



Terms of Reference - State of the Industry Report

Background

Established in 2011, The Global Shea Alliance (GSA) is a nonprofit industry association based in Accra, Ghana. We currently have 560 members from 35 countries including food and cosmetic brands, suppliers, women's groups, and non-profit organizations. Through public-private partnerships, the GSA promotes industry sustainability, quality practices and standards, and demand for shea in food and cosmetics.

From 2021, the GSA will publish an annual state of the industry report with the following objectives:

- Identify key trends and opportunities around the shea industry
- identify 'early warnings' of changes year-over-year by taking a step back
- serve as a trusted source of key information
- raise awareness of shea (and the GSA)
- mobilize support and resources to rally around the industry and its opportunities

Activities

The consultant(s) will produce a report that will contain the following elements:

1. Letter from the President
2. Shea in 2020 - infographic stats
3. Growth (production by region, by use)
4. Where we've come from and where we're going (2000-2020)
 - a. The history of shea and the shea belt
 - b. What the shea industry looked like when GSA was formed
 - c. What has changed in the shea industry since then
 - d. Where we're going - key trends and untapped opportunities
5. The shea value chain (2019-2020)- helping people understand what each step really means, key challenges/ big opportunities
 - a. Trees and kernel production
 - b. Collectors (demographics, including ages, incomes, and numbers)
 - c. Post-Harvest Processing
 - d. Trading
 - e. Small-scale Butter Processing - yield, volume, methods
 - f. Industrial Processing - yield, volumes, methods
 - g. Refining & Fractionation

- h. Formulation & Distribution
 - i. End use (including consumer preferences)
6. Country profile(s) and export flows (2019-2020)
7. Regulatory and policy trends (2019-2020)
 - a. CBE/standards of identity
 - b. Trade requirements
 - c. What governments (including fiscal policies and other policies) and development NGOs are thinking about with shea
 - d. Climate change and shea -- the good and bad

The report will be produced using the following information sources:

- Existing industry and trade information
- Survey among GSA members, focus groups, and targeted interviews

Timeline & Application

The consultant(s) need to send a CV and cover letter / expression of interest by December 18 to Aaron Adu, Managing Director at aadu@globalshea.com

A draft version of the report needs to be ready by February 15 for a final version ready for publication on February 28.