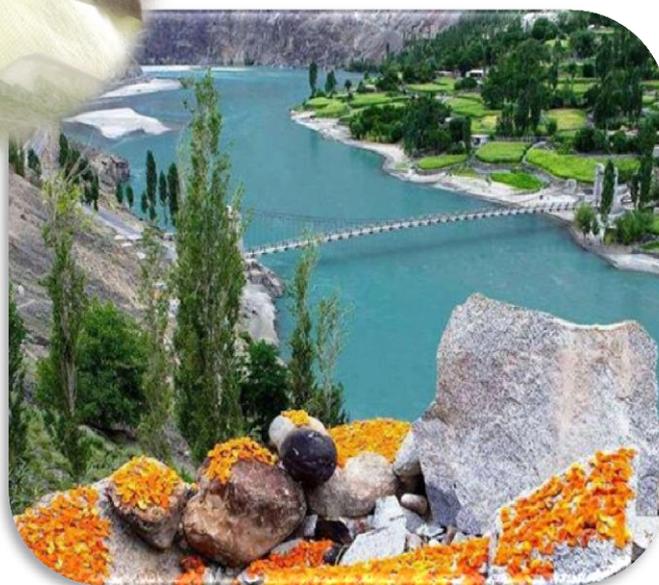


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# THE AGRIBUSINESS PROJECT



## Annual Progress Report-3

(October 1, 2013 to September 30, 2014)

October 30, 2014

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October 30, 2014

Cooperative Agreement No. AID-391-A-12-00001

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### **DISCLAIMER**

*The authors' views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.*

ABBREVIATIONS AND ACRONYMS

ASF	Agribusiness Support Fund
BDSPs	Business Development Services Providers
BRC	British Retail Consortium
COP	Chief of Party
DAP	Detailed Activity Plan
EA	Environmental Assessment
EGA	Economic Growth and Agriculture
EMMP	Environmental Monitoring and Mitigation Plan
EPA	Environmental Protection Agency
FEG	Farmer Enterprise Group
FSC	Farm Services Center
GAP	Good Agricultural Practices
GB	Gilgit Baltistan
GEC	Grants Evaluation Committee
GIS	Geographic Information System
HACCPs,	Hazard Analysis Critical Control Points
HV/OSV	High Value Off-Seasons Vegetables
ICT	Islamabad Capital Territory
IFS	International Featured Standards
IMIS	Integrated Management Information System
IP	Implementing Partner
ISO	International Standard Organization,
JAA	J.E.Austin Associates
KPK	Khyber PakhtunKhwa
LOP	Life of Project
M&E	Monitoring and Evaluation
MSMEs	Micro, small and medium enterprises
MSU	Management Support Unit
NGO	Non-Government Organization
PERSUAP	Pesticide Evaluation Report and Safe Use Action Plan
PRC	Planning and Review Committee
PRHA	Participatory Rural Horticultural Appraisal
PRLA	Participatory Rural Livestock Appraisal
SME	Small and Medium Enterprises
TA	Technical Assistance
TAP	The Agribusiness Project
USAID	United States' Agency for International Development
USG	United States Government
UVAS	University of Veterinary and Animal Sciences
VCP	Value Chain Platform

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## 1 EXECUTIVE SUMMARY

The following is a summary of the most significant achievements during FY 2014 that will contribute toward the achievement of the development assistance as well as project objectives.

- i. During the reporting period, a total of 2481 new jobs were created as a result of implementation of activities in high value off-seasons vegetables (HVOSV), grapes, apricot, seed potato value chains. The activities contributed towards new job creation include transformation support for production of HV/OSV through tunnel tunnels, structured farming and open field, establishment of vineyards, small solar tunnel dryer for apricot drying and support for construction of potato cellars for seed potato storage.
- ii. The project supported participation of Pakistani horticulture and meat enterprises in the international horticulture and livestock marketing events. As a result of their participation and business to business meetings with large buyers, 23 companies had exported fruit, vegetables and meat products worth USD 10.2 million to various export destinations. The total value of exports achieved as of September 2014 was USD 20.52 million.
- iii. The value of private sector leverages during the reporting year was USD 5.46 million while the total value of private sector leveraged as of September 2014 is USD 6.27 million.
- iv. The agribusinesses that participated in project activities, achieved incremental sales revenue of USD 12.39 million, while the total sales revenue comes to USD 24.04 million.
- v. A total of 6,926 micro and small enterprises received business development services and were linked to larger-scale firms during the reporting year as a result of USG assistance, while the total micro and small firms linked to large scale firms comes to 14,265.
- vi. A total of 10,334 beneficiaries from seven value chains have been trained in technical and enterprise development trainings during FY 2014, whereas 12,815 rural households have been directly benefited from USG interventions. 2055 hectare new land was brought under improved technologies and management practices as a result of project interventions in selected value chains during the reporting period.
- vii. Under the international certification program, 23 enterprises (7 Global GAP, 10 HACCP, 5 ISO and 1 Halal) have completed certification process and received certifications, enabling these enterprises to access international markets for marketing of their produce. The certification program was successfully completed.
- viii. The female beneficiaries in the project activities accounts for 27% during reporting year with 34% overall female participation in project activities as of September 2014.
- ix. Under the international certification component of project, 23 enterprises have completed certifications and have been issued certifications, enabling them to access international markets for sale of their produce.. Overall 45 certifications have been successfully completed.
- x. The key progress achieved in the prioritized eight value chains is as under:-
  - a. **Apricot Value Chain**
    - Established 20 Apricot orchards on 10 hectare of land at Gilgit Baltistan. The plants were purchased from certified fruit plant nursery, thus creating linkages with large scale firms.
    - 800 beneficiaries have installed structure of Apricot solar tunnel dryers. 140 farmers have started drying of apricot and other fruit and vegetables.
    - 766 apricot famers have been trained on post-harvest handling, while 627 of these small apricot farmers have also been trained on enterprise development.

- The project facilitated linkages of producers with the large buyers/exporting companies. M/S North Pole Fruits Traders (Pvt) Ltd. and M/S Organo Botanica Fruit Processing Company have purchased 15 tons of dried apricot from 252 apricot farmers worth USD 27,017.
- b. **Banana Value Chain**
- The project engaged the services of an Australian company namely “Global Fruit”. The company is providing technical inputs in program design and implementation.
  - The project trained 40 producers/processors in a two technical training on Banana bunchy top virus control and management held and pre-post-harvest practices.
  - M/S Pir Ali Shah Fruit Farm has been certified in Banana Global GAP. 10 persons of farm trained.
  - The project introduced improved agriculture practices on 40 acres of land at 8 model farms.
  - A total of 653 Banana farmers have been trained in enterprise development.
  - 62 Banana growers have been trained on Integrated Pest Management as per provision of the project’s Environmental Assessment report.
- c. **Red Chilies Value Chain**
- 715 farmers provided with geo-textile sheet for drying of red chili. 491 of these chili farmers have also received harvest bins for picking of red chili.
  - 1022 farmers have been trained on red chili crop production/pre-harvest practices, while 990 of these farmers have also been trained on post-harvest handling in collaboration with Sindh Agriculture University, Tandojam.
  - A total of 283 and 94 red chili farmers have been trained in enterprise development and integrated pest management respectively by the end of reporting year.
- d. **Grapes Value Chain**
- 238 grapes farmers from 17 Farmer Enterprise Groups in Attock, Chakwal and Islamabad districts established vineyards.
  - 58 of 63 grape farmers have completed plantation. 24 of these grape farmers have also completed trellises system, while remaining 39 grape farmers are in various stages of completion of trellises system. Two farmers have also completed milestone-3 and installed wires on plant support system.
  - Three field demonstration sessions held for 30 project supported farmers around Islamabad.
  - Thirty private sector enterprises including grapes growers, processors, buyers, input suppliers and service providers participated in Farmers Field Day.
- e. **High Value Off-Seasons Vegetables (HV/OSV) Value Chain**
- 279 farmers for high tunnels have completed layout of land and construction of foundation blocks. Out of 279, 201 farmers have completed structure of high tunnels for production of HV/OSV, while 56 of these farmers have also completed the plantation of first crop cycle.
  - A total of 1243 and 2445 HV/OSV farmers from KPK, FATA and Punjab have been trained in enterprise development and production of vegetables respectively during the reporting period.
  - 15 farmers’ field days for production of HV/OSV through high tunnels have been organized in relevant districts and attended by 215 high tunnel farmers, buyers, seed companies and representatives of agriculture research and extension department.

- The project supported 2084 farmers/FEG members through provision of improved quality hybrid HV/OSV seed. The project also supported 40 FEGs from Swat, Malakand, Dir Lower and Mansehra districts by providing packing materials (bags), seedling trays, harvest bins and toolkits.
- The project organized Pakistan Vegetable Fair 2014 on May 15, 2014 at Islamabad, which was attended by over 250 key stakeholders

f. **Meat Value Chain**

- A total of 30 Managers, 115 Workers and 57 Supervisors from Meat Industry have been trained in Karachi and Lahore under the three tier training program in collaboration with UVAS. The Project's Intl. Carcass Specialist trained 50 participants on meat cuts for targeting meat export.
- Developed Standard Operating Procedures (SOPs) for raising buffalo calves to veal.
- The project supported a veal production and marketing visit for stakeholders of Meat VC from Karachi, Peshawar and Lahore, who visited UVAS Lahore and Pattoki campus, where participants viewed calves reared under the veal production for further marketing milk-fed veal calves under pilot being carried out by UVAS.
- The project supported a 6 day study tour of 18 Meat enterprises and 7 Livestock Officials from KPK to Punjab from June 15-20, 2014. The group members had meetings with a number of Livestock SMEs and witnessed numerous good practices and technological interventions in livestock sector.
- A meeting was also held with All Pakistan Meat Exporters and Processors Associations (APMEPA) at Lahore and attended by 7 meat stakeholders.
- The project selected M/S Pakistan Housalamand Khawateen Network, who has trained 74 female farmers in district Haripur on livestock management & extension services.

g. **Seed Potato Value Chain**

- The project focused on establishing linkages of potato farmers with large companies. The value of private sector investment leveraged by three companies in seed potato amounts to USD 189,825.
- A total of 1100 and 199 seed potato farmers from GB and Mansehra have been trained in pre-harvest and post-harvest handling respectively by technical experts of National Agriculture Research Council (NARC). 475 and 15 farmers have been trained in enterprise development and integrated pest management respectively.
- The project supported establishment of 14 cellars for seed potato as per demand of the beneficiaries.
- The second meeting of VCP for Seed Potato was held on September 30, 2014 at Gilgit and attended by VCP members. They shared their experiences and gave recommendations for strengthening of seed potato VC.
- The project has also conducted two studies on market demand and prices of key varieties of seed potato and pre-post-harvest practices.

## **2 PROJECT OVERVIEW**

### **2.1 INTRODUCTION**

This annual progress report of the project is submitted as per requirement of the cooperative agreement signed between USAID Pakistan and ASF. It covers the activities carried out by the project during the period from October 01, 2014 to September 30, 2014. In addition to the preliminaries and an executive summary, the report comprised of three sections and five Annexures.

- The first section briefly introduces the project's background, goal, objectives, components, and financial progress during the reporting period.
- The second section provides highlights of achievements and activities during the third year of the project. It provides narrative information on the activities completed and progress achieved on different value chains and project components.
- The third section provides an update on the results achieved against the mission strategic framework (MSF)/ EGA indicators during the reporting year, and cumulative up to end of reporting year.

The report encompasses success stories of the project beneficiaries, demonstrating increase in their sales and incomes and strengthening of their business as a result of partnering with the project and availing USG assistance. These sections have been structured with a view to facilitate an essential understanding of the broader achievements of the project in general and, particularly, during reporting year.

### **2.2 BACKGROUND**

The Agribusiness Project, funded by USAID, commenced on November 10, 2011 with overall goal of "increased competitiveness and productivity of horticulture and livestock sub-sectors in collaboration with all stakeholders". The project was conceived based on the potential the agriculture sector represented in the country owing to its size, structure and relevance to poverty reduction. Although the agriculture sector has considerable contribution to national economy and employment generation, yet it is characterized by a narrow structure with overwhelming dependence on few major crops. The national strategies have been pursuing diversification into horticulture and livestock sector as a way to increase economic growth and eradicate poverty. Being relatively neglected, horticulture and livestock sub-sectors are constrained by low productivity, high rates of post-production losses, low levels of value addition, and inability of chain actors to ensure compliance to the quality standards. The lack of value chain linkages between stakeholders (input suppliers, farmers, service providers, traders, processors) is a demonstration of market failures and has resulted in slow growth in export products.

Horticulture and livestock sub-sectors offer potential for increased employment and income generation through diversification into high value production systems, product and process innovation, value addition and greater market orientation. This requires investment in downstream and upstream agribusiness functions. However, the cost to mobilize entire value chains has been prohibitive and beyond the capacity of individual enterprises, thus warranting interventions by Agribusiness Support Fund (ASF) with the financial assistance of USAID.

### **2.3 GOAL**

The overall goal of the project is to support improved conditions for broad-based economic growth, enhanced profitability, employment opportunities and will contribute to poverty alleviation through product and process transformation of selected value chains in horticulture and livestock sub-sectors."

### **2.4 OBJECTIVES**

The three specific objectives of the project are:

- To strengthen capacities in horticultural and livestock value chains to increase sales to domestic and foreign markets;
- To strengthen the capacity of smallholders (through farmer enterprise groups-FEGs), individual farmers and agribusinesses to operate effectively and efficiently; and,
- To increase productivity and profitability through adoption of new techniques and technological innovations (among farmers, agribusinesses and business development services providers).

## 2.5 TARGETED VALUE CHAINS AND PRIORITIES

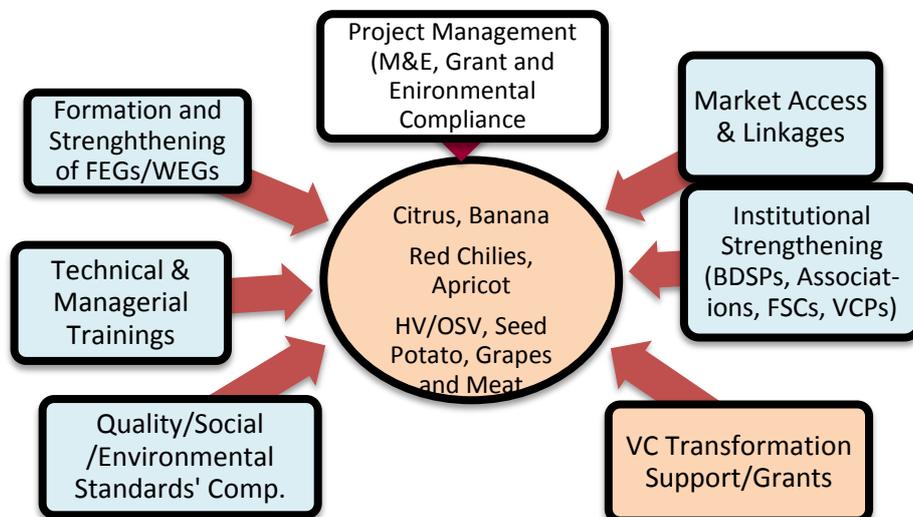
The Project plan contemplates working in eight value chains prioritized through multiple indicators based criteria:

- **Economic potential:** value of production; Pakistan's vs. global yields ratio; percent changes in production (past five years); current value of exports; percent change in export volume (past five years); revealed comparative advantage (RCA); and relative trade balance (RTB).
- **Distribution of benefits:** Number of acres harvested or dedicated to animal production; net income, farm size, share of household income provided by value chain, and, the percent of value chain farms belonging to small producers.
- **Geographic location:** focus on high production areas or natural clusters for the targeted value chains.

The targeted value chains identified on the basis of an evaluation of the characteristic of each with respect to its potential for achieving quantitative impact on income and employment, as well as with respect to the distribution of benefit with respect to impacting small producers and enterprises.

## 2.6 PROJECT COMPONENTS

The project components are (i) technical assistance and (ii) value chain transformation support. However, as opposed to the traditional component led project, the project design places primary focus on target value chains and clusters and uses the sub-components as a means to an end. Project components serve as a framework for operational ease only and group the activities as a package of assistance. Within the technical assistance, there are several sub-components that aim to strengthen market linkages between stakeholders; catalyze value chains; and, maximize the participation of small farmers in formal value chains. The components will complement each other and are graphically illustrated in Figure-1 below:



**Figure 1: Project approach and components**

### **2.6.1 TECHNICAL ASSISTANCE (TA) FOR VALUE CHAIN SUPPORT**

This component of the project provides the basis for transformation support and includes a number of sub-components. The technical assistance is an integral part of the value chain transformational support and addresses various systemic and functional gaps in the target value chains. The technical assistance includes:

- Technical and managerial training and market access and linkages;
- Formation and strengthening of farmer enterprise groups/women enterprise groups;
- Institutional strengthening (business development service providers, farm services centers, value chain platforms, associations and cooperatives); and, certifications standard compliance.

### **2.6.2 VALUE CHAIN TRANSFORMATION SUPPORT**

The value chain transformation support provides assistance to eligible agribusinesses and farmer enterprise groups for undertaking capital and capacity investments to strengthen and expand prioritized value chains. It is designed to identify and support innovative ideas such as, expansion of product lines, increase market access and marketability of existing and new products, raise level of productivity, facilitate effective management/operation of enterprises and organizations/associations, and raise the level of investment in the agribusiness sector.

The transformation support is provided within targeted value chains as a complement to technical assistance, training and market intervention package that the projects provides to participants of value chain clusters. Transformation support covers gaps at the individual agribusiness level and fund proposals of associations and service providers only, for commercial activities.

## **2.7 FINANCIAL SUMMARY**

The revised project duration is four years from November 10, 2011 to November 09, 2015. The revised project allocation, amount obligated and the expenditure made during year and cumulative till end of FY 2014 are given below. The component-wise financial progress is placed at **Annexure-1**.

Total allocation of the project:	USD 39,947,421
Amount obligated to-date:	USD, 27,300,000
Expenditures during year-3, FY 2014:	USD 11,871,153
Total expenditure since start till September 30, 2014	USD 25,429,021

3 PROJECT PROGRESS

A. TECHNICAL ASSISTANCE

3.1 STANDARDS COMPLIANCE

Pakistan has reported significant investment and growth in export of fruit and vegetables, as well as in the meat sector over the recent years. However, despite having tremendous potential, the country still shares negligible portion of the multibillion dollar trade of processed/value added food items. To compete in international market it has become inevitable to adopt food quality, safety and hygiene standards set by foreign buyers and consumers; the acquisition of export certifications is thus a minimum requirement for exporters.

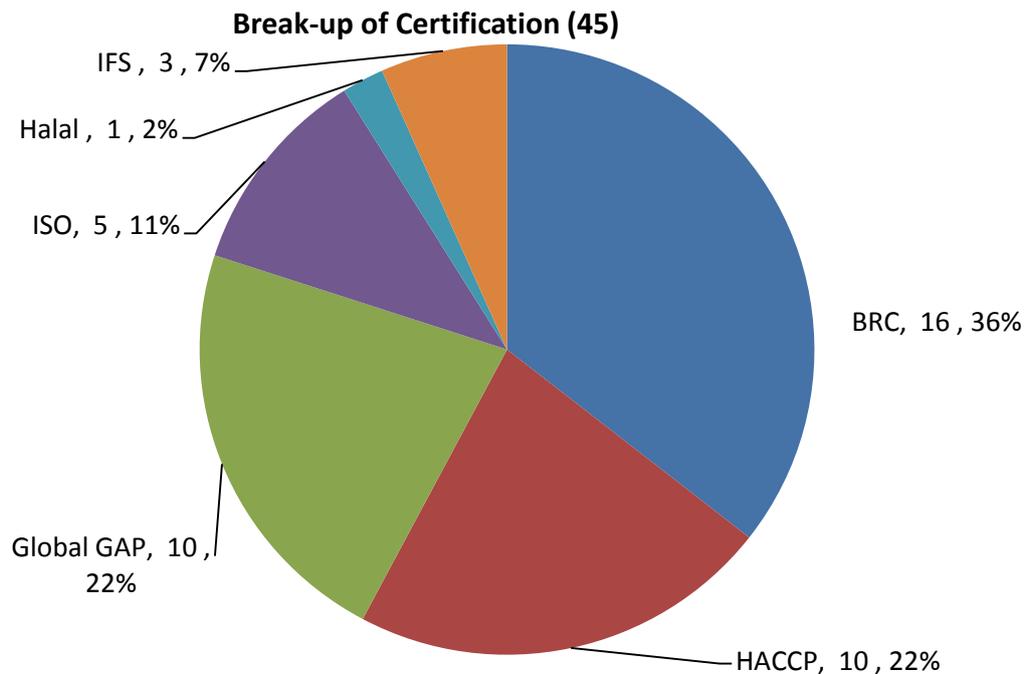


Figure 2: Break-up of Certifications

Under the international certification sub-component of project, 23 enterprises have completed 23 certifications (7 Global GAP, 10 HACCP, 5 ISO and 1 Halal) and were issued certifications during the reporting year, enabling them to access international markets for sale of their produce.

The project selected fifty one companies for 53 internationally accepted certifications and engaged two consulting firms<sup>1</sup> and a certifying body<sup>2</sup> to facilitate preparation and certification process. The consultation and certification process for 53 certifications of British Retail Consortium<sup>3</sup> (BRC), International Features Standards (IFS)<sup>4</sup>, Global GAP, ISO-22000, Halal, and HACCP were initiated in 2012 & 201, out of which 3 enterprises each for Global GAP and HACCP, one enterprise each for IFS and ISO were dropped out, while 45 certifications were successfully completed as per Figure-2. The list of companies certified is exhibited in **Annexure-2** and summarized position is reproduced below.

<sup>1</sup>Quality Systems and Star Farms

<sup>2</sup>BureauVeritas

<sup>3</sup> BRC is one of the leading trade associations in the United Kingdom and represent 80% of retail trade in UK by turn over. In order to qualify for export of food products to exporting companies are required to comply with the BRC standards.

<sup>4</sup> IFS is a case standard in Europe & all major retailers in Germany, France, Italy & other EU countries require suppliers to be certified to IFS.

- **BRC:** 16 enterprises certified.
- **HACCP:** 10 enterprises received certifications. 3 enterprises did not show interest to complete certification. The matter was pending for a long time and hence cancelled.
- **Global GAP:** 10 enterprises received certification; however, in case of Tawakkal Fisheries, certification body express its inability to audit because of not having relevant expertise to audit fisheries related business and hence was cancelled.
- **ISO:** 5 enterprises received certification while an enterprise from DIKhan failed to comply, hence cancelled.
- **IFS:** 3 enterprises received certification, while in case of Tata Best Food, certification body expressed its inability to audit because of not having relevant expertise to audit meat related business & hence cancelled
- **. Halal:** 01 enterprise completed certification.

During the reporting year, six farms have been certified in citrus (kinnow) and one in Banana value chain bringing 393 hectare of additional land under good agriculture practices.

<u>Name of Farm</u>	<u>Product</u>	<u>No. of Persons trained in Global Gap</u>
a. M/S Imam Estate Farms (Khanewal)	Kinnow-Citrus	6
b. M/S Lutfabad Fruit Farm (Multan)	Kinnow-Citrus	3
c. M/S Nawab Surbuland Farm (Multan)	Kinnow-Citrus	4
d. M/S Muzaffarnagar Fruit Farm (Multan)	Kinnow-Citrus	9
e. M/S Qaim Gerdezi Farm (Multan)	Kinnow-Citrus	6
f. M/S Sadruddin & Co. (Sargodha)	Kinnow-Citrus	4
g. M/S Pir Ali Shah Fruit Farm (Matiori)	Banana	10

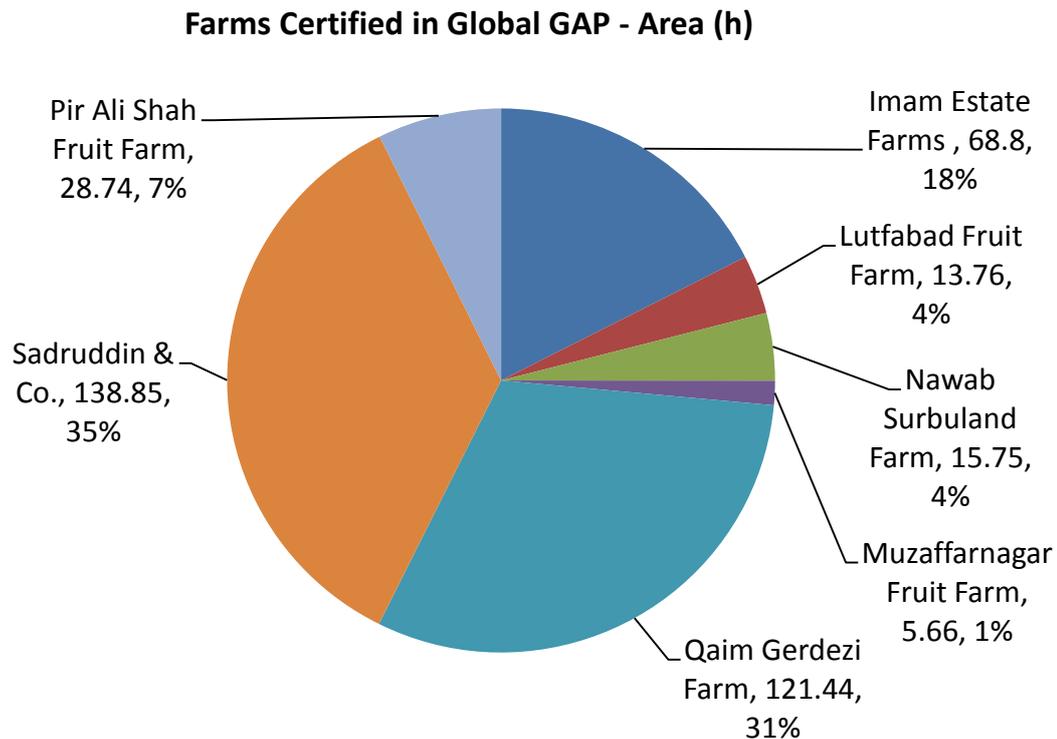


Figure 3: Break-up of certification completed

### 3.2 MARKET ACCESS AND LINKAGES PROGRAM (IMAP)

Under the IMAP, the project supported participation of fruit, vegetables and meat processors/exporters in various international marketing events for fruit, vegetables and meat. As a result of their participation in business to business (b2b) meetings with the large buyers during FY 2014, 23 companies/exporters have reported achievement of export sales of USD 10.21 million. The total value of export sales as September 2014 comes to USD 20.52 million. The products exported include kinnow, potato, dates, lemon, mango, meat, dried fruit, apricots, miscellaneous fresh fruit and vegetables to various export destinations including UAE, Saudi Arabia, Russia, India, Iran, Afghanistan, Ukraine, Spain and Indonesia. The summary of marketing event wise export value achieved by beneficiaries is shown in Figure-5 below, while details are placed at **Annexure-3**.



Figure 4: B2B meeting at Fruit Logistica, Berlin

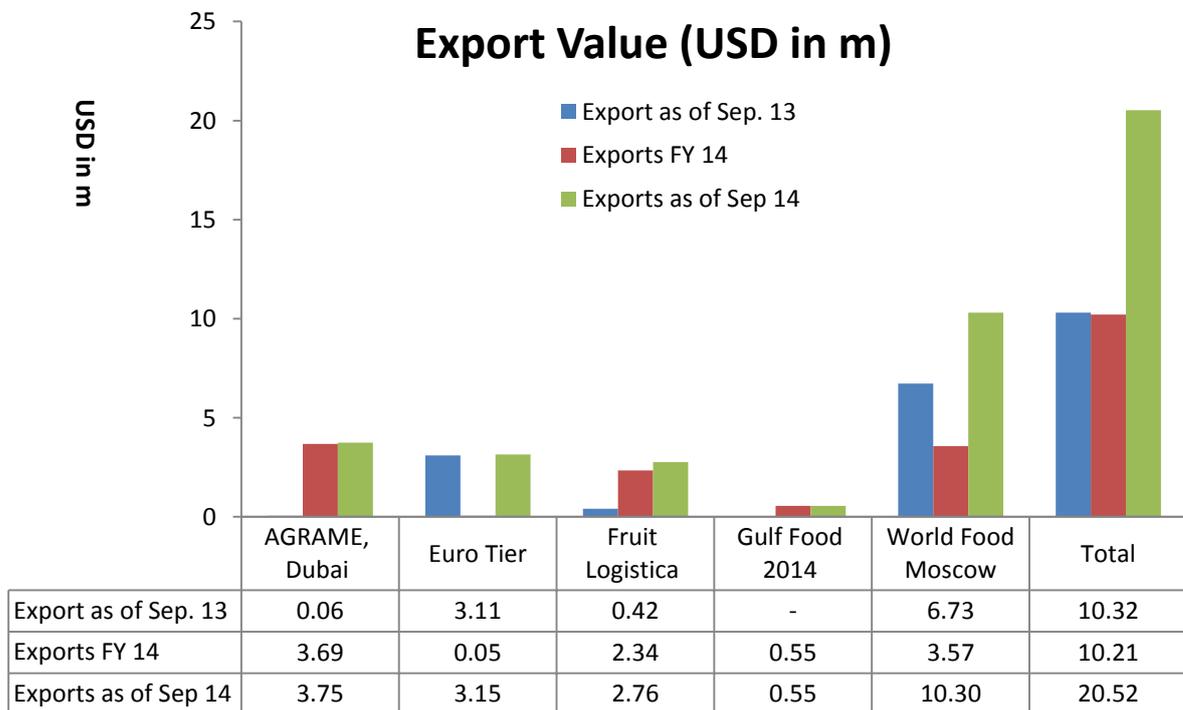


Figure 5: IMAP data - Export value

The Agribusiness Project supported participation of eight private sector enterprises in Fruit Logistica held from February 5-7, 2014 in Berlin. The enterprises attended business to business meeting and post-event information indicated that the participating companies received nine tentative purchase orders for potatoes, kinnow and mangoes. A questionnaire will be sent out to participants to determine final results.

The project supported participation of eleven private



Figure 6: Participation at Gulf Food, Dubai.

sector enterprises at Gulf Food, Dubai from February 23-27, 2014. In order to showcase Pakistani meat, samples of Pakistani beef and veal were provided by Abedin International and prepared by International Carcass Specialist Wayne Murtagh. An introductory tasting event was arranged in collaboration with the Pakistani High Commission in Dubai on February 25, which was attended by 95 prospective importers from different parts of the world.

The project supported a 10-member Pakistani Kinnow delegation on an exploratory marketing visit to Kuala Lumpur, Malaysia from March 7-12, 2014. The delegation held a series of meetings with major importers of fruits and met with the Pakistani High Commission in Malaysia and discussed the marketing strategy for export of Pakistani Kinnows to Malaysia. The delegation also met with the Chairman of ASEAN Business Council, Mr. Datur Ramesh, who assured his full support in getting access to major Malaysian importers of Kinnow, Meat, Chili and Potato. As a consequence of the visit, members of the delegation initially received orders for export of 5 containers of Kinnows to Malaysia.

The Agribusiness Project participated in the DAWN Agri Expo held on March 13-14, 2014 at Lahore. Five beneficiaries of the project, representing the Banana, Chili, Apricot, HV/OSV and Meat Value Chains, participated and displayed their products. The project shared communication material including leaflets, brochure on the upcoming meat festival and standees for dissemination of project related information. The DAWN Agri Expo is promoted as one of the largest agricultural expositions in Pakistan and attracts participants from all the agricultural business circles in the country. It was a significantly important event that helped promote the project, as well as give an opportunity to the participating farmers to project their business. TAP consultant, Mathew Brown, presented a paper on 'Meat-The Potential for Growth'.

The Agribusiness Project facilitated a meeting with a 15-member delegation of business leaders and members of the regulatory/business development body from the Xinjiang Province, China, who visited Pakistan to explore opportunities for export of Halal meat from Pakistan to China. The project made a presentation to the visiting delegation on "Pakistan as a hub for Halal meat" and accompanied the delegation during visits to various components of meat value chain.



**Figure 7: TAP stall at Dawn Agri Expo.**

### **3.3 INSTITUTIONAL STRENGTHENING (VC FACILITATORS, SERVICE PROVIDERS, FSC, VCP, ASSOCIATIONS AND COOPERATIVES):**

Three meetings of the National Technical Working Group (NTWG) for fruits and vegetables were held during the reporting year. The meeting decided to interpret the Global GAP standards into national interpretation guidelines Pakistan for fruits and vegetables and solicit approval of Global GAP directorate to this effect. The task has been completed and approved by the Global GAP directorate, Germany as "National interpretation guidelines for Pakistan FV IFA V4.0-2". These guidelines are valid for Pakistan from October 1, 2014 and are obligatory from January 1, 2015. A meeting of NTWG for Livestock and small ruminants was also held and attended by its members.

The Agribusiness Project and Trade Development Authority (TDAP) jointly signed a Memorandum of Understanding



**Figure 8: Signing of MOU - TAP & TDAP**

(MOU) to increase private sector participation in value addition in the horticulture and livestock sectors in Pakistan. The ceremony was held at Karachi and attended by TDAP, TAP and USAID representatives. Through a multi-pronged strategy, and with particular emphasis on small and medium enterprises and women, TDAP is making special efforts to improve the effectiveness of agriculture-related trade development, advancing employment opportunities and supporting change in the targeted sectors.

The second meeting of Banana Value Chain Platform was held on April, 15, 2014 at Hyderabad and attended by 25 members including growers, traders, exporters, representatives from government and academia. The participants discussed critical issues of their mutual interest and impediments adversely affecting quality Banana production, processing and marketing. The participants stressed upon TAP for development of communication material and training on banana good agricultural practices for increased quality yield per acre.

The second meeting of VCP for Seed Potato was held on Sep. 30, 2014 at Gilgit and attended by VCP members. The participants shared their experiences and suggestions for strengthening of seed potato VC.

The third meeting of Red chili value chain platform was held on June 11, 2014 at Kunri and attended by 30 stakeholders including chili growers, traders and exporters as well as representatives of FEGs, public sector and research institutions. The meeting reviewed the progress achieved/ status of decisions of second meeting, discussed the number of FEGs formed for red chili and support being provided to them. The project also shared a booklet on “red chili cultivation” prepared in Urdu and Sindhi languages for capacity building of chili growers.

A formal Memorandum of Cooperation was signed between ASF-TAP and Red Chili Growers Association (RCGA) at the VCP meeting. A visit to a model plot for improved cultivation of Chili was also undertaken by VCP members, where improved practices in cultivation, as well as drying technology, using TAP provided support were demonstrated.



**Figure 9: MoC signing with RCGA at Chili VC Platform Meeting**

### **3.4 TECHNICAL AND MANAGERIAL TRAINING**

The technical and managerial training for the project beneficiaries is an integral part of the grants component. The enterprise development and technical trainings have been carried out by the technical experts and training service providers engaged by the project and its implementing partners in the selected value chains. The duration of the training varied from 1 to 5 days. The trainers had expertise in the field of production, harvest, post-harvest handling and enterprise development. The following types of the trainings were conducted for project beneficiaries.

- a. Enterprise development
- b. Pre-harvest practices
- c. Harvest and post-harvest practices and processing
- d. Integrated pest management – environmental compliance

During the reporting year, a total of 10,334 participants representing agribusinesses have been trained. The value chain-wise participants trained are given in Figure-5 below, while participants trained by type of training is given below in Figure-3 and further details are given at Figure- below:

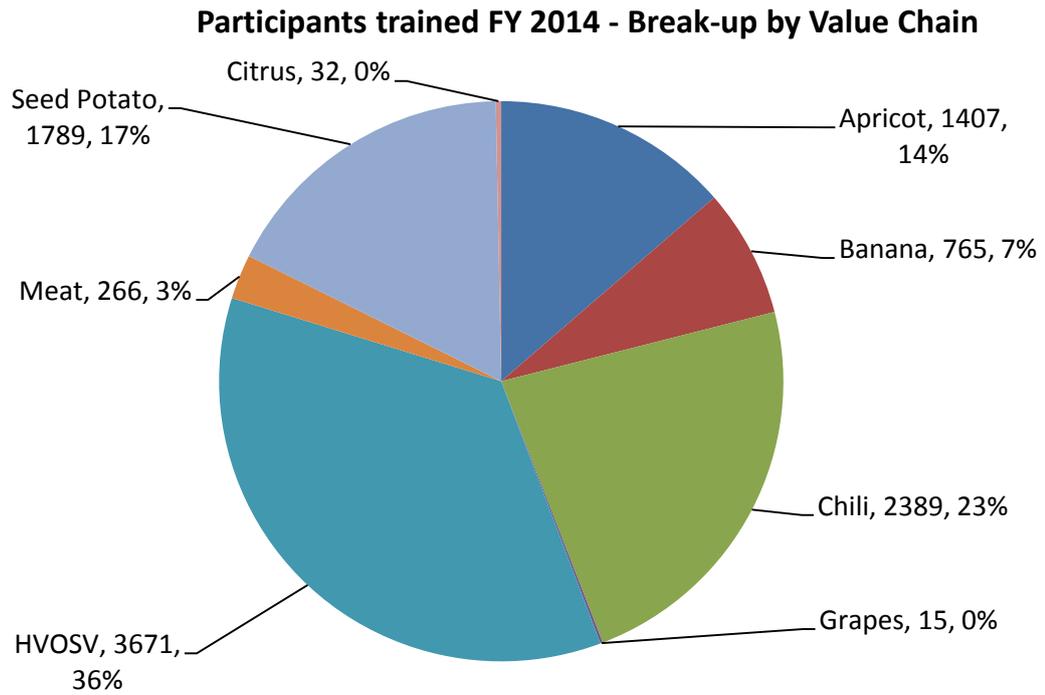


Figure 10: Participants trained - value chain-wise

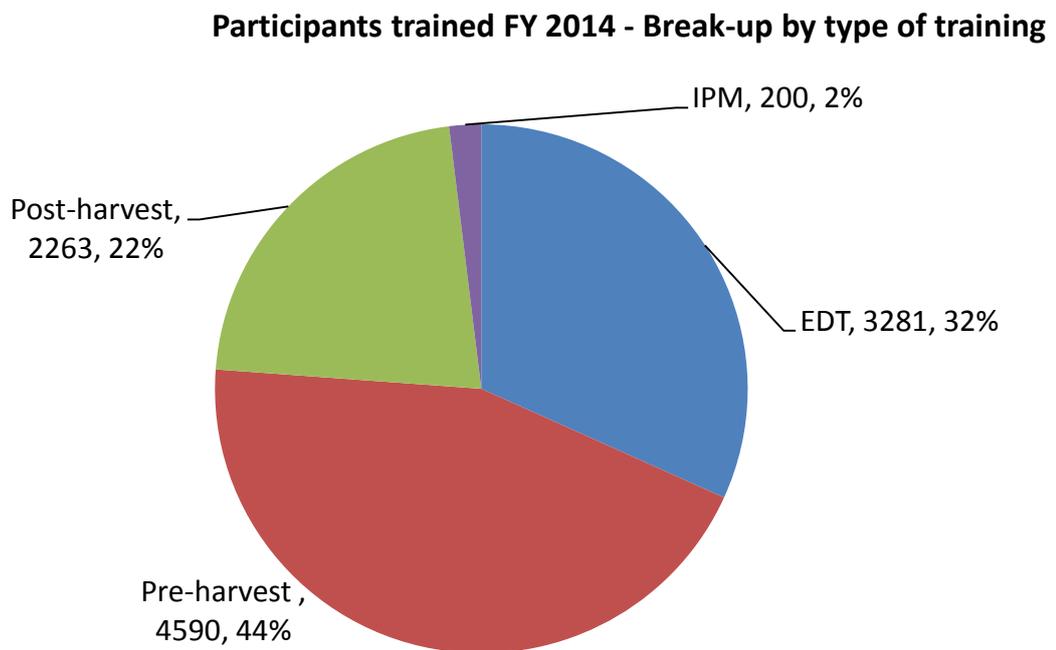


Figure 11: Participants trained - Type of training

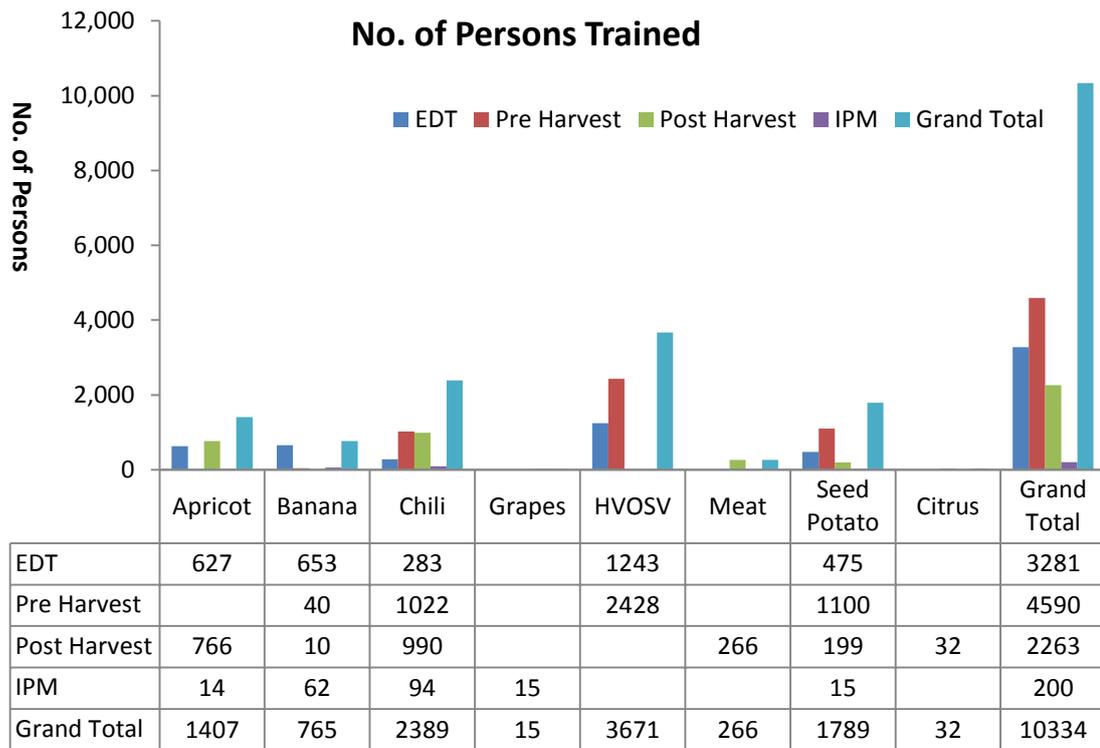


Figure 12: Participants trained

## B. TRANSFORMATIONAL GRANTS

The value chain wise progress achieved on transformation grants support during the reporting period is discussed below:

### 3.5 APRICOT VALUE CHAIN

**Establishment of Apricot Orchards:** 20 Apricot commercial orchards on 25 acres of land have been established in Gilgit Baltistan. This includes lay-out, pits digging, poles fixing and fencing, tree plantation and tree top working that will lead to transformation of apricot. The project also provided pruning kits to apricot farmers.

The project technical experts provided on-job training in orchard management including pruning of trees, fertilizing and irrigation to apricot orchard owners during the reporting period. The owners of Apricot orchard purchased plants from Area Research Center Jaglote Gilgit, thus creating linkages with large scale firms with project support



Figure 13: AOR presenting toolkit to orchard owner

**Provision of Small Solar Tunnel Dryers:** The project has supported 800 small Apricot farmers (75% female) from 5 districts of GB (Hunza Nagar, Ghangche, Ghizer and Gilgit, and Gojal) through provision of small tunnel dryers for drying of apricot. All the 800 small farmers have completed structure of small tunnel dryers.

Of the 800 farmers, 140 farmers/FEG members have completed milestone-2 including fabrication and installation of racks, trays and solar duct.

The project provided technical assistance to Apricot farmers in installation of solar tunnel dryers. The small solar tunnel dryer uses advanced drying technology for Apricot processing and would support improved quality of dried Apricot, which will result in increased sales revenue, beneficiaries' income, and creating new jobs, besides minimizing post-harvest losses.



**Figure 14: Drying and packing Apricot**

A total of 766 small apricot farmers have been trained on post-harvest handling, usage of small tunnels and marketing, while 627 of these small apricot farmers have also been trained on enterprise development. 14 Apricot farmers have also attended training on integrated pest management organized by the project. The project facilitated linkages of Apricot farmers from GB with the large buyers. Two private sector companies namely M/S North Pole Fruits Traders (Pvt) Ltd. and M/S Organo Botanica Fruit Processing Company have purchased 15 tons of dried apricot from 252 apricot farmers worth USD 27,017.



**Figure 15: Apricot Training**

The Intl. Apricot Expert conducted a TOT session on apricots from July 17-21, 2014 at Islamabad and shared his expertise and experience from Turkish apricot industry with stakeholders and made appropriate recommendations for improvement of apricot industry in GB. 15 Apricot entrepreneurs from Gilgit have been trained on Apricot post-harvest handling, drying, processing and packaging.

### **3.6 BANANA VALUE CHAIN**

The banana cultivation is an attractive crop as it is being grown around the year with comparatively better price premium of produce. Bananas are cultivated on 90,000 acres of land and production value is USD 31.5 million approximately in the country. Despite numerous constraints, the banana sector in Pakistan is growing. The progress achieved on Banana value chain is summarized below:

The project for the first time in Pakistan certified one large Banana producer from Matyari (Pir Ali Shah Fruit Farm - 29 hectare) in Banana Global good agriculture practices (GAP). 10 members of the farm have been trained during the certification process.



**Figure 16: Improved plant population & fruit Quality**

The project also carried out formation of Banana farmers into Farmer Enterprise Groups for collective farm management and enjoying economies of scale.

The project introduced improved agriculture practices on 40 acres of land at 8 model farms by engaging international technical experts and providing technical assistance to the model farms. The project is considering

new technological innovations in banana value chain through introduction of portable pack houses, micro sprinkler irrigation and improved tools provision to 90 farmers.

A total of 653 Banana farmers/FEG members have been trained in enterprise development by the implementing partner. 40 producers/exporters/ processors of Banana VC were trained in Banana supply chain management, Pre-post-harvest management and banana bunchy top control and management in collaboration with Sindh agriculture University Tandojam. 62 Banana growers have been trained on Integrated Pest Management as per provision of the project's Environmental Assessment report.

### 3.7 RED CHILI VALUE CHAIN

The chili value chain has witnessed a decrease in terms of exports despite a 145% expansion of its annual production during last five years. The average yield of chili is 2.71 tons/ha. Chili value chain offers potential for exports as well as value addition, provided that compliance to standards is ensured especially with regard to solving problem of aflatoxin. The key challenge that the industry is facing is to ensure quality control that bring down aflatoxin levels to an acceptable level.



**Figure 17: Demonstration of Geo Textile Sheet at Chili technical training, Kunri**

The project is providing support to 1000 chili famers/FEG members through provision of technical assistance in improved pre-post-harvest practices and geo-tax sheet for drying of chili. The progress achieved on red chili value chain in kunri is as under:

- A total 715 farmers provided with improved technology for picking, packing, transportation and chili drying. The farmers have completed at-least one drying cycle of red chili drying using the geo-tax sheet.
- A total of 1022 farmers have been trained on red chili crop production/pre-harvest practices, while 990 of these farmers have also completed on post-harvest handling in collaboration with Sindh Agriculture University, Tandojam and the implementing partner.
- A total of 283 and 94 red chili farmers have been trained in enterprise development and integrated pest management respectively by the end of reporting year.

The project is creating business linkages between producers, sellers, buyers and importers through participation in marketing events and business to business meetings etc. The President of Pakistan Agriculture Coalition Company (PACC), Mr. Arif Nadeem, along with three delegates (CEO, National Foods, Sr. Vice President, Habib Bank and representative from Siddique Sons, cold storage) visited TAP's Technical Training; Govt. Lab for Chili analysis, SMEDA's Chili processing plant and had a meeting with Red Chili Growers Association (RCGA) in June 2014. The National Foods in collaboration with PACC has setup a procurement center at Kunri for purchase of chili from project supported FEG members and other farmers. The project facilitated market linkages development of Chili growers with large buyers (National Food, Zaiqa Food and other processors).

### 3.8 HIGH VALUE OFF-SEASONS VEGETABLES (HV/OSV)

#### Establishment of High Tunnels for HV/OSV

The HV/OSV is among the fastest growing sub-sectors owing to its relatively high profitability and increasing market demand. The project is supporting the production of high value off-season vegetables in KPK/FATA, and Punjab through establishment of high tunnels and adoption of plastic culture.



The agribusiness project selected 308 farmers from KPK, FATA and Punjab for production of HV/OSV through installation of high tunnels. Out of 308, 22 farmers have been dropped due to various reasons. The progress achieved on establishment of high tunnels and production of HV/OSV in phase-I and phase-II of high tunnel grantees are shown below in Figure 17 and Figure-18 respectively.

Figure 4: Female Workers at project supported tunnel

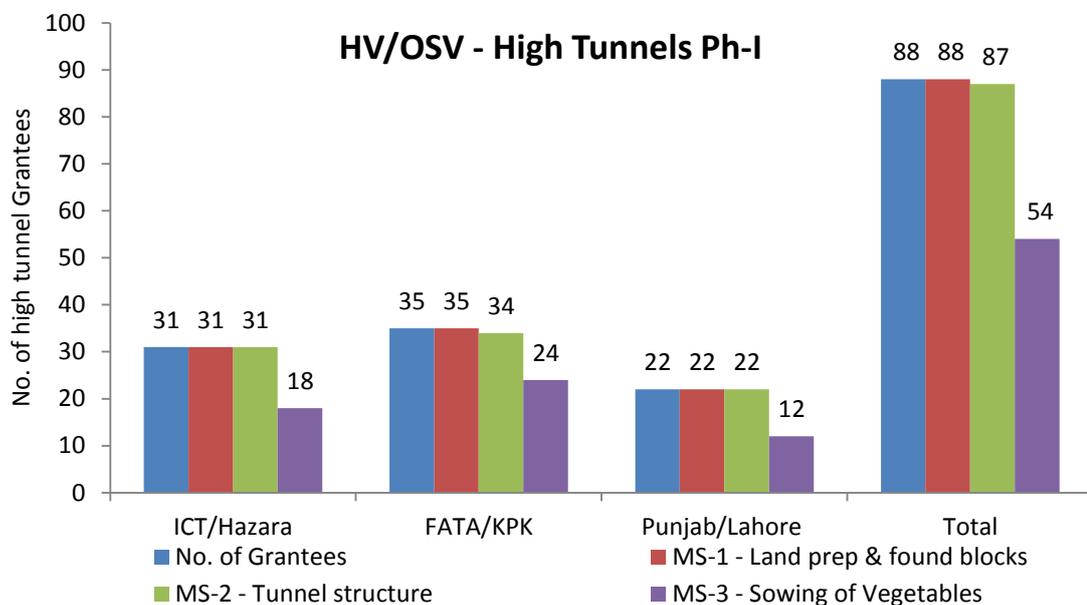


Figure 5: Establishment of High Tunnels Phase-I

All the 88 farmers have completed milestone-1 (layout of land and construction of foundation blocks), while 87 of these have completed milestone-2 (high tunnels structure work). 54 of the 87 farmers have also completed MS-3 by sowing HV/OSV including tomato, cucumber, bitter gourd, hot pepper, okra etc. inside high tunnels.

As regards, phase-II of high tunnels, all the 192 farmers have completed milestone-1, 114 of these farmers have also completed milestone-2 and only two farmers have also completed milestone-3 (plantation of first crop cycle) as per details given below in graph below.

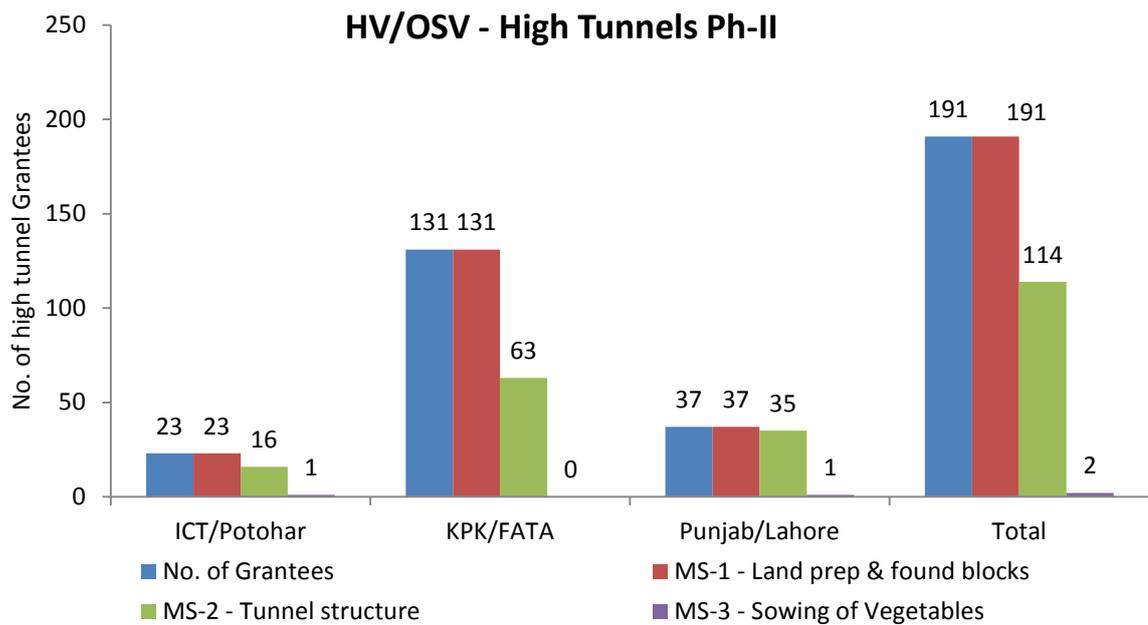


Figure 6: Establishment of High Tunnels Phase-II

A total of 1243 and 2445 HV/OSV farmers have been trained in enterprise development and production of vegetables in KPK/FATA, Potohar and Lahore regions during the reporting period.

Fifteen farmers' field days for production of HV/OSV through high tunnels have been organized in relevant districts/regions and attended by 215 high tunnel farmers, buyers, seed companies and representatives of agriculture research and extension department. These events proved to be an effective tool for getting better insights into crop management techniques and establishing business to business linkages. The representative of Metro Cash & Carry showed interest in buying HVOSV



Figure 7: Seeds distribution to FEGs by RCDS in Lahore



Figure 8: FEG training

produce from farmers.

The project supported 2084 famers/FEG members from 147 FEGs for HV/OSV through provision of improved quality hybrid HV/OSV seed. This include 24 FEGs formed by SRSP in District Peshawar and Nowshera, 45 FEGs formed by LASOONA in Swat and Dir Lower, 25 FEGs formed by Hashoo Foundation in Mansehra and 53 FEGs formed by the RCDS in Lahore region. The orientation sessions on HV/OSV production have been conducted on the day of grant delivery to the FEGs. The project supported 40 FEGs from Swat, Malakand, Dir Lower and Mansehra districts by providing packing

materials (bags), seedling trays, harvest bins and toolkits.

The project organized Pakistan Vegetable Fair 2014 on May 15, 2014 at Islamabad, which was attended by over 250 key stakeholders including large buyers, exporters, traders, vegetable producers and experts from academia, Government officials and USAID representatives. The event provided an opportunity to participants to acquire knowledge and establish business linkages. Ms. Nancy Estes, Deputy Mission Director US Embassy/ Chief Guest, appreciated the event and expressed her satisfaction on the support that the beneficiaries had gained from USAID interventions and desired for scaling up their operation towards structured farming of high-value and off-season vegetables. The event was featured on PTV and covered by four national periodicals.



**Figure 9: Project Grantee explaining HV/OSV production to Dy. Mission Director US Embassy**

### **3.9 ESTABLISHMENT OF GRAPE ORCHARDS:**

Grape value chain in the Pothohar Region presents a unique opportunity for both producers and buyers to earn high incomes. The project during FY 2013, did significant work in Grapes value chain in the region and helped 17 grape farmers establish 17 vineyards (3 acres). During FY 2013, under the grant support to FEGs, the project provided support to 238 grapes farmers from 17 Farmer Enterprise Groups in Attock, Chakwal and Islamabad Districts of ICT/Pothohar by providing support for installation of trellises system,. The intervention aims at establishing small grape orchards with new techniques and modernized farming to minimize risk of failure.



**Figure 10: Intl. Grapes Expert demonstrating good practices**

During 2014, the project also provided support to 63 Individual farmers for promotion of grapes production in ICT & Pothohar. The purpose of this intervention is to promote production of two grape varieties (Flame Seedless and Kings Ruby), in high potential areas. Fifty eight (58) grape farmers have completed Lay-out, pits digging and filling and plantation under the fixed obligatory grant (FOG) mechanism. Out of 58, 24 grape farmers have completed trellising materials including Y-shape pillars and anchor posts. The remaining 39 grape farmers are in various stages of completion. Two farmers have installed wires on plant support system.



**Figure 11: Farmers Field Day**

The International grape expert conducted three field demonstration sessions on post-harvest best practices, use of evaporative cooling system for field heat removal, sorting and pruning and best packaging and marketing practices for 30 project supported farmers around Islamabad. In addition to field visits and detailed

meetings with stakeholders, a comprehensive set of guidelines for pre and post-harvest best practices was developed.

Thirty private sector enterprises including grapes growers, processors, buyers, input suppliers and service providers participated in Farmers Field Day on June 18, 14 at Mr. Azam, vineyard, Attock. The participants discussed issues of their mutual interest and offered support for promotion of grape industry. The Punjab Irrigation Department Punjab has offered extending drip irrigation facilities to more project supported vineyards upon receiving request for the same.

### 3.10 SEED POTATO VC

The project is supporting interventions in seed potato sector in GB region and Mansehra district. The project during FY 2014, has worked working with 1155 Seed potato farmers from 75 FEGs. The project during FY 2013, provided seed potato to around 1500 potato farmers/FEGs members from GB region, Mansehra and Chitral districts. During FY 2014, the project focused on establishing linkages of potato farmers with various large companies. In pursuance to the business to business (b2b) meeting between Seed potato producers from GB and large Potato buyers organized by the Project, at Gilgit in January 2014, a number of private sector companies have entered into contract farming with the seed potato farmers from Gilgit Baltistan. The total private sector investment leveraged by three companies in seed potato amounts to USD 189,825 as per details given below:

Name of Seed Potato Company	Qty (t)	Amount-\$	Villages/areas in GB, where seed distributed
AGB Seed Lahore	68.3	110,170	Gojal, Yasin, Astor, Bagrot, Nalter
Zamindara Seed Corporation, Okara	46.35	60,255	Barkulti, Oumalsat, Sanndi, Sanndi Bala, Sultanabad, Yasin Khas of District Ghizer
Nanga Parbat Seed Association	24.25	19,400	Darel, Batogah of Chilas district
Total	138.9	189,825	

The seed companies will receive seed potato in exchange from seed potato farmers and/or will buy back produce as per mutually agreed rates, adjusting cost of seed potato issued to the farmers.

A total of 1100 and 199 seed potato farmers have been trained in pre-harvest and post-harvest handling respectively by technical experts of National Agriculture Research Council (NARC). 475 and 15 farmers have been trained in enterprise development and integrated pest management respectively.

The second meeting of VCP for Seed Potato was held on September 30, 2014 at Gilgit and attended by VCP members. They shared their experiences and gave recommendations for strengthening of seed potato VC. The project has also conducted two studies on market demand and prices of key varieties of seed potato and pre-post-harvest practices. 14 seed potato cellars have been established. The project supported these enterprises through provision of building materials, technical assistance and orientation session on construction of seed potato cellar. The seed potato will be stored in cellars to ensure availability of quality seed



Figure 12: Pre-harvest training



Figure 13: Cellars for storage of seed potato

potato for upcoming season. During the orientation session, CNFA TA Coordinator explained the salient features and critical steps involved in potato cellars construction in the snow-bound regions.

### **3.11 MEAT VALUE CHAIN:**

#### **Training of Meat Industry staff**

As part of implementation of Meat Value Chain, M/S University of Veterinary and Animal Sciences (UVAS), Lahore, was engaged for training of three levels of meat sector viz-a-viz Managers, Supervisors and Workers.

A total of 30 Managers, 115 Workers and 57 Supervisors from Meat Industry have been trained in Karachi and Lahore under the three tier training program in collaboration with UVAS.



**Figure 15: Training on Meat cuts**



**Figure 14: Practical demonstration at Workers Training**

The Project's International Carcass Specialist imparted training to the meat workers on specialized meat cuts for targeting meat export. The training aims at strengthening the ability of Pakistani meat processors and exporters to meet international quality standards and hygiene for halal and traceable meat and meat by-products to the Middle East and other markets.

The project selected M/S Pakistan Housalamand Khawateen Network, who has trained 74 female farmers in district Haripur on livestock management & extension services.

#### **Development of SOPs for Buffalo veal Production in collaboration with UVAS**

The project with the technical expertise from UVAS has developed Standard Operating Procedures (SOPs) for raising buffalo calves. This includes treatment protocols, calf rearing parameters, calf carcass parameters and statistical analysis of animal growth/health at different intervals. The SOPs for production of veal from buffalo animals is aimed at developing a model for encouraging commercial veal production. The procurement of SOPs is based on rearing of 100 buffalo calves during a six months period to establish the procedures for quality production of pink veal; at the village level and subsequently at the commercial level to tap export market under compliance of international standards, ultimately triggering development of a sophisticated meat supply chain as part of an integrated approach to transformation of sector in the economy.

On June 21st, the project supported a veal production and marketing visit for stakeholders of Meat Value Chain from Karachi, Peshawar and Lahore, who visited UVAS Lahore and Pattoki campus, where the participants viewed the calves reared under the veal production for further marketing the milk-fed veal calves under the pilot being carried out by UVAS. The purpose of this visit was at introducing the first batch of calves raised under the program to its potential market and interested stakeholders.

The project supported a six day study tour of 18 Meat enterprises and 7 Livestock Officials from KPK to Punjab from June 15-20, 2014. The group members had meetings with a number of Livestock SMEs/ exporters and witnessed numerous good practices and technological interventions in livestock sector. There was a class capacity development session for livestock & dairy farmers and Livestock Department Officers, followed by visit to Business Incubation Centre-UVAS, Al-Abideen International, Solve Agri Pvt Ltd, Bahadur Nagar Livestock Research Station, Anjum Farm, Sapphire Dairies, Fattening Facility Kasur, Nestle Dairy Farm, Du-Pont Pioneers Seed Pvt Ltd.

A meeting was also held with All Pakistan Meat Exporters & Processors Associations (APMEPA) at Lahore on June 5, 2014 and attended by 7 meat stakeholder. The APMEPA requested project support in registration of the association, capacity building and market linkages of meat stakeholders.

### **3.12 SUMMARY OF CHALLENGE GRANT COMPONENT:**

The summary of the progress achieved on the challenge grant component is as under:

- i. Under the challenge grant category, the project supported one Improvised Farm storage/reefer in district Swabi. This will help farmers in providing low-cost improvised post-harvest management technology for the fruits and vegetables. The improvised reefer will be used as a source of field heat removal as well as on-farm temporary storage of fruits and vegetables with 3-5 tons capacity.
- ii. Under the Challenge Grant Category (fruit and vegetables washing, grading and packing facility (MAP Technology), the project supported one modified atmosphere packaging unit in Lahore. The MAP technology will increase the shelf-life of Pakistani products for local and export destination. It will also create new market niche by introducing new products such as fresh cut fruits and vegetables. Farmers will get better price as they will be in a position to directly negotiate price with the processor without involvement of middlemen/broker. The pack house facility will help in minimizing the wastage of fruits/vegetables.

### **3.13 MANAGEMENT SUPPORT UNIT**

The Management Support Unit (MSU) continued realignment and smooth functioning of its activities, compilation of the quarterly report, and quarterly monitoring and assessment of the project activities. Areas of further focus were identified that included improvement in data quality, need for gender integration in all data collection tools, need for assessing data credibility / data quality assessment, identification of critical control points in data transmission, regularity of staff assessments, and impact evaluation. Further details of each activity are presented below:

- i. Developed revised M&E Plan with expanded M&E framework, structure and functions. The revised M&E plan has been submitted to USAID.
  - M&E Plan include all relevant indicators, frequency of data collection, for activities, outputs, and outcomes/ results, as well as the corresponding methodology for such data acquisition. The M&E Plan also included a data collection plan that identified data to be collected, when it will be collected, who will analyze it and to whom it shall be reported to. A data collection framework was also designed, based on which, data collection and reporting tools for jobs, income, sales, and value of exports, training events, and post-training follow-up were refined. In addition, sample size for carrying out regular evaluation exercise was also worked out.
  - The M&E strategy included bifurcation of M&E department into two sections: One section to deal with Monitoring, Validation, and Evaluation, while the other section focused on Information Management System, Progress Reporting and Data Repository.
  - Developed causal models for project supported value chains, stemming from activity-output-outcomes-and leading to results. This framework took off from Annual Detailed Implementation Plan. M&E Framework also included methodology and frequency of data acquisition.

- ii. Conducted an assessment of current M&E system and review of EGA indicators, developed suggestions and practical tools for a revised M&E framework. Evaluated M&E system at MSU evaluated on a customized checklist. Areas of further focus were identified that included: improvement in quality of instructions to field staff for data collection, need for gender integration in all data collection tools, need for assessing data credibility/data quality assessment, identification of Critical Control Points in data transmission, and increased focus on impact evaluation.
- iii. Developed quarterly monitoring and validation work plan covering sample validation of all grants so far disbursed, along with validation of data reported in the monthly and Quarterly Progress Reports.
- iv. Carried out validation visits by visiting 128 sites of High Tunnels and 50 applicants for Grape orchards. Validation of 22 applicants for High Tunnels was carried out. Also carried out more than 260 monitoring visits to evaluate meat value chain trainings in Karachi, Lahore, enterprise development training for grantees, and technical training for seed potato growers. The training assessment and evaluation have been carried out on prescribed templates developed for the purpose. Focus of post-test was on critical concepts without which trainees would not be able to apply the imparted knowledge and skills.



**Figure 16: Training on M&E**

- v. 27 monitoring visits were made to different districts, including Karachi, Hyderabad, Kunri, Gilgit, Lahore, Multan, Peshawar, and Nowshera. TAP interventions monitored included Solar Dryers, Chillies, Milk Chillers, Milking Machines, High Tunnels, and Farmer Field days.
- vi. The targets for EGA Indicators have been upward revised with detailed rationale for calculation for each indicator in targeted value chain in consultation with relevant value chain leads and USAID counterparts. The MVE team has collected data regarding EGA targets from relevant stakeholders on sampled basis with the view to validate the projections and /or provide any feedback, as applicable..
- vii. The guidelines for validation of TAP interventions have been developed followed by validation of data received from value chains in monthly and quarterly progress reports.
- viii. The MSU provided support to project management in development of work plan-4 and presentations of project activities/achievements. The progress review meetings have been conducted on quarterly basis with USAID.
- ix. The MSU team provided continued support to the project management in preparation of periodic progress reports for submission to ASF, USAID. The progress reports were uploaded on USAID Pak Info, Micro Enterprise Results Reporting databases, Trainet etc.
- x. The project facilitated the USAID and MSI-M&E



**Figure 25: In-house training on M&E**

Program team in conducting data quality assurance (DQA) for EGA indicators. The team also met the project's regional team at Peshawar and implementing partner to validate data collection, storage, retrieval, analysis and reporting system at the grass root levels.

- xi. Conducted two-day training held on designing of an evaluation study attended and attended by M&E, Value Chain and IPs staff. As a follow up, the participants collected data, analyzed and presented findings/recommendation in four-day training organized (January 27-30, 2014) at NARC Islamabad.
- xii. Conducted two-day in-house trainings on monitoring, evaluation, and reporting of the project activities at Islamabad, Karachi and Lahore. 32 staff members from project and regional offices were trained,

### **3.14 BRANDING, MARKING AND COMMUNICATION**

The Communications team provided support to project activities in selected value chains, to ensure that all direct and indirect stakeholders of the project, especially the beneficiaries, are aware that the financial assistance for all grants awarded and capacity building initiatives come from the American people through USAID and the Agribusiness Support Fund (ASF). Developments in this regard were i) Branding and marking of project activities ii) Publications iii) Matching selected communication tools iv) Highlight success stories of beneficiaries v) Field visits and picture archiving and vi) Appropriate and timely media coverage (press and electronic) Website management and social media updates.

In addition to general tracking, documentation and branding of activities across value-chains, development of video documentaries for Meat and HV/OSV and design of project communication materials for printing, TAP communications section contributed to various project promotion events including Vegetable Fair 2014 and visits of VIPs to the project sites.

### **3.15 ENVIRONMENTAL COMPLIANCE**

The environmental compliance system, established as per TAP's environmental assessment, has been strengthened through capacity building of TAP staff involved in environmental compliance and other related project staff. The environment focal persons have started regular environmental monitoring as per the EMMP in each EDF.

- A total of 681 EDFs after visiting 1424 sites in 24 districts, have been developed during the reporting year. For details refer to [Annexure-4](#).
- The project continued regular environmental monitoring of all implemented grants. During monitoring visit, the grantees were stressed upon on the safe use of pesticides, introduction to PERSUAP during their environmental monitoring visits.



**Figure 17 IPM training**

### **3.16 SUPPORT OF INTERNATIONAL IMPLEMENTING PARTNERS (CNFA & JE AUSTIN)**

- 3.16.1 During the reporting period, CNFA provided continued support to the project in strengthening M&E system, incremental delivery and testing of MIS for grants management, capacity building, EDF preparation and environmental compliance, and provision of national and international short term technical assistance in horticulture and livestock sectors. CNFA deployed two in-house international consultants to assist the project in realigning TAP's grants and procurement manuals. Engaged Intl. consultants for grapes and apricot, who guided strategic focus for different interventions in these value chains, and conducted training on pre and post-harvest best practices. CNFA also assisted in identification of requirements, development, pre-testing and implementation of integrated MIS. The staff provided continued support in networking, IT system support, reporting data on USAID Pak-info, Train-net. CNFA placed Intl. M&E Adviser, who conducted an assessment of current M&E system and also conducted a two-day training on designing an evaluation study with follow-up support to study teams and finally facilitated a training session, where findings/recommendation of study were presented. The M&E Adviser assisted in revision of M&E Plan.
- 3.16.2 J.E. Austin Associates (JEA), supported the agribusiness project by providing international technical assistance for international market linkages and branding of Pakistani products with international brands to identify and capitalize on opportunities in high price markets. The JEA engaged one international and three national consultants to analyze meat, fruit and vegetable value chains. The value chain assessment reports for eleven prioritized products were finalized by the project. These were conducted to validate program interventions as well as competitive position of products in markets and the sustainability of those markets. The JEA experts also conducted several consultative meetings with major processors/exporters, members of academia, certification bodies and major public sector players to develop a marketing strategy for all prioritized value chains. IMLP has reached out to Pakistan Turkey (Pak-Turk) Business Council to prioritize the list of major Apricot buyers from Turkey. The list will be used to invite a delegation of potential key apricot buyers from Turkey to visit Pakistan. Several major players including Roshan Traders, Bio Foods and Jawad Commission Shop have also agreed to sign MOUs with TAP IMLP&MAP. The JEA also facilitated a three member Malaysian delegation visit to Pakistan from November 6-12, 2013 to pre inspect 5 abattoirs (Zenith, PAMCO, Tazij, Abedin and Al Anis). TAP facilitated pre- and post-inspection meetings and all abattoirs have submitted their documentation for obtaining export approval.

### **3.17 IMPLEMENTATION CHALLENGES AND ISSUES REQUIRING MANAGEMENT ATTENTION**

- a. The complex nature of the project targeting large number of agribusinesses across the country is a challenge. The scattered location of project sites warrant increased resources for M&E, environmental monitoring and mitigation. This is a daunting challenge for timely completion and closure of project.
- b. The project is expected to speed up implementation of activities across the country, however, the prevailing poor law and order situation in project areas, has been a major challenge for travelling of staff especially expatriate STTAs working with the project. The delays in startup of activities may result in late completion.
- c. The project activities are time and season bound, while on the other hand, Grantees are responsible for its implementation including establishment of tunnels, orchards under the Fixed Obligatory Grant (FOG) mechanism/agreement signed with TAP. This process requires extensive technical and mentoring support to the Grantees, so as to enable them to implement required activities in a timely and effective manner. This process at times may lead towards delays in implementation of activities, however, it inculcates the culture of grantee's ownership and sustainability of interventions as the grantees are capable to upscale and replicate the model at their own.
- d. Lack of cooperation from the grantees, especially in the post grant award phase, where some of grantees often do not provide complete and accurate information of their activities and outcomes. This could be offset by adopting a case study based approach for extrapolation of the project results.

## 4 PROGRESS AGAINST EGA INDICATORS

### 4.1 Progress against Indicators

With the roll out of project activities and registration of beneficiaries, the Project is collecting rolling baseline information and periodic progress reports of project interventions on relevant indicators to identify changes in sales revenue, households' income and new jobs opportunities creation etc.

The targets for EGA indicators were reviewed and mostly upward revised as per discussion with USAID EGA counterparts and in consultation with project technical experts (value chain leads) in April 2014. The detailed rationale for revised targets for 13 EGA Indicators for each of the prioritized value chains was developed. The value chain-wise life of project (LOP) indicative targets with 10 years results projections were also shared with USAID. The targets for 9 EGA indicators were upward revised; targets for 2 indicators were slightly downward readjusted, while there was no change in targets for 2 indicators. The revised targets for EGA Indicators were also uploaded on USAID's Pak Info website.

The progress achieved during the reporting year, and cumulative progress as of FY 2014 (Sep 2014) against the targets of EGA indicators is paced at **Annexure-5**.



## SUCCESS STORY

### Banana Bonanza

#### USAID Helps Commercial Banana Growers in Sindh Improve Quality and Profitability



Banana is cultivated on an estimated 85,990 acres in Pakistan of which 87% is grown in the Sindh province. The Dwarf Cavendish variety accounts for 95% of the banana- grown and only a few growers are beginning to experiment with Grand Naine tissue culture plants imported from India. The Dwarf Cavendish variety has been grown in Pakistan for the last 60 years exhibiting adaptability to extreme climatic conditions of strong winds, very high summer temperatures and cold frost during winter.

Mr. Raheel Shah is an established commercial banana grower in Tando Allahyar in Sindh. His father started their family agribusiness some 67 years ago. He now cultivates bananas, mangoes, onions and other crops on 45 acres. Raheel is now growing bananas on 70 acres.

Mr. Raheel and other bananas farmers in the area generally observe low bunch weight (12-15kg); which is far below the international production of 30 to 35 kilograms per bunch. Quality of banana is also far below than the international quality specification for premium fruit of a minimum length of 8 inches and girth of 40mm. Raheel Shah's banana plantation is currently averaging an annual yield of only 8 to 10 metric tons per acre. Wastage is high owing to lack of proper bunch care during fruit development and poor handling after harvest.

The quality and yield of bananas suffered primarily due to use of flood irrigation, high population density of plants, poor planting pattern, lack of proper bunch management, improper application of fertilizer and limited plant nutrition management. Improper handling of fruit after harvesting causes damage to fruit, reducing shelf-life and revenues.

The Agribusiness Project engaged international banana experts and developed a strategy to address key issues that could result in long-term and sustainable changes in quality and yield of bananas for Raheel and other farmers. USAID's strategy included immediate measures for current crop, more elaborate improved practices for next cropping season and establishment of model farms for long-term sustainable improvement in the sector.

Immediate measures to improve the current crop between October and December 2014 comprises of improved bunch care. Bunch care training has been provided including removal of obstacles that can cause blemishes to the bananas, removal of unwanted hands and fingers to allow maximum fruit development and make better cosmetic looks of the fruits at harvest. The use of bunch covers (polyethylene bags) is also introduced to protect fruit from subsequent damage by insects.



## SUCCESS STORY



These measures are expected to increase bunch weight from 12-15kg to 25kg, increase production per acre from 8 metric tons per year to 25 metric tons per year. In terms of quality improvements, 60% of total fruit is expected to be A & B class for export. Fruit recovery will be increased to 95% and wastage reduced to 5% or less.

Mr. Raheel Shah summed up his experience over the past few months with USAID supported establishment of a model farm and technical assistance and training provided through an Australian based company; *“I am grateful to USAID and ASF for helping us improve the quality and reduce costs of bananas. In addition to quality improvements we expect a 30% increase in earnings from this crop. Now I am planning to increase the new planting pattern to 70 acres.”*

Mr. Raheel Shah and other farmers are already seeing the benefits of improved practices. Mr. Javaid Ali Khoro, another farmer who visited Raheel’s model farm implemented improved practices at his farm and later became one of the model farmers. He is planning to increase the new planting pattern over 270 acres by next year. Large number of farmers is now visiting these model farms to benefit from improved practices.

Harvesting is underway currently at Mr. Shah’s farm and others in the area with the help of the Australian based company. According to Raheel, *“We are confident that these practices will have an accelerated rate of absorption in our area and Sindh can have a good brand in the international market in the next few years”.*

Measures implemented for the next cropping season includes plant population control, replacement of flood irrigation that saturates plant roots and affects nutrient uptake from the soil, introduction of a scientific fertilizer program based on soil testing in addition to proper bunch care.

- a. A maximum population of 1000 plants per acre is being implemented compared to local average of 1500-2400 plants per acre, necessitating removal of excess plants
- b. Irrigation canals are advised after every five meters and sprinkler or drip irrigation system is suggested
- c. Balanced nutrition through an optimized fertilizer regime

Long-term strategy includes establishment of model plots at Mr. Shah’s farm and seven other progressive farmers in the area to illustrate a more optimal planting pattern in addition to above improvements. He planted four acres of a more internationally acceptable Grand Naine variety with technical assistance from the USAID Agribusiness Project and replicated another four acres on the same pattern. The new planting pattern included double hedgerow planting, optimally spaced irrigation canals, proposition of micro-sprinkler irrigation solutions, a more suitable fertilizer program for better plant nutrition and use of planting materials and modern tools.



## SUCCESS STORY

# GRAPE FARMING IN POTOHAR REGION

**Improved pre- and post-harvest techniques have improved the quality and increased profitability of the produce**



***“For the first time, I have sold 75% of my farm to the contractor before harvest,”*** said Wasiq Khan, a grape farmer from the Potohar Region.

Nestled in the Potohar region of Pakistan, in the village of Mallho in District Attock, Mr. Wasiq Khan along with his team start the process of harvest in his grape vineyard before the July monsoon rains. Acres of grape vines, heavy with King Ruby and Flameless Seed grapes are sprawled across the trellises. Mr. Wasiq Khan, the proud owner of this vineyard has already sold 75% of his produce for a hefty sum of Pak Rs.2.125 million. This was not the case 2 years ago.

After years of growing potato and wheat, Mr. Khan decided to start grape farming in 2010. After planting the grapes saplings, Mr. Khan tended to it for 2 years till the vineyard reached the fruiting stage. The first fruit harvest ended with no profit as most of the fruit was of poor quality. In 2013, through The Agribusiness Project funded by the USAID and implemented by the Agribusiness Support Fund, Mr. Khan received training on Vineyard management. Through the project he learnt pre- and post-harvest management techniques such as trellising, canopy management, spur pruning, picking and packaging. Through these practical, field-based trainings and technical support, Mr. Khan’s vineyard blossomed and in 2014, even before harvest, buyers had purchased 75% of his farms produce.

“Through The Agribusiness Project (USAID funded), we have received technical support and trainings that have been critical in producing a 100% turnaround profit for my farm. I hope we can continue receiving their support in the future as we want to be able to produce grapes that are of export quality. Right now we are not very far from that”.

Mr. Wasiq Khan is now proudly showing his grapes to buyers due to their superior quality and is also earning money by selling saplings from his vineyard.

ANNEXURE-1: FINANCIAL PROGRESS (AMOUNT IN USD)

No.	Head of Account	During Quarter-4 July-Sep 14	During FY 2014	Cumulative as of Sep 2014
1	Salary, Wages & STTA	556,307	1,717,975	4,763,023
2	Fringe Benefits	109,007	389,511	943,717
3	Travel	86,135	306,334	899,068
4	Equipment	-	81899	534,790
5	Supplies	-	26454	478,665
6	Communication	5,437	154,717	183,575
7	Security Cost	20,717	212,247	356,322
8	Training	1,131	9,840	23,572
9	Sub-Contracts	449,885	3,136,321	4,930,973
10	Sub-Grants	885,832	3,749,708	5,668,882
11	Others Direct Costs	442,100	2,086,148	6,646,434
	Total Cost	2,556,551	11,871,153	25,429,021

ANNEXURE-2: LIST OF COMPANIES CERTIFIED

Sr. #	Company	Contact Person	Location	Certified
1	Saeed Khan Enterprises	Saeed Khan	Karachi	BRC
2	Get Fresh	Shazia Mateen	Karachi	BRC
3	Shaikh International	M.Nasir	Karachi	BRC
4	Hamza Brothers Impex	M.Ilyas	Karachi	BRC
5	M. Ilyas & Brothers	M.Naseer	Karachi	BRC
6	Jehanzeb Muh. & Co.	Jahanzeb Khan	Karachi	BRC
7	M. K. Enterprises	Syed Jan. M	Karachi	BRC
8	Nazir & Sons	Shehzad Waraich	Karachi	BRC
9	Green Overseas	Ghulam Abbass	Karachi	BRC
10	Durrani Associates	Nadir Khan	Karachi	BRC
11	Seabird Fisheries	M.Ilyas	Karachi	BRC
12	NF International	Faisal Rehman	Karachi	BRC
13	Tata Best Foods Ltd.	Bilal Shahid Anwer	Karachi	BRC
14	Jam Traders	Munawar Hussain	Karachi	BRC
15	Khurram Enterprises	Pervaiz Hussain	Karachi	BRC
16	Asia Megafoods	Imtiaz Hussain	Karachi	BRC,
17	KGF Farm - Rabia Sultan	Rabia Sultan	Muzzafargarh	Global GAP
18	SMAS Fruit Farm	Raheel Nasir Shah	Matiari, Sindh	Global GAP
19	Ghulam Ali Shah Pasha	Ghulam Ali Pasha	Matiari, Sindh	GlobalGAP
20	Durrani Associates	Nadir Khan	Karachi	IFS
21	Imtiaz Enterprises	Imtiaz Hussain	Karachi	IFS
22	Asia Megafoods	Imtiaz Hussain	Karachi	IFS

	<b>Year-2</b>			
23	Adeel Mahmood Shah	Adeel Mahmood Shah,	Karachi (Tando Allahyar/Matari)	GlobalGAP (Banana)
24	Saddruddin & Company	Saleem Sadruddin	Karachi (Bhalwal)	GlobalGAP (Citrus)
25	Imam Fruit Farm	Syed Fakhar Imam,	Multan, Kabirwala	GlobalGAP (Citrus)
26	Lutfabad Farms	Tariq Khan	Multan	GlobalGAP (Citrus)
27	Nawab Sarbuland Farms	Waseem Khan	Multan	GlobalGAP (Citrus)
28	Qaim Gardezi Farm	Wajahat Hussain	Multan, Kabirwala	GlobalGAP (Citrus)
29	Muzaffarnagar Fruit Farm	Muzaffar H. Khakwani,	Multan	GlobalGAP (Citrus)
30	Zulfiqar & Co.	Zulfiqar Ali	Karachi	HACCP (Chilli, onion, HV )
31	NF International	Faisal Rehan	Karachi	HACCP (Chilli, Potato, HV)
32	A. Rehman & Sons	M. Rehan,	Karachi	HACCP (Chilli, Potato, HV)
33	M. F. International	Athar Khan	Karachi	HACCP (Chilli, Potato, HV)
34	Jan & K Enterprises	M. Javed, Jan & K Enterprises,		HACCP (Chilli, Potato, HV)
35	Bilal Traders	Afzal Ahmed	Karachi	HACCP (Citrus and Apple)
36	Buffield Private Ltd.	Bilal Ghazi	Karachi	HACCP (Dairy)
37	Organo Botanica	Emaduddin Ahmed	Gilgit	HACCP (Dry Apricot, Cherry, Pear, etc.)
38	Al Hameed Enterprises	Abdul Hameed	Karachi	HACCP (Onion, Potatos, HV)
39	SMA Enterprises	Syed Mehmood,	Karachi	HACCP (Onion, Potatos, HV)
40	Dairyland Private Ltd.	Sulaiman Monnoo,	Karachi	Halal (Dairy)
41	Pakia Garden Food Products	Kamran Khan	Peshawar	ISO-22000 (Fruit)
42	Hamza Halal Food	Fayaz Ahmad,	Peshawar	ISO-22000 (Meat)
43	F. A. International	Sameer Pakhali,	Karachi	ISO-22000 (Onion, Potatos, Citrus)
44	M. Z. Trading Corp.	Zahida Hameed	Karachi	ISO-22000 (Onion, Potatos, Citrus)
45	Virk International Pakistan	Rahat Abbas	Karachi	ISO-22000 (Onion, Potatos, HV)

**ANNEXURE-3: EXPORT OF FRUITS, VEGETABLES & MEAT THROUGH PARTICIPATION IN USG ASSISTED INTERNATIONAL MARKETING EVENTS**

No.	Name of Event	Name of Company	Exports as of Sep. 2013	Exports	Exports	Exports	Total Exports as of Sep 14
				FY 14 (Q1-Q3)	FY 14 (Q4)	FY 14 (Q1-Q4)	
C.1	C.2	C.3	C.4	C.5	C.6	C.7	C.8
1	AGRAME, Dubai	Seven Star Intl., Karachi		5,670		5,670	5,670
2	AGRAME, Dubai	MeatTech, Lahore		56,925		56,925	56,925
3	AGRAME, Dubai	Imtiaz Enterprises Karachi		1,700,000	182,000	1,882,000	1,882,000
4	AGRAME, Dubai	Haji Noor Ellahi & Sons, Peshawar	5,670	600,000		600,000	605,670
5	AGRAME, Dubai	New Shan Ent, Peshawar	56,925	10,711		10,711	67,636
6	AGRAME, Dubai	Ikram Nizam Cold Storage, Lahore		265,200	69,000	334,200	334,200
7	AGRAME, Dubai	Maxim Intl., Lahore			129,525	129,525	129,525
8	AGRAME, Dubai	Meat Tech Pvt Ltd			82,000	82,000	82,000
9	AGRAME, Dubai	MA Links			44,000	44,000	44,000
10	AGRAME, Dubai	Hunza Organics			545,333	545,333	545,333
	<b>Sub-Total</b>		<b>62,595</b>	<b>2,638,506</b>	<b>1,051,858</b>	<b>3,690,364</b>	<b>3,752,959</b>
11	Euro Tier	Tazij Meats & Foods, LHR	3,106,250		48,400	48,400	3,154,650
	<b>Sub-Total</b>		<b>3,106,250</b>	<b>-</b>	<b>48,400</b>	<b>48,400</b>	<b>3,154,650</b>
12	Fruit Logistica 2013	Asia Mega Foods, Karachi	418,775	1,075,000	220,800	1,295,800	1,714,575
13	Fruit Logistica 2014	FA Intl., Karachi		247,500	487,500	735,000	735,000
14	Fruit Logistica 2014	Sunny International		11,377	174,000	185,377	185,377
15	Fruit Logistica 2014	Fresh Pack, Lahore			125,000	125,000	125,000
16	Fruit Logistica 2014	Aagrow, Lahore			2,190	2,190	2,190
	<b>Sub-Total</b>		<b>418,775</b>	<b>1,333,877</b>	<b>1,009,490</b>	<b>2,343,367</b>	<b>2,762,142</b>
17	Gulf Food 2014	Seven Stars Intl., Karachi		276,050		276,050	276,050
18	Gulf Food 2014	Abdullah Traders, Multan		7,000	43,200	50,200	50,200
19	Gulf Food 2014	Meat Tech Pvt Ltd , LHR			82,000	82,000	82,000
20	Gulf Food 2014	Taha Trading, Lahore			136,750	136,750	136,750
21	Gulf Food 2014	Zaiqa Food Industries, KHI			8,822	8,822	8,822
	<b>Sub-Total</b>		<b>k -</b>	<b>283,050</b>	<b>270,772</b>	<b>553,822</b>	<b>553,822</b>
22	World Food Moscow	Chase Intl., Karachi	4,252,500	3,393,325		3,393,325	7,645,825
23	World Food Moscow	FA Intl., Karachi	1,275,000	180,000		180,000	1,455,000
24	World Food Moscow	Shehzad Asia Intl. , ISB	1,200,000			-	1,200,000
	<b>Sub-Total</b>		<b>6,727,500</b>	<b>3,573,325</b>	<b>-</b>	<b>3,573,325</b>	<b>10,300,825</b>
	<b>Total</b>		<b>10,315,120</b>	<b>7,828,758</b>	<b>2,380,520</b>	<b>10,209,278</b>	<b>20,524,398</b>

ANNEXURE-4: LIST OF EDFs DEVELOPED

No.	Activity	No. of EDFs	No. of sites Visited	Locations (Districts)
1	Small Tunnel Dryers for Apricot FEGs	80	800	Gilgit, Ghizer, Hunza and Ghanche
2	High tunnels (individual)	245	245	Swabi, Mansehra, Abbottabad, Haripur, Chakwal, Attock, Peshawar, Nowshera, Charsadda, Swat, Malakand, Lower Dir, Lahore and FATA
3	Chili FEGs by SAFWCO	100	100	Umerkot
4	Grape Orchards (individual)	67	67	Attock, Chakwal, Islamabad, Rawalpindi
5	Potato Cellar	15	38	Ghizer, Gilgit, Hunza, Diamer
6	HVOSV FEGs by RCDS	60	60	Lahore, Shaikhupura and Nankana Sahib
7	HVOSV FEGs by SRSP	24	24	Peshawar and Nowshera
8	HVOSV WEGs by HASHOO	25	25	Mansehra
9	HVOSV FEGs by LASOONA	45	45	Swat and Lower Dir
10	Individual apricot orchards	20	20	Gilgit and Ghizer
	<b>Total</b>	<b>681</b>	<b>1424</b>	<b>24 districts</b>

ANNEXURE-5: PROGRESS ACHIEVED AGAINST KEY RESULTS /EGA INDICATORS AS OF FY 2014

Sr. No	Indicator	Unit of Measure	Revised LOP Target	Achievements as of Sep 2013	FY-2014 Targets	Achievements FY 2014		Cumulative Achievements as of Sep 2014	FY - 2015 Targets	%age achieved of total target
						During Quarter-4	During FY 2014			
1	2	3	4	5	6	7	8	9	10	11
1	2a. Number of jobs attributed to program implementation (4.5-2)	No. of FTE Jobs	13,135	5,604	3,596	1,361	2,481	8,085	5,050	62%
2	2c. Project-related household incomes of USG targeted beneficiaries	Change in HHs Income	2,908,000	689,383	1,163,200	689,499	963,621	1,653,004	1,254,996	57%
3	2.1a. Value of incremental sales attributed to program implementation	USD	39,468,788	11,644,966	7,811,571	3,991,172	12,399,847	24,044,813	15,423,975	62%
4	2.1b. Value of exports of targeted commodities as a result of USG assistance (4.5.2-36-mod)	USD	27,145,926	10,315,120	7,549,468	2,500,520	10,329,278	20,644,398	6,501,528	76%
5	2.1c. Number of micro and small enterprises linked to larger-scale firms as a result of USG assistance to VCs	No. of Enterprises	8,244	2,255	2,128	1,134	5,302	7,557	2,794	92%
6	2.1.1b. No.of micro, small & medium enterprises including farmers, receiving BDS from USG assisted sources (4.5.2-37)	No. of Enterprises / Farmers	13,333	7,339	2,078	2,516	6,926	14,265	2,849	107%
7	2.1.1c. Value of new private sector investment leveraged with USG resources	USD	7,600,000	813,701	5,320,000	2,052,372	5,461,584	6,275,285	1,324,715	83%
8	2.1.2b. Number of persons receiving training on skill dev.:	Persons	12,440	2,480	6,651	6,234	10,334	12,814	3,259	103%

Sr. No	Indicator	Unit of Measure	Revised LOP Target	Achievements as of Sep 2013	FY-2014 Targets	Achievements FY 2014		Cumulative Achievements as of Sep 2014	FY - 2015 Targets	%age achieved of total target
						During Quarter-4	During FY 2014			
1	2	3	4	5	6	7	8	9	10	11
9	2.1.3b. Number of entities (e.g., farmers or private enterprises) that have applied new technologies or management practices as a result of USG assistance	Entities	19,813	7,339	6,623	2,098	6,734	14,073	5,741	71%
10	2.1.3c. Number of hectares under improved technologies or management practices as a result of USG assistance (4.5.2-2)	No. of Hectares	5,737	1,947	2,402	1,417	2,055	4,002	1,735	70%
11	2.2.2a. Number of USG-assisted organizations that participate in legislative proceedings and/or engage in advocacy at all levels	Organizations	7	6	1	-	1	7	-	100%
12	2.2.3a. Number of rural households benefiting directly from USG interventions (4.5.2-13)	Households	28,209	8,938	12,352	4,154	12,815	21,753	6,456	77%
13	2.2.3b. Proportion of female participants in USG-assisted programs designed to increase access to productive economic resources (GNDR-2)	%age	20%	42%	10%	12.5%	27%	34%	10%	168%

Note: The value of HHs income and Private sector leverages indicators will significantly increase in FY 2015 upon receiving data from

- a) 45 companies that obtained international certification (See 3.1 above) as a result of project support.
- b) 24 Pakistani exporting companies for fruit, vegetables and meat that were supported for participation in the international marketing events for fruit, vegetables and meat and business to business meetings. These companies have reported achievement of export sales of USD 20.5 m as a result of participation in these events. These companies are yet to disclose the profit margins in the export sales. The project will collect the data on the profit margins in the next quarter.