);
* A summary of the interviews conducted with the economic players;
* A report analysing the results of interviews and breaking down the target markets of interest and growth in terms of aquaculture product exports.

**Mission 1.3: Drawing up a branding strategy tailored to target markets**

As part of this study, the service provider will have to formulate strategic recommendations for the positioning of Moroccan aquaculture products in the identified international markets. This analysis will include:

1. **Proposed Positioning by Target Market:**
* Analysis of the competitive advantages of Moroccan products compared to competitors;
* Recommendations on the most promising market segments (supermarkets, HORECA, etc.);
* Suggestions for product differentiation (quality, traceability, sustainability).
1. **Pragmatic Commercial Action Plan** (2-year horizon):
* Prioritisation of markets by potential and ease of access;
* Timeline of key actions per market;
* Estimated budgets required for initial actions;
* Simple and relevant monitoring indicators.
1. **Elements for a future branding strategy**:
* Identification of assets to be promoted;
* Recommendations on useful certifications (organic, eco-labels, etc.);
* Guiding principles for sectoral branding.

**Mission 1.3 Deliverables:**

* An aquaculture product positioning strategy;
* Action sheets per priority market;
* A summary presentation for stakeholders and professionals.

**Phase II : Preparation and Dissemination of the Exporter's Guide**

This phase is divided into two missions:

**Mission 2.1 : Drawing up a Guide for Exporting Aquaculture Products**

This mission should identify all procedures and mechanisms governing the export of aquaculture products to the target countries. The goal is to break down all key stages of exporting farmed seafood products, from the aquaculture farm to the final customer.

The main objective of this work is to enable operators in the aquaculture sector to gain an understanding of the procedures for exporting farmed seafood products and to identify the steps to be taken, by market and by product to be exported.

The service provider should produce **a detailed guide** covering all necessary operations for exporting aquaculture products.

This guide should include the following elements:

* International requirements and standards for the international trade of seafood in general and aquaculture products in particular;
* Structures involved in foreign trade: (Ministries in charge of foreign trade, ONSSA, Foreign Exchange Office, Customs and Indirect Taxes Administration, PortNet S.A …);
* Steps to be taken depending on the type of transport (sea or air);
* Necessary transport documents for shipment;
* Customs formalities and procedures;
* Main international payment instruments and their specific features;
* Technical export control and the accreditation of control establishments;
* Requirements for labeling, packaging, and conditioning;
* Requirements for certification and labeling;
* Non-tariff barriers.

At the end of this mission, aquaculture exporters should have a practical guide summarising all operations related to international trade in aquaculture products and charting the path to new export markets. The guide should also highlight each country’s specific technical, administrative, and commercial requirements for importing aquaculture products.

**Mission 2.1 Deliverable:**

* The exporter's guide in electronic formats.

**Mission 2.2 : Organisation of Workshops to disseminate the Exporter's Guide and Capacity Building for Operators**

The service provider will be responsible for organizing and moderating **three (3) workshops** to present and popularize the exporter's guide and for strengthening the capacities of operators to facilitate their access to target international markets. It will have to propose workshops tailored to the specific needs of operators and focusing on international regulations and the requirements of international markets, certification and accreditation as well as international marketing practices and the management of export operations.

|  |  |  |  |
| --- | --- | --- | --- |
| Workshop | City | Number of participants | Materials to be provided |
| Export of finfish / shrimp products | Rabat  | 15 | * Customized PowerPoint presentation for each workshop;
* Exporter’s Guide (printed & digital formats);
* Simplified infographic summary of the exporter’s guide (printed & digital formats).
 |
| Export of mussels | Agadir | 15 |
| Export of oysters and clams | Dakhla | 30 |

In addition, the service provider will have to support these operators in designing and implementing export plans and marketing strategies for each sector, and help them to establish partnerships with distributors, potential customers, investors and any other relevant stakeholders in the aquaculture sector's value chain.

**Mission 2.2 Deliverables:**

* PowerPoint presentations of the workshops presenting the exporter's guide;
* Summary report of the exporter's guide workshops;
* Photo library of the exporter's guide workshops.

N.B.: The working language during the assignment and for deliverables will be one of the following languages: French, Arabic, English.

**Required skills, composition and qualification criteria for the key personnel team**

* + 1. **Key personnel**

The consultant must have in-depth knowledge of international trade, marketing of agri-food or aquaculture products, export development strategy, and a solid understanding of value chains, market dynamics, and regulations related to the export of agri-food products.

1. The consultant must not only demonstrate experience, but must also have approved experience. (At least 5 years experience in carrying out comparable assignments, particularly in strategic analysis, market intelligence, positioning of agri-food/aquaculture products and analysis of export opportunities).
2. The consultant must have a verifiable track record of success and have completed at least two similar assignments in the last five years. (Reference certificate proving that the consultant has performed similar services).
	* 1. **Academic and professional qualifications of key staff members of the consulting firm**

Team members must hold an advanced degree (at least a master's degree or equivalent) in one or more of the following specialisations: international trade, import/export, commercial strategy, business strategy, business internationalisation, data science, strategic marketing, or similar.

* + 1. **Required experience**
* In- Depth knowledge of market access mechanisms, distribution channels, export practices, entry requirements (customs duties, health certificates, etc.);
* Experience in designing positioning strategies for agri-food or aquaculture products internationally;
* Consulting experience: previous experience in providing consulting services in international trade and export.

The consultant must demonstrate their capabilities and experience to meet the expectations outlined in these ToRs.

**Association with other firms**

Consultants may form partnerships with other firms in order to strengthen their qualifications, clearly indicating the type of partnership, i.e. a consortium of consultants or an intention to subcontract. In the case of a consortium, all partners in the consortium will be jointly and severally liable for the entire contract, if awarded.

Interested consultants are invited to review Clauses 1.23 and 1.24 of the Guidelines for the Procurement of Consultant Services under Projects Financed by the Islamic Development Bank (the ‘Guidelines’) defining the IDB's rules on conflicts of interest.

The selection will be made in accordance with the “selection based on Consultant Qualifications (QC)” method stipulated in the IDB Guidelines.

**Contents of the technical and financial proposal**

The firm deemed most qualified at the end of the shortlisting stage will be asked to submit a combined technical and financial proposal. The candidate must detail the approach they intend to take to achieve the objectives of the assignment. To this end, they must submit:

* A detailed description of their recent experience in similar assignments and their knowledge of the specificities of Morocco in this area;
* The methodologies proposed to meet the terms of reference;
* The CVs (curriculum vitae) and detailed references of the key team members assigned to the assignment on a permanent basis;
* The schedule for completing the assignment.

**Method of remuneration for consulting services**

Payment after completion and acceptance of the deliverables for each assignment specified in the letter of intent.

**Consultant's responsibility**

During the assignment, the selected consultant will be required to report periodically to the monitoring committee on the progress made, while specifying any issues that may arise and updating the roadmap, if necessary, for the remaining period.