



VIETNAM FISHERIES SOCIETY (VINAFIS)
International Collaborating Centre For
Aquaculture and Fisheries Sustainability (ICAFIS)



Annex 4

TERMS OF REFERENCE
Market Systems Expert

US - Viet Nam Aquaculture Value Chain Project

Background information

The United States Department of Agriculture (USDA) has officially designated Viet Nam as one of five focal countries for the "Food for Progress" Program (2025–2030). In Viet Nam, this program will be executed through the U.S.–Viet Nam Aquaculture Project. This project offers a unique opportunity to leverage U.S. financial resources and technical expertise to improve the tilapia value chain in Viet Nam; enhance trade in high-quality soybean products for aquaculture feed, and expand tilapia trade to consumers in the U.S., the region, and Viet Nam. The USDA Vietnam Aquaculture Project is a five-year program designed to increase Vietnam's tilapia production and competitiveness across the value chain, raising productivity to a cumulative volume of 1.21M metric tons and total volume of sales of \$1.25B, while facilitating imports of United States (U.S.) soy products in aquafeed, and expanding the trade of tilapia to U.S., regional, and Vietnamese consumers. It will be led by Lutheran World Relief (LWR), with support from Vietnamese partner International Collaborating Centre for Aquaculture and Fisheries Sustainability (ICAFIS) and U.S.-based American Soybean Association World Initiative for Soy in Human Health (ASA/WISHH).

Lutheran World Relief is a member of Corus International, and this organisation combines over 150 years of experience of non-profit and for-profit subsidiary organizations – IMA World Health, Lutheran World Relief, CGA Technologies, Ground Up Investing, and Farmers Market Brands. Together, the organizations take a systematic approach to grow rural economies, eliminate extreme poverty, ensure access to quality healthcare, and respond to urgent humanitarian needs in fragile settings.

The project seeks to strengthen the aquaculture sector in Vietnam by improving productivity, expanding market opportunities, and enhancing the capacity of actors across the aquaculture value chain. The project will work with aquaculture farmers, producer groups, hatcheries, input suppliers, processors, traders, financial institutions, and relevant government agencies to promote sustainable and market-oriented aquaculture development. There are six interrelated activities, the outputs and outcomes of which contribute to Food for Progress (FFPr) objectives SO1 (increased productivity) and SO2 (expanded trade). This is planned to be achieved by activities include developing aquafeed and seed/hatchling suppliers, developing demonstration plots, building the capacity of producer and trade associations, facilitating micro, small and medium enterprise finance, providing in-kind grants for broodstock and equipment, and facilitating buyer-seller relationships.

2. Objective of the Assignment

The objective of this assignment is to assess and document the current status, structure, and performance of the tilapia value chain in Vietnam across nine provinces in the Red River Delta and Mekong River Delta, through a comprehensive review of existing studies and field-based analysis of value chain actors, production systems, supporting services, and market linkages, in order to identify key constraints, gaps, and opportunities and provide evidence-based



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recommendations to strengthen sector competitiveness and expand tilapia production and exports to the United States and other markets.

3. Scope of Work

3.1. Specific requirements for the tasks of the Market Systems expert

The market system expert will be responsible for analyzing tilapia markets, including domestic consumption, regional trade, and export opportunities, particularly focusing on the U.S. market, through the following tasks.

- 1) Conduct specialized tilapia market system tasks in consultation with the team leader and coordinate with the other consultants in the team across the three study sections.
- 2) Conduct market system analysis including mapping tilapia marketing channels in Vietnam and analyzing value transformation from production to final markets. Identify and evaluate constraints and opportunities, core markets, enabling factors, rules and regulations, for expanding production and exports, particularly to the USA.

Map the value transformation of Tilapia products along the supply chain including domestic to export outlets, from ponds and cages to outlets to include

- i) Products (whole, fresh, frozen, filets, processed products)
 - ii) Market volumes and values and trends
 - iii) Opportunities for expansion
- 3) Assess export market with focus on U.S. tilapia market requirements, import regulations, SPS standards and HACCP compliance and certification requirements.
 - 4) Assess current processing and export capacities including fish processing facilities, cold chain infrastructure and export logistics.
 - 5) Report on key finding on tilapia market systems, constraints and opportunities for expanding production and exports (Market volumes, values and trends, ect)
 - 6) Participate, as team member, in working with relevant tilapia value chain stakeholders such as processors, exporters, and buyers.
 - 7) Draft, revise and finalise the market assessment report.
 - 8) Support the team leader to draft, revise and finalize the final report based on feedback from ICAFIS, LWR and DFiS and relevant stakeholders

4. Timeframe

The consultancy will be implemented between April 15 2026 and June 30 2026. The total input times for the market system expert is up to 22 working days, including travels to provinces for data collection and consultation.

5. Deliverables

Report Title / Deliverables	Quantity	Timeline
I. Report on key finding on Tilapia Market Systems Assessment: constraints and opportunities, core markets, enabling factors, rules and regulations, for expanding production and exports (Market volumes, values and	02 (Vietnamese and English)	May 30 2026



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trends, etc) particularly focusing on the U.S. market		
1. Draft, revise and finalise the Market Systems Assessment Report to include <ul style="list-style-type: none">• Core Market Chain: Mapping the direct players—producers, processors, traders, and consumers—who buy, sell, and transform a product. In conjunction with tilapia value chain mapping.• Enabling factors: financing, transportation, storage, and market information systems.• Rules and Regulations: Identifying formal laws (taxes, quality standards) and informal norms (power dynamics, gender roles) that govern market behavior.• Systemic Constraints: Identifying underlying barriers that restrict growth or inclusion, such as lack of skilled labor or poor infrastructure.	02 (Vietnamese and English)	June 5 2026

6. Consultant Qualification Requirements

- Advanced degree in aquaculture/ commodities marketing/ agricultural economics or related fields.
- Minimum 10 years of working experience in agricultural and/or seafood market analysis.
- Proficiency in quantitative and qualitative data analysis software, Office 365 applications including Word, Excel, SharePoint, and PowerPoint.
- Strong analytical, coordination and report writing skills including English language skills at intermediate level or higher.
- Experienced in working with central and local government and communities in Vietnam
- Highly effective in working in small teams, good communication and interpersonal skills.
- Authorization to work legally in Viet Nam.

7. How to apply

Interested professionals/consulting teams must submit the application in English. To apply, please submit no more than 4 pages with your CV and responses to the selection criteria to email HVu@corusinternational.org, quoting the position title in the email's subject line by April 3rd 2026.