

Call for proposals

Analysis of domestic production and export trade flows of the soy and beef supply chains in the Brazilian Amazon, Cerrado, Gran Chaco and Argentine Pampas regions.

I. Background to WWF/Vida Silvestre's Work with Markets

The increasing demand for soy and beef in the last decade has led to a rapid agricultural expansion which has contributed to deforestation and natural habitat conversion in the Amazon (Brazil), Cerrado, Gran Chaco and Pampas (Argentina) regions. The demand drivers for beef come in large part from domestic markets in these respective regions, as well as internal and global markets. The demand drivers for soybeans has a much greater reliance on international markets, but also a growing reliance to supply animal feed to other domestic animal protein sources such as swine and poultry production.

WWF/Vida Silvestre seeks to better understand the current market status of these value chains, with an identification of the key actors and trade flows for both the domestic and global markets for these two commodities, and their by-products. As part of this work, we will need to identify companies within these respective supply chains as well as the deforestation or conversion risk in the suppliers.

This work is related to and will be financed by the project: Eat4Change – Mobilising youth for sustainable diets. Reference: EuropeAid/160048/DH/ACT/MULTI

II. Content Requirements

The report is to be used mainly internally to guide content development for different strategies in the project (communication, advocacy, company and policy engagement). Some data may be used externally, and this will depend on the type and source of information. The information which will be published externally must come from reliable data sets and sources, which shall be proposed by the Consultant, and approved by WWF/Vida Silvestre. We are seeking information on trade flows for the commodities, the key players within the supply chain for both domestic and international markets to further analyze the deforestation or conversion risk linked to the supply chain.

The analysis must clearly identify and prioritize those companies and traders who play a predominant role within these specific regions, as well as in key demand countries importing soy and beef from these regions. While it may very well be that there is no difference at a local or national level, we need to understand the relationships and roles of the companies, nationally and internationally, with regards to these specific biomes (i.e. policies in place regarding specific biomes). The specific biomes are: Amazon (Brazil), Cerrado, Gran Chaco and Pampas (Argentina).

The data specified in the 'Detailed Requirements' section is a comprehensive list of the information that could be of use to WWF/Vida Silvestre. Through the process of gathering the data the Consultant must identify trends and draw out the key points of focus where market leverage may be the greatest. Modifications or changes to the information requirements should be done in consultation with the WWF/Vida Silvestre.

III. Detailed Requirements

The lists below show the detailed information required for the report. Data should be gathered from the period (2015-2020).

A. SOY

- 1) National production detailed by region and state (hectares and Mtons)
- 2) Key producers by state, micro-region and municipality, where available (Hectares and Mtons)
- 3) A breakdown by company of sourcing of soy by state, micro-region and municipality.
- 4) Key National trade flows
 - a. Domestic processing and consumption
 - i. Beans, Meal and Oil
 - ii. Key Domestic Animal Feed Sectors'
 - Poultry (incl. eggs), Swine, Dairy, etc.
 - Key producers in each of these sectors
 - iii. Key Domestic Animal Feed Producers
 - Poultry (incl. eggs), Swine, Dairy, etc.
 - iv. Local distribution: retail and brands
- 5) Major Exports Trade Flows from target producing countries and biomes
 - a. Export/Imports by Country and biome, by-products (beans, meal, oil) and certification type (organic, carbon neutral, etc.) in Mtons.
 - b. Key traders (exporters, importers), processors and consumers including table with at least:
 - i. Top 10 traders/importers in export countries
 - ii. Top 10 Crushers in export country
 - iii. Top 10 processors/manufacturers in export country
 - iv. Top 10 retailers and brands in export country
 - c. Processing and consumption description in key export Markets
 - i. Beans, Meal and Oil exports, processing and re-exports
 - ii. Ranking of export and consumption by volume per country, sectors and top companies with market share % by biome per country
 - iii. Trade flows between traders, processors, manufacturers and retailers in each sector
 - iv. Specific export purchasing requirements (Def-free, certified, non GMO, etc.)
 - v. Details of profiles of the identified key companies and sectors (ownership type, investment profile, investors, sourcing model, etc.)
 - vi. Key Domestic Animal Feed Sectors' in Export Country
 - Poultry (incl. eggs), Swine, Fish, Dairy, etc.
 - Key feed manufacturers and producers in each of these sectors
 - vii. Poultry, fish and swine producers in export country
 - viii. Poultry and Swine meat imports from target producing countries
 - ix. Soy oil sector in target producing countries and export/consumer country
 - x. Local distribution: (retail) and brands in export/consumer country
 - xi. Re-export of beans, meal, oil, feed, and Poultry (incl. eggs), Swine, Fish, Dairy, etc. from export countries

B. BEEF

- 1) National production detailed by biome (#of heads/year, hectares and Mtons of beef)
- 2) Ranked list of packers and their plants with production capacity, current and past production of beef (Mtons and # of heads/year) and market share % by biome per country

- 3) Number of direct and indirect suppliers/producers of beef per packer, biome and if possible, per plant with their average size (# of heads/year)
- 4) Key National trade flows per biome including:
 - a. Domestic processing and consumption
 - i. Beef and byproducts
 - ii. Ranking of Domestic Buyers of Beef by volume per country with market share %
 - Supermarkets
 - Butchers
 - Restaurants and Food Service
 - iii. Ranking of Domestic Buyers of byproducts per country with market share %
 - iv. Estimate size of informal sector, by biome
- 5) Major Exports Trade Flows from target producing countries:
 - a. Export/Imports by Country and biome, and certification type (organic, carbon neutral, etc.) in Mtons.
 - b. Key traders (exporters, importers)
 - i. Ranking of beef traders in export by volume per country with market share % by biome per country
 - c. Processing and consumption in key export Markets, ranked by volume:
 - i. Beef
 - ii. By products
 - iii. Ranking of International Buyers (outside of Latin America) of Beef by volume per selling and buying country with market share % (including suggested table below)
 - Supermarkets
 - Butchers
 - Restaurants and Food Service
 - iv. Ranking of International Buyers of by products by volume per selling and buying country with market share %

IV. Consultant Responsibilities and minimal deliverables

1. Project management - prepare and maintain a project management plan and coordinate meetings with WWF/Vida Silvestre.
2. Design methodology and main sources, and validate it with WWF/Vida Silvestre
3. Prepare an index table with the available information related to the project and gaps to be filled or updated;
4. Prepare outline of report, to be agreed upon with WWF/Vida Silvestre
5. Conduct secondary research and analysis
6. Create graphs and charts as necessary to accompany text
7. Maintain reference list
8. Prepare first draft for review by WWF/Vida Silvestre
9. Prepare second draft for review by WWF/Vida Silvestre
10. Deliver final report, executive summary, and power point with main findings
11. Present final report to WWF/Vida Silvestre and other core partners
12. All deliverables must be in English.

The Consultant will gain further clarity on the desired project outcomes in the first month of the project through interviews with key WWF/Vida Silvestre staff, and can then prioritize areas of focus.

V. Requested materials with the proposal

1. Tenderers must state their nationality in their proposals and provide proof of nationality from the country they are legally registered in.
2. References from previous works attesting technical expertise for the scope of the project.
3. CVs of all participating team members.
4. Detailed budget, methodology, timeline and deliverables.

All proposals will be evaluated against objective criteria, which consider the quality of the offers, taking also into account the overall cost of the proposal.

The deadline to submit proposals is **Dec 14th, 2020**. Please, send your proposal to daniela.delvalle@vidasilvestre.org.ar with the subject "Proposal Eat4Change". Clarifying questions about the process will be accepted until **Nov 30th, 2020**.