

Government of the People's Republic of Bangladesh  
Ministry of Commerce  
Bangladesh Regional Connectivity Project-1  
Office of the Project Director  
Level-12 (West side), Probashi Kollayan Bhaban,  
Eskaton Garden, Dhaka-1000

Memo No: 26.00.0000.066.07.067.26 - 81

Date: June 10, 2026

**REQUEST FOR EXPRESSION OF INTEREST (EOI) FOR CONSULTING FIRM (National)**

1. The Government of the People's Republic of Bangladesh has received an SDR 150 million Credit from the International Development Association (IDA) – a member of the World Bank Group for financing the cost of the Bangladesh Regional Connectivity Project 1(BRCP-1), being jointly implemented by the Bangladesh Land Port Authority, National Board of Revenue and Ministry of Commerce (MoC). The Ministry of Commerce as a separate technical assistance project is implementing the 2<sup>nd</sup> Part of this umbrella project. The overall objective of this technical assistance project is to strengthen trade related institutional capacity in order to ensure active and sustainable cooperation among trade related stakeholders and economic empowerment of women traders.

2. The Procuring Entity intends to apply a part of the IDA Credit for procuring consulting firms for the following 2 (two) services:

Package no. and Duration of contract	Name of Package	Required qualifications and experiences
SD-58  From the date of signing of contract to November 30, 2026	Relevant trade related studies and policy studies (03 studies): Study 1: Assessment of Agri-Trade Logistics for Horticulture and Floriculture Exports (Including Cold Chain, Packaging, Treatment Facilities, and Green Channel Systems) Study 2: Assessment of Trade Logistics, cold chain and Export Readiness for Animal Products (Meat, Dairy, Fish, and Processed Animal Goods) Study 3: Study on the Processing, Market Development and Export Potential of Plant/Vegetable Waste and Fibre-Based By-products in Bangladesh.	<ol style="list-style-type: none"> <li>1. The consulting firm/institute shall have the legal capacity to enter into the contract and shall have minimum 10 years of general experience in providing consulting services out of which at least 03 years of experiences in conducting business related surveys/sectoral assessment;</li> <li>2. The firm/institute should have successfully completed at least one service contract similar/related to conducting major sectoral assessment in the last 05 years;</li> <li>3. Prior experience in conducting assessment of export-oriented industries will be an advantage;</li> <li>4. The required average annual turnover of the consulting Firm/Institute shall be at least BDT 50 (fifty) lakh in last three years; and</li> <li>5. Experience(s) in working with development partner's funded projects will be added an advantage.</li> </ol>
SD-61  From the date of signing of contract to November 30, 2026	Capacity building of women traders on trade related regulatory regime and E-Commerce solutions and procedures in 08 Divisional HQ including Reform dialogues (Policy Dialogues) to resolve the challenges facing the women traders.	<ol style="list-style-type: none"> <li>1. The Consulting firm shall have the legal capacity to enter into the contract with minimum 10 (Ten) years of general experience out of which at least 05 (five) years of experience in training management for public and private sector;</li> <li>2. The minimum specific experience as lead consultant in providing training of at least cumulatively 500 (Five Hundred) numbers of trainees completed training course over last 05 (five) years shall be required.</li> <li>3. The firm should have experience in working with development projects funded by any development partner;</li> <li>4. The firm should have successfully completed at least one service contract related to capacity development (designing training module/organize training program) in any sector for women entrepreneurship development in last 05(five) years;</li> <li>5. The required average annual turnover of the consulting firm shall be at least of the amount of Tk. 01 (One) Crore for the last three years; and</li> <li>6. A capacity statement on available training infrastructure facilities, IT equipment, logistics support, transport and office space.</li> </ol>

3. The Scope of Services of the consulting firms for 2 separate packages are as follows:

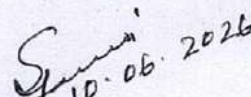
SD-58	Study 1: Policy and Data Foundation; Value Chain, Cold Chain and Packaging; Treatment and Compliance; Trade Logistics and Procedures; Economic Analysis; and Benchmarking and Best Practices. Study 2: Product Scoping; Policy & Institutional Mapping; Cold-Chain & Processing Infrastructure; Compliance, Testing & Certification; Port Handling, Logistics & Green Channel Feasibility; Economic & Competitiveness Analysis for frozen and chilled animal products; Value Chain and Market Assessment; and Benchmarking & Best Practices. Study 3: Fibre Typology and Residue Mapping; Quantification and Distribution; Current Utilisation and Value Chains; Product Segmentation and Processing Technologies; Market Demand and Standards; Techno-Economic Analysis (SME Focus); Policy, Institutional and Investment Recommendations; and Action Plan (2026–2036).
SD-61	Desk review on the previous training manuals and schedule developed by the BRCP-1 and develop a new one and identify potential beneficiaries; Implementation of the training curriculum and Reform dialogues (Policy Dialogues) to resolve the challenges facing by the women traders.

4. The interested consulting firm/all partners of Joint venture firm must submit the following documents with its Expression of Interest for the above mentioned 2 (Two) packages in separate 2 (Two) sealed envelopes:

1. Updated Trade License valid up to June 30, 2026, 2. TIN Certificate & Update Income Tax Clearance Certificate/Evidence, 3. VAT Registration Certificate, 4. Firm Registration certificate, if any, 5. Bank Solvency Certificate, 6. Audited Accounts for last 03 Years, 7. A written undertaking that the Firm/Institute has not been blacklisted or debarred by any Government Organization & IDA, 8. Consulting Firm/Institute's Brochure/Profile bearing organizational structure, and 9. All supporting documents to prove that the Consulting Firm/Institute/ has required qualifications and experiences.

5. The Project Implementation Unit of BRCP-1, MoC on behalf of the Ministry of Commerce invites eligible consulting firm to indicate their interest in providing the services. Interested consulting firms must provide information indicating that they are qualified to perform the services. Details of the qualification requirements and responsibilities are available in the Terms of Reference (TOR) which is available in the office of the undersigned and also at [www.mincom.gov.bd](http://www.mincom.gov.bd) and <http://brcp-1.gov.bd/>. The attention of interested Consulting firms is drawn to paragraphs 3.14 to 3.18 of The World Bank Procurement Regulations for IPF Borrowers, Procurement in Investment Project Financing, Goods, Works, Non-Consulting and Consulting Services, July 2016 ("Procurement Regulations"), setting forth the World Bank Group's policy on conflict of interest. A Consulting firm will be selected in accordance with the Quality and Cost Based Selection (QCBS) method OR Consultant's Qualification-based Selection (CQS) method, as appropriate, set out in the Procurement Regulations. Further information can be obtained at the address given below during office hours between 09:00 a.m. to 4:00 p.m. Expressions of Interest (EOI) must be delivered in written form - 2 (two) hard copies of which one original & one copy for each package in sealed envelope to the address given below in person or through surface mail by 2:00 p.m. on June 28, 2026. Separate sealed envelopes shall be used for the above stated two separate packages.

6. The Procuring Entity reserves the right to apply selection method and to accept or reject any or all EOIs without assigning any reason, whatsoever.

  
10.06.2026  
(Shaila Yasmin)

Project Director (Additional Charge)  
Bangladesh Regional Connectivity Project-1 [Part-2]  
and Joint Secretary (WTO), Ministry of Commerce  
Phone: +8802- 55138022  
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**Package no. SD-58**

**Terms of Reference (TOR) for Selection of Firm / Institution**

**Conducting three trade related studies:**

*Study 1: Assessment of Agri-Trade Logistics for Horticulture and Floriculture Exports (Including Cold Chain, Packaging, Treatment Facilities, and Green Channel Systems)*

*Study 2: Assessment of Trade Logistics, cold chain and Export Readiness for Animal Products (Meat, Dairy, Fish, and Processed Animal Goods)*

*Study 3: Study on the Processing, Market Development and Export Potential of Plant/Vegetable Waste and Fibre-Based By-products in Bangladesh*

**Introduction**

The Government of the People’s Republic of Bangladesh has received an SDR 150 million Credit from the International Development Association (IDA)– a member of the World Bank Group – for financing the cost of the Bangladesh Regional Connectivity Project 1(BRCP-1), being jointly implemented by the Bangladesh Land Port Authority (BLPA), National Board of Revenue (NBR) and Ministry of Commerce. The Ministry of Commerce as a separate technical assistance project is implementing the second component of this umbrella project. The overall objective of this technical assistance project is to strengthen trade related institutional capacity in order to ensure active and sustainable cooperation among trade related stakeholders and economic empowerment of women traders.

This technical assistance project consists of following three (3) components:

- Component A: Develop (pilot) programs to support female traders and entrepreneurs. This component will pilot activities to help address barriers to women becoming more integrated into regional and global supply chains and trading opportunities.
- Component B: Support to the National Trade Facilitation Committee. The inter-ministerial National Trade Facilitation Committee (NTFC) has been set up to coordinate all trade and transport-related policies and activities in Bangladesh, and will also serve as the Advisory Committee for the Project.
- Component C: Improvement of Bangladesh Trade Portal and to set up a National Enquiry Point for Trade. The Bangladesh Trade Portal (BTP) was launched in March 2016. This component will support further up-gradation of the BTP to expand its functionality to include information of relevance for potential Bangladesh exporters and to ensure that content is kept up to date. This component will also set up the National Enquiry Point for Trade, which will help Bangladesh to meet a key requirement of WTO Trade Facilitation Agreement.

This technical assistance project intends to apply a part of the IDA Credit for procuring consulting/training management services to conduct the following trade related studies:

Study 1: Assessment of Agri-Trade Logistics for Horticulture and Floriculture Exports (Including Cold Chain, Packaging, Treatment Facilities, and Green Channel Systems)

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Study 2: Assessment of Trade Logistics, cold chain and Export Readiness for Animal Products (Meat, Dairy, Fish, and Processed Animal Goods)

Study 3: Study on the Processing, Market Development and Export Potential of Plant/Vegetable Waste and Fibre-Based By-products in Bangladesh

**Study 1: Assessment of Agri-Trade Logistics for Horticulture and Floriculture Exports (Including Cold Chain, Packaging, Treatment Facilities, and Green Channel Systems)**

**Background of the assignment:**

With agriculture contributing about 11 percent of GDP and nearly 37 percent of national employment, Bangladesh depends heavily on the agriculture sector. It ranks among the top global producers of rice, vegetables, onions, jute, tea, potatoes, mangoes, and fish. Favorable climatic conditions and steady advances in mechanization have enabled a steady rise in crop production, while the agro-processing industry is also growing in importance. However, agricultural exports remain a relatively underutilized avenue for Bangladesh's trade diversification strategy.

Despite a sharp rise in the country's overall exports, agricultural exports grew at a much slower pace. Compared to fiscal year 2012-13 to 2022-23, agricultural exports rose from \$536 million to \$843 million, an increase of only 57 percent. This performance underscores both the untapped potential and the structural constraints of Bangladesh's agriculture trade sector.

Bangladesh has strong potential to expand exports of horticulture and floriculture products due to favorable agro-climatic conditions, growing private sector participation and increasing demand in regional and international markets.

Exports of agricultural products, especially those from horticulture and floriculture, are extremely sensitive to freshness (due to post-harvest handlings, temperature controlled logistics, and packaging) quality, and adherence to global standards. However, exporters are subject to a number of logistical and policy-related limitations, which include but not limited to:

- **Cold Chain Infrastructure:** Along production clusters and trade routes, Bangladesh has relatively few pack-houses, pre-cooling facilities, refrigerated transportation, and cold storage facilities. High post-harvest losses and a decline in export competitiveness result from this.
- **Packaging Standards:** In order to keep costs down, exporters sometimes use imported packaging materials that are subject to heavy tariffs. In overseas markets, improper use of contemporary, standardized packaging shortens shelf life and raises rejection rates.
- **Treatment Facilities:** Exporters' capacity to meet the SPS regulations of destination markets is restricted by a lack of globally recognized quarantine, fumigation, irradiation, and vapor heat treatment facilities.
- **Green Channel at Ports:** Protracted clearance processes at sea ports, land ports, and airports cause major delays for export consignments of perishable agricultural products. Timely delivery is compromised by the lack of a streamlined "green channel," particularly for expensive, time-sensitive goods like fresh vegetables and cut flowers.
- **Freight and Logistics Costs:** Bangladesh's competitiveness was further undermined by container and cargo freight costs that were four to five times higher than those of

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competitors like Thailand and India. Another significant barrier is the limited space available for perishable flying goods.

The Bangladesh Regional Connectivity Project-1 (BRCP-1), implemented by the Ministry of Commerce (MoC), provides an opportunity to address these structural gaps. An assessment of agri-trade logistics in the horticulture and floriculture sectors will map the current status of:

- Cold chain networks and logistics corridors
- Packaging and treatment facilities aligned with international standards
- Customs facilitation measures, including the feasibility of a green channel for perishable exports at sea, land, and airports

This assessment will also benchmark Bangladesh against comparator countries, identify critical investment gaps, and propose policy reforms to reduce costs, enhance compliance, and strengthen the competitiveness of agro-exports.

### **Objective of Consulting Service**

The primary objective of this study is to assess the current state of agri-trade logistics in the horticulture and floriculture sectors and identify actionable interventions under BRCP-1 to strengthen Bangladesh's agro-export competitiveness.

Specific objectives include:

1. Identification of top 20 products agricultural-products based on domestic production and processing capacity and international demand and export potential.
2. Mapping the logistics ecosystem for horticulture and floriculture exports (of the identified products) from farm to export destinations, including cold chain, packaging, transport, and treatment facilities. Assess the existing infrastructure and the performance of the same.
3. Assessing infrastructure gaps in pre- and post-harvest handling, storage, processing and export readiness.
4. Reviewing SPS, TBT and GAP compliance systems and the availability of accredited testing and treatment facilities.
5. Examine the regulatory, institutional and operational arrangements and analyze port clearance procedures (*sea, land, and air*) and evaluating the feasibility of a green channel for perishable agri-products.
6. Benchmarking Bangladesh against comparator countries (e.g., India, Thailand, Vietnam, Kenya) in terms of agri-trade logistics and export facilitation.
7. Recommending investment priorities and policy reforms to enhance competitiveness and reduce trade costs.

### **Scope of Service**

#### **• Policy and Data Foundation:**

- Conduct a thorough analysis of existing relevant national policies, strategies, and reports, including the Agriculture Policy, logistics policy, Export Policy, NBR's circular, Bangladesh Banks circular and the Trade Facilitation Action Plan etc.

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- Gather critical trade data on horticulture and floriculture exports and imports (top 20 products) to understand product composition, destinations, volumes, and rejection rates.
  - Identify and map the roles of key public and private institutions, such as the Ministry of Commerce (MoC), Ministry of Agriculture (MoA), Bangladesh Association of Producers of Agri-products (BAPA), Bangladesh Standards and Testing Institution (BSTI), Export Promotion Bureau (EPB), Plant Quarantine Wing (DAE) and other private sector associations.
- **Value Chain, Cold Chain and Packaging:**
    - Assess the domestic value chain system (distribution, and warehousing) from farm to port.
    - Create a detailed inventory of current cold chain facilities, including pack-houses, pre-cooling units, cold storages, refrigerated transport, and cold storage at different ports.
    - Assess the current standards, availability, and cost of packaging materials, including any duties on imported packaging.
    - Analyze gaps in the cold chain network between farm clusters and ports.
- **Treatment and Compliance:**
    - Map all accredited laboratories and specialized treatment facilities, such as those for quarantine, fumigation, irradiation, and vapor heat treatment.
    - Evaluate the country's ability to meet international compliance requirements, including SPS and TBT measures, GAP certifications, and ISO testing standards (market access information)
    - Identify bottlenecks in the certification, testing, and international acceptance of results.
    - Current system for traceability and their limitation in regards to export of agricultural products.
- **Trade Logistics and Procedures:**
    - Review current customs and clearance procedures for agricultural exports at all major sea ports, land ports, and airports.
    - Conduct a time-release study for horticulture and floriculture consignments to identify and quantify delays.
    - Identify the current status of “green channel” for perishable agricultural products to speed up their clearance.
- **Economic Analysis:**
    - Conduct a comparative analysis of logistics and freight costs between Bangladesh and its regional competitors.
    - Assess the financial impact of delays and costs related to packaging, freight, and customs clearance.
    - Estimate the post-harvest losses that are directly attributable to poor logistics, limited cold chain and weak infrastructure.
- **Benchmarking and Best Practices:**

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- Examine successful agricultural product export logistics models in other countries (such as India, Thailand, Viet Nam for their key products) to learn from their best practices.
- Identify models that can be adapted and implemented in Bangladesh, such as public-private partnerships for cold chain, pack-houses, cargo villages, and dedicated facilities at perishable terminals.

• **Recommendations and Action plan:**

- Propose specific investment priorities for improvements to cold chain, treatment, and packaging facilities.
- Suggest new policy reforms related to customs procedures, export incentives, and SPS/GAP compliance.
- Draft a clear action plan with timeline for establishing and implementing a green channel for agricultural exports at ports.
- Recommendations should include: production clusters, packaging hub, cold storage, treatment facilities, transport routes, inspections & certification steps, cargo handling and customs management etc.
- Define a framework for monitoring the implementation and progress of these recommendations under relevant agencies.

**Methodology**

The impact assessment will employ a mixed-methods approach, combining quantitative surveys and qualitative interviews. The methods will include:

a. **Interviews:** Conduct in-depth interviews with key stakeholders, including government agencies, beneficiaries, trainers, program implementors, local stakeholders, business associations etc. At least 15 KIIs are to be conducted. The final list of KIIs needs to be approved by the PIU.

c. **Focus Group Discussions (FGDs):** Organize 02 FGDs to gather collective insights and experiences from a select group of beneficiaries. The consultant is required to propose the number of participants per FGD with proper justification in the technical proposal.

d. **Public consultation:** Organize one national public consultation engaging relevant stakeholders (approx. 40 participants), share preliminary findings and solicit input.

e. **Desk Research:** Review relevant documents, reports, and data related to the training programs and similar initiatives. Documents include but not limited to: baseline survey data, pre-training assessment reports, report completion documents, and others (policy and regulatory documents).

f. **Case Study:** Necessary case studies need to be developed to highlight the successes of the training programs including the piloting activities and business support center.

g. **Trade Data Analyse:** Use recognized data sources to conduct trend analysis, market potential analysis, competitor analysis etc.

The above methodology is indicative and relevant instruments should be adjusted in consultation with PIU- BRCP-1, MOC and finalized before implementation.

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**Approach:** The consulting firm needs to design an appropriate approach to undertake the activities necessary to measure the impact of the training programs and business support centers.

**Work Plan:** The work plan should propose the main activities of the assignment, its content and duration, phasing and interrelations, milestones and delivery dates among the component of the assignment. The proposed work plan should be consistent with the technical approach and methodology, showing understanding of the ToR.

**Expected deliverables:**

1. Inception Report
2. Value Chain and Logistics mapping
3. Draft assessment report
4. Stakeholder validation workshop
5. Final report
6. Policy brief

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## Study 2: Assessment of Trade Logistics, cold chain and Export Readiness for Animal Products (Meat, Dairy, Fish, and Processed Animal Goods)

### Background:

The livestock, fishery, and dairy subsectors are vital for Bangladesh's economy and rural livelihoods, with the livestock sector alone contributing 16.54 % of agricultural GDP growth (constant prices) in recent years ([dls.portal.gov.bd](http://dls.portal.gov.bd)) While agriculture broadly accounts for ~12.5% of GDP, and employs a large share of the population, the share of animal-origin exports in Bangladesh's trade remains minimal despite high domestic production and demand.

The export potential of meat, dairy, fish, and processed animal goods is constrained by systemic barriers: inadequate cold-chain logistics, limited export-grade processing and certification facilities, inefficient port handling and clearance, and weak traceability systems. To unlock this potential under the Bangladesh Regional Connectivity Project-1 (BRCP-1), an integrated assessment of the logistics, infrastructure, and export readiness for animal products is essential. This study will analyze Bangladesh's current trade logistics and cold chain system, and map the performance gaps, benchmark against regional peers, and recommend strategic interventions to reduce trade costs, improve compliance, and strengthen Bangladesh's animal-product export competitiveness.

### Objective:

To assess the logistics, cold-chain infrastructure, and export readiness of Bangladesh's animal-origin products (meat, dairy, fish, processed goods), and recommend policy, institutional, and investment measures to enhance competitiveness and compliance with top destination market standards.

### Specific Objectives:

1. Identify key exportable animal products based on production scale, processing capacity, and global demand and export potential.
2. Map the current logistics and cold-chain ecosystem, from collection centers/slaughterhouses/ processing center to ports, covering refrigerated transport, chilling/freezing units, and buffer storage from production to reaching destination points.
3. Assess infrastructural gaps in pre- and post-processing, packaging, and existing traceability systems.
4. Review availability and performance of certification, laboratory, and SPS testing systems and TBT issues.
5. Review Trade logistics system and analyze customs, quarantine, and clearance procedures at air, sea, and land ports, and assess feasibility of "green channel" arrangements for perishable animal goods.
6. Review relevant policy, institutional and regulatory framework relevant to processing and export of animal products
7. Benchmark Bangladesh with comparator countries (India, Thailand, Malaysia, Vietnam) in logistics, export compliance, and trade facilitation.
8. Recommend prioritized investments, PPP models, and policy reforms to reduce logistics cost, strengthen cold chain, and enhance export readiness.

### 3. Scope of Services

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### 3.1 Product Scoping

- Identify animal products with local production capacity and international market demands. Animal products would include livestock, fisheries, and poultry.
- Leading dairy products
- Processed animal products (livestock, fisheries, and poultry), including value -added and packaged products
- Other associated by-products

### 3.2 Policy & Institutional Mapping

- Review relevant national policies (Livestock Policy, Fisheries Policy, Export Policy, SPS and TBT rules, NBR & Trade Facilitation plans, Logistics policy).
- Compile trade data on animal-product exports: product mix, volumes, destinations, rejection and returns.
- Identify roles and mandates of institutions such as Department of Livestock Services (DLS), Department of Fisheries (DoF), Bangladesh Fishery Development Corporation (BFDC), BSTI, EPB, MoC, and private associations.

### 3.3 Cold-Chain & Processing Infrastructure

- Create an inventory of slaughterhouses (for meat processing), processing plants, chilling/freezing units, and refrigerated transport fleets.
- Evaluate capacity, certification status, geographical distribution, utilization rates, and gaps.
- Assess challenges in linking production clusters with export terminals.

### 3.4 Compliance, Testing & Certification

- Map accredited labs, veterinary certification bodies, and SPS control units (HACCP, ISO 22000, OIE compliance).
- Evaluate export certification processes, accreditation recognition, and bottlenecks in testing/tracing.

### 3.5 Port Handling, Logistics & Green Channel Feasibility

- Review clearance procedures and time-release data for exported animal products at airports, seaports, and land crossings.
- Assess perishable cargo handling facilities (cold storage at ports, perishable cargo terminals).
- Propose design and feasibility of green channels to expedite time-sensitive export consignments.

### 3.6 Economic & Competitiveness Analysis for frozen and chilled animal products

- Compare logistics, freight, cold-chain, and certification costs with peer countries (e.g. India, Thailand).
- Estimate losses due to suboptimal logistics and delays.

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- Conduct cost-benefit analyses for proposed interventions (infrastructure, digital traceability, improved certification).

### 3.7 Value Chain and Market Assessment

- Map domestic and export value chains for selected products
- Identify major actors: producers, traders, processors, transporters, cold storage operators, laboratories, inspection agencies, regulators, local and international buyers
- Analyse current and potential export markets, product positioning and market requirements.

### 3.8 Benchmarking & Best Practices

- Examine successful export logistics models in key countries (e.g. India, Malaysia, Vietnam) for meat, seafood, dairy.
- Adapt lessons for Bangladesh in cold-chain clusters, PPPs, perishable terminals, and trade facilitation.

### 3.9 Recommendations & Actionplan

- Propose prioritized investments, policy reforms, institutional arrangements, and PPP models.
- Propose a 10 year long sectoral development actionplan for export-oriented growth.
- Prepare a monitoring & evaluation framework to track implementation and outcomes.

## 4. Methodology

- **Key Informant Interviews (KIIs):** At least 15 interviews across government agencies, exporters, processors, logistics service providers, port authorities, and certification bodies.
- **Focus Group Discussions (FGDs):** Two FGDs across major production/export clusters (e.g. Dhaka, Mymensingh, Chattogram, Khulna, Jessore, Cox's Bazar- to be finalized).
- **Public Consultation:** One national stakeholder workshop (~40 participants) to present preliminary findings and solicit feedback.
- **Desk Research & Data Review:** Existing reports, trade and logistics data, policy documents, international benchmarks.
- **Case Studies:** Selected firms or clusters illustrating best practices or failure points in animal-product export logistics. This would include both local and international firms.
- **Trade Data Analysis:** Use reliable sources to conduct trade data analysis relevant to this sector.

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### Study 3: Study on the Processing, Market Development and Export Potential of Plant/Vegetable Waste and Fibre-Based By-products in Bangladesh

#### Background and Rationale

As an agrarian economy, Bangladesh produces vast quantities of plant-based residues every year. This include but not limited to rice straw, jute sticks, banana pseudostems, pineapple leaves, sugarcane bagasse, coconut husks, bamboo, and wood residues, internodes/stems of gourd-type plants, pineapple leaves etc. These materials, though often treated as waste, possess high potential for processing into fibre-based, biodegradable, and value-added industrial products such as packaging materials, pulp, boards, geotextiles, and natural composites.

Globally, the shift toward sustainable, low-carbon, and circular production systems has generated growing demand for plant-derived fibres and bio-based materials.

- The global natural fibre composites (NFC) market **stood at** USD 9.44 billion in 2024, projected to reach USD 18.65 billion by 2030 (CAGR ~12%)<sup>1</sup>.
- The plant-based packaging market was valued at USD 5.36 billion in 2023, growing at over 9% annually<sup>2</sup>.
- Banana fibre and pineapple leaf fibre (PALF) are emerging segments worth USD 2.3 billion<sup>3</sup> and USD 285 million respectively, with annual growth rates exceeding 7%<sup>4</sup>.

At the domestic level, credible information may be limited and dated which would require meticulous update. However, a few sources indicate that:

- Bangladesh generates approximately 52 million tonnes of rice straw<sup>5</sup>, 3 million tonnes of jute sticks<sup>6</sup>, and 0.8 million tonnes of bagasse each year<sup>7</sup>.
- The country also produces ~5,800 tonnes of coir fibre, and ranks among the world's largest producers of banana and pineapple, both rich in extractable fibres<sup>8</sup>.

World production of jute, kenaf and allied fibres rose from around two million tonnes in the 1960s to more than three million tonnes. Over the past decade, production in India has trended lower, while production in Bangladesh has increased, surpassing volumes produced in India between 2017 and 2019<sup>9</sup>.

Despite this abundance, most residues are burned, discarded, or used informally as fuel or animal feed. At the same time, Bangladesh's jute exports (approximately 820 million USD annually) are plateauing, underscoring the need for diversification into new plant fibre value chains<sup>10</sup>.

<sup>1</sup> Collected from [Natural Fiber Composites Market Size | Industry Report, 2030](#)

<sup>2</sup> Collected from [Plant-Based Packaging Market Size & Share Report, 2024-2032](#)

<sup>3</sup> Collected from [Banana Fiber Market Insights 2025-2035 | Overview & Growth](#)

<sup>4</sup> Collected from [Pineapple Leaf Fiber Market Research Report 2033](#)

<sup>5</sup> Collected from Journal Article Title: [Unlocking the potential of rice straw: Sustainable utilization strategies for Bangladesh](#)

<sup>6</sup> Collected from [The global promising performance of jute in the context of Bangladesh - RMG Bangladesh](#)

<sup>7</sup> [Sugar Industry - Banglapedia](#)

<sup>8</sup> This is taken from a very dated journal article. Updated information would be required on this. [p9](#)

<sup>9</sup> [Market trends affecting natural fibres](#)

<sup>10</sup> [New Age | Export earnings stand at \\$48.28b in FY25](#)

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This study aims to identify, assess, and develop practical pathways for processing plant/ vegetable waste and fibre based by products into exportable products by:

- (i) mapping residue availability and seasonality across key products and districts;
- (ii) screening fibre-rich feedstocks (bast, leaf, fruit, seed, stalk) against technology readiness, quality standards, and logistics;
- (iii) shortlisting high-value product lines (e.g., moulded pulp/packaging from rice straw and bagasse, PALF/banana fibres for textiles and composites, coir substrates, jute-stick boards/biochar); and
- (iv) building investable processing models with CAPEX/OPEX benchmarks, unit economics, and compliance roadmaps (national, international standards, buyer specifications etc).

The work will align value-chain actors starting from farmers/collectors, pre-processors, mills, labs, exporters, and financiers through district-level hub-and-spoke collection and pre-processing schemes, supported by testing/certification and trade facilitation. Outputs will include market dossiers for priority destinations (EU, North America, Japan), standards and due-diligence checklists, and a 3–5-year action plan specifying pilot plants, cluster locations, financing instruments, and policy measures (fiscal incentives, quality infrastructure, SPS/TBT support).

In doing so, the study leverages Bangladesh's abundant biomass base and growing industrial capabilities to capture demand from global sustainability trends and extended-producer-responsibility regimes, translating waste streams into resilient export earnings and rural jobs.

## Objectives

To assess the processing and export potential of Bangladesh's plant waste and fibre-based by-products, and to propose a strategic roadmap for industrial development, investment, and trade diversification.

### Specific Objectives

1. **Categorize** plant residues based on a five-type fibre classification (bast, leaf, fruit, seed, and stalk fibres).
2. **Quantify** availability and distribution of major residues suitable for fibre extraction and processing. Identify major types and quantities of plant waste generated in key agricultural and agro-processing sectors.
3. Assess the current utilization, disposal methods, and value chains of such waste.
4. **Identify high-potential product segments** and evaluate processing technologies and value chains.
5. **Assess global market demand**, standards, and competitive positioning.
6. **Conduct techno-economic analyses** for selected processing (SME) industries (CAPEX, OPEX, IRR, NPV).
7. **Recommend industrial, trade, and investment policies** to enhance export competitiveness.
8. **Prepare an Action Plan (2026–2030)** outlining strategic interventions, pilot projects, and capacity-building needs.

### Scope of Work

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The core activities are summarized in a table:

SI no	Scope Area	Description / Key Activities	Expected Output
1	<b>Fibre Typology and Residue Mapping</b>	Classify plant residues into five fibre types such as bast, leaf, fruit, seed, and stalk and map their sources and suitability for fibre extraction and processing.	Fibre Typology Matrix and Residue-to-Product Mapping
2	<b>Quantification and Distribution</b>	Estimate annual generation and recoverable volumes of residues across key crops and agro-industries (rice, jute, banana, pineapple, sugarcane, coconut, etc.); identify major producing regions and seasonal patterns.	Plant Residue & Fibre Atlas with district-level and seasonal data
3	<b>Current Utilisation and Value Chains</b>	Assess current uses, disposal methods, and collection practices; analyse existing value chains, identifying inefficiencies, gaps, and entry points for value addition.	Baseline Utilisation and Value Chain Assessment
4	<b>Product Segmentation and Processing Technologies</b>	Identify high-potential product segments (e.g., pulp/packaging, fibre mats, coir substrates, banana/PALF yarns); review processing technologies and scalability for SME and cluster-based models.	Product & Technology Dossiers/ report
5	<b>Market Demand and Standards</b>	Analyse global demand, price trends, and target markets (EU, North America, Japan, Middle East); map standards and compliance (e.g., EU Green Deal, EN 13432, REACH). Benchmark Bangladesh's competitive positioning.	Market & Standards Dossiers with Competitor Analysis
6	<b>Techno-Economic Analysis (SME Focus)</b>	Conduct financial modelling (CAPEX, OPEX, IRR, NPV) for SME-scale processing archetypes to assess commercial viability and investment needs.	Techno-Economic Feasibility Notes
7	<b>Policy, Institutional and Investment Recommendations</b>	Recommend industrial, trade, and investment policies, financing mechanisms, and incentives to strengthen fibre-processing industries and export readiness.	Policy & Institutional Roadmap
8	<b>Action Plan (2026–2036)</b>	Develop a Five-Year Action Plan detailing strategic interventions, pilot projects, investment pipeline, and capacity-building needs, with clear	Action Plan 2026–2030 with Implementation Framework

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	KPIs for export growth and circular-economy outcomes.	
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## Methodology

- Desk Research & Data Collection:** Review existing studies, statistics (BBS, DAE, EPB, FAO, ITC Trade Map).
- Field Assessment:** Conduct interviews (at least 30), FGDs (at least 2), field visits, industry visits in high-residue districts and with processing industries.
- Value Chain Analysis:** Identify actors, input-output relationships, and cost structures.
- Market Assessment:** Global demand, pricing, trade barriers, standards, and sustainability certifications.
- Techno-Economic Modelling:** Cost-benefit, CAPEX/OPEX, IRR, NPV for priority products.
- International Best Practices:** Compare Bangladesh with global leaders (India, Japan Vietnam, Philippines, China, etc.).
- Case Study:** Successful case studies (enterprise level) should be highlighted in the report.
- Public consultation:** Organize one national public consultation engaging relevant stakeholders (approx. 40 participants), share preliminary findings and solicit input.

## Period of Services:

Three (03) months from signing the contract.

## Final Deliverables

The deliverables are the following:

Deliverables	Indicative Timeline
Inception report	Within week 02
Submit the Finalized the key indicators and Data Collection Instruments	Within week 03
Collect data (Survey, FGD, KII, and Public Consultation)	Week 03-08
Submit compiled raw data for verification purposes	Within week 08
Draft Assessment Report	Within week 09
Organize three validation workshops	Within Week 10
Submit final report	Within Week 12
Policy briefs	

## The Consultant's Team and Inputs

The proposed services under this Terms of Reference shall be carried out by using a firm (Consultant) with adequate experience in conducting the impact assessment. The team composition will be finalized during the ToR finalization phase. However, the following team composition may be considered:

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Sl. No.	Name of Position	Quantity	Qualification	Responsibility
1	<b>Team Leader</b>	01 no. (03 man month)	At least Bachelor and Master in Economics/Business/Trade/ Development/ Policy or related.  PhD in a relevant field will be an advantage.  At least 10 years in trade policy/ trade logistics/ export diversification related studies.  Previous experience in team leadership is a must.	Overall delivery management for all 3 studies; methodology finalization; coordination with PIU; quality assurance; consolidation of findings; final recommendations and roadmap; lead national consultation & validation
2	<b>Study Lead-1: Agri-Trade Logistics Specialist (Horticulture &amp; Floriculture)</b>	01 no. (03 man month)	At least Bachelor and Master in Agri-econ/horticulture Trade Logistics/ Business/ Trade/ Development or related.  PhD in a relevant field will be an advantage.  At least 7 years in agri-export logistics/value chain assessments	Lead Study 1 end-to-end; product prioritization; mapping packhouses/ pre-cooling/ packaging/ treatment; airport/ land/sea port process mapping; green channel feasibility inputs; draft report and brief
3	<b>Study Lead-2: Animal Products Export Readiness Specialist (Meat/Dairy/Fish)</b>	01 no. (03 man month)	At least Bachelor and Master in Veterinary/ Fisheries /Food Tech/ Supply Chain/ Trade.  PhD in a relevant field will be an advantage.  At least 7 years in animal products value chains/export readiness.	Lead Study 2 end-to-end; mapping collection/ processing/ chilling/ freezing; traceability readiness; perishable handling; compliance bottlenecks; draft report and brief
4	<b>Study Lead-3: Fibre Value Chain &amp; Industrial Processing Specialist</b>	01 no. (03 man month)	Bachelor and Master in Industrial Materials/Agri-processing/ Environmental/Trade At least 7 years in fibre processing value chains/industrial diagnostics.	Lead Study 3 end-to-end; residue mapping & seasonality; product/technology shortlisting; cluster models; processing pathways; export product positioning; draft report + brief

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5	<b>Financial/ Investment Analyst</b>	01 no. (03 man month)	Bachelor and Master in Economics/ Finance  At least 7 years in investment appraisal/ cost-benefit/ sector modelling. Experience in trade data analytics and reporting  Preference will be given to individuals with sectoral experience.	Cost and loss estimation; logistics cost comparison; CAPEX/OPEX benchmarking; techno-economic models (IRR/NPV where required); prioritization and PPP/investment options Trade data compilation/cleaning; HS mapping; product ranking; unit value checks; evidence tables/annexes; supports all reports and briefs
6	<b>Data Collection Coordinator</b>	01 no. (03 man month)	Bachelor and Master in Social Science/Development/Policy  At least 5 years managing KIIs/FGDs and field research	KII/FGD plan; stakeholder scheduling; instrument finalization; enumerator management; consent/quality checks; raw data compilation for PIU verification
7	<b>Research Associates</b>	06 nos. (03 man month each)	Bachelor and Master in Economics/ Business/ Development Studies/ Agro- economy/ or relevant fields At least 3 years of relevant experience in research support	Desk review, stakeholder mapping, case studies, note- taking, transcription summaries, drafting support, annex preparation

**Required qualifications and experiences of the Consulting Firm:**

The interested Consulting Firm/Institute shall provide demonstrated evidences/documents as follows for reviewing expressions of interest (EOI) submitted for the assignment:

- The consulting firm/institute shall have the legal capacity to enter into the contract and shall have minimum 10 years of general experience in providing consulting services out of which at least 03 years of experiences in conducting business related surveys/sectoral assessment;
- The firm/institute should have successfully completed at least one service contract similar/related to conducting major sectoral assessment in the last 05 years;
- Prior experience in conducting assessment of export-oriented industries will be an advantage;

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- The required average annual turnover of the consulting Firm/Institute shall be at least BDT 50 (fifty) lakh in last three years;
- Experience(s) in working with development partner's funded projects will be added an advantage;
- List of key professional staffs showing qualification's and experiences and other resources including logistic support of the Firm/Institute;
- A list of core team of Key Experts to be proposed for the assignment, showing their qualification and experience including the projects/assignment on which they have worked, their role in the assignment/project and duration of their engagement. However detailed CV of Individual would not be required at the initial selection stage.

**Selection Method:**

The selection method for this package will be Quality and Cost based Selection (QCBS) described in the World Bank's "Procurement Regulations" for IPF Borrowers (July 2016, updated in November 2020).

**Required documents with its Expression of Interest:**

1. Updated Trade License valid up to June 30, 2026,
2. TIN Certificate & Update Income Tax Clearance Certificate/ Evidence,
3. VAT Registration Certificate,
4. Firm Registration certificate, if any,
5. Bank Solvency Certificate,
6. Audited Accounts for last 03 Years,
7. A written undertaking that the Firm/Institute has not been blacklisted or debarred by any Government Organization & IDA,
8. Consulting Firm/Institute's Brochure/Profile bearing organizational structure, and
9. All supporting documents to prove that the Consulting Firm/Institute has required qualifications and experiences.

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(Shella Yasmin)  
Project Director (Joint Secretary)  
(Additional Charge)  
Bangladesh Regional Connectivity Project-1  
Ministry of Commerce

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