

JAMHUURIYADDA FEDERAALKA SOOMAALIY
WASAARADDA BEERAHA & WARAABKA



جمهورية الصومال الفيدرالية
وزارة الزراعة والري

Federal Republic of Somalia
Ministry of Agriculture & Irrigation

Terms of Reference for Consulting Services

for

Consultancy to Conduct Seed Market Analysis in Somalia

Ref No: *MAI/DEP/HR,C&PR/117/2025*

Submission date: September 6th, 2025

1. Introduction

1.1 Background

Somalia's seed sector is vital for agricultural growth, food security, and rural livelihoods, yet it continues to face a range of systemic challenges. Supply and demand remain imbalanced, with farmers often lacking timely access to quality seeds while imports and humanitarian distributions dominate the market. Pricing is volatile, creating affordability barriers for smallholder farmers, while distribution networks are fragmented and largely informal, leading to inefficiencies and limited market reach. In addition, weak value chain linkages and inadequate infrastructure for production, storage, and marketing further constrain sector performance. Despite recent seed sector assessments by MoAI and partners (e.g., country study, SeedSAT, Seed Performance Index), comprehensive Seed Market Analysis has not yet undertaken. The absence of reliable data on supply, demand, and pricing trends limits evidence-based policymaking, private investment, and regulatory oversight.

1.2 The Ugbaad Project (GCF-Funded)

The Climate Resilient Agriculture in Somalia (Ugbaad) Project is a seven-year program (2024–2031), financed by the Green Climate Fund (GCF) with a grant of USD 79.7 million and implemented by FAO in partnership with the Federal Government of Somalia. Ugbaad is Somalia's first GCF-funded, single-country investment dedicated to strengthening agricultural resilience.

The project's development objective is to enhance climate-resilient livelihoods and food security through:

- Restoration of 40,000 hectares of productive landscapes.
- Rehabilitation of irrigation canals and rural access roads.
- Improved access to water for over 900,000 people.
- Climate information services reaching nearly 1 million farmers and pastoralists.
- Strengthened institutional capacity to deliver climate-smart agriculture and seed system reforms.

The seed supply initiative under this ToR is part of Ugbaad's component on sustainable input access and seed system strengthening. A Seed Market Analysis is critical to ensure that certified, climate-resilient seed supply is demand-driven, identifies market gaps and opportunities, supports SARIS and MoAI in aligning certification systems with farmer needs, and guides private sector engagement. This will enable Somali farmers to access reliable improved seed varieties, while building long-term demand and contributing to Ugbaad's goal of climate-resilient agriculture and food security.

1.3 Rationale of Seed Market Analysis

A functioning seed system is critical for agricultural productivity, food security, and resilience. In Somalia, the sector faces multiple challenges, including limited availability of improved varieties with

reliance on imports and aid, weak demand forecasting, volatile pricing that limits smallholder affordability, and fragmented value chains with infrastructure gaps.

The need for a Seed Market Analysis is urgent as Somalia enters a new phase of reform. SARIS has been established, the Seed and Plant Variety Law enacted, and a national research system created. At the same time, new crop varieties are being released, private seed companies are emerging, and a formal seed system is beginning to take shape. These developments make it essential to generate a robust evidence base on seed demand, supply, pricing, and value chain gaps to guide investment decisions and ensure reforms respond to actual market needs.

The Seed Market Analysis will provide critical insights into Somalia's seed supply and demand dynamics, pricing trends, and value chain bottlenecks. Its findings will inform practical interventions to improve seed availability, accessibility, and affordability for smallholder farmers. The analysis will also support evidence-based planning for government, NGOs, and private sector actors, strengthen coordination among value chain stakeholders, and highlight investment opportunities to build a more resilient and sustainable seed system.

1.4 Purpose of this Terms of Reference (TOR)

The purpose of this TOR is to recruit qualified consultant to conduct a Seed Market Analysis in Somalia. The analysis will generate evidence on seed supply, demand, pricing and value chain gaps and provide actionable recommendation to inform MoAI, FMS, NGOS and private sector actors. The finding will support evidence-based planning, strengthen coordination among stakeholder, and identify investment opportunities to build a more resilient and sustainable seed system in Somalia

2. Objective of the Assignment

2.1 Overall Objective

The objective of this assignment is to conduct a comprehensive Seed Market Analysis in Southwest, Jubaland, and Hirshabelle States. The analysis will assess current seed supply, demand, pricing trends, and value chain gaps, and generate clear, evidence-based recommendations to improve the efficiency, accessibility, and competitiveness of Somalia's seed sector within the project timeframe.

2.2 Specific Objectives

- Assess seed supply and demand dynamics in Southwest, Jubaland, and Hirshabelle States, with attention to crop preferences, farmer adoption, and seasonal demand patterns.
- Map the seed value chain (production, imports, distribution, and marketing), identifying key actors, market flows, and bottlenecks.
- Analyze seed pricing trends and affordability, including farmer access and willingness to pay for improved varieties.

- Identify institutional, regulatory, and infrastructural gaps affecting the seed sector, particularly in relation to SARIS, MoAI, and regional harmonization frameworks (EAC, COMESA, IGAD).
- Provide actionable, evidence-based recommendations to strengthen governance, improve competitiveness, and attract private sector investment in the seed market.

3. Scope of Work

The consultant, in collaboration with Research Department and SARIS, will undertake the following tasks:

a) Desk Review

- Review existing seed sector reports, legislation, and regional market studies.
- Benchmark Somalia's seed market against IGAD, COMESA, and EAC frameworks.

b) Field Data Collection

- Develop the data collection tools
- Design and implement surveys with farmers, seed producers, agro-dealers, and distributors.
- Conduct training for enumerators on data collection to ensure accuracy, consistency, and high-quality field data.
- Lead and collect quantitative and qualitative data on seed availability, demand, pricing, and adoption.
- Ensure ethical standards, including informed consent and data confidentiality.

c) Stakeholder Consultations

- Conduct interviews with government agencies, private sector actors, NGOs, and farmer cooperatives.
- Facilitate focus group discussions in target regions.

d) Value Chain Mapping

- Map seed production, importation, certification, and marketing flows.
- Identify constraints in infrastructure, storage, transport, and distribution.

e) Market Analysis and Recommendations

- Analyze seed supply-demand trends and pricing structures.
- Develop recommendations for policy, regulation, and private sector investment.
- Prepare a consolidated market analysis report with actionable strategies.

Study Timeline

- The consultant is expected to follow this timeline to ensure timely deliveries; the schedule is based on actual working days during the assessment.

Milestone	DAYS																							
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
Inception report preparation	■	■																						
Stakeholder Consultation meeting			■	■																				
Enumerators Training					■	■																		
Finalizing study data collection tools					■	■																		
Secondary Data submission						■																		
Field Data collection						■	■	■	■	■	■	■	■	■										
Data analysis													■	■	■									
First study draft													■	■	■		■	■						
Internal review – by MoAI																	■	■						
External Review – Ugbaad Team																			■	■				
Dissemination workshop and validation																					■			
Final study report -																						■	■	
Study approval and publication																						■	■	■

4. Deliverables

The consultant will produce the following outputs:

1. Inception Report with methodology, work plan, and survey tools.
2. Seed Market Analysis Dataset (cleaned, coded, and documented).
3. Draft Seed Market Analysis Report with preliminary findings and recommendations.
4. Validation Workshop to present findings and gather stakeholder feedback.
5. Final Seed Market Analysis Report incorporating validation inputs and actionable recommendations.

5. Duration

The consultancy will be implemented over **24 working days** within a one -month period, though limited flexibility for minor delays may be allowed with prior approval from MoAI/SARIS.

6. Consultant Qualifications

The consultant must demonstrate:

- Advanced degree in Agricultural Economics, Agribusiness, Seed Science, Agronomy, Agricultural Science or related field.
- At least 7–10 years of experience in seed sector research, agricultural value chain studies, or market analysis.
- Proven track record in seed supply-demand studies and pricing analysis.
- Familiarity with regional harmonization frameworks (EAC, COMESA, IGAD).
- Strong skills in survey design, statistical analysis, and report writing.
- Prior experience working in fragile and emerging contexts is an asset.

7. Reporting and Supervision

The consultant will report directly to the Director of Research Department and work closely. Regular consultations will be held with MoAI management and relevant development partners.

The consultant shall submit the following reports during the assignment period:

- Inception Report – outlining methodology, work plan, and data collection tools.
- Progress Updates – brief notes or presentations on fieldwork progress, preliminary findings, and any emerging challenges.
- Draft Seed Market Analysis Report – presenting preliminary results, analysis, and recommendations for MoAI and partner review.
- Final Seed Market Analysis Report – incorporating feedback, and submitted in both electronic and hard copy formats, along with datasets and presentation slides.

8. Payment Schedule

Payments will be made in installments based on the successful completion and formal approval of deliverables.

Deliverable / Milestone (with Conditions)	Payment %
Inception Report (methodology, detailed work plan, and timeline). <i>Payment will be made upon submission and formal approval by MoAI/FAO confirming completeness, clarity of methodology, and feasibility of the work plan.</i>	20%
Draft Seed Market Analysis Report (including survey findings, analysis of supply, demand, pricing trends, and value chain gaps). <i>Payment will be released upon submission of an acceptable draft report of sufficient quality for review by MoAI/FAO and development partners.</i>	40%
Final Seed Market Analysis Report & Validation Workshop (consolidated report with actionable recommendations, dataset, and presentation slides). <i>Payment will be made after official acceptance by MoAI/FAO, confirming that all deliverables are complete, of satisfactory quality, and incorporate feedback from internal and external reviews.</i>	40%

NB: MoAI/SARIS may withhold or delay payments for late, incomplete, or substandard deliverables, while timely and satisfactory submissions may allow faster processing.

9. Application Procedure

Interested candidates/consulting firms are invited to submit:

- A cover letter expressing interest and suitability for the assignment.
- Technical proposal outlining methodology and work plan.
- Financial proposal indicating consultancy fees and related costs.
- Curriculum Vitae (CV) of the lead consultant and team members (if applicable).
- Evidence of relevant assignments previously undertaken.

Applications should be submitted electronically to hr@moa.gov.so and CC: Projectcoordinator@ugbaadgcf.gov.so no later than **September 16, 2025**. Only shortlisted candidates will be contacted.

10. Evaluation Criteria

10.1 Technical Proposal (70%)

The Technical Proposal will carry a weight of 70% of the overall score and will be evaluated against the following criteria:

- Understanding of the TOR and proposed methodology- 20 points
- Expertise and experience of the consultant- 20 points
- Consultant qualifications- 15 points
- Work plan and timeline- 15 points

10. 2 Financial Proposal Evaluation:

The Financial Proposal will carry a weight of 30–40% of the overall score. It will be evaluated based on competitiveness and value for money.

The lowest-priced, technically compliant bid will receive the maximum financial score, with other bids scored proportionally according to the following formula:

Financial Score = (Lowest Priced Bid ÷ Price of Bid Under Evaluation) × Maximum Financial Points