

FINAL REPORT

for

MARKET ASSESSMENT AND VALUE CHAIN ANALYSIS IN SINDH AND PUNJAB

Submitted to



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List of Acronyms

AMD	Agricultural Market Development
CBOs	Community Based Organizations
CHRS	Complete Human Resource Solutions
CSOs	Civil Society Organizations
DFID	Department for International Development
FAO	Food and Agriculture Organization
FGDs	Focus Group Discussions
IFAD	International Fund for Agricultural Development
KIIs	Key Informants Interviews
MDC	Management and Development Center
NGOs	Non-Governmental Organizations
NPGP	National Poverty Graduation Program
Pos	Partner Organizations
PPAF	Pakistan Poverty Alleviation Fund
PVTC	Punjab Vocational Training Council
SMEDA	Small Medium Enterprise Development Authority
SMEs	Small Medium Enterprises
TEVTA	Technical Education & Vocational Training Authority
TOR	Terms of Reference
TVET	Technical Vocational Education and Trainings
UCs	Union Councils
USMDC	United States Agency for International Development
VCA	Value Chain Analysis

Executive Summary

National Poverty Graduation Programme (NPGP) funded by International Fund for Agricultural Development (IFAD) and Government of Pakistan is designed to catalyze change at the grassroots to pull people out of poverty, building largely (but not exclusively) upon BISP beneficiaries and leveraging Interest Free Loans to build a smooth 'seamless service' where the poorest can move from consumption support to asset transfers to interest free loans to microcredit. The Pakistan Poverty Alleviation Fund (PPAF), who works on multi-dimensional aspects of poverty, addressing economic, social and institutional aspects that are reflected in the NPGP design, is implementing the project.

For such integrated socio-economic interventions for the poor of the poorest segment of the underprivileged districts; it was important to conduct a market assessment and analyze the economic eco-system of the targeted areas and thus existing value sectors and sub-sectors, possible constraints, challenges and future opportunities that may bridge the poor with the sustainable economic activities and bring prosperity to the whole area in particular. In this regard, MDC and CHRS conducted detailed market assessment and value chain analysis of the 10 selected districts (seven in Sindh and three in Punjab).

MDC mobilized a team of experts (one for each technical area) to provide technical support in the areas of value chain analysis, enterprise development, technical and vocational training, gender mainstreaming and other technical areas. Another team of field coordinators, note keepers and surveyors were mobilized at the local level to help collect information more efficiently and effectively. The teams were trained by the experts and mobilized to conduct a rapid assessment of the 10 districts and 247 union councils (UCs). Followed by the rapid assessment and UC profiling, special tools were designed to help gather as much information as possible during the 244 Focused Group Discussions (FGDs). 27% of the participants were women in FGDs. The FGDs covered sectors and subsectors including Agriculture, Livestock and Non-Farm; also engagement of poor, women and youth were specific cross-cutting subjects of the discussions. The teams also engaged local and national level enablers including Government institutions, NGOs, technical institutes and private sector players to help assess the information in totality.

Based on the findings of the rapid/ participatory assessments and FGDs and in consultation with PPAF's local partner organizations, potential future partners for the project were also identified and conducted detailed key informant interviews to note their point of view, the challenges and the future opportunities for the poor. This activity also helped a more top-down approach and triangulation of information collected during primary research. Although, there were several potential value chains identified and consolidated at cluster and district level through the mechanized scoring approach three value chains for each sector are prioritized and further analyzed in detail for informed choices for the project. Meat, Beef and Dairy are shortlisted under Livestock sector, while Chilli, Wheat, Potato, tomato, oil seed, vegetables, pulses, onion, and Rice are shortlisted under Agriculture value chains, while the Non-Farm sector contains Grocery shops, Services and Handicraft as major

value chains. These value chains are assessed and prioritized considering their re-occurrences in all the geographic locations, their socio-economic contribution in the area and also their adequacy for business startup by poor household i.e. target population of the project.

Project intervention areas are either located in close proximity of CPEC route or close to Special Economic Zones (SEZ) that will be established under CPEC. There is a huge potential for trade with China, which provides opportunities to the target districts to reap the benefits.

Private Sector engagement is critical to address the gaps in existing value chains. The study recommends to engage the private sector in training and developing backward and forward linkages. That model will ensure the sustainability of the project and can access private sector investment in the longer run.

The study recommend that implementation approaches will be innovative that ensures scale, consistent supply and quality at respective target areas that provides space for technology, engaging the private sector and attracts private investment, ensuring B2C relationship. CIGs approach is very vital for the project success and an integrated model need to encourage that not only provide economic uplift of landless farmers and also create opportunities' for young agriculture graduates to make partnership/service arrangements with CIG for agri-technological innovations.

Proposed strategies for Common Interest Groups (CIGs) include formation of CIG around various similar subsectors as micro and small business enterprises and also consolidate various similar CIGs of a sector to improve their buying power, market potential and access to market. The consolidation is proposed to be a community institutional structure with a name of "Apex CIG". The apex will have representation from the participating CIGs, which will give common voice and power to the local people. It will also help participating CIGs in bulk buying, selling, accessing and negotiating with the private sector, reaching out to export markets and thus creating an eco-system at village and UC level. The Apex CIG will also be able to create a franchise model through providing support to participative CIGs in bring similar quality standards, linking external capital and investment from outside and presenting one brand to the outside world.

The study was done with inclusive approach and assesses potential businesses for poor, vulnerable, disables and women. It specifically include, businesses like grocery stores, vegetable, fruits and tea stalls and shops, tailoring and handicrafts. These business can not only be started quickly, but also with minimum funding requirements and also if franchising and apex CIG model is effectively applied to these businesses in letter and spirit, these businesses can provide a quick success and graduation for the poor beneficiaries, as this will ensure aggregation of inputs/ outputs but also will help in providing and sustaining quality of the products and services at all levels.

Based on the size and planned outreach of the project i.e. NPGP, it is not possible to achieve desired results without information and communication technology and

related services. One specific example is tracing the number of assets for the life of the project i.e. recording assets at the time of distribution, follow-up and feedback in every quarter and recording the increase in assets after the life of the project. This should be done very effectively along with beneficiary's information and locations. The system should also have information about the available and improved products and services in PPAF target areas and trained workforce availability in various trades. Through this, PPAF will not only be able to track assets and services provided to beneficiaries at any point in time but also PPAF will better be able to negotiate with the private sector and create sustainable linkages with national and international markets and employers. This will help in overall consolidation of the project and will surely create a great impact.

Finally the proposed consolidation strategies including Apex CIGs, purchase centers, franchising and technological solutions for tracing will help foster an eco-system within the communities and attract private sector, export markets and thus create investment potential while also it will help lessen the role of traditional artist, and increase margins of the local farmers and workers.

1 Introduction

Pakistan Poverty Alleviation Fund hired services of MDC and CHRS for market assessment and value chain analysis of the 10 selected districts (*seven in Sindh and three in Punjab*) of its National Poverty Graduation Program. The study was conducted as per agreed methodology and scope defined in the inception report submitted to PPAF by the consultant, in continuous consultation with PPAF's experts to achieve the objectives of the study more effectively and efficiently. The consultant tried to analyze every aspect of all the potential value chains, positive intrusion which may efficiently help the poor graduate out of poverty. During the analysis, the underprivileged target group was one of the major concerns; therefore, the interventions are proposed keeping in view the adequacy to the target group and the possible treatment by the project. All the players contacted during the course of this study through FGDs and KIs have provided information according to their experience and profiles. The information therefore was triangulated to prioritize value chains and thus potential partners around selected value chains.

2 Objective and Scope of Work

The objectives of the study as per the TOR and agreed during the inception report include:

- I. Mapping and analysis of existing value chains of on-farm and off-farm products/services for targeted poor in NPGP targeted areas;
- II. Identify list of potential value chains for the target districts of NPGP wherein an individual household can work and earn a decent living as well as different households having common interest can reach of the suggested value chain;
- III. Define the potential market for each of the suggested value chain;
- IV. Define what value addition PPAF can bring in to each of the identified value chain;
- V. Identify the knowledge gaps, input supply issues, technology gaps, and financial access and issues related to backward and forward market linkages;
- VI. Identify relevant training institutes to build the capacity of the intended beneficiaries in that particular segment which they are going to identify as a gap;
- VII. Define the potential market for capacity of the intended beneficiaries in that particular segment which they are going to identify as a gap;
- VIII. Assess the potential for growth, profitability and employability of local economic sectors to strengthen pro-poor value chains and to integrate products/services of the target poor with the high-yielding value chains;
- IX. In line with the proposed programme interventions, identify backward and forward market dynamics and opportunities and assess and map the supply and demand of services in the targeted areas;
- X. Develop an understanding of the economic potential and gaps present at district level to:
 - a. Give informed choices to target beneficiaries for productive assets and technical and vocational trainings.
 - b. Avoid market saturation by a distribution of particular type assets or training(s).
- XI. Recommend value chains for each of the target district that have maximum benefit for the target poor and to help maximize the outputs of given assets, training and interest free loan which would lead to improvement of livelihoods of the targeted poor in particular as well as improvement of the local economy in general.

Scope of the assignment entails market assessment, prioritization of the existing potential value chains, detailed analysis of the prioritized value chains along with recommendations for the following 10 districts of the provinces of Sindh and Punjab;

list of respective union councils of the selected districts are attached as **Annex-I**. In line with the afore mentioned objectives, the consulting firm provides district wise value chain analysis and recommendations for the following target districts from Punjab and Sindh Provinces:

Table 1: List of 10 Project Districts of Sindh and Punjab

List of Target Districts in Sindh Province		
Sr. #	District Name	# of UCs
1	SHIKARPUR	34
2	KASHMORE	32
3	THATTA	23
4	SUJAWAL	21
5	BADIN	30
6	UMERKOT	25
7	THARPARKAR	9
Total		174
List of Target Districts in Punjab Province		
Sr. #	District Name	# of UCs
1	DERA GHAZI KHAN	38
2	JHANG	15
3	LAYYAH	20
Total		73

3 Methodology

Implementation methodology as envisaged in the inception report was to start with the analysis of the secondary information that exists through different studies already conducted in these areas. The list of various studies and reports reviewed is attached as **Annex-II**. Review of this information helped in designing effective tools for primary data collection. The tools design was also aided through the rapid assessments of the area through the MDC teams on the ground. The primary data collection was done in the following order.

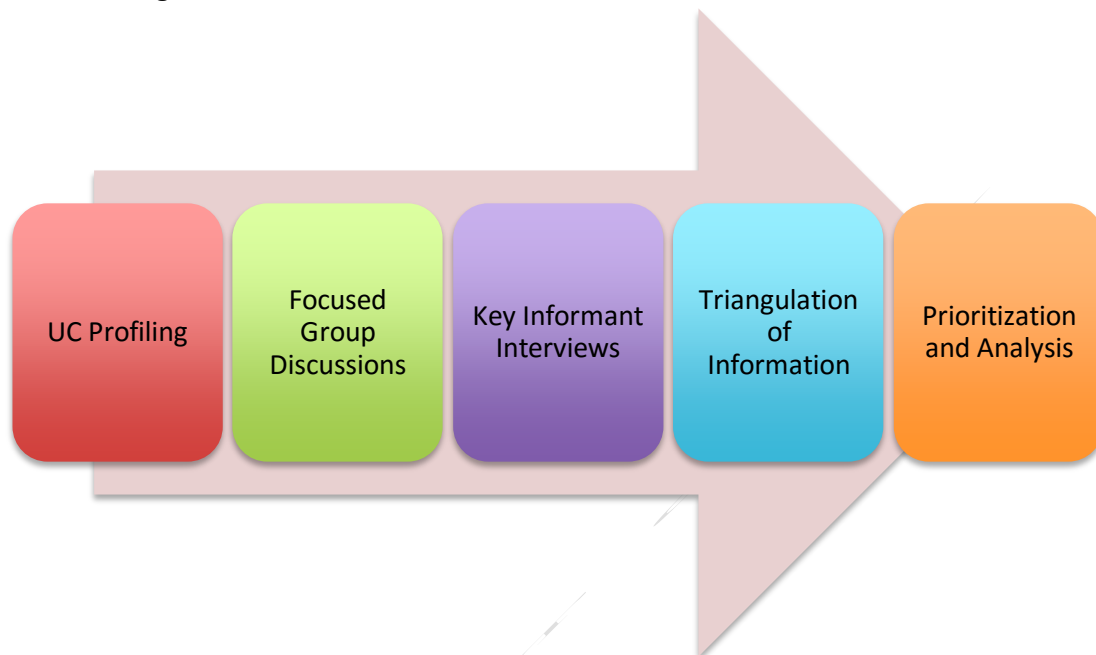


Figure 1: Primary Data Collection and Analysis Flow

3.1 Development of Tools

Based on the secondary research and the rapid assessment of the areas; while keeping in view the objectives of the market assessment study, the consultant developed tools for three facets of primary data collection including following:

- I. UC Profiling Performa – attached as **Annex-III**
- II. Focused Group Discussions:
 - a. Agriculture (On-Farm Group) – attached as **Annex-IV-A**
 - b. Livestock – attached as **Annex-IV-B**
 - c. Non-Farm Group – attached as **Annex-IV-C**
 - d. Women Group – attached as **Annex-IV-D**
 - e. Enabler Group – attached as **Annex-IV-E**
- III. Key Informant Interviews – attached as **Annex-V**

These tools are developed by the pool of experts, which include Value Chain Specialist, Enterprise Development Specialist, Gender Expert, TVET Expert and in consultation with the field staff and the donor staff followed by a two days training sessions and a practical demonstration to field staff in district Thatta (one of the sites) for clear understanding on the application of the tools. The tools were designed to capture the information of the area for value chain segments not limited to the following:

- Input/ Supply side of the selected value chains;
- Market/ Demand side of the selected value chains;
- Information regarding enablers (including training institutions) and their role in the value chains;
- Role of people living under the poverty line as actors in the value chains;
- Role of women as actors in the value chains.

3.2 Training of Staff

The three-day intensive training of the field staff to conduct Focus Group Discussions (FGDs) and Key Informant Interviews (KIIs) Under “Market Assessment and Value Chains Analysis in Sindh and Punjab” study was organized by Management and Development Center (MDC) and Complete Human Resource Solution (CHRS) on October 20 to 22 at conference hall of Training Resource Center (TRC) Qasimabad, Hyderabad. The field facilitators note takers and field coordinators of each district were invited for this training sessions which include 05 lead coordinators and 10 note takers. The overall objective of the training was to train field facilitator, note taker and field coordinator from different districts of Sindh and Punjab to collect quality data from the field for market assessment and value chain in real time. The resource persons from MDC & CHRS delivered the sessions and following major topics were covered:

- Introduction of Program and its Objectives
- Concept of Market Assessment and Value Chains Analysis study
- Poverty Graduation Models an Overview
- Explaining the FGD and KII Tool
- Feedback and Reflections of Pre-Test Field
- Skype Orientation by Gender and TVET Experts
- FGD Tool Representation by Field Team

3.2.1 Pre-Test Field Work at village Jhirk, Thatta-Sindh

The second day started with pre-test field work at Jhirk, Thatta, where all four trained teams from Sindh and Punjab along with project experts and PPAF monitoring team reached at Jhirk cluster at around 10am; where each team conducted Focus Group Discussion with each particular group that were; Agriculture, Non-Agriculture, Livestock and Women participant groups. All teams conducted their FGD sessions as per instructions given in training at first team took attendance of participants and noted all



Figure 2: Pre-Test of FGD Tool

response received from the FGD session. All project experts including Dr. Usman Mustafa, Mr. Asim Mushtaq, Mr. Iftikhar Ahmad, and Mr. Umer Arifi observed and facilitated these all focus group discussions. Moreover, Mr. Fawad Khan and Ms. Nabeela Kausar from PPAF monitored all focus group discussion activities. The video recordings throughout all focus group discussion were ensured expect women group that was not permitted by female participants. The detailed report is attached as **Annex-VI**.

3.3 UC Profiling

The UC profiling was done during the rapid assessment of the target area. The purpose of this profiling and rapid assessment was to assess the following at the union council level:

- Major business activities at main market of union councils;
- Major home based business activities at union councils;
- Major actors involved in enterprises at union councils.

The rapid assessment and union council profiling was conducted through team of 10 members (one from each target district), designated as coordinators and trained to conduct required research using UC profiling tool. District wise list of selected UCs include,

Table 2: List of Selected UCs of the 10 Districts

S. No.	District	UCs	Name of Visited UCs
1	Sujawal	21	Darya Khan Soho, Ali Bahar, Ladiun, Mehar Shah, Bano, Belo, Liakpur, Bijora, Jhoke Sharif, Bachal Bugu, Goongani, Doulat Pur, Kar Malik / Kar Shah, Gul Muhammad Baran, Jar, Jongo Jalbani, Kothi, Mureed Khoso, Kharo Chan / Jan Muhammad Jatt, Keenjhar, Begna.
2	Badin	30	Tando Bago, Khalifo Qasim, Pahar Mari, Dadha, Chabralo, Rahooki, Dubi, Tarai, Muhammad Khan Burgri, Seerani, Luwari Shareef, Nindo, Kadi Kazia, Khurwah, Shaheed Fazal Rahoo, Gharo, Three, Budho Dumbrani, Peeru Lashari, Saeed Pur, Rajo Khanani, Dai Jarkas, Ghulam Shah, Dumbalo, Kherpur Gambo, Phalkara, Malhan, Halepota. Haji Sawan, Manik Laghari.
3	Thatta	23	Jhampir, Jung Shahi, Kalan Kot, Karampur, Sukhpur, Gujjo, Khaarn, Jhuttuck, Onger, Mahar, Buhara, Haji Gharano, Ghullamullah, Kotri Allah Rakhiyo Shah, Sonda, Mirpur Sakro, Tando Hafiz Shah, Doomani, Udassi, Chow Bandi, Chhato Chand, Kalri, Makli.
4	Kashmore	31 ¹	Gulan Pur, Sodhi, KSA Ali Bilwal, Rasool Bux Chacher, Akhero, Buxapur, Kajali, Karampur, Lashari, Malheer, Suhliyani, Tangwani, Kashmore Colony-2, Gulwari, Cheel, Rasaldar, Khewari-1, Kewari - 2, Ghehalpur, Gubalo, Saifail, Jamal, Dena Pur, Ghous Pur, Dari, Lalao, Badani, Habat, Cumb, Dolat Pur, Zorghar.
5	Umerkot	25	Kharo Syed, Nabisar Road, Gapno, Talhi, Bostan, Kunri Memon, Pithoro, Shadi Palli, Samaro, Atta Muhammad Palli, Padhario Farm, Samaro Road, Khokhrapar, Kaplore, Chore, Sabho, Dhoronaro, Sher

¹ UC Chandia listed in Kashmore is belonged from Ghotki district.

S. No.	District	UCs	Name of Visited UCs
			Khan Chandio, Araro Bhurgari, Faqeer Abdullah, GRB-II, Khajri, Dadhro, Shah Mardan Shah, Satryoon.
6	Jhang	15	Malhana, Kot Sai Singh, Havalal, 18-Hazari, Bhangoo, Rashid Pur, Allahyar Joota, Babgle Yesmeen, Haveli Bahadar Shah, Chak no 497/013, Chayan Wale uc/90, Chak No 017 Ghugh, Shah Sadi Nahang, Kaki Nau, Pir Abdul Raahman.
7	DG Khan	38	Kot Mubarak, Mutfariq Chahan, Kot Chutta, Drahma, Haji Ghazi Gharbi, Chabri, Ranman, Nautak, Khakhe, Mahmori, Kala, Shadan Lund, Barthi, Ghousabad, Fazila Kach, Pir Adil, Sakhi Sarwar, Gadhai, Nawan, Choti Zareen, Smena, Shah Sadar Din, Yaro, Choti Bala, Tuman Qaisrani, Bahadur Garh, Wadoor, Jhok Utra, Johor Imam Shah, Mana Ahmadani, Chorota, Mubarki, Tuman Leghari, Basti Malana, Basti Fauja.
8	Layyah	20	Kotla Haji Shah, Chak No164A, Mondi Town, Tail Indus, Bakhri Ahmad Khan, Sharista Thal, Jakhar, Lounch Nasheeb, Chowk Azam, Chubara, Khaira Wala, Shah Ghar, Jamaal Chapri, Nawan Kot, Nushara, Karoor Thal Jamali, Basira, Saho Wala, Samtia, Shadu Khan.
9	Tharparkar	09	Malanhore Vena, Mithrio Bhatti, Sonalbo, Khario Ghulam Shah, Juroo, Tigusar, Satidera, Viravah, Pithapur.
10	Shikarpur	32 ²	Wazirabad, Taib, Sehwaani, Mahmood Bagh, Ruk, Sultankot, Lodra, Jaggan, Jahan Wah, Karan, Mungrani, Jahan Khan, Abdoo, Bhirkan, Main Sahib, Zarkhel, Hamayoon, Jano, Noshero Abro, Mirza Pur, Gaheja, Amrot, Bhambhir, Pir Bux Shujrah, Garhi Dakho, Rahimabad, Thanhiro, Nim Sharif, Dakhan, Jindo Dero, Waryaso, Chatto Mangi.
Total		244	

Quick interviews conducted in each UC to find established major enterprises and other business activities as well as women's and poor's involvement related home based major work/ business. During interview team received some basic information from any business actors of the UCs also note down their names, designation, and contacts for their consent in case of any business partnership opportunity or any relevant business information. During survey, team also collected GPS of their main market and captured some photos of major business activities, such as; On-Farm, Non-Farm, Livestock, Fisheries and women involved enterprises. Moreover, after completion of field visit each team member called to share list of Agriculture, Livestock and Fisheries products based on their observations of field visits that is part of the detailed report along with other findings attached as **Annex-VII**. District wise consolidated UC profile information is attached **Annex-VIII**.

3.4 Focused Group Discussions

The UC profiling was done followed by detailed focused group discussions with various sectors' stakeholders. Before the formal launch of research through focused group discussions clusters were formed in districts. MDC/CHRS conducted an in-depth

² UC Ghari Tegho and Shabirabad of Shikarpur were not visited during Rapid Assessment survey due to security issue.

discussion with the PPAF Partner Organizations (POs) in the district and brainstormed the clustering of UCs. Since there were 247 UCs in the 10 proposed districts, it was difficult to visit each UC during the short project duration and conduct focused group discussions individually. Further, there was many UCs, which had the same type of ecosystem, development issues and products. Therefore, clustering of UCs has been done, keeping in mind that all the UCs was covered. With the assistance of local POs/NGOs, it was ensured that well-informed beneficiaries from each UC participated in the FGD. An inclusive approach was followed while selecting the participants of each UC.

Separate focused groups were formed including 1) On-Farm, 2) Livestock, 3) Non-Farm, 4) Women and 5) Enablers to emphasize each segment of the value chain and obtain role and perspective of these sectors separately. The category wise status of the FGDs conducted is as following:

Table 3: Categories Wise Breakup of FGDs & Participants

District	Agriculture	Male	Female	Non-Agriculture	Male	Female	Livestock	Male	Female	Women	Female	Enabler	Male
Sujawal	5	51	0	5	42	0	5	43	0	5	49	1	5
Badin	7	54	0	7	51	0	7	57	0	7	68	1	1
Thatta	4	31	0	4	29	0	4	29	0	4	29	1	1
Kashmore	7	69	9	7	55	6	7	65	6	3	40	0	0
Umerkot	7	73	0	7	78	0	7	32	30	7	102	4	19
Jhang	4	35	0	4	30	0	4	47	0	4	36	0	0
DG Khan	9	99	0	9	69	0	9	85	0	9	78	2	2
Layyah	5	43	0	5	48	0	5	61	0	5	55	3	3
Tharparkar	4	22	0	4	19	3	4	19	0	4	13	0	0
Shikarpur	7	51	0	7	53	0	7	49	0	7	34	0	0
Total	59	528	9	59	474	9	59	487	36	55	504	12	31

The district and gender wise summary of the participants of the FGDs is presented in the following table:

Table 4: Gender wise Segregation of the FGDs Participation

District	Total Participants	Male	Female	Male %	Female %
Sujawal	190	141	49	74	26
Badin	231	163	68	71	29
Thatta	119	90	29	76	24
Kashmore	250	189	61	76	24
Umerkot	334	202	132	60	40
Jhang	148	112	36	76	24
DG Khan	333	255	78	77	23
Layyah	210	155	55	74	26
Tharparkar	76	60	16	79	21
Shikarpur	187	153	34	82	18

Total	2078	1520	558	73	27
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Total of 2078 participation was observed during the FGDs out of which 558 i.e. 27% were women. The district and cluster wise long list of major business activities/ value chains among all the sectors i.e. On-Farm, Non-Farm, Livestock, Women and Enablers is tabulated in **Annex-IX**, while the detailed database for the findings of the FGDs is attached as **Annex-X** and the consolidated reports (district wise) as **Annex-XI**.

3.5 Key Informant Interviews (National and Local)

Based on the feedback of the participants during the FGDs, the UC profiling and the consultations with PPAF partners and community stakeholders, MDC/ CHRS shortlisted 46 key informants from the local and district level stakeholders/ potential partners relevant to all the sectors. The summary of the key informant interviews and its findings is attached as **Annex-XII**.

The consultants conducted around 15 other interviews with the national level market players and potential private sector partners for value chains sustainable interventions to help poor being pulled out of poverty.

4 Value Chain Prioritization

Each geographic area contains various value chains; analysis of which are beyond the practical scope of any study. Therefore a three-tiered prioritization approach was opted for the study as per following:

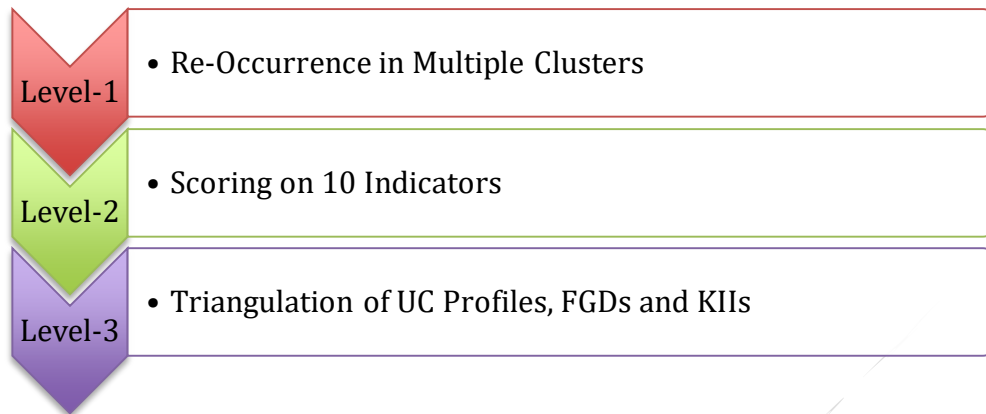


Figure 3: Value Chain Prioritization Steps

Cluster wise long list of the value chains and businesses were populated after FGDs as attached in **Annex-IX**. The initial shortlisting was done keeping in view the re-occurrence of the value chains in the multiple clusters in the same districts. All the value chains with more than 30% re-appearance in the clusters were shortlisted and taken to the next level of prioritization.

Initially shortlisted value chains were passed through a detailed scoring matrix; the list of indicators as agreed in the inception phase was further improvised to have more meaningful, comprehensive and rationalized prioritizations. It also covers constraints related to geography, gender, vulnerability and ease of business. The scoring table provided in the inception report does not include any scoring rational; therefore the consultant developed framework for more programmatic scoring. The scoring is based on a customized scale. Initially, it was planned to use lickert scale from 1-5 for scoring, however it is evident that the lickert scale has a lot of probability of miss information or confused feedbacks. Therefore after driving all rubrics, the team of experts spent the whole day to assess possible situations and answers and thus developed this scoring matrix, provided training to field staff on how they should put numbers to the tables on each indicator. The list of indicators and respective scoring is as per following:

Table 5: Scoring Rational for Prioritization

Sr. #	Scoring Rational and Scores
1	<p>Mechanical Scoring for calculation of highest and marking through proportion from the highest: $[(\text{District Tonnage} / \text{Provincial Tonnage}) * 100]$</p> <ul style="list-style-type: none"> - > 30% of the province production in the district - (100) - > 20% and < 30% of the province production in the district - (80) - > 5% and < 20% of the province production in the district - (60) - < 5% of the province production in the district - (4)

Sr. #	Scoring Rational and Scores
2	<p>Possibility (adequacy) of inclusion of poor as following:</p> <ul style="list-style-type: none"> - Poor as owner/ tenant/ leaser - (0-30) - Participation as general operator- (0-15) - Technical/ machinery operations - (0-15) - Participation in marketing/ sales - (0-20) - Participation in labor services - (0-20)
3	<p>Possibility of inclusion of women as following:</p> <ul style="list-style-type: none"> - Women as Owner/ Tenant - (0-30) - Participation as general operator - (0-15) - Technical/ Machinery operations - (0-15) - Participation in marketing - (0-20) - Participation in labor services - (0-20)
4	<p>Possibility (adequacy) of inclusion of youth as following:</p> <ul style="list-style-type: none"> - Youth as owner/ tenant/ leaser - (0-30) - Participation as general operator- (0-15) - Technical/ machinery operations - (0-15) - Participation in marketing - (0-20) - Participation in labor services - (0-20)
5	<p>Possibility of (adequacy) inclusion of disabled as following:</p> <ul style="list-style-type: none"> - Poor as owner/ tenant - (0-30) - Participation as general operator - (0-15) - Technical/ machinery operations - (0-15) - Participation in marketing - (0-20) - Participation in labor services - (0-20)
6	<p>Investment requirement and possibility of quick start for business as following (Total score 0 - 40):</p> <ul style="list-style-type: none"> - Business can be initiated quickly with < Rs. 50k (21-40) - Business can be initiated with > Rs. 51k and < Rs. 75k (11-20) - Business can start with > 75k (0-10) <p>.....</p> <p>Skills requirement to do business (availability of training locally) - (Total score 0-20):</p> <ul style="list-style-type: none"> - Highly technical skillset required to establish/ operationalize business (0-10) - General skillset required to establish/ operationalize business (11-20) <p>.....</p> <p>Ease of input access - Quality of input and credit line (Total Score - 0-20):</p> <ul style="list-style-type: none"> - Inputs are accessible in districts/ UC - (11-20) - Inputs are accessible provincially and nationally - (0-10) <p>.....</p> <p>Ease of marketability/ demand, existence of corporate buyers/ middle man (Total Score - 0-20):</p> <ul style="list-style-type: none"> - Products/ Services are marketable and required locally - (11-20) - Products/ Services are Provincially/ Nationally and Internationally - (0-10)

Sr. #	Scoring Rational and Scores
7	<p>Potential markets for products and services:</p> <ul style="list-style-type: none"> - Products/ services are marketable locally with existing buyer - (0-30) - Products/ services are marketable provincially/ national - (0-30) - Products/ services are marketable Internationally - (0-20) - National and provincial buyers already exists locally - (0-10) - International buyers already exist locally or nationally - (0-10)
8	<p>Potential for export:</p> <p>Ease of Export (easy legislative requirement) and existence of markets/ demand:</p> <ul style="list-style-type: none"> - Products and services are already being exported internationally - (41-60) - Number of international exporters demanding products/ services (demand already exists) - (21-40) - Products services are not exported but there are potential buyers in international markets (demand to be explored) - (1-20) <p>.....</p> <p>Quality Standardization:</p> <ul style="list-style-type: none"> - Quality of products and services with value added features is established and acceptable to buyers - (21-40) - Quick value additions and quality improvisation can foster export of products and services - (1-20)
9	<p>Assessment of value for money:</p> <ul style="list-style-type: none"> - Value addition through input/ quality/ supply chain and distribution channel (0-25) - Value addition through use of machinery/ ICT (0-25) - Value addition through process improvement like post harvest handling (0-25) - Value addition through market channel improvement (0-25)
10	<p>Climate change profiling:</p> <ul style="list-style-type: none"> - Area is prone to disaster (periodic repeated disasters) - (0-30) - Output/ quality of products and services are affected through weather - (0-30) - Local migration due to disasters and climate change - (0-20) - Change in cropping pattern/ business trend due to change of weather and climate change - (0-20)

The scoring was done by the field staff, which conducted FGDs in their respective areas. Moreover, special emphasis was given to the geographical constraints and opportunities thus the shortlisting through this scoring matrix already carries aspect of geographic priorities. Scoring of the value chains and further shortlisting is attached as **Annex-XIII**.

The third phase of prioritization was triangulating information received through the UC profiling, Focused Group Discussions and the Key Informant Interviews. This was done through matching information collected during consultative sessions in all three modes and uniformity and consistency was observed. The results provided following nine value chains in on-farm, three in livestock and three in non-farm including,

Table 6: Prioritized Sector Wise Value Chains

On-Farm	Livestock	Non-Farm
<ul style="list-style-type: none"> • Chilli • Rice • Wheat • Potato • Tomato • Onion • Pulses • Oil Seeds • Fruits 	<ul style="list-style-type: none"> • Meat • Beef • Dairy 	<ul style="list-style-type: none"> • Grocery/ Merch. • Handicraft • Services

5 Prioritized Value Chain Analysis

The prioritization of the value chains is based on the systematic approach and methodology defined in chapter-4 of the report. However, it is worth noting that the prioritized value chains exist in all the geographic areas and with a lot of re-occurrences. Innovative approaches are also proposed in this section for improving the performance of each value chain, increasing productivity, marketability and sustainability of the interventions.

Analysis of the value chains is done separately for each shortlisted one, however special paragraphs are added where there is any geographic significance and impact with respect to VC segments and potential partners.

The cost benefit analysis of the all the explained value chains are separately provided in an excel sheet attached as **Annex-XIV**.

5.1 Prioritized Livestock Sector Value Chains

The shortlisted and prioritized value chains under the livestock sector include the following,

- Meat
- Beef
- Dairy

Meat and Beef value chains are almost the same thus analysis is collectively done for ease.

5.1.1 Analysis of Meat and Beef Value Chains

Goats, sheep, and calf are one of the major commodities found common during the study in all the 10 districts of the study. Local markets exist at a small scale in the clusters, however sizable mandis/markets are found near big cities/ districts capitals. The overall impact of this commodity, if consolidated is huge; the need is to find out and develop provincial and national consolidators and aggregators to get benefit of the impact. Based on the FGDs, KIIs and the consultation with potential private sector, MDC/ CHRS presents the following value chain valid for all districts.

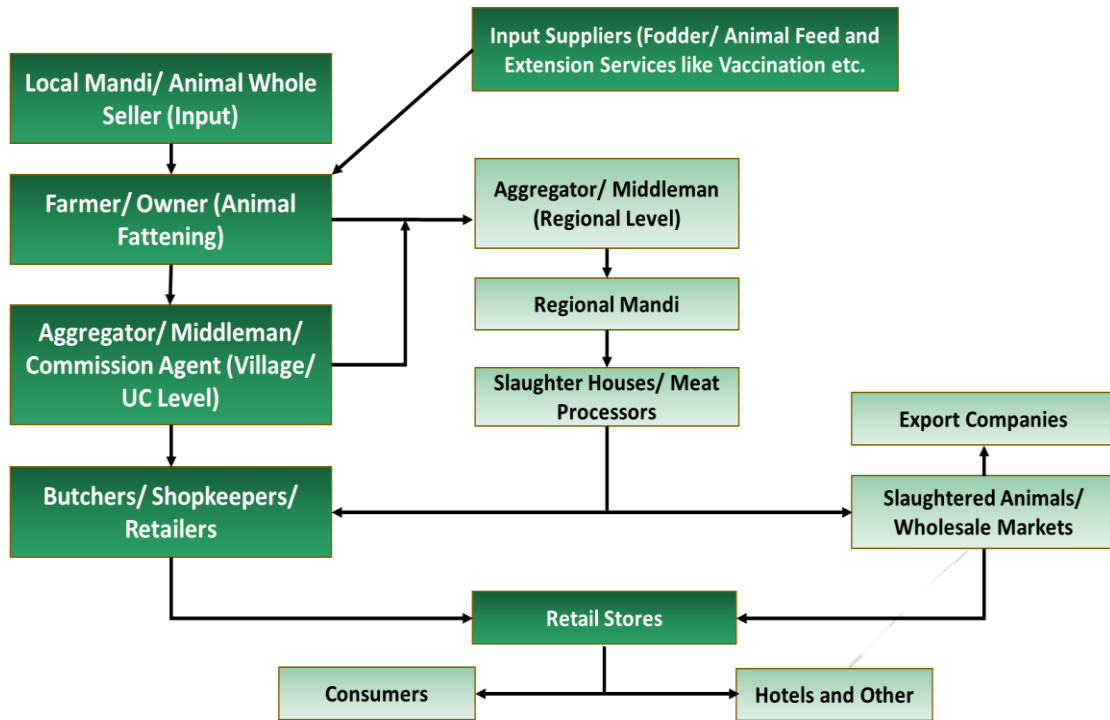


Figure 4: Value Chain Diagram for meat and beef

5.1.1.1 Market Channels for Meat and Beef

The market channel information is presented as per following,

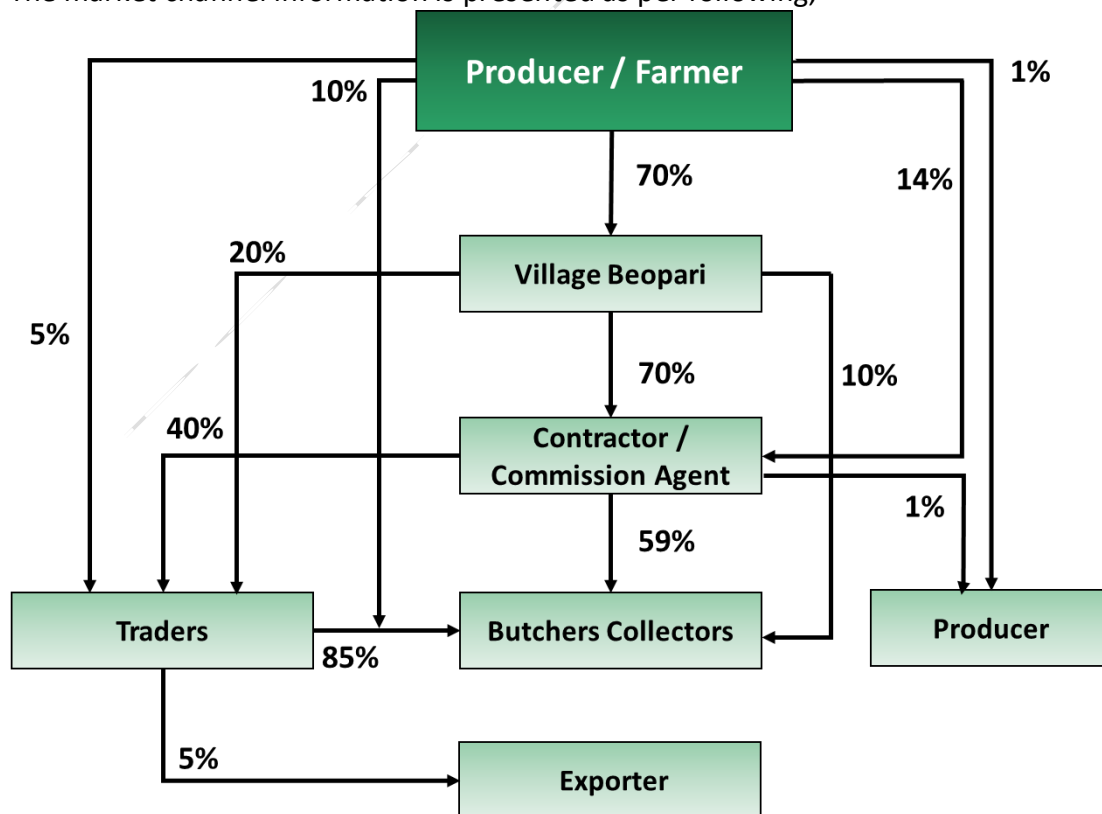


Figure 5: Market Channels for meat and beef

5.1.1.2 Identification of Different Trades Around Meat and Beef

There are various trades that may exist around these trades, one that were found relevant to the selected geographic locations include,

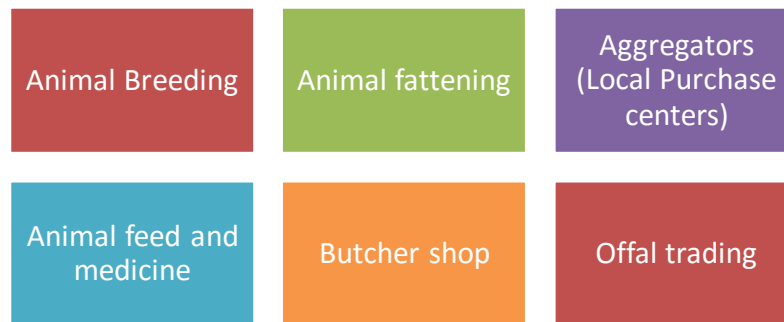


Figure 6: Types of Possible Trades in Meat and Beef Value Chains

Keeping in view the NPGP interventions, the types of assets and trainings that are required for the beneficiaries to be productively engaged with businesses of the mentioned trades. It is also proposed to choose from the available training providers from the private sectors. The list includes following:

Table 7: Types of Assets and Trainings with Training Providers

Value Chain Trades	Type of Trainings	Type of Assets	Partners/ Training Service Providers
Animal Rearing/ Fattening*	<ul style="list-style-type: none"> - Breed Selection - Animal/ Farm Management - Fodder selection and management - Marketing 	Animals	<ul style="list-style-type: none"> - Dairy Lac - Maxim - Tando Jam University - Potato, tomato, oil seed, vegetables, pulses, onion,
Input Supply <ul style="list-style-type: none"> - Animal - Feed - Vaccination - Extension Serv. 	<ul style="list-style-type: none"> - Business Development Training - Understanding animal diseases and growth requirement - Financial Management (managing cash and supplier credit) Negotiations - For Technical Extension Services (Vaccination, disease management etc) 	Stock of animals, feed, medicines etc.	<ul style="list-style-type: none"> - Dairy Lac - Maxim - Tando Jam University
Aggregator-	<ul style="list-style-type: none"> - Understanding market needs - How to access market? 	Purchase Center establishment- Accessories and training	<ul style="list-style-type: none"> - Fauji meat - Prime cuts - PK Food - Organic meat

Value Chain Trades	Type of Trainings	Type of Assets	Partners/ Training Service Providers
	- Supply Chain Management		
Butcher Shop	- Butchery skills - Business Development and Financial literacy (managing cash and supplier credit)	shop accessories and training	- Tando Jam University - NAVTTC and TEVTA
Local Slaughter House (Cluster through CIG)	- Business Development and Financial Management (managing cash and supplier credit)	accessories	- Local Meat processor - NAVTTC and TEVTA
Offal Trading	- Understanding Market Requirements - Supply Chain Management	Tools and training	Local trader

5.1.1.3 Potential Private Sector and Role

The private sector around meat and beef value chain include following:

- Fuaji Meat
- Prime Cut
- PK Foods
- AHA Traders and
- Tando Jam University

These private sector partners may not only be contacted for training and capacity building of the beneficiaries but also for building sustainable supply chains for and market linkages for national and international export. Some challenges working with the private sector include:

5.1.1.4 Role of Common Interest Group (CIG)

As it is already suggested that the existing value chain need to be consolidated, for which role of CIG is very important. It is proposed to form CIGs in the trades mentioned in the list specific area, while there should be an apex CIG with representation of the other CIGs of different trades of the value chain with a role to consolidate all the efforts and bring a sizable impact in the respective area.

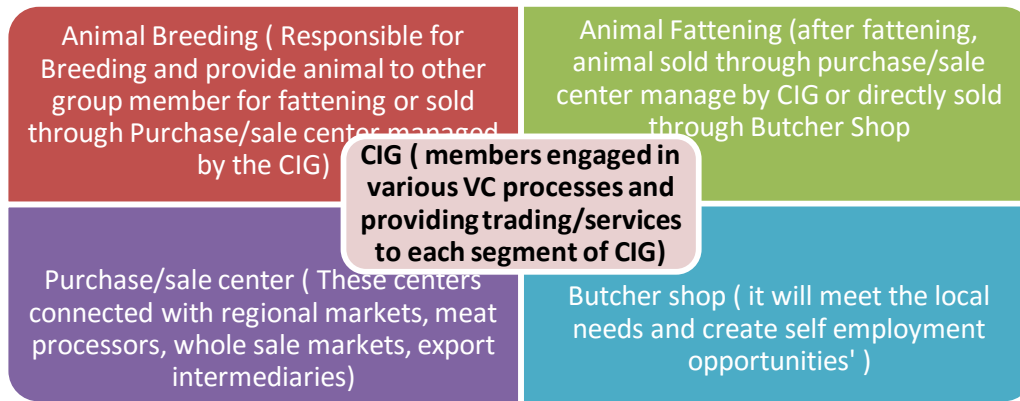


Figure 7: Role of Apex CIG around Various Trades

5.1.1.5 Challenges and Opportunities

The challenges for the specific value chain include,

- Poor linkages between farmers and commercial buyers
- Middleman exploitation (pricing and payment)
- Poor farm management practices
- Lack of understanding about market needs and demand
- Non availability of quality animal feeds, breed and medicine/vaccination
- Loss of animal due to disease or death.

Overcoming these challenges and mitigating the issues of the value chains with developing linkages with the private sector partners with the sense of consolidation may result in the following possible opportunities and benefits.

- Better return and confirmed market
- Bone to meat ratio improved
- Paradigm shift in aggregator role from exploiter to service provide
- Cost effective/efficient supply chain
- Access to market information
- Market driven trainings
- Beneficiary have diverse choices for selling
- Improvement in backward linkages (breed, medicines, vaccination, Extension services etc)
- Jump start for beneficiary and facilitate in coming out of poverty in shortest possible time.

5.1.2 Dairy Value Chain

Dairy is yet another major sector in the villages and the rural areas. The poor and the poorest, however usually do not possess large number of animals but the sector still have shown a great potential to growth during the study in the selected districts, if improvised. The sector is so informally organized in the villages that analysis of the exact market channels was difficult during the course of the study. The glimpse of the value chain actors and an estimated market channel share is as per following:

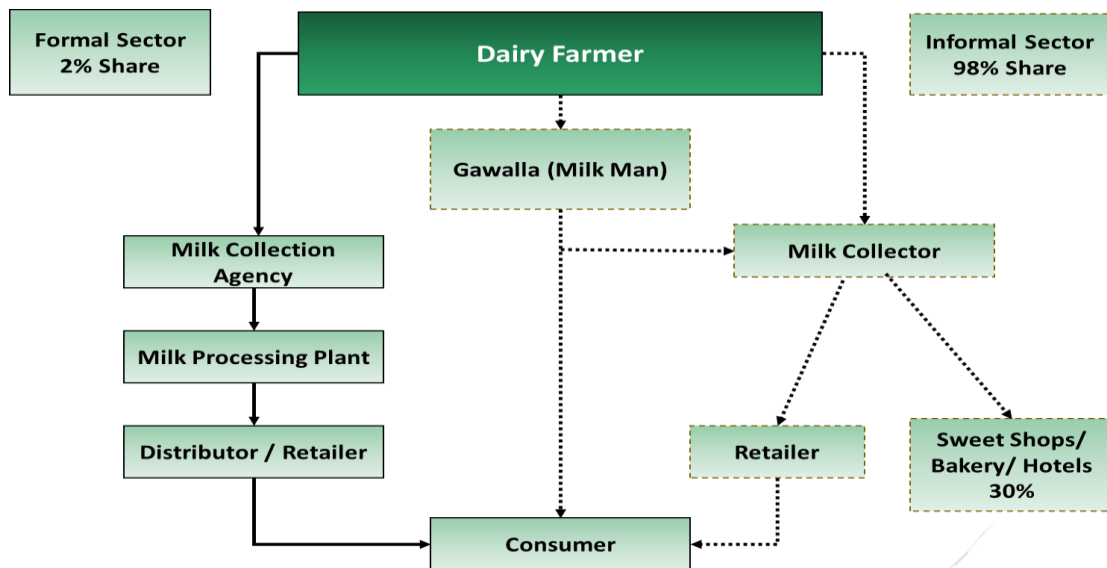


Figure 8: Dairy Value Chain Actor

5.1.2.1 Identification of Various trades in Dairy VC Chains

The possible trades that may have great potential with respect to the types of beneficiaries and the areas include:



Figure 9: Types of Trades around Dairy Value Chain

Keeping in view the NPGP interventions, the types of assets and trainings that are required for the beneficiaries to be productively engaged with businesses of the mentioned trades. It is also proposed to choose from the available training providers from the private sectors. The list includes following:

Table 8: Identification of Trade Wise Assets and Trainings for Dairy VC

Value Chain Trades	Type of Trainings	Type of Assets	Partners (Training Service Providers)
Animal Rearing- CIG managed community dairy farm	<ul style="list-style-type: none"> - Breed Selection - Animal/ Farm Management - Fodder selection and management - Marketing 	Animals	<ul style="list-style-type: none"> - Dairy Lac - Maxim - Tando Jam University - Nestle foods - Engro corporation - NAVTEC - -TEVTA

Value Chain Trades	Type of Trainings	Type of Assets	Partners (Training Service Providers)
Input Supply - Animal - Feed - Vaccination - Extension Serv.	- Business Development Training - Understanding animal deceases and growth requirement - Financial Management (managing cash and supplier credit) Negotiations - For Technical Extension Services (Vaccination, disease management etc)	Stock of animals, feed, medicines etc.	- Dairy Lac - Maxim - Tando Jam University - Dairy Development Board
Milk Collection Centers	- Understanding market needs - How to access market? - Supply Chain Management	Purchase Center establishment- Accessories and training	- Engro collection center - Nestle - Pakola
Milk Shop	- Business Development and Financial literacy (managing cash and supplier credit)	Shop accessories and training	- Tando Jam University
Value Addition (Cluster through CIG)	- Business Development and Financial Management (managing cash and supplier credit)	Accessories	- Large cash and carry, Metro, Imtiaz

5.1.2.2 Role of Potential Private Sector Partners

The potential private sector partners that may be engaged for sustainable impact of the VC include following:

- Dairy Lac
- Nestle
- Maxim
- Engro
- Tando Jam University

These private sector partners may not only be contacted for training and capacity building of the beneficiaries but also for building sustainable supply chains for and market linkages for national and international export. Some challenges working with the private sector include:

5.1.2.3 Role of Common Interest Group

As it is already suggested that the existing value chain need to be consolidated, for which role of CIG is very important. It is proposed to form CIGs in the trades mentioned in the list around a value chain in a specific area, while there should be an apex CIG with representation of the other CIGs of different trades of the value chain

with a role to consolidate all the efforts and bring a sizable impact in the respective area.



Figure 10: Role of CIG and Apex CIG

5.1.2.4 Challenges and Opportunities

The possible issues and challenges of the value chain include:

- Market linkage with large buyers exist but require diversification
- Middleman exploitation (pricing and payment)
- Poor farm management practices and lower milk yield
- No value addition at local level
- Non availability of quality animal feeds, breed and medicine/vaccination
- Unviability of the trained VET or inability to purchase the required services.

On the other side, if properly treated and a good value chain approach adopted with leveraging existing private sector resources; following opportunity exist:

- Better return and confirmed market
- Milk Yield increase
- Paradigm shift in aggregator role from exploiter to service provide
- Cost effective/efficient supply chain
- Access to market information
- Market driven trainings
- Beneficiary have diverse choices for selling
- Improvement in backward linkages (breed, medicines, vaccination, Extension services etc.)
- Jump start for beneficiary and facilitate in coming out of poverty in shortest possible time.

5.1.3 Challenges for Private Sector Engagement

The private sector players were contacted and the details of the contacts are attached separately with the list of all other potential private sector partners. The challenges with the private sector that need to be addressed during the interventions for the effective and efficient participations include following:

- Consistent supply that required systemic distribution of assets

- Payment cycle- cash on delivery/credit
- Rejection based on quality parameters
- Dispute resolution
- Business development services for linking private sector/beneficiary.

5.2 Prioritized Agriculture Value Chains

The shortlisted and prioritized value chains for the agriculture sector include the following,

- Chilli
- Wheat
- Rice
- Potato
- Tomato
- Onion
- Pulses
- Oil Seeds
- Fruits

5.2.1 Value Chain Analysis of Chilli

The value chain diagram of the Chilli sector is as per following:

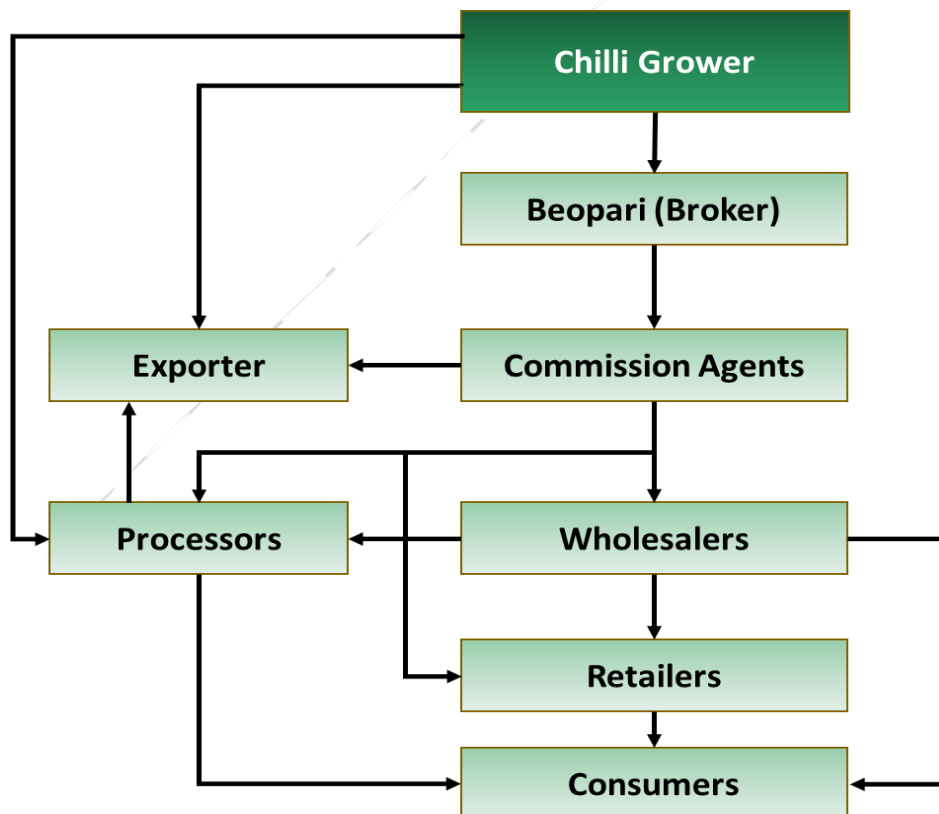


Figure 11: Value Chain of Chilli

5.2.1.1 Identification of Trades for Chilli Value Chain

The trades identified during the study for which the enterprises may be established around chilli value chain include:



Figure 12: Trades identified for Chilli Value Chain

Keeping in view the NPGP designed interventions, the types of assets, possible training and the potential partners include:

Table 9: Types of Assets and Training for Chilli VC Trades

Value Chain Trades	Type of Trainings	Type of Assets	Partners (Training Service Providers)
Farming-CIG managed community dairy farm	<ul style="list-style-type: none"> - Seed Selection - Farm Management - Land preparation - Use of Input supplies - Fodder selection and management - Marketing 	Agri inputs	<ul style="list-style-type: none"> - National Foods - Local Chillies processors - Abadgar machinery - Tando Jam University - Shan Foods - Mehran Foods - Crispo
Input Supply <ul style="list-style-type: none"> - Seed - Fertilizers - Pesticide - Tools, equipment and supplies - Extension Serv. 	<ul style="list-style-type: none"> - Business Development Training - Understanding diseases and growth requirement - Financial Management (managing cash and supplier credit) Negotiations - For Technical Extension Services (pest management, farm management etc.) 	Stock of inputs that includes: <ul style="list-style-type: none"> Seed Fertilizers Pesticide Tools, equipment and supplies 	<ul style="list-style-type: none"> - Rachna Seed - Fauji Fertilizers - Pak Agri - FMC - Sygenta - Tando Jam University
Value Addition	<ul style="list-style-type: none"> - Understanding market needs - How to access market? 	Machinery and training	<ul style="list-style-type: none"> - National food - Local Chillies processors

	- Supply Chain Management		
Chillies Shop	- Understanding various varieties - Business Development and Financial literacy (managing cash and supplier credit)	Shop accessories and training	Tando Jam University

5.2.1.2 Role of Potential Private Sector Partners and Challenges

The potential private sector partners include

- National Food
- Pak Agri Services
- Rachna Seed
- Local Chillies processors
- FMC/Sygneta
- Tando Jam University

These private sector partners may not only be contacted for training and capacity building of the beneficiaries but also for building sustainable supply chains for and market linkages for national and international export.

5.2.2 Wheat Value Chain Analysis

The value chain diagram with flow from farmer to market tis as per following:



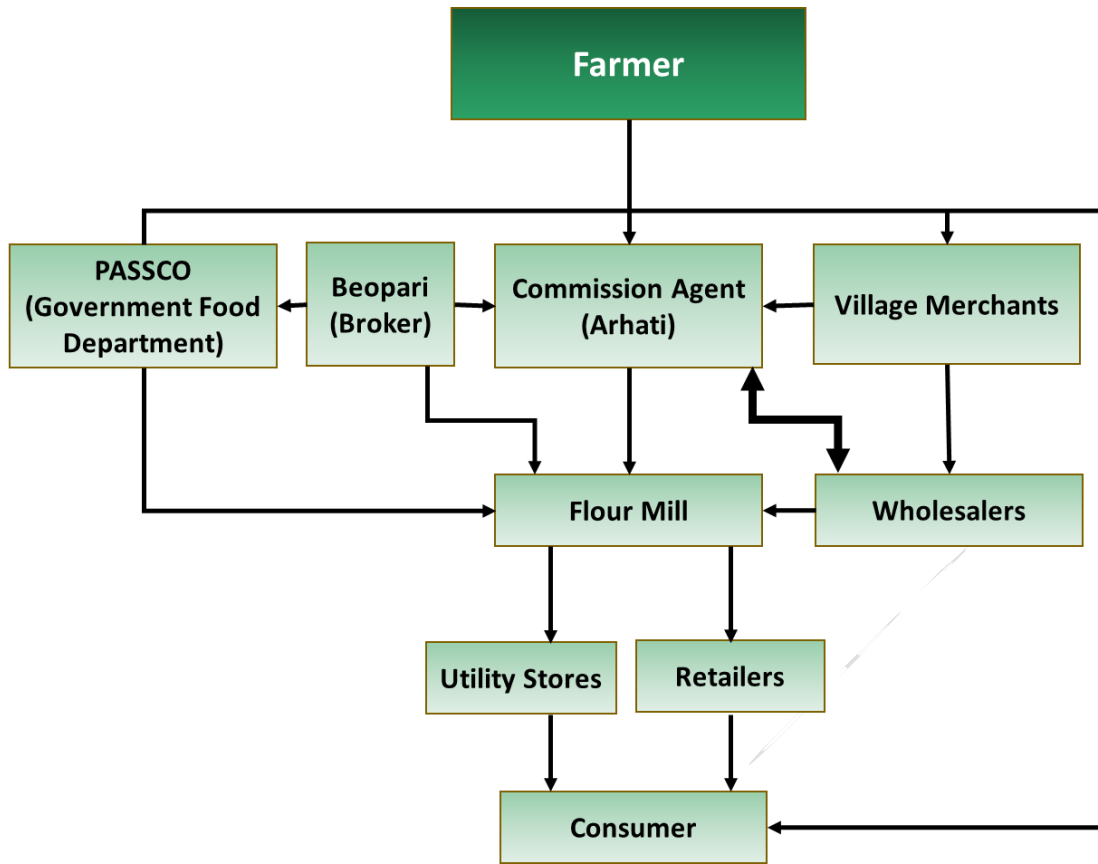


Figure 13: Value Chain Diagram for Wheat

5.2.2.1 Identification of Trades Around Wheat Value Chain

Various identified trades for Wheat VC include:



Figure 14: Trades for Wheat Value Chain

The type of assets and possible trainings for the various proposed trades include:

Table 10: Types of assets and Trainings for Wheat VC Trades

Value Chain Trades	Type of Trainings	Type of Assets	Partners (Training Service Providers)
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Farming-CIG managed farm	<ul style="list-style-type: none"> - Seed Selection - Farm Management - Land preparation - Use of Input supplies - Fodder selection and management - Marketing 	- Agri inputs	<ul style="list-style-type: none"> - Engro Foundation - Local Wheat processors - Abadgar machinery - Tando Jam University
Input Supply <ul style="list-style-type: none"> - Seed - Fertilizers - Pesticide - Tools, equipment and supplies - Extension Serv. 	<ul style="list-style-type: none"> - Business Development Training - Understanding deceases and growth requirement - Financial Management (managing cash and supplier credit) Negotiations - For Technical Extension Services (pest management, farm management etc) 	Stock of inputs that includes: <ul style="list-style-type: none"> - Seed - Fertilizers - Pesticide - Tools, equipment and supplies 	<ul style="list-style-type: none"> - Rachna Seed - Fauji Fertilizers - Westren Agri - FMC - Syngenta - Tando Jam University
Value Addition (Flour Shops)	<ul style="list-style-type: none"> - Understanding market needs - How to access market? - Supply Chain Management 	Machinery and training, Grinding machines, packaging tools, packing material, other shop accessories	<ul style="list-style-type: none"> - Engro Foundation - Local Wheat processors
Wheat Shop	<ul style="list-style-type: none"> - Understanding various varieties - Business Development and Financial literacy (managing cash and supplier credit) 	Shop accessories and training	Tando Jam University

5.2.2.2 Role of Potential Private Sector Partners and Engagement Challenge

The potential private sector partners include

- Engro Foundation
- Westren Agri
- Rachna Seed
- Local Wheat processors
- FMC/Sygneta
- Tando Jam University

These private sector partners may not only be contacted for training and capacity building of the beneficiaries but also for building sustainable supply chains for and market linkages for national and international export.

5.2.3 Rice Value Chain Analysis

The value chain diagram and the market channel and share information is reflected as following:

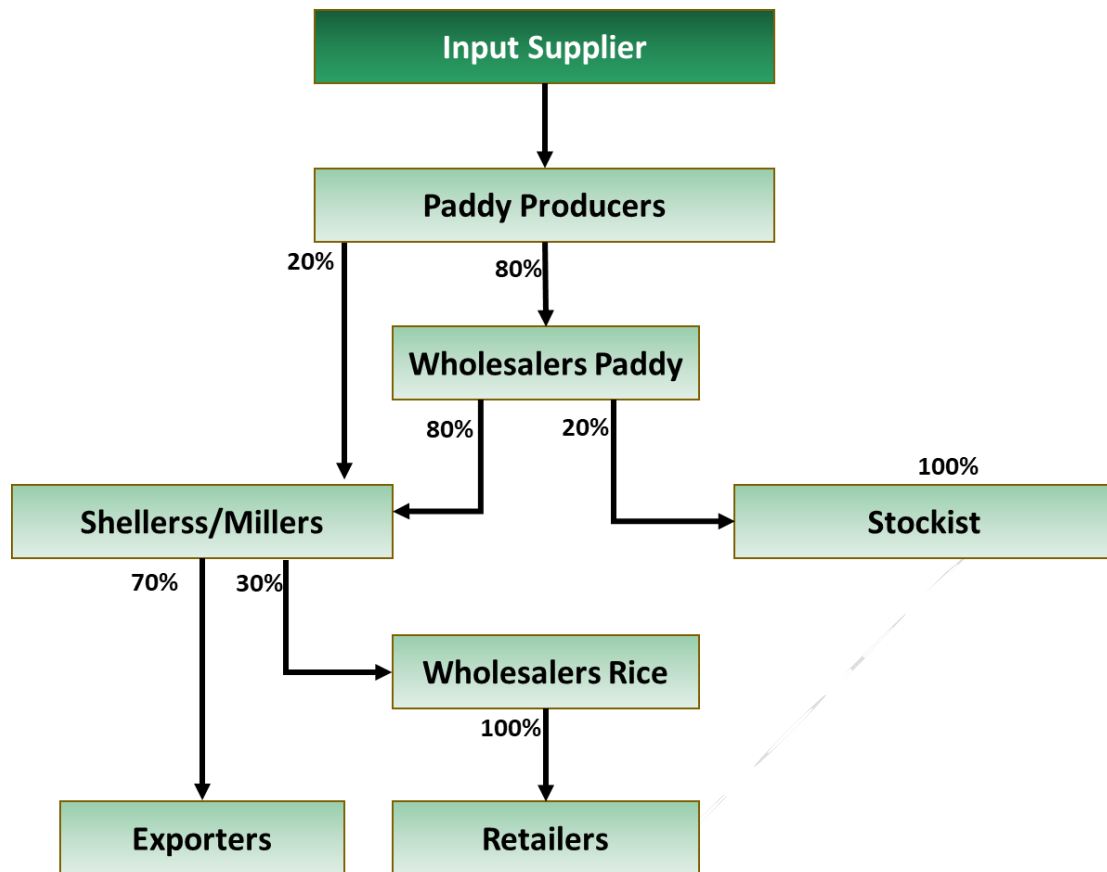


Figure 15: Value Chain Diagram of the Rice Value Chain

5.2.3.1 Identification of Trades Around Rice Value Chain

Various identified trades for Rice VC include:

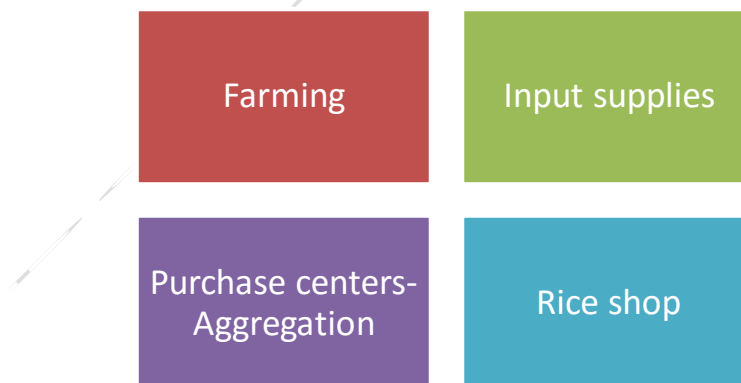


Figure 16: Identified Possible Trades for Rice Value Chain

The type of assets and possible trainings for the various proposed trades include:

Table 11: Types of assets and Trainings for Rice VC Trades

Value Chain Trades	Type of Trainings	Type of Assets	Partners (Training Service Providers)
Community manage farming CIG	<ul style="list-style-type: none"> - Seed Selection - Farm Management - Land preparation 	Agri inputs	<ul style="list-style-type: none"> - Engro Foundation - Local rice processors

	<ul style="list-style-type: none"> - Use of Input supplies - Fodder selection and management - Marketing 		<ul style="list-style-type: none"> - Abadgar machinery - Tando Jam University
Input Supply <ul style="list-style-type: none"> - Seed - Fertilizers - Pesticide - Tools, equipment and supplies - Extension Serv. 	<ul style="list-style-type: none"> - Business Development Training - Understanding deceases and growth requirement - Financial Management (managing cash and supplier credit) Negotiations - For Technical Extension Services (pest management, farm management etc) 	Stock of inputs that includes: <ul style="list-style-type: none"> - Seed - Fertilizers - Pesticide - Tools ,equipment and supplies 	<ul style="list-style-type: none"> - Rachna Seed - Daimaond seed - Fauji Fertilizers - Westren Agri - FMC - Sygenta - Tando Jam University
Purchase Centers	<ul style="list-style-type: none"> - Understanding market needs - How to access market? - Supply Chain Management 	Purchase Center establishment- Accessories and training	<ul style="list-style-type: none"> - Engro Foundation - AHA Traders - Local rice processors
Rice Shop	<ul style="list-style-type: none"> - Understanding various varieties - Business Development and Financial literacy (managing cash and supplier credit) 	Shop accessories and training	Tando Jam University

5.2.3.2 Role of Potential Private Sector Partners and Engagement Challenge

The potential private sector partners include

- Engro Foundation
- AHA Traders
- Westren Agri
- Rachna Seed
- Daimond Seed
- Local rice processors
- FMC/Sygneta
- Tando Jam University

These private sector partners may not only be contacted for training and capacity building of the beneficiaries but also for building sustainable supply chains for and market linkages for national and international export.

5.2.4 Value Chain Analysis of Potato

The value chain diagram and the market channel and share information is reflected as following:

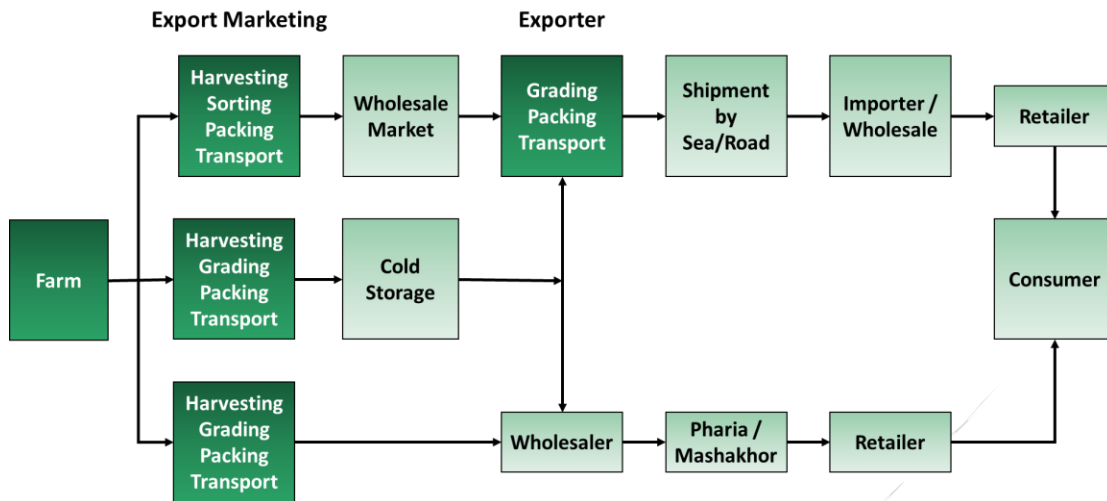


Figure 17: Market Channel Diagram for Potato

5.2.4.1 Identification of Trades Around Potato Value Chain

Various identified trades for Potato VC include:

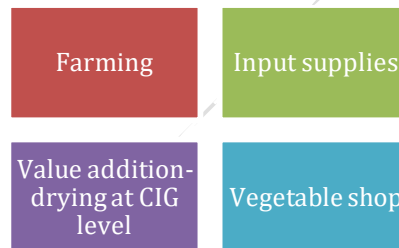


Figure 18: Identified possible trades for potato VC

The type of assets and possible trainings for the various proposed trades include:

Table 12: Possible Types of Trades, Assets and Trainings for Potato VC

Value Chain Trades	Type of Trainings	Type of Assets	Partners (Training Service Providers)
Farming-CIG managed	<ul style="list-style-type: none"> - Seed Selection - Farm Management - Land preparation - Use of Input supplies - Fodder selection and management - Marketing 	Agri inputs	<ul style="list-style-type: none"> - Pepsi - United Snacks - Fresh and Freeze - Metro cash and carry - Processors - Exporters
Input Supply - Seed - Fertilizers - Pesticide - Tools, equipmen	<ul style="list-style-type: none"> - Business Development Training - Understanding deceases and growth requirement - Financial Management (managing cash and supplier credit) Negotiations 	Stock of inputs that includes: <ul style="list-style-type: none"> - Seed - Fertilizers - Pesticide - Tools , equipment 	<ul style="list-style-type: none"> - Private seed suppliers - Fauji Fertilizers - FMC - Sygenta

Value Chain Trades	Type of Trainings	Type of Assets	Partners (Training Service Providers)
t and supplies - Extension Serv.	- For Technical Extension Services (pest management, farm management etc)	and supplies	
Value Addition	- Understanding market needs - How to access market? - Supply Chain Management	Machinery and training	- Pepsi - United Snacks - Fresh and Freeze - Metro cash and carry - Processors - Exporters
Retail Shop	- Understanding various varieites - Business Development and Financial literacy (managing cash and supplier credit)	shop accessories and training	TEVTA

5.2.4.2 Role of Potential Private Sector Partners and Engagement Challenge

The potential private sector partners include

- Fresh and Freez
- Pepsi Co
- United Snacks
- Local Potato Processors
- FMC/ Sygneta
- TEVTA

These private sector partners may not only be contacted for training and capacity building of the beneficiaries but also for building sustainable supply chains for and market linkages for national and international export.

5.2.5 Value Chain Analysis of Tomato

The value chain diagram and the market channel and share information is reflected as following:

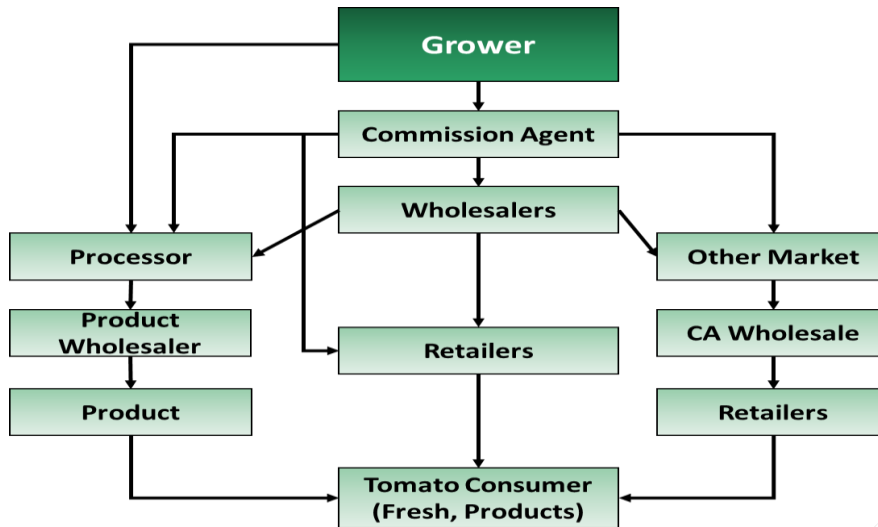


Figure 19: Market Channel for Tomato

5.2.5.1 Identification of Trades Around Tomato Value Chain

Various identified trades for Potato VC include:

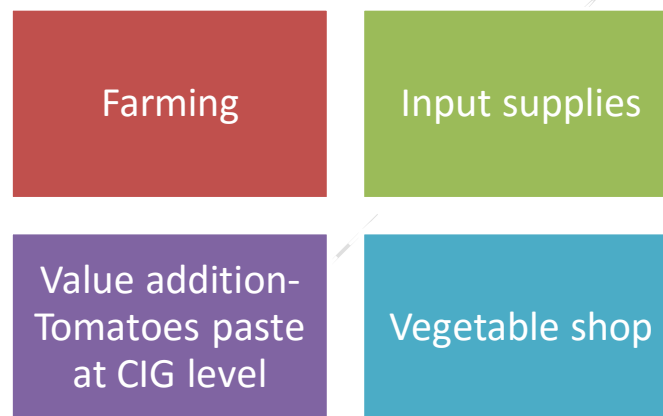


Figure 20: Possible Trades Around Tomato VC

The type of assets and possible trainings for the various proposed trades include:

Table 13: Possible Types of Trades, Assets and Trainings for Tomato VC

Value Chain Trades	Type of Trainings	Type of Assets	Partners (Training Service Providers)
Farming-CIG managed community farm	<ul style="list-style-type: none"> - Seed Selection - Farm Management - Land preparation - Use of Input supplies - Fodder selection and management - Marketing 	Agri inputs	<ul style="list-style-type: none"> - Shangrila - Local processors - Tando Jam University
Input Supply <ul style="list-style-type: none"> - Seed - Fertilizers - Pesticide 	<ul style="list-style-type: none"> - Business Development Training - Understanding diseases and growth requirement 	Stock of inputs that includes: <ul style="list-style-type: none"> - Seed - Fertilizers - Pesticide 	<ul style="list-style-type: none"> - Rachna Seed - Fauji Fertilizers - Pak Agri - FMC - Sygenta

<ul style="list-style-type: none"> - Tools, equipment and supplies - Extension Serv. 	<ul style="list-style-type: none"> - Financial Management (managing cash and supplier credit) Negotiations - For Technical Extension Services (pest management, farm management etc) 	<ul style="list-style-type: none"> - Tools, equipment and supplies 	<ul style="list-style-type: none"> - Tando Jam University
Value Addition	<ul style="list-style-type: none"> - Understanding market needs - How to access market? - Supply Chain Management 	Machinery and training	<ul style="list-style-type: none"> - Shangrila - Local Tomatoes processors
Vegetable Shop	<ul style="list-style-type: none"> - Understanding various varieites - Business Development and Financial literacy (managing cash and supplier credit) 	shop accessories and training	Tando Jam University

5.2.5.2 Role of Potential Private Sector Partners and Engagement Challenge

The potential private sector partners include

- Shangrila
- Rachna Seed
- FMC/ Sygneta
- Pak Agri Services
- Local Tomato Processor
- Tando Jam University

These private sector partners may not only be contacted for training and capacity building of the beneficiaries but also for building sustainable supply chains for and market linkages for national and international export.

5.2.6 Value Chain Analysis of Onion

The value chain diagram and the market channel and share information is reflected as following:

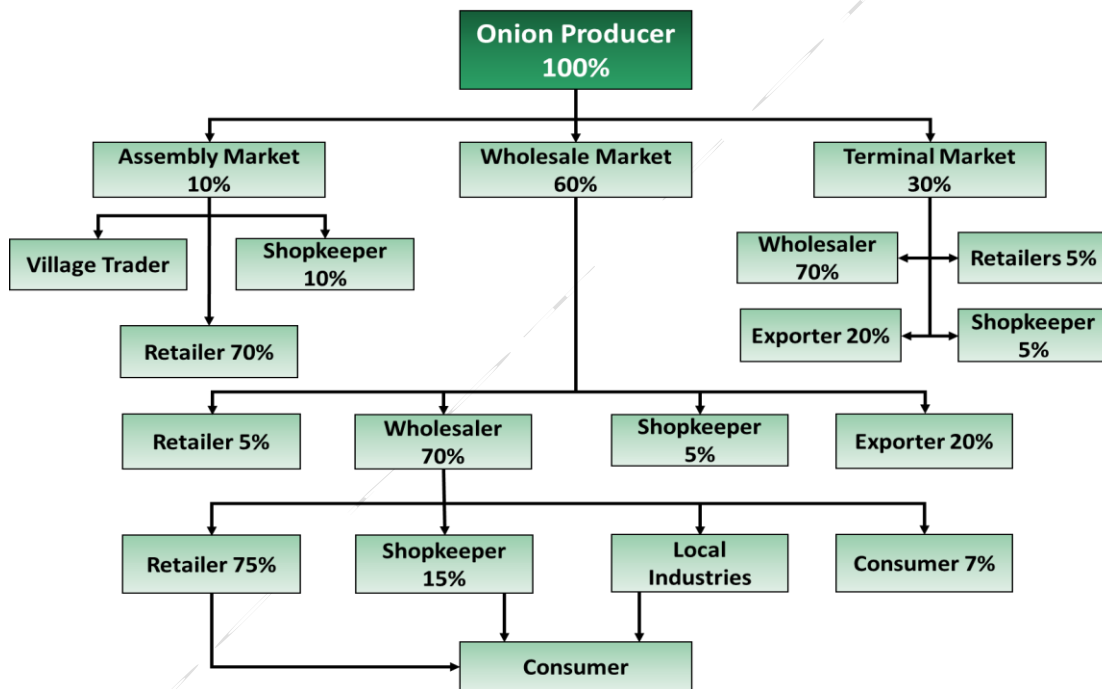


Figure 21: Market Channel Diagram for Onion

5.2.6.1 Identification of Trades Around Onion Value Chain

Various identified trades for Potato VC include:

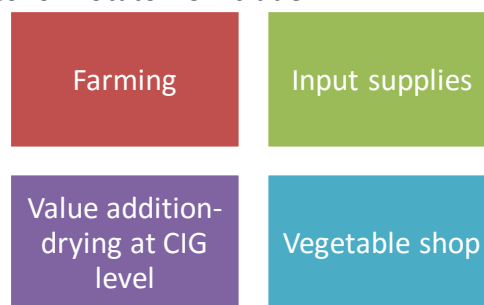


Figure 22: Identified Trades for Onion VC

Various trades, assets and respective training proposal with prospective partners for onion value chain is as per following:

Table 14: Possible Types of Trades, Assets and Trainings for Onion VC

Value Chain Trades	Type of Trainings	Type of Assets	Partners (Training Service Providers)
Farming-CIG managed community dairy farm	<ul style="list-style-type: none"> - Seed Selection - Farm Management - Land preparation - Use of Input supplies - Fodder selection and management - Marketing 	Agri inputs	<ul style="list-style-type: none"> - AHA Traders - Local Onion processors - Abadgar machinery - Tando Jam University
Input Supply <ul style="list-style-type: none"> - Seed - Fertilizers - Pesticide - Tools, equipment and supplies - Extension Serv. 	<ul style="list-style-type: none"> - Business Development Training - Understanding deceases and growth requirement - Financial Management (managing cash and supplier credit) Negotiations - For Technical Extension Services (pest management, farm management etc) 	Stock of inputs that includes: <ul style="list-style-type: none"> - Seed - Fertilizers - Pesticide - Tools, equipment and supplies 	<ul style="list-style-type: none"> - Rachna Seed - Fauji Fertilizers - Pak Agri - FMC - Sygenta - Tando Jam University
Value Addition	<ul style="list-style-type: none"> - Understanding market needs - How to access market? - Supply Chain Management 	Machinery and training	<ul style="list-style-type: none"> - Local onion processors
Vegetable Shop	<ul style="list-style-type: none"> - Understanding various varieites - Business Development and Financial literacy (managing cash and supplier credit) 	`shop accessories and training	Tando Jam University

5.2.6.2 Role of Potential Private Sector Partners and Engagement Challenge

The potential private sector partners include

- National Foods
- Pak Agri Services
- Rachna Seed
- Local processors
- FMC/ Sygneta
- TandoJam University

These private sector partners may not only be contacted for training and capacity building of the beneficiaries but also for building sustainable supply chains for and market linkages for national and international export.

5.2.7 Value Chain Analysis of Pulses

The value chain diagram and the market channel and share information is reflected as following:

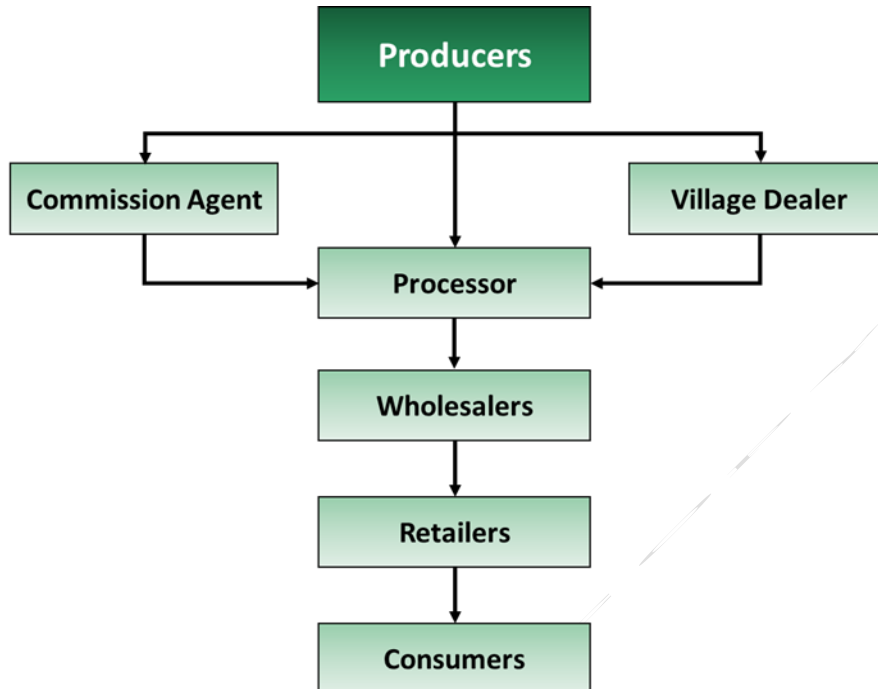


Figure 23: Market Channel Diagram for Pulses

5.2.8 Value Chain Analysis of Oil Seeds

The value chain diagram and the market channel and share information is reflected as following:

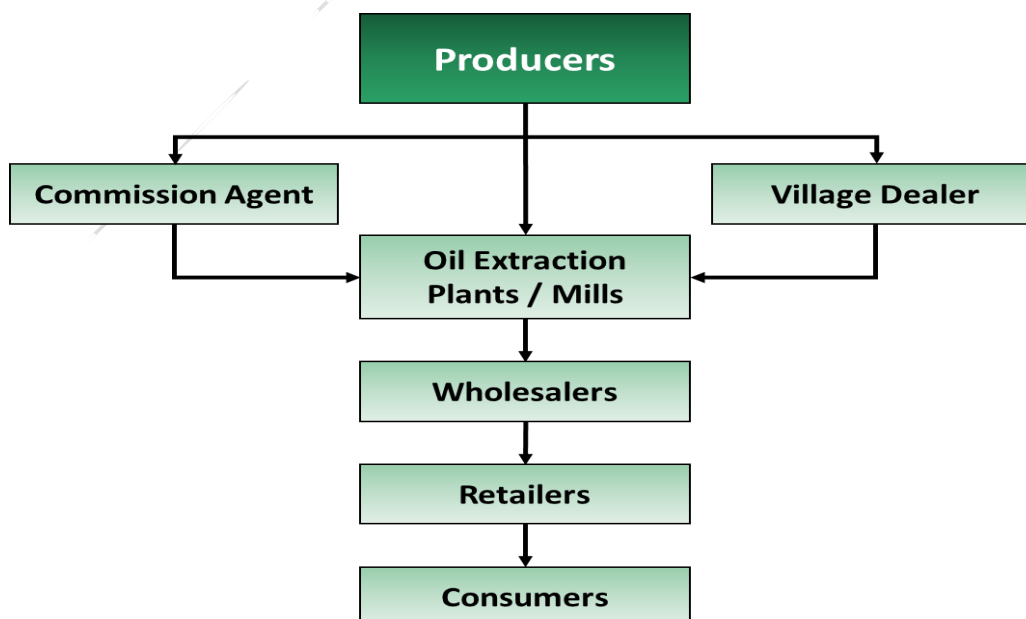


Figure 24: Market Channel Diagram for Oil Seed

5.2.9 Value Chain Analysis of Fruits

The value chain diagram and the market channel and share information is reflected as following:

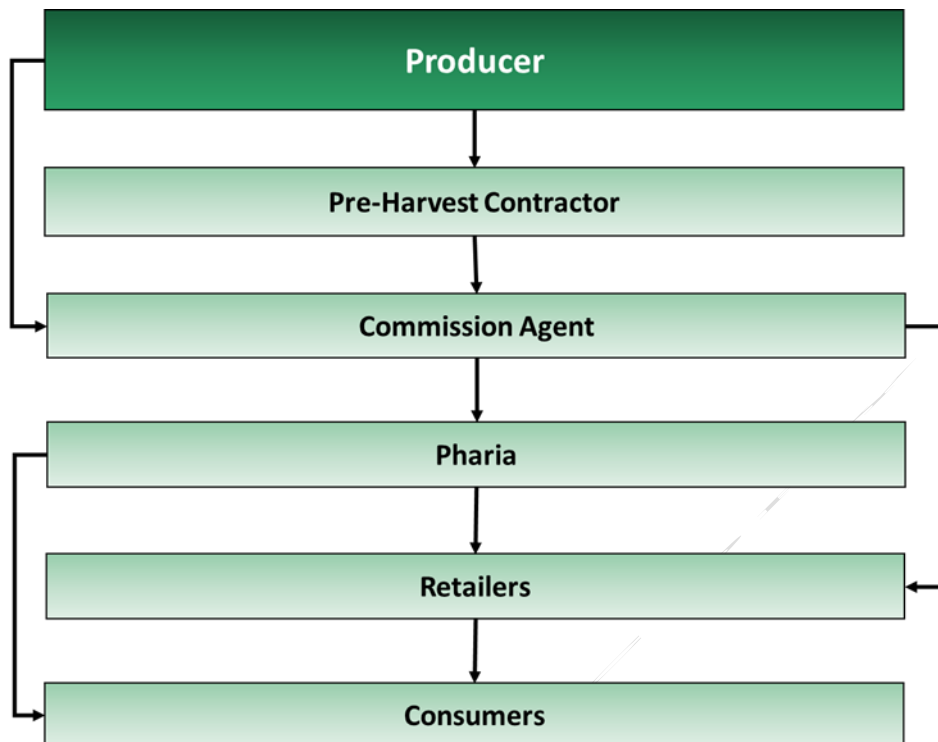


Figure 25: Value Chain Diagram for Fruits

5.2.10 Role of Common Interest Group in Agriculture Sector Value Chains

As it is already suggested that the existing value chain need to be consolidated, for which role of CIG is very important. It is proposed to form CIGs in the trades mentioned in the list around a value chain in a specific area, while there should be an apex CIG with representation of the other CIGs of different trades of the value chain with a role to consolidate all the efforts and bring a sizable impact in the respective area.

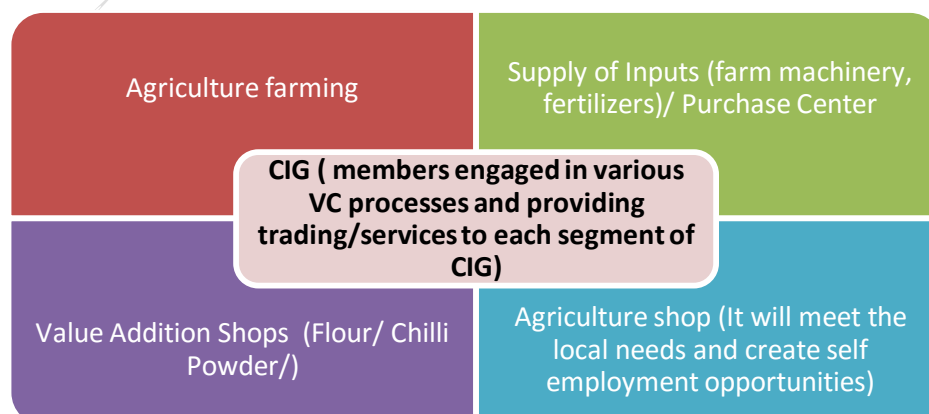


Figure 26: Role of Common Interest Group

5.2.11 Challenges and Opportunities of the Agriculture Value Chain

Based on the various discussions with stakeholders, focused groups, key informant and consultation with partners; there are several challenges that were observed include:

- Market linkage with large buyers exist but require diversification
- Middleman exploitation (pricing and payment)
- Poor farm management practices and lower yield
- No value addition at local level
- Non availability of quality inputs (seed, fertilizers and pesticide)

Other challenges for private sector engagement includes:

- Consistent supply that required systemic distribution of assets
- Payment cycle- cash on delivery/credit
- Rejection based on quality parameters
- Dispute resolution
- BDS for linking private sector/beneficiary

Despite several challenges, if addressed properly carries a lot of market and export potential along with other opportunities including:

- Better return and confirmed market
- Productivity increase
- Paradigm shift providing landless farmers to get better return through CIGs
- Cost effective/efficient supply chain
- Access to market information
- Market driven trainings
- Increase bargaining power due to aggregation through purchase centers managed by CIG
- Improvement in backward linkages (seed, pesticides Extension services etc)

Jump-start for beneficiary and facilitate in coming out of poverty in shortest possible time.

5.3 Prioritized Value Chains of the Non-Farm Sector

Prioritization of value chains in the non-farm sector is challenging as there are so many minor products and services that exist in the rural and target areas. Therefore, for analysis purposes, the similar value chains of consolidated and categorized together for analysis. These value chains are very useful and quicker to establish and if effectively implemented they are sustainable and impactful. The list is as per following:

- Handicraft (all types of handicrafts)
- Services (all types of services being provided in target areas)
- Grocery Stores (products sales)

5.3.1 Value Chain Analysis of the Handicraft

The value chain diagram for the Handicraft value chain is as per following:

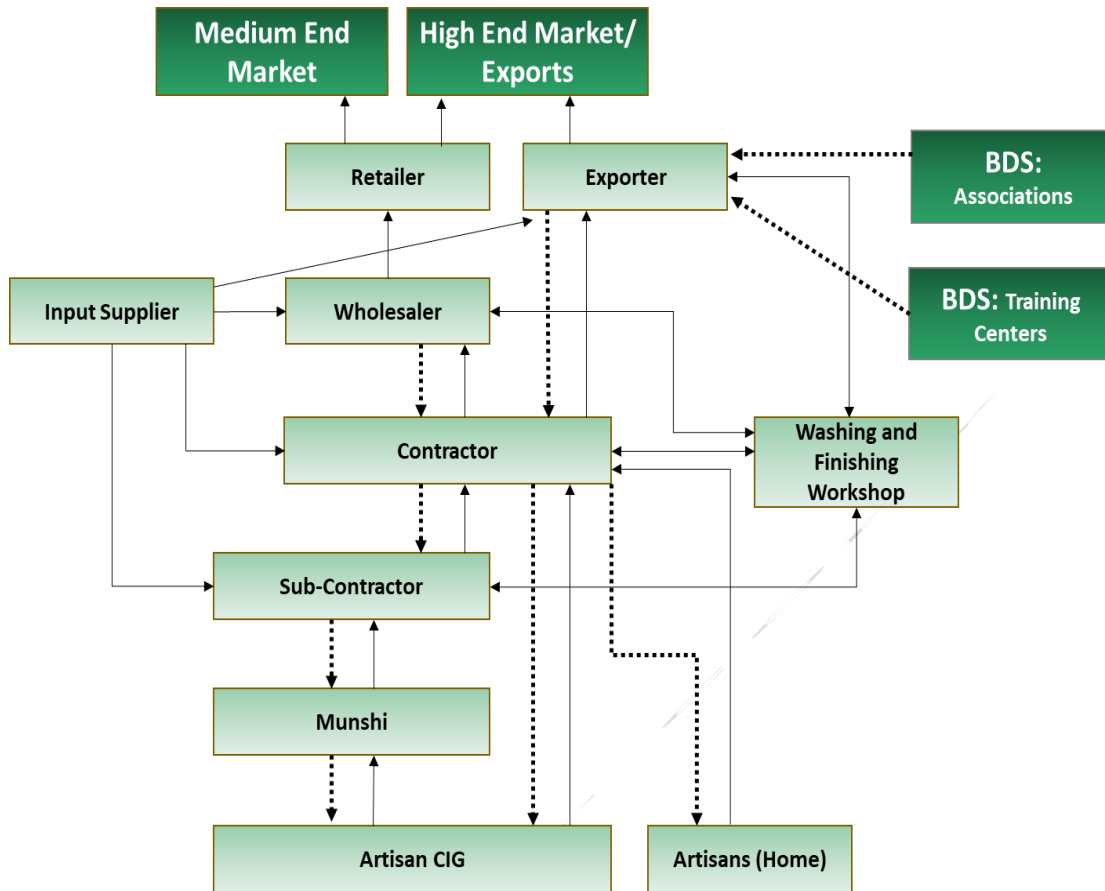


Figure 27: Value Chain Diagram of the Handicraft Value Chain

5.3.1.1 Identified Trades for Handicraft Value Chain

The possible trades, with great potential for entrepreneurship for women, disabled and youth at the last mile include following:



Figure 28: Identified Trades for Handicraft Value Chains

The possible types of assets for the identified trades include:

Table 15: Types of Assets and Trainings for Identified Handicraft VC Trades

VC Trades	Types of Assets	Types of training	Partners (Training Service Providers)
Stitching Unit	Purchase of 2-3 stitching machines	<ul style="list-style-type: none"> Stitching and cutting Financial literacy and business management 	<ul style="list-style-type: none"> Hunar Foundation TVETA AMAN Foundation Memon Institute of technical Training Lead private partner NEVTTC
Embellish Units	Purchase of frame for cloth mounting and tools/supplies	<ul style="list-style-type: none"> Embroidery and designing Financial literacy and business management 	<ul style="list-style-type: none"> Hunar Foundation TVETA AMAN Foundation Memon Institute of technical Training Lead private partner

5.3.1.2 Cost Benefit Analysis of the Handicraft Value Chain

The cost benefit analysis of the Handicraft Value chain trades are following:

Table 16: Cost Benefit Analysis of the Trades for Handicraft Value Chain

VC Trades	Startup capital	Purpose of startup capital	Profit Margin
Stitching Unit	50,000	Purchase of 2-3 stitching machines	30%
Embellish sector	30,000	Purchase of frame for cloth mounting and tools/supplies	20%

5.3.1.3 Role of Private Sector and Challenges

The list of enablers identified during the consultations include the following:

- **Training Services Providers:** University and private sector companies
- **Federal chamber and commerce:** private sector meaning full engagement
- **Financial Institutions:** players available but lack of financial products
- **Distributors/wholesalers**

Other private sector stakeholders that may be partnered for greater marketability of the handicraft products and services include but not limited to the following:

- TMUC
- Indus Valley school of arts
- EURA-Centra
- Daraz
- FPCCI

Engagement of private sector players is pivotal for handicraft promotion and marketing. The private sector players should include 1) design institutions, 2) designers, 3) marketer and retailers, 4) exporters and bulk sourcing agents. Few major challenges that hinder the sustainability of the handicraft value chain are:

- Consistent supply that required systemic distribution of assets
- Payment cycle- cash on delivery/credit
- BDS for linking private sector/beneficiary
- In-adequate quality orientation of the artisans
- Poor Merchandizing
- No Cooperative setups

5.3.1.4 Other Challenges and Issues

Other challenges of the handicraft value chain include following:

- Cost of purchase is high due to limited number of wholesaler at UC level
- Middleman exploitation (pricing and payment)
- Lack of understanding about market needs and demand
- Non availability/understanding of quality material/accessories
- Inadequate technical skills

5.3.2 Value Chain Analysis for Services

During the union council profiling and the focused group discussions, there were several businesses identified which were micro and small businesses – the businesses were identified as not only a quick start-up option for the poor but also the sustainable ones, as it is relatively viable for the poor to manage small businesses with lesser amount of capital investments. Moreover, there are several other gaps identified during the study with respect to unavailability of technical services in the last mile rural areas, which could be filled, with the initiation of such businesses. With the service nature of such businesses are defined under the value chain category of Services. The trades identified in this section may include several other services, which are practical and part of the cluster based databases annexed with the report. The value chain diagram of the service sector businesses is as per following:

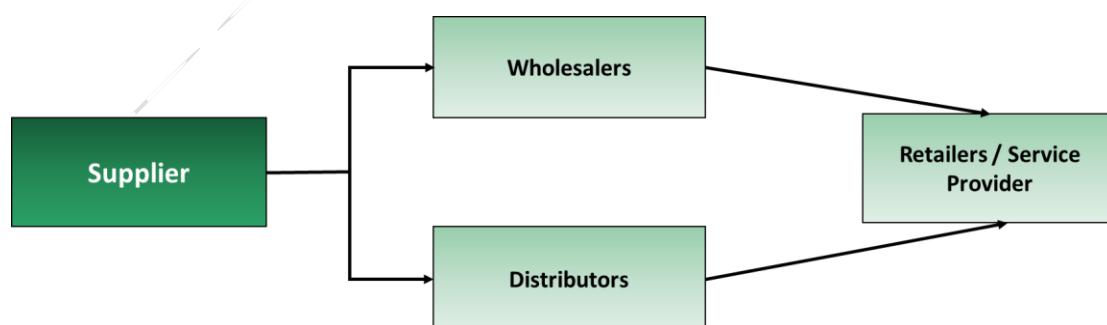


Figure 29: Value Chain Diagram of the Service Sector Businesses

5.3.2.1 Identification of Trades Around Service Value Chain

The identified trades under the services values chains include but not limited to the following:



Figure 30: Identified Trades for Service Value Chain

The trade wise possible asset and training table is as per following:

Table 17: Trade Wise Asset and Trainings for Service Value Chain

VC Trades	Types of Assets	Types of training	Partners (Training Service Providers)
Stitching Unit	Purchase of 2-3 stitching machines	<ul style="list-style-type: none"> Stitching and cutting Financial literacy and business management 	<ul style="list-style-type: none"> Hunar Foundation TVETA AMAN Foundation Memon Institute of technical Training Lead private partner
Embellish sector	Purchase of frame for cloth mounting and tools/supplies	<ul style="list-style-type: none"> Embroidery and designing Financial literacy and business management 	<ul style="list-style-type: none"> Hunar Foundation TVETA AMAN Foundation Memon Institute of technical Training Lead private partner
Beauty Parlor	For purchase of furniture, makeup material and equipment	<ul style="list-style-type: none"> Beautician Financial literacy and business management 	<ul style="list-style-type: none"> Hunar Foundation TVETA AMAN Foundation Memon Institute of technical Training Unilever-Guddi Baji Depilex

VC Trades	Types of Assets	Types of training	Partners (Training Service Providers)
Food processing (Nimko, Samosa, etc)	Purchase of machinery/tools/supplies	<ul style="list-style-type: none"> • Food technology • Financial literacy and business management 	<ul style="list-style-type: none"> • Tando Jam Univeristy • TEVTA
Lab Collection Center	Purchase of computers and medical supplies	<ul style="list-style-type: none"> • Lab technicians • Financial literacy and business management 	<ul style="list-style-type: none"> • Excel Labs • Indus Hospital
Home based catering	Purchase of equipment and supplies	<ul style="list-style-type: none"> • Chef • Financial literacy and business management 	<ul style="list-style-type: none"> • Unilever • Cotham • Pitham • Hashoo group
Hotel and restaurant	Purchase of furniture and cooking equipment	<ul style="list-style-type: none"> • Chef • Financial literacy and business management 	<ul style="list-style-type: none"> • Unilever • Cotham • Pitham • Hashoo group
Hairdresser	Purchase of furniture and equipment	<ul style="list-style-type: none"> • Beautician • Financial literacy and business management 	<ul style="list-style-type: none"> • Hunar Foundation • TVETA • AMAN Foundation • Memon Institute of technical Training • Unilever-Guddi Baji • Depilex
Mobile accessories	-Purchase of inventory	<ul style="list-style-type: none"> • Mobile repairing • Financial literacy and business management 	<ul style="list-style-type: none"> • Hunar Foundation • TVETA • AMAN Foundation • Memon Institute of technical Training •
Generator/UPS Repair and selling of accessories	Purchase of machinery and tools	<ul style="list-style-type: none"> • Electrical and mechanical • Financial literacy and business management 	<ul style="list-style-type: none"> • 3 Hunar Foundation • TVETA • AMAN Foundation • Memon Institute of technical Training

VC Trades	Types of Assets	Types of training	Partners (Training Service Providers)
Solar equipment and accessories	Purchase of machinery and tools	<ul style="list-style-type: none"> Electrical and mechanical Financial literacy and business management 	<ul style="list-style-type: none"> Hunar Foundation TVETA AMAN Foundation Memon Institute of technical Training Lead private sector
Home care (electrician, plumber and mechanics)	Purchase of machinery and tools	<ul style="list-style-type: none"> Electrical and mechanical Financial literacy and business management 	<ul style="list-style-type: none"> Hunar Foundation TVETA AMAN Foundation Memon Institute of technical Training

5.3.2.2 Cost Benefit Analysis of the Services Value Chain

The cost benefit analysis of the service value chain is reflected as per following:

Table 18: Cost Benefit Analysis of the Services Value Chain

VC Trades	Startup capital	Purpose of startup capital	Profit Margin
Stitching Unit	50,000	Purchase of 2-3 stitching machines	30%
Embellish sector	30,000	Purchase of frame for cloth mounting and tools/supplies	20%
Beauty Parlor	25,000	For purchase of furniture, makeup material and equipment	50%
Food processing (Nimko, Samosa, etc)	50,000	Purchase of machinery/tools/supplies	50%
Lab Collection Center	70,000	Purchase of computers and medical supplies	30%
Home based Boutiques (selling of stitched and un stitched cloth)	80,000	Stitching and cutting	50%
Home based catering	50,000	Purchase of equipment and supplies	100%
Hotel and restaurant	50,000	Purchase of furniture and cooking equipment	100%
Hairdresser	50,000	Purchase of furniture and equipment	50%
Push cart (burger, juice,	50,000	Manufacturing of cart and purchase of material/supplies	100%

VC Trades	Startup capital	Purpose of startup capital	Profit Margin
fruit and vegetables)			
Mobile accessories	70,000	-Purchase of inventory	30%
Generator/UPS Repair and selling of accessories	60,000	Purchase of machinery and tools	30%
Solar equipment and accessories	100,000	Purchase of machinery and tools	30%
Home care (electrician, plumber and mechanics)	50,000	Purchase of machinery and tools	50%

5.3.3 Value Chain Analysis of Grocery Store/ Stalls

There is a great variety of grocery stores/ stalls in the rural area. Everyone through poor still needs basis necessary products and services. Therefore, such businesses are told to be very successful in the rural areas. It ranges from selling very minor regular products to necessary products like flour, bread, vegetables water etc.

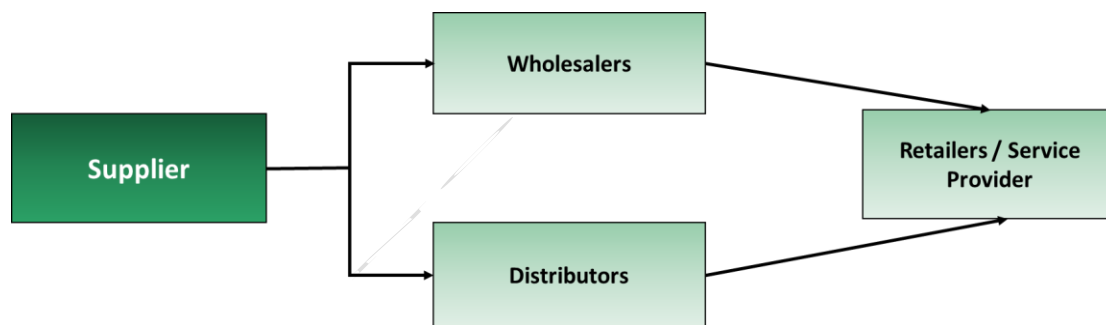


Figure 31: Value Chain Diagram for Grocery Business

5.3.3.1 Identification of Various Trades for Grocery Value Chain

Value Chain Trades	Type of Trainings	Type of Assets	Partners (Training Service Providers)
Wholesaler-CIGs	<ul style="list-style-type: none"> - Sales and marketing - Inventory management - Financial Management (managing cash and supplier credit)Negotiations 	Stocks	<ul style="list-style-type: none"> - Metro Cash and Carry - FPCCI - International Business Council-IBC retail academy

Value Chain Trades	Type of Trainings	Type of Assets	Partners (Training Service Providers)
Retail Stores	<ul style="list-style-type: none"> - Business Development Training - Understanding animal deceases and growth requirement - Financial Management (managing cash and supplier credit) Negotiations - For Technical Extension Services (Vaccination, disease management etc) 	Stock and set-up cost	<ul style="list-style-type: none"> - Jugno-Salesflo - Metro Cash and Carry - IBC-Retail Academy - Unilever (Umeed/Rahber)

5.3.3.2 Cost Benefit Analysis of the Value Chain

Value Chain Trades	Cost (PKR)	Profit (PKR)	Remarks
Wholesale	300,000	5%	5% profit per working capital cycle of 1 month each.
Retail Store	60,000	5-8%	It is assume that stock turn over in 1.5 month.

5.3.4 Role of Private Sector in Non-Farm Sector

The role of private sector in this value chain is very important as there should a consolidation angle. If horizontal and vertical linkages of the services are done with the private sector this will add not only to the provision of improved quality of services at the grass root level but also, it will ensure the sustainability of the local businesses. The possible private sector partners include,

- Unilever
- Metro Cash-carry
- Greeno Juice
- Tando Jam University
- Depilex
- Indus Vallley school of Arts

5.3.5 Role of CIG and Micro-franchising

Franchising, is a contractual relationship wherein an independent coordinating organization, offers individual independent operators the ability join into a franchise network for the provision of selected services over specified area in accordance with an overall blueprint devised by the franchisor.

- Professional training,
- Use of brands or brand advertisements,
- Supplies and equipment,
- Support services, and
- Access to professional advice.
- Linking Sourcing and Networking

5.3.6 Other Challenges of the Non-Farm Value Chain

- Cost of purchase is high due to limited number of wholesaler at UC level
- Middleman exploitation (pricing and payment)
- Lack of understanding about market needs and demand
- Non availability/understanding of quality material/accessories
- Inadequate technical skills

5.3.7 Role of Technology

- Facilitating supply chain
- Financial access
- Monitoring and tracking the beneficiary

5.3.8 Opportunities

- Cost effective/efficient supply chain
- Access to market information
- Market driven trainings
- Beneficiary have diverse choices for selling
- Jump start for beneficiary and facilitate in coming out of poverty in shortest possible time

5.4 Common Interest Groups-CIG

To improve the competitiveness, productivity and earnings in the agriculture and livestock sectors, the region needs strong farmers groups to bring scale to the sector and act as aggregator - small farms are difficult to consider for commercial sale buyers due to the high cost of opportunity in dealing with small farms. Additionally, it needs viable structure to serve as a conduit for the supply of quality inputs and for marketing of the produce; we propose to create CIG to serve as such conduit. If such centers are created, a farmer's group can become sustainable almost immediately and their dependency on the donor's support will be very limited. Establishment of one CIG per each cluster of sizable (50) number of farmers. CIG will have following functions:

- Commodity trading (buying and selling)
- Farming/animal rearing
- Linkages with large-scale buyers and other commodity markets
- Extension services
- Leveraging technology (farmers payment, supply chain, market information and connecting private sector)

We do not propose that such centers replace or push out other dealers in the value chain but fill in the gaps currently existing in the value chain as well as balance the influence of the commission agents and traders in the market.

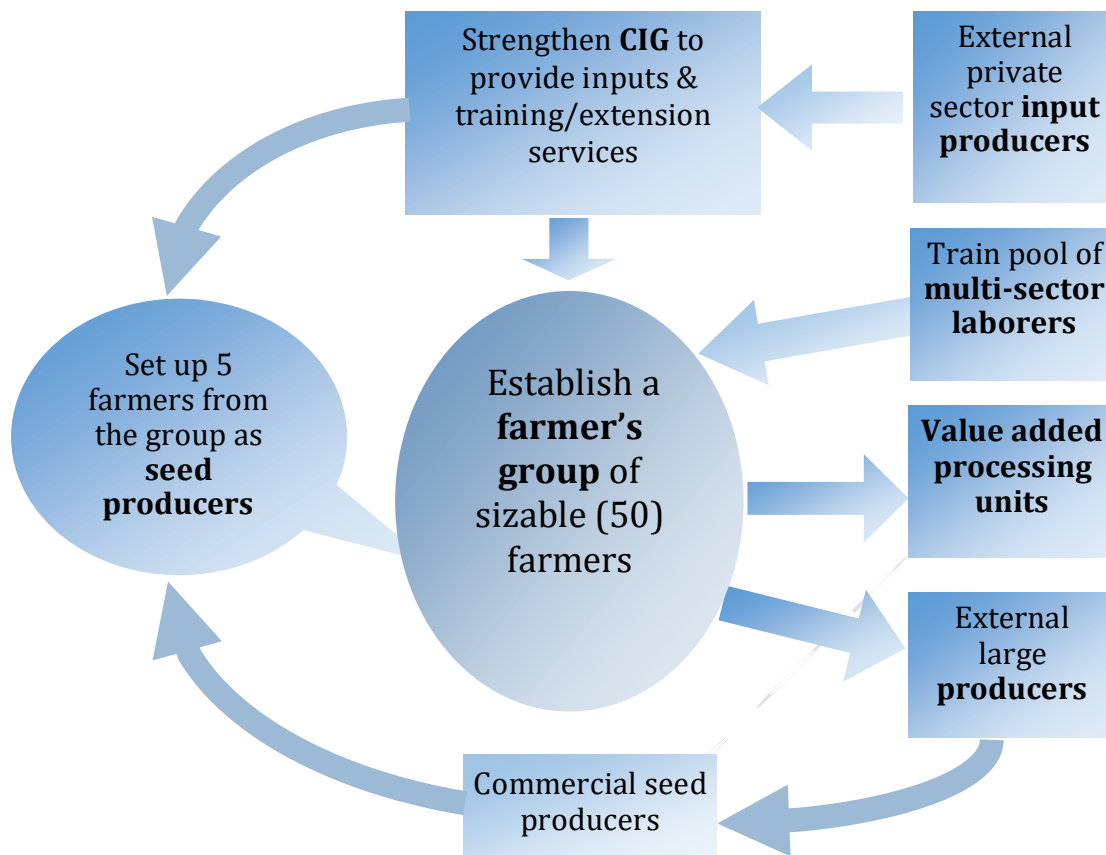


Figure 32: Strategic Proposal for CIGs Model

Proposed strategies for Common Interest Groups (CIGs) include formation of CIG around various similar subsectors as micro and small business enterprises and also consolidate various similar CIGs of a sector to improve their buying power, market potential and access to market. The consolidation is proposed to be a community institutional structure with a name of “Apex CIG”. The apex will have representation from the participating CIGs, which will give common voice and power to the local people. It will also help participating CIGs in bulk buying, selling, accessing and negotiating with the private sector, reaching out to export markets and thus creating an eco-system at village and UC level. The Apex will also be able to create a franchise model through providing support to participative CIGs in bring similar quality standards, linking external capital and investment from outside and presenting one brand to the outside world.

5.5 Purchase Centre

Currently, Farmers sold their produce through following channels:

- Arthis (Arthi provide advances/loan to farmers and farmers bound to sold their produce to arthis)
- Seasonal contractor/aggregator
- Local aggregator- provide services to local farmers for selling of product to market

Though above mentioned marketing channels available but farmers sold their produce at very low price due to following reasons:

- Dependency on Arthi as farmers availed credit from Arthi
- Lack of market information
- No bargaining position
- Lack of expertise in handling produce after harvesting that force farmers to sold their produce instantly.

Therefore, we are proposing the establishment of Purchase Centre responsible to provide following services to farmers that will increase the farmers bargaining position, better awareness about market and provide better position to negotiate/get best price of their products.

- Handling produce after harvest
- Ensure the quality parameters of various market channels
- Connect large private sector buyers with purchase center
- Ensure scale and supply chain management.

5.6 Role of Technology

Based on the size and planned outreach of the project i.e. NPGP, it is not possible to achieve desired results without information and communication technology and related services. One specific example is tracing the number of assets for the life of the project i.e. recording assets at the time of distribution, follow-up and feedback in every quarter and also recording the increase in assets after the life of the project. This should be done very effectively along with beneficiary's information and locations. The system should also have information about the available and improved products and services in PPAF target areas and trained workforce availability in various trades. Through this, PPAF will not only be able to track assets and services provided to beneficiaries at any point in time but also PPAF will better be able to negotiate with the private sector and create sustainable linkages with national and international markets and employers. This will help in overall consolidation of the project and will surely create a great impact.

5.7 Inclusion of Poor, Vulnerable, Disable and Women

The study was done with inclusive approach and assesses potential businesses for poor, vulnerable, disables and women. It specifically include, businesses like grocery stores, vegetable, fruits and tea stalls and shops, tailoring and handicrafts. These business can not only be started quickly, but also with minimum funding requirements and also if franchising and apex CIG model is effectively applied to these businesses in letter and spirit, these businesses can provide a quick success and graduation for the poor beneficiaries, as this will ensure aggregation of inputs/ outputs but also will help in providing and sustaining quality of the products and services at all levels.

6 CPEC- An Opportunity

Project intervention areas are either located in close proximity of CPEC route or close to Special Economic Zones-SEZs will be established under CPEC. In ensuring paragraph, we highlight the significance of trade with China and the target districts can reap the benefits.

6.1 Trade with China

China is a big market and CPEC provide an opportunity for Pakistan to increase the exports. According to the SMEDA publication (SME Observer, Jan-June 2017), in order to reap benefits of the opportunity at hand, review of the current export basket of Pakistan can serve as a starting point for exploring options. Pakistan, a developing country, has an interest in exploring new export based products, whereas China may want to concentrate on discovering new markets for their existing export products. This publication also made critical analyses with reference to a) identification of High Value Export-HVE; Medium Value Export-MVE; and Low Value Export-LVE and b) Price comparison of Pakistani exports and Chinese import. Following table highlights the trade potential with China.

Table 19: Products Identified with High International Potential

Major High Potential Export Products Under HIGH Value Export-HVE	Major High Potential Export Products Under Mid Value Export-MVE	Major High Potential Export Products Under Low Value Export-LVE
<ul style="list-style-type: none"> • Meat • Fish • Mangoes • Chromium Ores and Concentrates • Medical Instruments • Marble • Foot ware • Rice • Milk and Cream • Granulated Sugar • Denim • Ethyl Alcohol • Foot Balls 	<ul style="list-style-type: none"> • Maize • Milk and Cream Solids • Bananas • Leather Handbags • Plastic/Textile material Handbags • Polyethylene Terephthalate • Sweet Biscuits • Modified Polystyrene • Safety Razor Blades • Frozen orange Juice • Natural Honey • Frozen Fish • Frozen Edible Bovine Offal • Butter Milk Butcher knives and Hunting Knives 	<ul style="list-style-type: none"> • Bran • Articles of Leather • Paints and Varnishes • Articles of Stone • Folding Cartons and Boxes • Coats and Jackets • Hydrochloric Acid • Tools for Masons/watchmakers/Miner • Crates and Similar Articles of Plastic • Ball Point Pens • Vegetable Products • Fruit Seeds for Sowing • Articles of Wood • Clover Seeds for Sowing • Shelled Almonds • Hide and Skins of Goats Craps

Table 20: Price comparison for export and imports b/w Pakistan and China

Product	Unit	Pakistan Export Price per Unit. (\$)	Pakistan Total Export Value of Products	Pakistan Major Export Countries	China Import Price Per Unit (\$)	China Major Import Countries	China's Total Import Value of the Product (\$)
Fish frozen, excluding fish fillets	Kilogram (Kg)	2.23	124 Million	Vietnam, Thailand, China	1.39	USA, Russia, Canada	177 Million
Milk and cream of a fat content by weight >1% but <=6%	Kilogram (Kg)	1.18	34 Million	Afghanistan, UAE, Mozambique	0.85	Germany, New Zealand, Australia	308 Million
Under natures ethyl alcohol of an alcoholic strength by volume of 80% Volume or higher	liter	0.56	231 Million	China, Korea, Netherlands	0.57	Pakistan, Vietnam	122 Million
Mangoes	Tons	726	40 Million	UAE, UK , Oman	2980	Australia, Peru, Thailand	30 Million
Sweet Biscuits	Kilogram (Kg)	2	17 Million	Afghanistan, UAE, Mauritius	4.6	Indonesia, Denmark, Malaysia	305 Million
White Crystalline Cane sugar (Granulated Sugar)	Kilogram (Kg)	0.44	230 Million	Afghanistan, Djibouti, Saudi Arabia	0.44	Korea, Thailand, Guatemala	301 Million
Frozen boneless bovine meat	Kilogram (Kg)	3.48	26 Million	Vietnam, UAE, Saudi Arabia	5.42	Australia, Uruguay, Brazil	1.99 Billion

7 Other Recommendations

- Implementation approaches should be innovative that ensure scale, consistency supply and quality at respective target area that provide space for technology, engaging private sector and attract private investment, ensuring B2C relationship.
- CIG integrated model need to encourage to not only provide economic uplift of landless farmers and also create opportunities' for young agriculture graduates to make partnership/service arrangements with CIG for agri technological innovations
- Approach should be to ensure the enabling eco-system so target beneficiary benefitted and also provide protection to falling in poverty.
- Engaging private sector for imparting training that ensure the better understanding of various aspects of markets.
- Grocery stores duly enabled with technology and meat will be high priority that provide jumpstart and have good revenue stream. Based on already collected data/beneficiary data should be further triangulated that provide basis for forecasting essential for making effective roll out strategy
- Implementation should be private sector led for sustainability and economic empowerment.
- Tracing of assets and human resources with improved technical capacities through an online Information Management system.
- An active MIS and placement services for trained youth to be linked with national and international employers.

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