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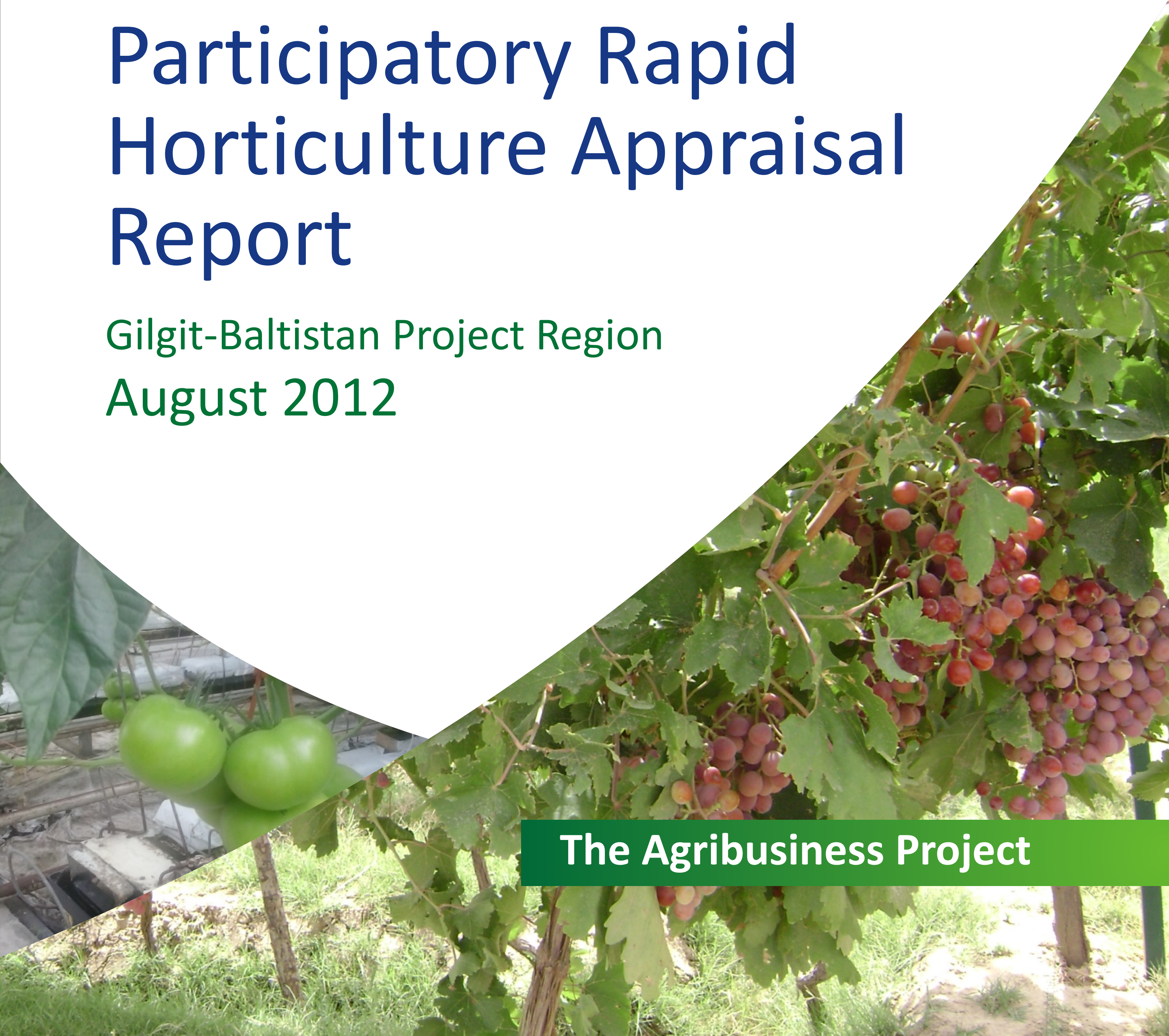
Participatory Rapid Horticulture Appraisal Report

Gilgit-Baltistan Project Region

August 2012



The Agribusiness Project

Abbreviations

ASF	Agribusiness Support Fund
FGD	Focused Group Discussion
FSC&RD	Federal Seed Certification and Registration Department
GB	Gilgit-Baltistan
PCSIR	Pakistan Council for Scientific and Industrial Research
PRHA/LA	Participatory Rapid Horticulture Appraisal/Livestock Appraisal
USAID	United States Agency for International Development

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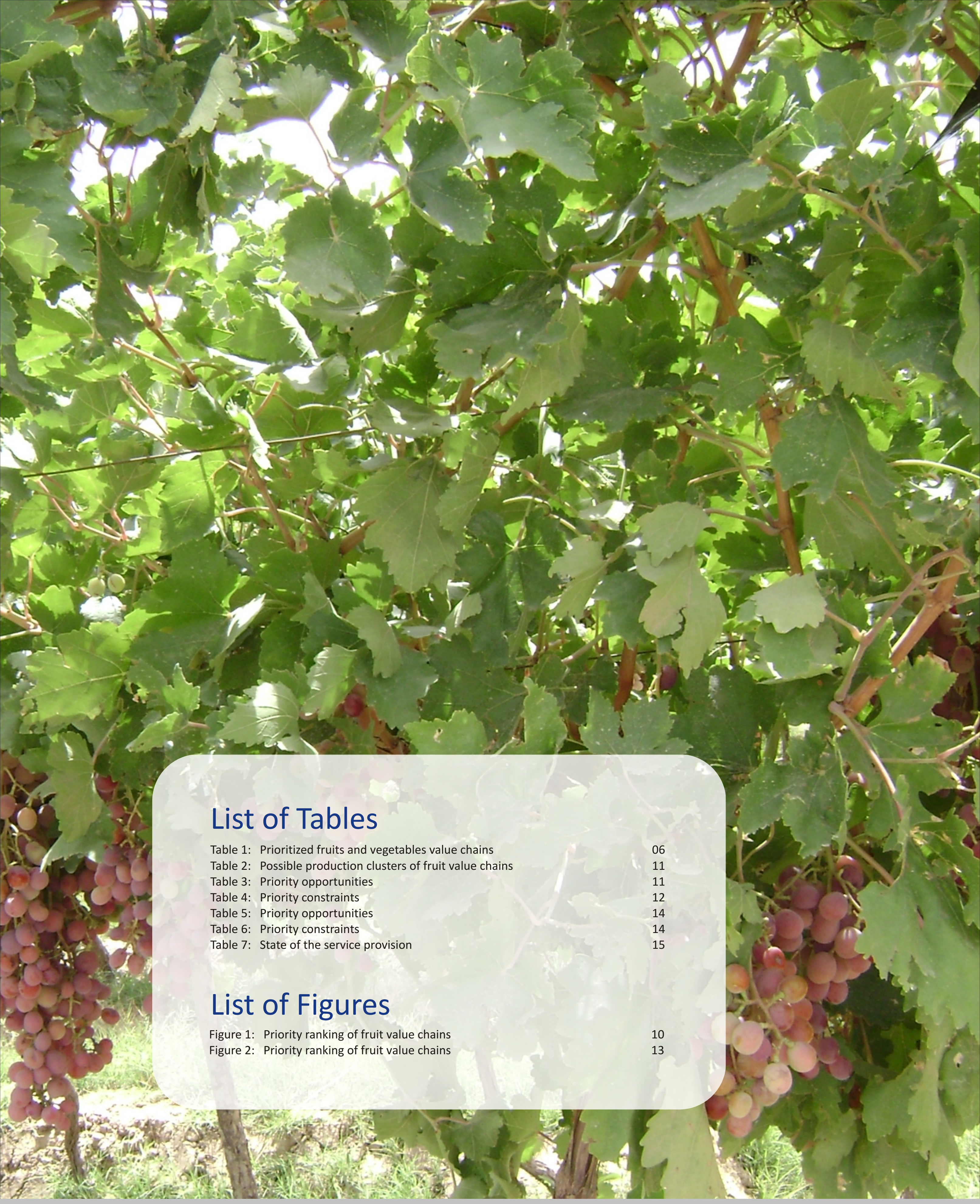

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Executive Summary

The Agribusiness Project is an initiative funded by United States Agency for International Development (USAID) and is being implemented by Agribusiness Support Fund (ASF) in collaboration with international and national organization. The overall goal of the Project is to support improved conditions for broad-based economic growth, create employment opportunities and contribute to poverty alleviation through increase in competitiveness of horticulture and livestock value chains in partnership with all stakeholders. During the first year of this five-year (2011-16) project, a preparatory program was undertaken to gauge the potential of the sub-sector and to prioritize value chains in the context of various project regions including the project region of Gilgit. Findings from Participatory Rapid Horticulture Appraisal (PRHA) will enable the project to identify and prioritize; horticulture and value chains, opportunities, constraints; and state of the business development services to provide required basis for focusing project interventions. Gilgit Project Region comprises of seven districts of Gilgit-Baltistan.

Within the framework of the cluster and value chain approach, a two-prong approach was adopted, first preparation for PRHA exercise in the field and second to collect secondary data and develop appropriate tools for quantification of factors so that it can be measured on a scale for ranking/prioritization. This report pertains to work completed based on both secondary data and primary appraisals of horticulture sub-sector.

The PRHA methodology provides for probing, analysis, and validation of information as they were unfold during the field work. Seven factors were applied in the prioritization of value chain. These include; (i) extent of employment generation; (ii) commercial worth; (iii) percentage of small farmers associated, (iv) women involvement; (v) households associated with the value chains; (vi) understanding growth potential; and, (vii) vulnerability of the concerned value chains. Covering 50% of the districts, the exercise was undertaken in the randomly selected settlements/villages within each cluster/region. Each focus group consisted of 10-15 stakeholders, a representative sample of sub-sector. In each district, 2-3 FGDs were carried out. The analysis of secondary data is based on the district-wise data on area and production for last ten years which was collected and tabulated as time series data.

Based on the analysis of both secondary and primary information, it can be concluded that apricot, apple, grapes, cherry and potato are the priority value chains in Gilgit Project Region. Apricot is the top most prioritised value chain. It has 70% women involvement and provides livelihood to 93.5% small farmers. Apple is the second prioritised value chain of the region and about 74% of its produce is commercialised. It provides employment to 66% small farmers. About 20.67% increase in growth of walnut has been over the past five years and 79.44% of the small farmers are associated with walnut production. This fruit is commercially consumed both in fresh form and can be preserved for consumption during the rest of the year. Cherry production has grown upto 43% over the last 5 years. It has great potential as about 88% of its produce is commercialised. Potato contributes to 46% employment. Of those employed approximately 85% comprise of small farmers. About 78% of its produce is commercialised.

A number of opportunities exist, in the region, which can catalyse the development of the fruits sub-sector. Of them the most important are:

- Capacity Building and trainings
- Cold storage
- Processing technology including solar drying
- Dehydration plants
- Plastic Tunnels
- Inputs Supply stores
- Certification
- National and International markets
- Packaging

[1] Gilgit, Ghizer, Hunza Nagar, Astore, Diamer, Ghanche, Skardu

These opportunities can be further reinforced through the project interventions leveraged by primary-sector investments provided that a holistic and integrated approach is applied. The opportunities that can be explored for the development of vegetables sub-sector are:

- Throughout the country demand for fresh and dry vegetables
- Worldwide demand of potato
- Processing

These opportunities are cross-cutting and investment in these will generate employment and income generation opportunities. Some of the constraints hampering the development of horticulture sector are:

- High dependency on middlemen
- Inadequate storing / packaging facilities/ technical expertise
- Limited financial resources
- Unavailability of quality seed/inputs
- Weak linkages with FSC&RD and Agri Reasearch Department
- Weak linkages with top national Markets and processing units
- Unavailability of suitable transportation facility
- Perishability of some produces increases the risk
- No pulping industry at local level

Most constraints are cross-cutting and generic in nature which provide information on the overall sub-sector and some of the constraints can be considered as opportunities for investment by the project provided that willingness in the private sector for investment exists.

The availability and quality of business development services is important for the overall development of any sub-sector. In the region mostly the linkages between service providers and users can be termed as weak to medium. To be effective in enhancing profitability of fruit growers, there is a need to build confidence and develop strong linkages of agribusiness with service providers.

Marketing of fruits and vegetables varies from commodity to commodity; however, generally, most of the produce is channeled to local and country markets. Some of the national markets relevant for the regional producers include Rawalpindi, Islamabad, Lahore and Peshawar demand for fruits and vegetables do exist in the international markets but require certification and other export requirements. Marketing of fruits and vegetables is characterized by the presence of numerous intermediaries performing at various distribution stages, thus adding to marketing costs and directly affecting the price received by the farmer and paid by the consumer. In general, intermediaries dominate the system and there is little direct market participation of the farmers, particularly small farmers.

Absence of enabling policies favoring growers (particularly small farmers), ineffective approaches towards improving and sustaining product quality, and lack of reliable updated market information also impede farmers' ability to take maximum benefits they deserve. Lack of market information system has increased the complexity of the marketing system on one hand and brought less return to the farmers on the other. Exports endeavors need to be supported by a “grow-for-export” strategy.

Introduction

The Agribusiness Project is an initiative funded through the financial assistance of the American People implemented by United States Agency for International Development (USAID) in collaboration with Agribusiness Support Fund (ASF). The overall goal of the Project is to support improved conditions for broad-based economic growth, create employment opportunities and contribute to poverty alleviation through increase in competitiveness of horticulture and livestock value chains in partnership with all stakeholders. Specific objectives of the project are to; (i) strengthen the capacity in horticulture and livestock value chains to increase sales to domestic and foreign markets; (ii) strengthen the capacity of smallholders and farmer enterprises to operate autonomously and effectively; and, (iii) increase agriculture efficiency and productivity through adoption of new farming techniques and technological innovation among targeted beneficiaries.

During the first year of this five-year project, a preparatory program has been launched to gauge the potential of the sub-sector and to prioritize value chains in the context of various project regions. The project planned and conducted Participatory Rapid Horticulture Appraisal/Livestock Appraisal (PRHA/LA) in all the project regions throughout Pakistan. Findings from PRHA/LA will enable the project to identify and prioritize; horticulture and livestock value chains, opportunities, constraint; and state of the business development services to provide required basis for focusing project interventions.

The reports articulate, for each region separately to enable better targeting and focusing project interventions. This report covers the project region of Gilgit-Baltistan. Within the framework of the cluster and value chain approach, a two-prong approach was adopted, first preparation for PRHA exercise in the field and second to collect secondary data and develop appropriate tools for quantification of factors so that it can be measured on a scale for ranking/prioritization. This report pertains to work completed based on both secondary data and primary appraisals.

The Region

Fruits and vegetables possess a significant potential in Gilgit-Baltistan (GB) where this sub-sector shows a major potential for economic growth and development. The GB Project Region (PR) under the project consists of 7[1] districts and stretches from central to north and east of the province. The high-mountain valleys of Gilgit-Baltistan (GB) are famous for producing a diverse nature of delicious fruits, more particularly apricots. For centuries, the farmers of the region have been practicing horticulture as part of their livelihoods management strategy. Fruits and vegetables remained important food supplements in addition with a vital source of minerals, fiber and antioxidants. Dried fruits and vegetables were an important source of household food supplies in the long winter period. Many scholars have linked the mineral-rich diet of the region with the famed longevity of its people.

With the formal opening of the Karakoram Highway (KKH) in 1978, GB started to produce small market-bound horticultural surpluses. During the subsequent two decades (1980s, 1990s), the local economy began diversifying from the subsistence tradition of Livelihood to the orientation of market-dependence. The horticulture sector thus became an integral source of cash income for small farming families. Over the past 25 years, the government departments, the United Nations agencies, particularly the Food and Agriculture Organisation (FAO), the Aga Khan Rural Support Programme (AKRSP), community based organizations (CBOs), and the private sector played major roles in fostering emergence of horticulture sector in GB.

Construction of the KKH and investments by the government, communities in the construction of valley and link roads, the constraints of physical access began to improve that put a limit on development of high value horticulture. In the current context, with improving accessibility and further plans for new and planned improvements in the road, air and telecommunication infrastructure and services, the role of horticulture in the local economy is expected to increase manifolds. Gilgit-Baltistan has a natural advantage with the rest of the country for supplying many high value fruits and vegetables during off-season.

1. Gilgit, Ghizer, Hunza Nagar, Astore, Diamer, Ghanche, Skardu

PRHA activity in district Ghizer

Methodology and Approach

The Participatory Rapid Horticultural Appraisal (PRHA) is one of the effective methodologies for exploring and gathering topical and focused information about a sub-sector system. Its advantages are to gather and analyse market information in a relatively short period of time employing less resource. The methodology provides for probing, analysis, and validation of information as they unfold during the field work.

The PRHA exercise allowed for a quick assessment of the sub-sector, including prioritization of value chains, identifying and prioritizing opportunities and relevant constraints impeding the realization of the opportunities as well as an assessment of the current state of the services provided by various facilitators to agribusinesses in the region. Further, linkages of the sub-sectors with local and national markets were also explored. The appraisal was conducted with a view to prepare the stage for focusing project intervention as well as for the project baseline and value chains benchmarking studies. The PRHA results will enable The Agribusiness Project to prioritize value chains (validating the cluster approach), set benchmarks, and support establishment of a database to generate primary data on key indicators to be maintained and updated during the course of project implementation and afterwards supporting the planning, monitoring, evaluation and communication functions of the project.

The analysis of secondary data is based on the district-wise data on area and production for last ten years which was collected and tabulated as time series data. This covers seven districts of GB. The district-wise secondary data on area, production for apricot, apple, walnut, pine nut, almond, mulberry, cherry, apple and grapes was tabulated from year 2005 to 2010. The major factors considered as important aspect for prioritization included; (i) the growth % rates share of commodity in world production. GB Project Region share in national production; (ii) share in GB (iii) productivity gap; (iv) employment intensity; and, (v) export potential based on incentive structure.

Focus Group Discussion

Primary appraisals were based on quantification of factors so that it can be measured on a scale for ranking/prioritization. Seven factors were applied in the appraisal including; (i) extent of employment generation; (ii) commercial worth; (iii) percentage of small farmers associated, (iv) women involvement; (v) households associated with the value chains; (vi) understanding growth potential; and, (vii) vulnerability of the concerned value chains.

The appraisal was carried out by the project region with the assistance of the project Monitoring, Evaluation and Communication unit and consultants retained to guide the team throughout the implementation of the appraisals. Covering 50% of the districts, the exercise was undertaken in the randomly selected settlement/villages within each cluster/region. Each focus group consisted of 10-15 stakeholders, a representative sample of sub-sector. In each district, 2-3 FGDs were carried out. The analysis of the information was consolidated at the project region level to draw conclusion and inferences.

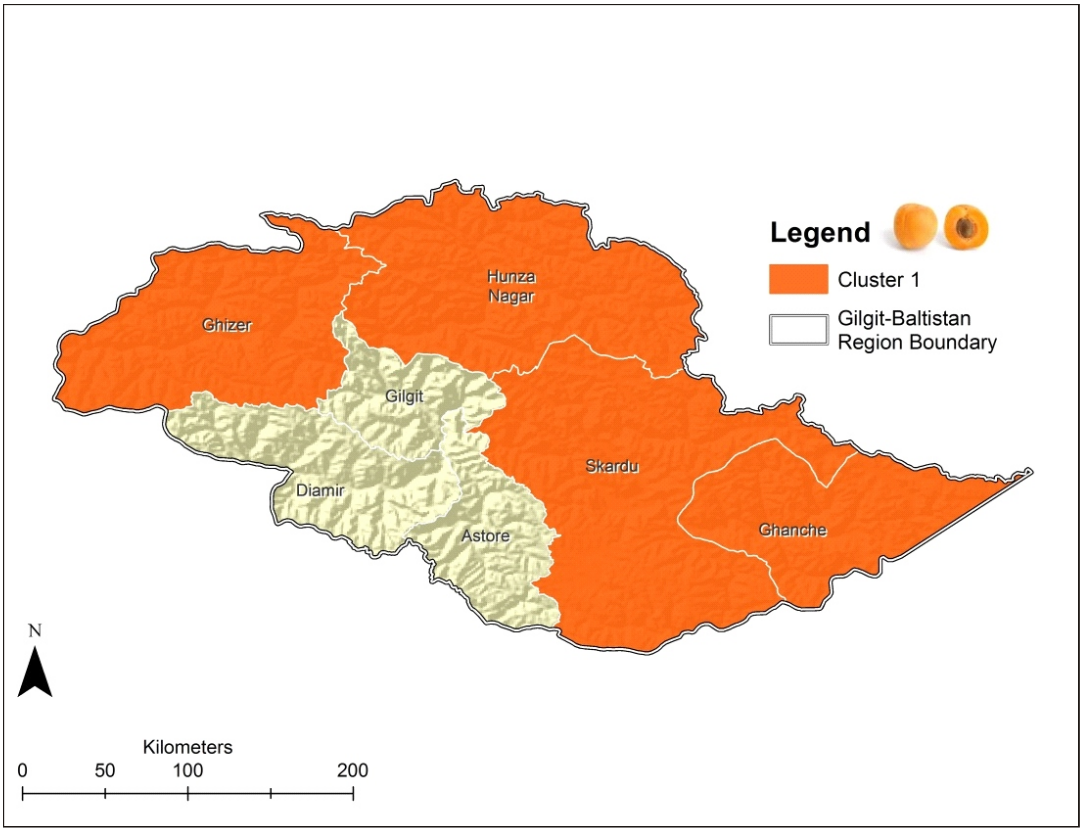
Based on the analysis of both secondary and primary information, it can be concluded that apricot, apple, grapes, walnut, cherry and potato are the priority value chains in the region of Gilgit. The key clusters for the priority sub-sectors, with their production and share percentage in the province and country, are given below in Table 1.

Table 1: Prioritised fruits and vegetables value chains

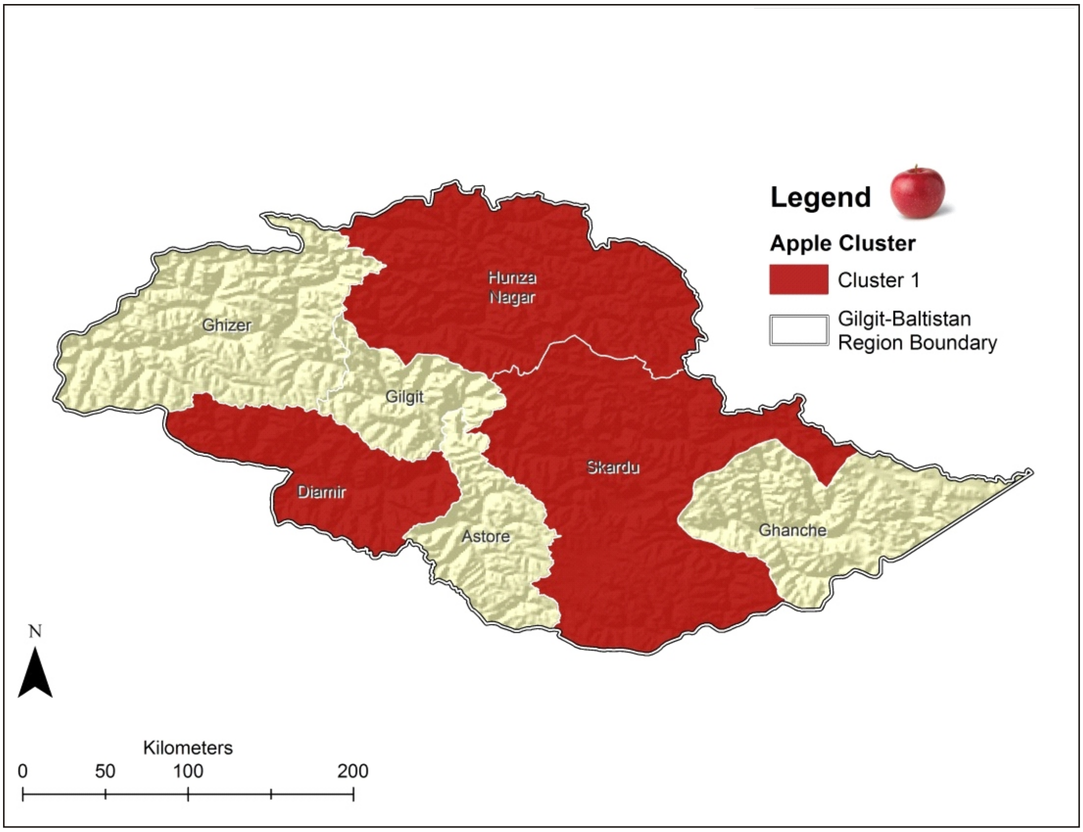
S.#	Priority Value Chains	Clusters (Mention Districts)	Total Production (Tons)	Percentage share of the Province	Percentage share of the Country
1	Apricot	Ghanche, Hunza-Nagar, Ghizer	100,790	88	52
2	Apple	Hunza-Nagar, Diamer	12,639	65	3
3	Grapes	Gilgit, Diamer, Astore, Ghizer	3,953	69	61
4	Cherry	Gilgit, Hunza-Nagar	1,335	56	-
5	Potato	Hunza-Nagar, Astore, Ghizer	91,213	68	3

Source: DOA 2009

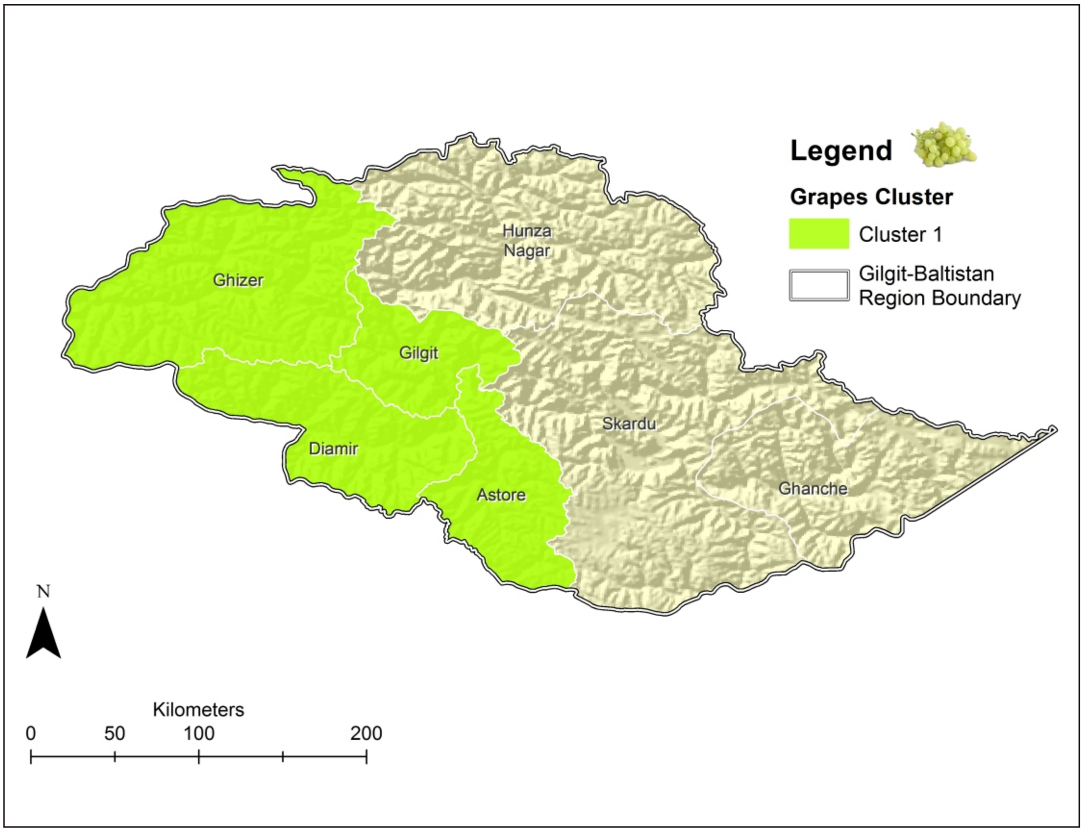
Apricot Clusters



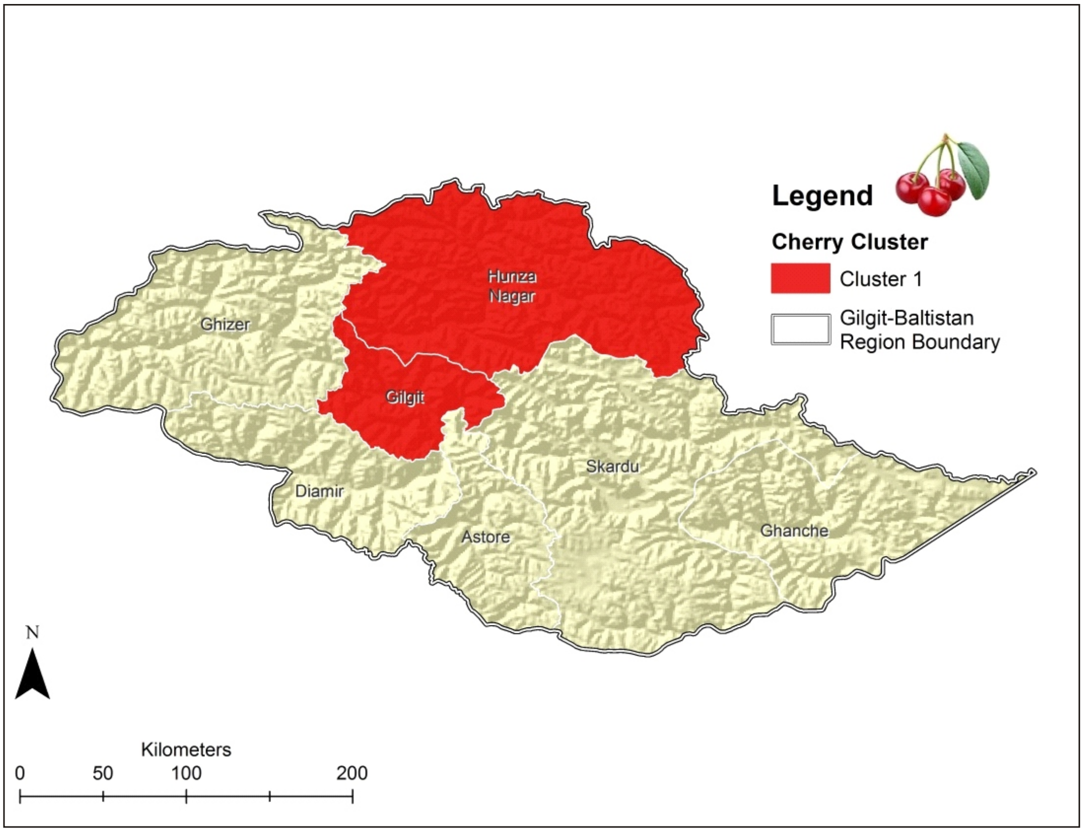
Apple Clusters



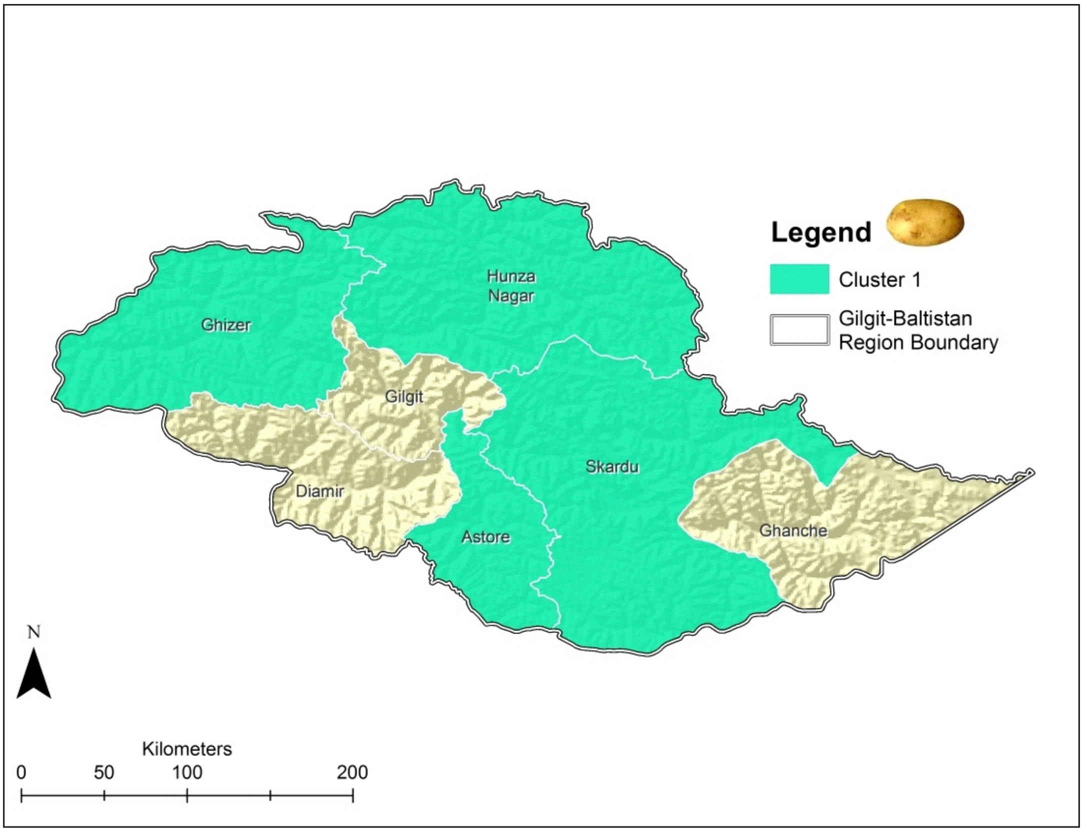
Grapes Clusters



Cherry Clusters



Potato Clusters



Appraisal of Fruit Sub-Sectors

Prioritization of value chains

The comparative appraisal is based on the composite index calculated based on the seven factors used in the grid analysis. The analysis of fruits places apricot as the priority followed by walnut, almond, cherry and apple in the region.

Apricot is grown in Skardu, Ghanche, Hunza Nagar, and Ghizer. Results from FGDs showed that growth rate of apricot over the past five years is highest among the value chains; its growth is rising in different areas of GB; however, its growth in Diamer and Astore district is negligible. Apricot offers 70% women involvement and provides livelihood to 93.5% to small farmers. Losses in apricot have been observed to be 36.5%, which can be minimized using improved management practices. It has high potential to be marketed at the national and international levels.

Walnut is grown in Gilgit, Diamer and Astore districts 20.67% increase in growth has been recorded in walnut during the past five years, 79.44% of the small farmers are associated with walnut production. This fruit is commercially consumed both in fresh form and can be preserved for consumption during the rest of the year.

Pine nut is third on the priority ranking index. It is wild and produced in Diamer District of GB and the third highest level (23.33%) of employment among the top ranking value chains. Due to its longer shelf life and hard shell, losses in it have been observed to be very meagre.

Next on the priority index is **almond**. It is produced in districts of Gilgit, Hunza Nagar, Ghizer only. As shown in the table below, growth rate of almond has been estimated at 25.38%, which is third highest percentage among the top ranking five value chains of GB Project Region.

Based on the analysis of both secondary and primary information and growth potential, it can be argued that apricot, cherry, grapes, apple and walnut are the priority value chains in the region of Gilgit-Baltistan. The key clusters for the priority products are given in Figure 1 below.

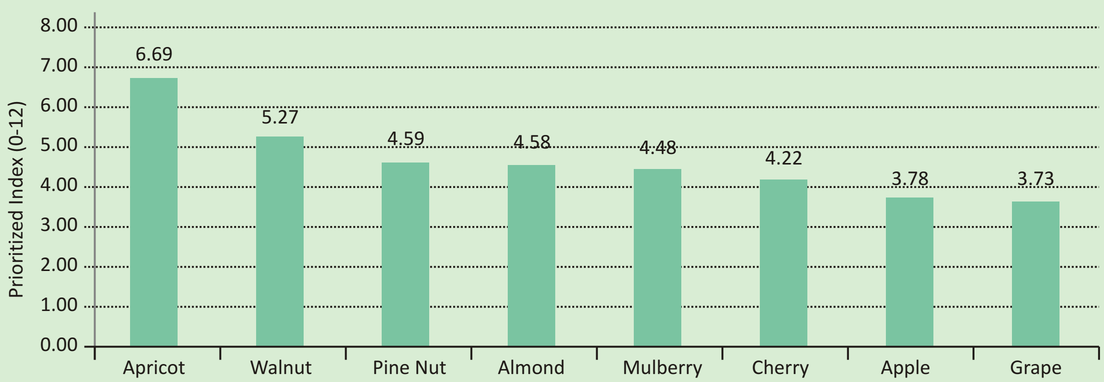


Figure 1: Priority ranking of fruit value chains

Source: PRHA activity, June 2012

PRHA respondents prioritized following value chains which can be seen in Table 2 below.

Table 2: Possible production clusters of fruit value chains

Priority sub-sectors	Clusters/Districts	Total Production of the Cluster (Tons)	Percent share in the Province	Percent share in the country
Apricot	Skardu, Ghanche, Hunza-Nagar, Ghizer	100790	88	52
Cherry	Gilgit, Hunza-Nagar	1335	56	-
Apple	Skardu, Hunza-Nagar, Diamer	12639	65	3
Grapes	Gilgit, Diamer, Astore, Ghizer	5710	69	9

Source: PRHA activity, June 2012

Prioritized Opportunities

For prioritization of opportunities, paired ranking tool was used. Table-3 provides self-explanatory list of opportunities as prioritized/ranked by the participants during the FGDs.

The study reveals that a number of opportunities exist, in the region, which can catalyse the development of the sub-sector. Of them the most important are the trainings, cold storage and processing technologies, dehydration and certification etc. These opportunities can be further reinforced through the project interventions leveraged by private sector investments provided that a holistic and integrated approach is applied.

Table 3: Priority opportunities

Priority Opportunities	Rank
Capacity building and trainings	1
Cold storage	2
Processing technology including solar drying	3
Dehydration plants	4
Plastic tunnels	5
Inputs supply stores	6
Certification	7
Markets	8
Packaging	9

Source: PRHA activity, June 2012

Prioritized Constraints

Constraints to fruit value chains were also identified and prioritized by participants during the FGDs on the basis of their potential as high, medium or low. Here is a list, which is self-explanatory.

The key constraints hindering the development of fruit sub-sector are listed in Table 4 below . Those ranked as high are of greater intensity. Major constraints include weak linkages with public /private sector, national markets, transportation issue, and perishability/cold storage which will provide rationale for value adding steps.

Table 4: Priority constraints

Priority Constraints	Intensity
Inadequate storing/packaging facilities	High
Inadequate technical expertise/financial resources	High
Unavailability of quality seed/inputs	High
Weak linkages with FSC&RD and Agri Reasearch Department	High
Weak linkages with top national Markets	High
Unavailability of suitable transportation facility	High
Perish ability of the some produces increases the risk	High
High dependency on middlemen	Medium
Very few cold storage facilities	Medium
weak linkages with Processing units	Medium
No pulping industry at local level	Medium

Source: PRHA activity, June 2012

Appraisal of Vegetables Sub-Sectors

Prioritization of value chains

On the priority scale, peas and potato are the leading commodities followed by peas, tomato, capsicum, cucumber, chinese cabbage and others. The priority ranking of vegetables based on the rapid appraisal is shown in Figure 2 below.

Potato and peas are grown in Skardu, Astore, Ghizer and Diamer Districts. Capsicum is grown in Diamer District which are mostly for commercial purposes. Tomato, chinese cabbage, cucumber are grown in Gilgit District partially for commercial purposes as well as for domestic consumption. While potato and peas provide leading employment opportunities. Higher women involvement has been recorded in capsicum as compared to other top ranking vegetables.

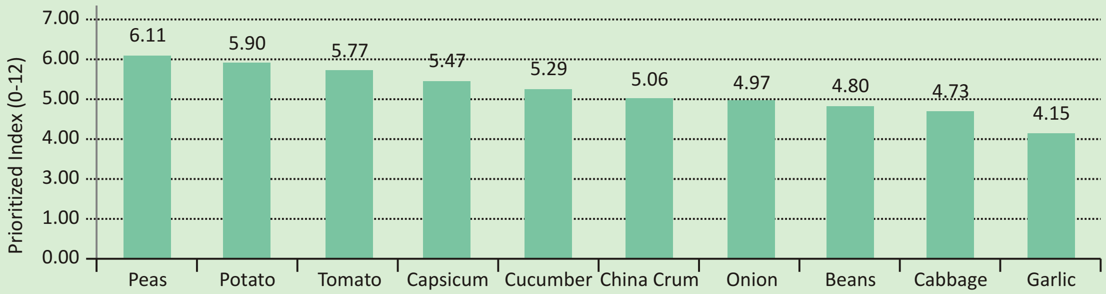


Figure 2: Priority ranking of fruit value chains

Source: PRHA activity, June 2012

PRHA activity in district Ghizer

Prioritized Opportunities

Opportunities for vegetables related value chains were scored and ranked during the exercise.

Amongst the top opportunities are the growing demand for fresh and dry vegetables both locally and nationally. Great demand of seed potato produced in GB exists in plains. Potato has a great demand by multinationals for chips and snacks making. Likewise, existence of PCSIR and some private processing plants are a great opportunities that needs to be exploited. PCSIR has all modern technology, ideas, research, fruits/vegetables processing techniques, training capacity but on extension side a gap has been observed between producers and Pakistan Council for Scientific and Industrial Research (PCSIR). So this is an opportunity to bridge this gap by linking producers with PCSIR to fully exploit the presence of PCSIR. As a result of PRHA activity prioritized opportunities in vegetable sector can be seen in Table 5.

Table 5: Priority opportunities

Priority Opportunities	Rank
Down Country Market Demand for fresh and dry Vegetables	1
Demand of multicnationals for potato	2
PCSIR	3
Processing	4

Source: PRHA activity, June 2012

Prioritized Constraints

Constraints to vegetables value chains were also identified and prioritized by participants during the FGDs on the basis of their potential as high, medium or low. Here is a list, which is self-explanatory.

The key constraints hindering the development of vegetales sub-sector are listed in Table 6 . Those ranked as high are of greater intensity.

Major constraints include weak linkages with public/private sector, national markets, transportation issue, and perishability/cold storage which will provide rationale for value adding steps.

Table 6: Priority constraints

Priority Constraints	Intensity
Inadequate storing/packaging facilities	High
Inadequate technical expertise/financial resources	High
Unavailability of quality seed/inputs	High
Weak linkages with FSC&RD and Agri Reasearch Department	High
Weak linkages with top national Markets	High
Unavailability of suitable transportation facility	High
Perish ability of the some produces increases the risk	High
High dependency on middlemen	Medium
Very few cold storage facilities	Medium
weak linkages with Processing units	Medium
No pulping industry at local level	Medium

Source: PRHA activity, June 2012

State of the Services Provision

The availability and quality of business development services is important for the overall development of any sub-sector. The situation with regard to services provision for both fruits and vegetables was appraised through focus group associations. In most cases the linkages between service providers and users were termed as weak to medium. To be effective in enhancing profitability of fruit growers, there is a need to build confidence and develop strong linkages of agribusiness with service providers. As a result of PRHA activity, following service providers have been identified. The list of service providers can be seen in Table 7 below

Table 7: State of the service provision

Services Providers	Linkages	Paid/Free	Services Provided
Market Agents	Medium to strong	Cash & Credit	Marketing and fixing of prices and supply of inputs
NGO's	Medium to strong	Free and cash both	Trainings and information, consultancy and timely supply of inputs on subsidized cash payment
Private seed, agrochemical, packaging and fertilizer companies	Medium to strong	Cash	Provide inputs, timely supply of inputs on cash payment, awareness of the farmers
Agriculture Departments (Research, Extension, Water Management etc.)	Medium	Free	Awareness, guidance and information regarding seeds and improved agriculture practices.
Banks (ZTBL)	Medium		
Exporters	Medium		Collect the produce from the farm for local market (mandi)
Commercial Banks	Weak	Paid	Finance, training and information

Source: PRHA activity, June 2012

State of Market Linkages

Marketing of fruits and vegetables varies from commodity to commodity; however, generally, most of the produce is channelled to local and country markets. Some of the national markets relevant for the regional producers include Rawalpindi, Islamabad, Lahore and Peshawar. Demand for fruits and vegetables do exist in the international markets but that needs certification.

Marketing of fruits and vegetables is characterized by the presence of numerous intermediaries performing at various distribution stages, thus adding to marketing costs and directly affecting the price received by the farmer and paid by the consumer. The domestic market players include farmers, commission agents, contractors, wholesalers, inter-market traders and many other retailers. In general, intermediaries dominate the system and there is little direct market participation of the farmers, particularly small farmers.

The existing marketing operations are performed by traditional way such as, rough harvesting and handling methods, rudimentary grading, and poor quality packing, which reduces its marketability, leading to lower prices in the market. The non-availability of refrigerated lorries/trucks to transport vegetables and fruits from farm to distant markets increases the spoilage rate and reduces the bargaining position of the sellers.

Absence of enabling policies favouring growers (particularly small farmers), ineffective approaches towards improving and sustaining product quality, and lack of reliable updated market information also impede farmers' ability to take maximum benefits they deserve. Lack of market information system has increased the complexity of the marketing system on one hand and brought less return to the farmers on the other. Strengthening market information system can play vital role in increasing returns to the growers of fruits and vegetables, which can ultimately improve the living standard of the rural population and bring prosperity in the country. Exports are considered as a means of surplus disposal mainly channelled from the wholesale markets. Exports endeavours need to be supported by a "grow-for-export" strategy. Again, a well-established market information system can play vital role in this connection.

Conclusion

The region represents a special case for opportunity and constraints to expand horticulture exports. The key constraints that are hampering the abilities of the sector include poor quality of the produce often failing to meet export standards; perishability of produce that requires efficient handling, low level of value addition and processing and marketing, resultantly poor performance of the sub-sectors as a whole.

Based on the PRHA, the following summary conclusions can be drawn:

- Apple, apricot, walnut, cherry, grapes and potato are potential value in terms of volumes, value and diversity while other products can be promoted as niche market opportunities.
- For fruit and vegetables, growth in volumes coupled with quality improvement and value addition will help compete in the national and international markets.
- Post-harvest losses is an opportunity to be worked on by curtailing it as much as possible.
- Lack of post-harvest infrastructure (cool chain, pack houses, poor packaging etc.) and logistics for maintaining the quality of the highly perishable fruits that carries poor physical market access, increasing input prices, poor coordination among stakeholders, lack of economies of scale and traditional practices are some of the constraint that impact the production of both fruit and vegetables.

References

The secondary data in this report has been taken from and estimated based upon data given with the following sources:

1. Agriculture Statics of Pakistan
2. Economic Survey of Pakistan
3. FAO Database

4. **The Growth % rates**

4.1 Crops area and production (by districts) 2004-2005 to 2008-2009, Government of Pakistan, Ministry of Food, Agriculture and Llivestock (MINFAL)

5. **Share of commodity in world production**

5.1 Crops area and production (by districts) 2004-2005 to 2008-2009, Government of Pakistan, Ministry of Food, Agriculture and Livestock (MINFAL)

5.2 Agriculture Statistics of Pakistan, 2009-10 and previous publications

5.3 FAO Database 2012 accessed through internet

6 **Region Share in National Production**

6.1 Crops area and production (by districts) 2004-2005 to 2008-2009, Government of Pakistan, Ministry of Food, Agriculture and Livestock (MINFAL)

6.2 Agriculture Statistics of Pakistan, 2009-10 and previous publications

7 **Region Share in the Province**

7.1 Crops area and production (by districts) 2004-2005 to 2008-2009, Government of Pakistan, Ministry of Food, Agriculture and Livestock, (MINFAL)

7.2 Agriculture Statistics of Pakistan, 2009-10 and previous publications

8 **Productivity Gap**

8.1 Crops area and production (by districts) 2004-2005 to 2008-2009, Government of Pakistan, Ministry of Food, Agriculture and Livestock, (MINFAL)

8.2 FAO Database 2012 accessed through internet

9 **Employment Intensity**

Potential for labor per acre calculated as percentage of labor days of wheat (ADB) plus index derived by PRHA results at field survey in the region and information gathered from various reports.

10 **Export Potential as Measured by Incentive Structure**

FAO Database: The difference between export value of Pakistani produce and world export value (five years average).

(Annexure are available at The Agribusiness Project Office Islamabad, and can be provided upon request for reference)

www.agribusiness.org.pk