TERMS OF REFERENCE

The Shea Market Report

Background

The Global Shea Alliance (GSA) is a non profit industry association established in 2011 and based in Accra, Ghana. It brings together stakeholders across the shea value chain, including food and cosmetic brands, processors, suppliers, women's groups, development organisations and other industry actors. GSA promotes the sustainability, quality and commercial development of the shea industry through public private partnerships, policy advocacy, market development and the promotion of shea in food and cosmetics.

To strengthen the availability and use of reliable market intelligence, GSA intends to establish an Annual Shea Market Report and Data Package. This will provide a concise, evidence based overview of the industry, supported by a consistent dataset that can be updated annually. Unlike a comprehensive State of the Industry Report, the proposed publication will focus on a defined set of market indicators, emerging trends and developments that influence the production, trade, processing and commercial use of shea. The report should also be complementary to existing market analysis reports such as N'kalo.

The intention is to establish a repeatable annual process that enables GSA and its members to monitor industry performance, identify emerging opportunities and risks, and make better informed business and policy decisions.

Objectives

The assignment will have the following objectives:

- Provide an annual overview of developments in production, trade, prices, processing capacity and global market dynamics across the food and cosmetic sectors
- Identify significant year on year changes, emerging trends, opportunities and potential risks
- Provide a short outlook on the shea season, including relevant supply and market considerations
- Highlight developments in key shea producing countries, including changes in production, trade, market conditions and the operating environment

- Track relevant policy and regulatory developments affecting the industry
- Establish a standardised dataset and methodology that can be maintained and updated annually.

Scope of Work

The report will provide an overview and analysis of the following indicators. The report should cover 11 major shea producing countries, including Benin, Burkina Faso, Cameroon, Chad, Côte d'Ivoire, Ghana, Guinea, Mali, Nigeria, Senegal, Togo, and Uganda. Where date is available, it should be presented by country

1. Production And Supply

- Estimated annual kernel production
- Production trends across key shea producing countries
- Factors influencing production and supply, including seasonality and weather
- Significant changes in supply conditions and their implications for the market.

2. International and Regional Trade

- Shea kernel, shea butter and shea stearin trade flows
- Export and import volumes and values, where available
- Key origin countries, destination markets and changes in trade patterns
- Significant developments affecting regional and international trade.

3. Prices and Market Trends

- Price movements across key origins and destination markets
- Factors influencing price changes, including supply, demand, competition and logistics.

4. Processing Capacity

- Overview of small scale and industrial processing capacity in key origin countries
- Estimated installed and operational processing capacity, where available
- Processing volumes and capacity utilisation, where reliable information exists
- Developments in butter production, refining and fractionation
- Significant investments, new facilities and changes in processing capacity.

5. international markets dynamics

- Developments in food and cosmetic application demand and market opportunities
- Relevant trends in the cocoa and vegetable fats markets that influence demand for shea
- Regulatory developments, standards and requirements affecting the use of shea in existing markets
- Market access opportunities and constraints for shea derivatives.

6. Regulatory and Policy Updates

- Export and import restrictions, bans, taxes and levies
- Local processing requirements and domestic supply obligations
- Licensing and registration requirements
- Trade regulations and market access requirements
- The consultant will identify and summarise significant regulatory and policy developments affecting the shea industry in origin and destination markets.

Data Package and Annual Update Protocol

- A central output of the assignment will be a structured dataset that supports the report and can be updated in subsequent years. The consultant will develop a standardised dataset covering the core indicators identified
- Present information in a consistent format, with clear definitions, units of measurement and geographic coverage
- Include historical data where available to enable year on year comparisons and trend analysis
- Be provided in a clear, well structured and editable format that allows GSA to easily access, use and update the data.
- The consultant will also provide a data dictionary or methodology note explaining the indicators, definitions, sources and procedures used to compile the dataset
- The dataset should be designed so that GSA can retain it and update it annually without having to redesign the entire data collection and reporting framework.

Methodology and Information Sources

The consultant is expected to use a combination of quantitative and qualitative research methods, including:

- Existing industry, production and trade information
- Official national and international statistics, where available

- Relevant market and commodity price information
- GSA's existing industry data and publications
- Targeted surveys or consultations with GSA members and industry stakeholders
- Interviews with processors, traders, buyers and other relevant market participants.

Where reliable data are unavailable, the consultant should clearly identify the gaps rather than present unsupported estimates. Any estimates or projections used must be accompanied by an explanation of the methodology and assumptions.

Deliverables

Deliverable 1

- A concise analytical report covering the agreed scope
- Key indicators, tables, charts and visualisations
- Analysis of annual developments, trends and market implications
- Season outlook, origin country insights and regulatory updates
- Revised report incorporating GSA's comments and feedback
- Final validated dataset
- Supporting data documentation and source references.

Deliverable 2

- Structured and editable dataset
- Data dictionary and methodology note
- Sources and references for the indicators
- Recommendations on maintaining consistency and comparability across reporting years.

GSA's Role

- Provide access to relevant existing reports, datasets and industry information available to the organisation
- Facilitate engagement with relevant members and industry stakeholders, as appropriate
- Review and provide feedback on the proposed methodology, draft report and dataset.

Application Requirements

Interested consultants or firms should submit:

- A technical proposal outlining their understanding of the assignment and proposed methodology
- A proposed workplan and delivery schedule
- Relevant experience and examples of similar assignments
- CVs of the proposed team members
- A financial proposal, including professional fees and other anticipated costs
- Proposals should be submitted to the Global Shea Alliance for consideration.

Interested parties should submit their applications to msakyi@globalshea.com by **9 December 2026**.

Ownership and Use of Outputs

All reports, datasets, methodologies, documentation and other materials developed under this assignment will be the property of the Global Shea Alliance.
The consultant will be expected to ensure that all data sources are appropriately acknowledged and that the final outputs are provided in editable formats to facilitate future annual updates.