



USAID FIRMS PROJECT

# District Profile and Sector Assessments- Multan District

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# Data Page

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# Abstract:

The purpose of this report is to determine and priority rank, within the context of district, the optimal mix of not less than 10 of the most economically promising sectors that would be of most benefit to the districts using a rigorous, empirically sound assessment methodology.





# Acronyms

AAGAH	Local NGO
AKAPP	Askari Kissan Agri Finance Program
BZU	Bahauddin Zikriya University
CD	Community Development
DCO	District Coordination Office
EDO	Executive District Office
COP	Chief of Party
GOP	Government of Pakistan
IBD	Investment Banking Division
IMF	International Monetary Fund
MCB	Muslim Commercial Bank
MICS	Multi-Indicating Cluster Survey
MoU	Memorandum of Understanding
MSME	Micro Small Medium Enterprise
NFC	National Fertilizer Corporation
NGO	Non-Governmental Organization
NOC	No Objection Certificate
NRSP	National Rural Support Program
PIA	Pakistan International Airline
PRSP	Punjab Rural Support Program
PVC	Polyvinyl Chloride
SPDC	Social Policy and Development Centre
SME	Small and Medium Enterprises
SMEDA	Small and Medium Enterprises Development Authority
STEP	Local NGO
SYCOP	Social Youth Council of Patriots
TEVTA	Technical Education and Vocational Training Authority
TMA	Town Muncipal Administration
UBL	United Bank Limited
UFAQ	Local NGO
UNDP	United Nations Development Program

US	United States
USAID	United States Agency for International Development
WASA	Water and Sanitation Agency
WTO	World Trade Organisation

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# Executive Summary

District Multan has very congenial business environment centered on the city of Multan, which is the sixth largest city of Pakistan and the hub of commercial, industrial, financial, business and numerous other activities in southern Punjab. Multan brings along with it many centuries long legacy of serving as a vibrant centre of cross-regional trade and commerce.

With nearly 600 industrial units in the formal sector, thousands of small-scale enterprises in the informal sector, traditional skills, arts and crafts, wholesale markets for fruits, vegetables, food and non-food items of all types, livestock marts, distribution networks, a large services sector, over 200 national/international/commercial/micro-finance banks and a regional branch of the State Bank of Pakistan, export houses, business support institutions, sectoral associations, chamber of commerce, a growing population of business related professionals and skilled human resource, modern communication facilities, print and electronic media, and efficient road, rail and air transportation links, the district is well endowed and already undertaking a range of intra-district, national and international business activities.

Apart from supportive federal and provincial policies, the Multan District Government provides technical support to key economic sectors/areas and is oriented towards promoting a business-friendly environment in the district. Thus Executive District Office (EDO) Agriculture provides a range of services in Agriculture and Livestock which constitute the backbone of the district's economy. The responsibilities of EDO (Community Development) include industrial peace, labor welfare, enforcement of labour laws, registration of factories, shops and business establishments, inspection of factories/transport and shops, manpower and employment, enforcement of weights and measures law, and socio-economic development of the people, particularly women. The Women Development Wing under EDO (CD) undertakes schemes for socio-economic development of women, training in income generation skills and rendering opportunities for women in both urban and rural areas, and research studies and surveys about women related issues and problems for identifying areas of immediate actions and development. EDO (CD) is responsible for formation and regulation of Cooperative Societies including Cooperative Farming in the district.

The scope of work of EDO (Finance and Planning) includes Enterprise & Investment

Promotion, which covers promotion of small business, cottage industry and medium size enterprise; control, monitoring and stabilization of prices of essential commodities; organizing industrial exhibitions; and implementation of Industrial Statistical Act regarding: 1) updating of district pre-investment studies, 2) survey reports on different industries to identify industrial potential and 3) preparation of industrial directory on district basis. The Office is also responsible for registration of firms under the Partnership Act; registration of societies and associations under the Societies Registration Act and the Companies Ordinance; providing feedback to the Government for formulating industrial/trade import and export policies; forwarding planning promotion and development of medium and large scale industrial sector; liaison with Chambers of Commerce & Industry and feedback to the provincial Government in industries & mineral development in Punjab; grant of Location Clearance Certificate for establishment of industrial unit; development of industrial estates and technological parks; and investors protection.

The responsibilities of EDO (Revenue) include land ownership registration/transfer/ demarcation and record keeping, local taxes, 'taccavi' loan for land improvement and other agricultural loans and matters under Money Lenders Ordinance, Usurious Loans Ordinance and Relief of

Indebtedness Ordinance. EDO (Information Technology) is responsible for IT development and promotion and database in the district, which is critically important to the business environment.



# 1. Introduction and Background

## 1.1 Goals and Objectives

The district profile of Multan seeks to provide a sound foundation from which will evolve the economic and investment strategies for the district. The district profile gives data and analysis of critical characteristics based on social and economic indicators including: population demographics; employment; income levels; natural resources; agricultural, industrial, and service productive capacity; energy supplies; their socio-economic needs in health, education/training, and governance; and the institutional capacity (public, civil society, and business) to meet those needs. The district profile together with sector assessments represents a critical and foundational first step in the implementation of each of these projects

## 1.2 Context: District Business Environment

District Multan has very congenial business environment centered on the city of Multan, which is the sixth largest city of Pakistan and the hub of commercial, industrial, financial, business and numerous other activities in southern Punjab. Multan brings along with it many centuries long legacy of serving as a vibrant centre of cross-regional trade and commerce.

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## 2. District Profile

### 2.1 Snapshot of District

#### 2.1.1 Background (include ethnic make-up, etc.)

The importance of District Multan is characterized by the historic city of Multan city, popularly known as the city of Saints and Shrines, as a large number of saints, sufis (mystics) and religious scholars of great fame lived here at different times. Multan, historically, was located at the crossroads of east-west and north-south caravan trade routes; hence it always enjoyed importance in terms of both local and distance trade. This locational advantage persists to the present time and become even more important, with Pakistan's main north-south rail and road routes for both national and international trade, air routes, and east-west link roads passing through Multan.

District Multan lies at the centre of southern Punjab and may be considered as its heartland, given its leadership role in industry, agriculture, commerce, education and other realms in an otherwise less developed sub-region of Punjab. Notably, Multan has always remained a major centre of politics in Punjab as well as Pakistan, and the present Prime Minister of Pakistan belongs to Multan, making the district all the more important. District Khanewal to the north, districts Vehari and Lodhran to the east, district Bahawalpur to the south, and districts Muzaffargarh, Dera Ghazi Khan and Rajanpur to the west surround district Multan. River Chenab flows along the western boundary of the district, separating it from district Muzaffargarh. The southern boundary of district Multan lies along river Sutlej, separating it from district Bahawalpur. The water of river Sutlej has been exclusively allocated to India under the World Bank mediated Indus Water Treaty of 1960, although surplus floodwater released by India or rainwater at times flows into the otherwise dried up riverbed. A network of canals fed by river Chenab flows across the district and irrigates the land.

The district has an area of 3,721 square kilometers and comprises four Tehsils (sub-districts). The first two twin-Tehsils are Multan City and Multan Saddar, emerging from bifurcation the old Tehsil Multan in 1980. Multan city as commonly understood is spread over both these Tehsils. The other two Tehsils are and Shujabad and Jalalpur Pirwala.<sup>1</sup>

Following local government reforms under the Musharraf regime and the promulgation of Local Government Ordinance 2001, Multan District was designated City District and divided into six Towns (equivalent of Tehsils in case of City District): Shah Rukan Alam Town, Sher Shah Town, Bosan Town, Mumtazabad Town, Shujabad Town, and Jalalpur Pirwala Town. This resulted in creation of six Town Municipal Administrations (TMAs) in City District Multan. There are 129 Union Councils besides the cantonment<sup>2</sup> (which falls outside the District Government jurisdiction although contiguous to and integral part of Multan city). The number of urban and rural UCs in each town<sup>3</sup> is given in the table below:

Town of Multan City District	Total # UCs	Urban UCs	Rural UCs
Shah Rukan Alam Town	25	16	9
Sher Shah Town	24	12	12
Bosan Town	24	14	10

<sup>1</sup> [http://www.multan.gov.pk/dt\\_revenue/index.php](http://www.multan.gov.pk/dt_revenue/index.php)

<sup>2</sup> <http://www.multan.gov.pk/index.php>

<sup>3</sup> Punjab Development Statistics 2009

Town of Multan City District	Total # UCs	Urban UCs	Rural UCs
Mumtazabad Town	24	15	9
Shujabad Town	17	2	15
Jalalpur Pirwala Town	15	2	13
<i>Total</i>	129	61	68

According to the 1998 census of Pakistan, 67% of the population in district Multan is Saraiki speaking. The ethno-linguistic break-up<sup>4</sup> of the district is give below:

Ethno-linguistic group	% population	Ethno-linguistic group	% population
Saraiki	66.58%	Sindhi	1.04%
Haryanvi	14.59%	Pashtun	0.62%
Punjabi	11.14%	Baloch	0.07%
Urdu-speaking Muhajar	5.68%	-	-

Major tribes of the district are Syed, Gilani, Qureshi, Gardezi, Khakwani, Arain, Kamboh, Pathan, Baloch, Jat and Rajput.

The district has extreme temperature in summer rising up to 49°C and falling to 1°C in winter. The average rainfall in the district is 127 mm. The land of the district is plain and very fertile. However, some parts of Tehsils Multan and Shujabad close to the river Chenab are flooded during the monsoons season.<sup>5</sup>

### 2.1.2 Demographics (population, age structure, gender, literacy, poverty, infant mortality)

According to Punjab Development Statistics 2009, total population of district Multan estimated as on December 2009 based on District Census Report 1998, is 3925 thousand persons (i.e. 3.925 million). Town-wise population break-up is given as under:

Town	As per 1998 Census			Estimated as on 31-12-09		
	Total	Rural	Urban	Total	Rural	Urban
Jalalpur pirwala Town	358	32	326	442	39	403
Bosan Town	571	285	286	664	302	362
Shah Rukn-e-Alam	598	309	289	779	414	365
Mumtazada Town	560	297	263	730	398	332
Sher Shah Town	541	273	268	705	366	339
Shujabad Town	427	57	370	530	62	468
Cantt	62	62	-	75	75	-

<sup>4</sup> <http://en.wikipedia.org/wiki/Multan>

<sup>5</sup> <http://hamaramultan.com/profile.asp>

Federal SAP Secretariat 2002 reports that the total population of the district is 3,116,851 persons and gender wise composition is 16,35,768 (52.49%) male and 14,81,083 (47.51%) female. The rural population is 18, 02,103 (57.8%) and urban 13, 14,748 (42.2%).<sup>6</sup> According to the Multan City District Government official website population, the district's population is 5 million.

Following is the age structure of the district as stated in district census report 1998.<sup>7</sup>

Under 1	Under 5	Under 10	Under 15	15 to 49	15 to 64	65 & above
2.3 %	14.3%	30.3%	43.6%	46.2%	53.2%	3.2%

The population density of the district is 837.9 persons/sq. km. The average household size is 7.1 persons/household and growth rate is 2.73%.<sup>8</sup>

According to Federal SAP Secretariat Report 2002, the literacy rate in the district is 43.4%. It is higher for male at 53.3% as compared to 32.3% for female. The urban literacy rate is 60.9% and rural 29.5%.<sup>9</sup>

According to the Social Policy and Development Centre (SPDC), Multan ranks 13th on the district deprivation ranking of 34 districts in the province and falls in the category of medium deprivation districts.<sup>10</sup> The Multi Indicator Cluster Survey (MICS) 2003-04 ranks Multan 16<sup>th</sup> on the district deprivation ranking of 34 districts.<sup>11</sup>

A recent study conducted by the Lahore University of Management Science reveals that the incidence of poverty in South Punjab is 50.1%. Districts in the South Punjab include: Rahimyar Khan, Bahawalpur, Bahawalnagar, Multan, Lodhran, Vehari and Khanewal.<sup>12</sup>

### **2.1.3 Local economy (Major economic sectors and subsectors; for agriculture, crop area, livestock, % of employed in agriculture; , breakdown of Micro, Small, Medium Enterprises (MSMEs), listing of major companies and employers)**

Multan is a commercial and industrial centre. Industries include fertilizer, cosmetics, glass manufacturing, cotton production and processing, large textile units, flour mills, sugar and oil mills and large-scale power generation projects. It is famous for its handicrafts (carpets & ceramics) and cottage industries.

Mangoes of Multan district are well known. Multani *khussa* (traditional shoes), embroidery on dresses for women and men, furniture and other wooden products, earthenware pottery, painted pottery, camel-skin ware, surgical instruments and carpets are a few of the city's major export items with a great demand within the country as well.

<sup>6</sup> Government of Pakistan, Social Sector District Report Series; Multan District, Federal SAP Secretariat (M&E UNIT), Planning & Development Division, Islamabad, April - May 2002.

<sup>7</sup> Government of Pakistan, District Census Report, 1998

<sup>8</sup> Government of Pakistan, Social Sector District Report Series; Multan District, Federal SAP Secretariat (M&E UNIT), Planning & Development Division, Islamabad, April - May 2002.

<sup>9</sup> Ibid.

<sup>10</sup> Haroon Jamal, Amir Jahan Khan, Imran Ashraf Toor and Naveed Amir, "Mapping the Spatial Deprivation of Pakistan 2001", research report no 52, Social Policy and Development Center, 9.

<sup>11</sup> Punjab MICS 2003-04, p- 13

<sup>12</sup> <http://www.weeklypulse.org/pulse/article/3719.html>

## Agriculture

Multan is an important agricultural, industrial and tourist centre. Wheat, cotton and sugarcane are the main crops grown in the district. Moreover, rice, maize, tobacco, bajra, moong (lentils), mash (lentils), masoor (lentils), oil seed such as rapeseed, mustard and sunflower are also grown in minor quantities in the district.

**Table 5: Production trend of major crops**

Crops	Production (000 tons)							
	1998-99	1999-2000	2000-2001	2002-03	2003-04	2005-06	2006-07	2007-08
Wheat	388.34	472.50	480	486	475	517	547	434
Sugarcane	212.30	168.50	153.30	186	181	88	124	106
Cotton (000 bales)	394.29	664.43	618.24	600	623	889	830	760
Rice	-	14	14	12	15	17	16	23

Source: Punjab Development Statistics, 2004 and 2009

Mangoes, citrus, guavas and pomegranate are the main fruits grown in the Multan district. Additionally, dates, jaman, pears, phalsa and bananas are grown in lesser quantities in the district. Potatoes, Onion and Cauliflower are main vegetables grown in the district. Besides, Bottle Gourd, Bitter Gourd, Chillies, Carrot, Peas and Garlic are also grown in the district in lesser quantities.

Table 6: Production Of Major Fruits And Vegetables			
Fruits/Vegetables	Production (metric tons)		
	1998-99	1999-2000	2000-2001
Mango	81970	88310	93259
Citrus	49548	52230	49013
Guavas	4387	4588	4746
Pomegranate	3586	3645	3773
Potatoes	24609	25558	23777
Onion	14013	14829	15116
Cauliflower	3747	3807	3693

Source: <http://hamaramultan.com/resources.asp>

According to Punjab Development Statistics 2009, total production of mangos in the country in 2003-04 was 1055,000 metric tons of which Punjab produced 708, 000 metric tons. Thus the share of Punjab in production of mango was 67.1%. In 2000-01 total production of mangos in Punjab was 634900 metric tons of which district Multan produced 93259 metric tons. The share of the district in the production of mango was 4.6%.<sup>13</sup>

Punjab Development Statistics 2009 states that total cropped area in the district is 496000 hectares out of which total irrigated area is 477000 hectares. Various modes of irrigation are as follows: 70000 hectares is irrigated by canal, 1000 hectares by wells, 54000 hectares by tubewells, 2000 hectares by canal wells, 406000 hectares by canal tubewell, and 7000 hectares through other ways.

<sup>13</sup> <http://hamaramultan.com/resources.asp>

According to Agriculture Census 2000, Average farm size in the district is 8.3 acres. The total number of farms in the district is 103101 of which 9 are government farms and 103092 privately owned.

Size Category	Number of Farms	Size Category	Number of Farms
Under 1.0 acre	13685	12.5 to under 25 acres	8282
1.0 to under 2.5 acres	25577	25 to under 50 acres	8174
2.5 to under 5 acres	19273	50 to under 100 acres	1571
5 to under 7.5 acres	14117	100 to under 150 acres	225
7.5 to under 12.5 acres	12000	150 acres and above	190

Source: Agriculture Census 2000

Topographical review shows the Multan as plain ground dissected by rivers, canals and narrow water channels. The irrigation network of Punjab consists of 24 main canal systems with a total capacity of 110000 cusecs, drawing allocated discharges from 14 barrages and diverted to farms through 58,000 outlets. For operational efficiency, the system has been divided into 6 Irrigation Zones (Lahore, Faisalabad, Sargodha, Multan, Bahawalpur & D.G Khan zones). Multan Zone comprises 5 barrages, and 8114 km long irrigation channels to deliver 27022 cusecs discharge for Kharif crop and 14012 cusecs for Rabi crop through 11611 outlets to irrigate an area of 4.98 million acres. The length of main canals and branches in Multan Division is 1249 km.

According to City Report Multan 1998, 2.62% population is employed in agriculture, forestry, hunting and fishing. According to Punjab Human Development Index, 19% of households own agricultural land, and 26.5% of the households have livestock in the district. Punjab Development Statistics 2009 reported following type and number of livestock and poultry population in the district.

Cattle	Buffaloes	Sheep	Goats	Camels	Horses	Asses	Mules	# of Private Poultry Farms		
								Broiler Farms	Layer Farms	Breeding Farms
499	416	81	594	1161	1524	8526	589	653	58	3

#### 2.1.4 Employment and Wages (% of occupational groups, employment share)

City Report Multan 1998 reported largest proportion of the population comprising 37.91% being self employed followed by the 28.41% private employees, 24.51% government employees and 2.39% employees in autonomous bodies.

Employment Status	Both Sexes	Male	Female
Total	246,463	234,261	122,02
Self Employed	37.91	39.22	12.78
Employees (Govt.)	24.51	24.15	31.47

Employment Status	Both Sexes	Male	Female
Employees (Autonomous Body)	2.39	2.32	3.79
Employees (Private)	28.41	28.96	17.89
Employers	2.88	2.92	2.07
Unpaid Family Helpers	3.90	2.43	32.00

## Industries

Multan has 613 registered industrial units<sup>14</sup> and 3,400 units of cottage industry.<sup>15</sup> Punjab Development Statistics 2009 divides registered factories in two categories; employing less than 100 persons and employing 100 or more persons. In district Multan nearly 241 registered factories fell in the first category (less than 100 employees) and 34 registered factories in the second category (100 or more employees) in 2004. There are 275 registered factories in which estimated employment is 19172. The data also provides the statistics on manufacturing industries.<sup>16</sup>

Statistics of Manufacturing Industries: 2000-01 (Cost/Volume in Million Rs.)	No. of reporting factories	Av. daily employment during the year ('000' Number)	Employment cost	Gross value of industrial production	Gross value added	Indirect tax
	123	11	957	1881	3791	588

According to City Report Multan 1998, the distribution of employed population by industry indicates highest percentage in "Community, Social and Personal Services i.e. 38.28% followed by 20.34% in wholesale & retail trade and restaurants & hotel. Another 17.08% are employed in construction and 11.51% in manufacturing.

Average monthly wage in manufacturing industry calculated from the data of Punjab Development Statistics 2009, is Rs. 7250.

### 2.1.5 Tax burden and district revenue base (tax rates)

Prior to the establishment of District Government, 23 taxes/duties were being assessed and collected by the Excise and Taxation Department. As a result of abolition of various taxes and duties through the Finance Ordinance, the following taxes/duties are now being collected and administrated by the department.

- Property tax (The tax is payable at the rate of 25% of the amount of the property tax payable.)<sup>17</sup>
- Excise Duty

Other Taxes Recovered By the Excise and Taxation Department

<sup>14</sup> <http://portal.punjab.gov.pk/portal/portal>

<sup>15</sup> [http://www.pie.com.pk/industrial\\_estates.php](http://www.pie.com.pk/industrial_estates.php)

<sup>16</sup> Government of Pakistan, "Punjab Development Statistics 2009", Bureau of Statistics, P- 212, 253.

<sup>17</sup> <http://www.cbr.gov.pk/newdt/circulars/1996cir19.pdf>



### District/Local Govt. Taxes

- Any other Local Taxes assigned by District Government

### Provincial Govt. Taxes

- Entertainment Duty.
- Motor Vehicle Tax
- Provincial Excise
- Tax on Trade Calling and Profession
- Tax on Hotels
- Cotton Fee

### Federal Govt. Taxes

#### Income Tax on Motor Vehicles

Security (Crime levels by category, security personnel)

Crime trend of the last four years shows an increase in all types of crimes in the district. The data on crime is given in the table below:

	2008	2007	2006	2005	2004
<b>All Reported</b>	14020	10834	9313	8626	9001
<b>Against Person</b>	2230	1660	1869	1587	1851
<b>Against Property</b>	3999	3146	3397	2464	2788
<b>Local &amp; Special Laws</b>	3665	3640	3079	3311	3040
<b>Misc</b>	4126	2388	968	1264	1322

Source: Punjab Police Website

There are 27 Police stations in the district and police to population ratio is 1:723. Total strength of the police personnel in the district is 5322.

## 2.2 Factor Environment

### 2.2.1 Institutions - Purpose: To show the framework within which individuals, firms, and governments interact to generate income and wealth in the district.

There are 13 departments working in the City District Government which include the following:

Department of Agriculture: Agriculture extension, livestock, farm, water management, soil conservation, soil fertility, fisheries and forest. The department reaches out to the farming community for technical support through training sessions, awareness campaigns, provision of services, etc.

Department of Community Development: Coordination human resource, Social welfare, Maintenance of Industrial peace, Labor Welfare, Special Education. The department seeks to ensure observance and enforcement of relevant government laws and policies concerning industrial labour and their welfare through close interaction with the labour and industry.

Department of Education: Boys and girls school, technical education, colleges other than professional, sports education and special education. The department to some extent is responsive to the needs of the industry and market in providing relevant skills, e.g. computer skills in recent years. Lot more coordination is needed to make the education provided marketable and relevant to business needs.

Department of Finance and Planning: Finance and budget, planning and development, accounts, enterprise and investment promotion. The department regulates setting up of industries and facilitates enterprise and investment promotion through industrial exhibitions, etc.

Department of Revenue (Excise & Taxation): land revenue and state, excise and taxation. The department deals with all land demarcation, transfer and ownership issues and is custodial of the title and other records.

Department of Works & Services: Spatial planning and development, district roads and buildings, energy, transport and environment. The department deals with provision and maintenance of infrastructure in the district (other than major roads under the provincial/federal jurisdiction).

Department of Literacy: Literacy campaigns, continuing educational and vocational education. The department contributes to human resource development through raising literacy level and skills development among men and women.

Department of Municipal Services: Environment, solid waste management. The department is responsible for solid waste collection and disposal, and dealing with industrial waste and effluent, etc.

Besides, there is the Multan Development Authority responsible for residential and commercial schemes in the district. The Water & Sanitation Agency (WASA) is responsible for water supply, sewerage and drainage, preparation of plans and design for their extension, rehabilitation and replacement, construction, improvement, maintenance and operation of water works, sewerage works and main storm water drainage channels, and pumping stations.

### **Strength of supporting institutions (business associations, govt. agencies, NGOs)**

Multan Chamber of Commerce and Industry is one of the premier Chamber of Punjab. The Chamber has four classes of membership, Ordinary Class, Associate Class, Town Association and Trade Group. Its jurisdiction as defined by the Ministry of Commerce and covers Multan Division. Currently it has 600 members both from the industries and among traders. Multan Chamber of Commerce is providing technical support through WTO help desk, trade inquiries, official news bulletin and potential business opportunities.

Under the umbrella of Multan Chamber of Commerce, its Executive Committee every year forms Sub Committees on various subjects relating to Trade and Industry. The Sub Committees formulate recommendations for consideration and approval of the Executive Committee. Every year comprehensive memoranda and policy proposals are sent to the Government. There are Sub Committees on the following subjects: Industry, Taxation, General Sales Tax, Refund, Gas/Powers/Utilities, Banking/Insurance/ Economic Affairs, Import/Export, Chamber's Building, Communications, PIA, Railway, Road Transport, Telephone Provincial/local Taxes, Municipal Corporation Affairs, Labour and Social Welfare, Industrial Estate, Computer/Internet, Auto Engineering, Cotton & Textile, Custom/Excise, Small Traders, Agriculture Products Export, Research and Development, Women Entrepreneurs, UNDP-SMEDA, and ■■■■ Lesion. The Chamber has representation on the various Advisory

Committees/Boards at Government level. There is also a women chamber of commerce, known as the “South Punjab Women Chamber of Commerce and Industry Multan”.

There are at least 11 business associations in the district: Multan Mango Growers Association, Multan Cotton Association, Pakistan Cotton Ginners Association, All Pakistan Handloom and Traditional Textile Manufacturers & Exporters Association, All Pakistan Power Looms Association, Bed Sheets & Upholstery Manufacturers Association, Multan Exporters Natural Sheep Casing Association, The Pakistan Medical Association (Multan Chapter), Pakistan Tanneries Association, and Pakistan Footwear Manufacturers Association. These associations have a major contribution in articulating industry concerns with the government, influencing policy formulation, serving as a bridge between the government and industry, and providing latest information, support and guidance to respective industry members.

Approximately 43 NGOs are working in the district on social welfare and development issues.<sup>18</sup> These include NRSP, Anjum Mafad-e- Amah, Asheyna Development Organization, Pakistan Young Council, Noor Development Foundation, Aashiana Welfare Organization, Aaghoos Development Organization, Multan Theater Foundation, Hadi Welfare Society, Community Forward Development and Environment, Zakariya Welfare Development Association, Human Rights Commission For Pakistan, Taraquee Passand Organization, Women Right Association, Women Development Organization, Shoaib Welfare Society, AAGAH, Roshani Welfare Organization, Pakistan Human Development Foundation, Organization Forward Development and Peace, Women Empowerment Organization, Sujhal for Social Change, Azaan Development Organization, Women Development Organization, Trust Volunteer Organization, Pakistan Volunteer Human Development Foundation, Justice and Peace Commission, STEP, Caritas Pakistan Multan, Punjab Rural Support Programme (PRSP), Islamic Media Foundation, Pattan Taraqiati Tanzeem, SYCOP, Peoples’ Development Organization, Rawadari Development Organization, Fiza Development Organization, Women Empowerment Organization, Awam Dost Citizen Community Board, Ali Organization for Development, Anjum-n- Falah-e-Awam, Pakistan Youth Forum, and UFAQ Development Organization.

NRSP’s “Social and Human Protection Program” is working in district Multan. Its main emphasis is on Identification of Vulnerable and Destitute Family’s in the project area, Identification and assessment of Economic, Opportunities in the project districts, Assessment through Poverty Score Card, Preparation of Family Development Plan, income Generation Grants, Micro Credit, Vocational and Technical Skills Training, Follow up support, life skills and guidance for empowerment of marginalized and vulnerable segments of the workforce.

### **Assistance offered by support institutions (i.e. financial, technical, advocacy)**

Website of Agriculture Market Information Service is providing information about crop prices<sup>19</sup>. Board of Investment Pakistan, Export Promotion Bureau sub-regional office in Multan, Trade Development Authority of Pakistan and Regional office SMEDA are also providing technical support to existing and potential entrepreneurs. Besides these institutions, some research institutions are also providing technical support in agriculture sector in the district i.e. Central Cotton Research Institute, Cotton Research Station, Mango Research Station and Agricultural College at Baha-ud-Din Zakria University.

## **2.2.2 Governance: Political stability, government effectiveness, regulatory quality & corruption**

The structure of governance in the district is defined under the Local Government Ordinance 2001 in which the District Government consisted of the Zila Nazim and District Administration.

<sup>18</sup> [http://www.pacp.pk/List\\_NOGs-Pak/NGO%20Multan.pdf](http://www.pacp.pk/List_NOGs-Pak/NGO%20Multan.pdf)

<sup>19</sup> <http://www.pakissan.com/english/reportcenter/market.prices/multan.grain.market.shtml>

The District Administration consisted of district offices including sub-offices at Tehsil level, who are responsible to the District Nazim assisted by the District Coordination Officer. The District Coordination Officer is appointed by the Provincial Government and is coordinating head of the District Administration. The Zila Nazim is accountable to the people through the elected members of the Zila Council. A Zila Council consisted of all elected Union Nazims in the District and those elected on reserved seats including seats reserved for women, peasants, workers, and minority community. The Zila Council had its Secretariat under the Naib Zila Nazim and had a separate budget allocation. Adequate checks and balances were introduced in the system. While this system was introduced and nurtured by Musharraf regime, its future has been under debate in the post-Musharraf era. Some uncertainty looms with the DCO (provincial bureaucrat) having been more empowered compared to the Zila Nazim elected by an electoral college.

Some modifications in the system, especially the election and role of Zila Nazim, is expected by the end of the year. The old Divisional Commissioners are also being reintroduced. However, lot of investment has gone into the system and it's likely to be modified but not reversed as such. The developments are not likely to affect the business environment as such. Multan district has a dynamic and motivated District Government leadership and staff and corruption is not a major problem at district level, except for routinized and petty corruption deep rooted in the local system (e.g. patwari, lower staff, etc.).

### **2.2.3 Infrastructure (Logistics) - Purpose: To ensure the effective functioning, the location and kinds of activities or sectors of the district**

#### **Number of paved roads**

According to the Punjab Development Statistics 2009, the length of metalled roads in the district is 1972 kms as on 30<sup>th</sup> June 2008. Both inter-district roads passing through Multan and intra-district and farm to market roads are in reasonably good and functional condition.

#### **Proximity to highways**

According to the Punjab Development Statistics 2009, the length of National Highways in the district is 140 kms, Provincial Highways is 134 kms and farm to market road is 873 kms as on June 30, 2008. Highways are accessible from all points within 1 to 2 hours travel time.

#### **Number and location of airports**

Airport is situated 10 km away from the Multan city centre. It is presently not as large as the other airports in Pakistan, and operates to cater mainly to the population of Multan, Vehari, Khanewal, Muzaffargarh, Rajanpur, Sahiwal, and Pakpattan. However, its expansions into an international airport are already underway.

#### **Number and location of railways**

There are 8 railway stations <sup>20</sup> in Tehsil Multan and 5 stations in Tehsil Shujabad. Multan is connected by rail with all parts of the country and lies on the main railway track between Karachi, Peshawar, Lahore and Quetta.

#### **Number and location of ports (inland and ocean)**

There is one dry port on the city railway station. Multan Dry Port Trust handles imports and exports of various items. The export items are textile products, grey cloth, cotton yarn, leather

<sup>20</sup> <http://hamaramultan.com/facilities.asp>

goods, raw cotton and rice, etc. The import items are auto spare parts, PVC, chemicals, cotton yarn waste, paper waste scrap, raw cotton, leather goods, vehicles, etc.

#### 2.2.4 Natural Resources

##### Rivers

In the days of Mogal Emperor Aurengzeb the river Ravi flowed past Multan. One of the revenue "Mahals" (palaces) is still known at Taraf Ravi. A branch of the Ravi (Monan) ran within a kilometer of the city as late as the 18<sup>th</sup> century. Even in recent past before the intervention of the sindhnai cultivation a channel of the Ravi flowed during the floods up to the shrubs of the city. The level of water in the Ravi during the winter months has much decreased owing to the supplies taken off by the Bari Doab Canal system and for the greater part of winter, its bed is dry in the aftermath of the Indus Water Treaty 1960, allocating water of Ravi exclusively to India. The Chenab is never dry except in exceptionally dry seasons. River Chenab is flanking over Multan district in the east. Total length of Chenab River running through the district is approximately 129 km. The Chenab water brings fertile soil in the plains of Multan.

##### Forest

According to District Census Report 1998, total area under forest during 1996-97 was about 8.804 hectares of which 8313 hectares was reserved forest, 335 hectares protected forests and 156 hectares un-classified forest. Punjab Development Statistics 2009 reports only 812 kms of linear forest as protected forest.

##### Minerals

The district is deficient in mineral wealth. Saltpeter (potassium nitrate) is manufactured on a small scale and a little *kankar* is found here and there on the surface.

##### Fisheries

Punjab Development Statistic 2009 reports that 127000 quintiles of fish were produced in Multan Division valued Rs.1270 million in 2007-08.

#### 2.2.5 Macroeconomic Stability

##### Employment and unemployment levels and poverty

##### Employed Population by Occupation

According to the City Report Multan 1998, unemployment rate is 22.28% and gender wise composition is 23.08% male and 2.98% female.<sup>21</sup> The data of employed population shows that 29.95% population is employed in elementary occupations and 20.94 % employed as services workers and shop and market sales workers.

Occupation	Employed Population	
	Number	Percentage
All Occupation	246,646	(100)
Legislators, Senior Officials and Managers	564	0.23
Professional	16,969	6.89
Technicians and Associates	12,931	5.25

<sup>21</sup> Government of Pakistan, "City Report Multan: Population and Housing Census, 1998", Statistics Division Population Census Organization, p- 33.

Occupation	Employed Population	
Professionals		
Clerks	6,846	2.78
Service Workers and Shop and Market Sales Workers	51,616	20.94
Craft and Related Trade Workers	28,507	11.57
Plant and Machine Operators and Assemblers	12,422	5.04
Elementary Occupations	73,847	29.95
Others	37,216	15.10

Source: City Report Multan 1998

### Labor Force participation

According to the City Report Multan 1998, the percentage of economically active population to the total population in the district is 26.48% and represents crude activity or participation rate. The percentage among population aged 10 years and above representing refined activity rate or labor force participation rate is 36.07% for the city. There is a wide variation in the labor force participation rates for male and female i.e. 64.17% for male as compared to only 3.11% for female (i.e. paid labor).

Economic Category	Both Sexes	Male	Female
Economically Active (Labor Force)	26.48	47.74	2.25
Not Economically Active	73.52	52.26	97.75
Children Under 10	26.57	25.60	27.67
Students	9.90	17.77	0.92
Domestic Workers	32.77	0.99	69.01
Others	4.28	7.90	0.15
Unemployment Rate	22.28	23.08	2.98
Labor Force Participation Rate (Refined)	36.07	64.17	3.11

Source: City Report Multan 1998

### Local income levels

According to the Punjab Human Development Index average per capita income in the district is Rs. 1754.<sup>22</sup>

#### **2.2.6 Health Services and Primary Education– Purpose: The state of health services and primary education is vital to the productivity of the district's workforce.**

Availability of health services

<sup>22</sup> <http://www.punjabpolice.gov.pk/>

According to Punjab Development Statistics 2009, there are 13 government hospitals (including Nishtar Hospital, the main government hospital), 48 dispensaries, 10 Rural Health Centers, , 77 Basic Health Centres, 14 Child Health Centres, 24 Mother & Child Health Centres, and 17 private hospitals available in the district.

### Availability of Education

**Table 14: Number of Public Sector Education Institutions: 2007-08**

Govt. Primary Schools	Number			Enrollment			Teaching Staff		
	Total	Boys	Girls	Total	Boys	Girls	Total	Boys	Girls
	1253	478	775	176180	83550	92630	4166	1921	2245
Govt. Middle Schools	195	88	107	71625	32832	38793	2111	957	1154
Govt. High Schools	138	101	37	117205	75298	41907	3130	2137	993
Arts and Science Intermediate Colleges (Punjab, Federal & Private)	5	2	3	1184	383	801	81	27	54
Arts and Science Degree Colleges (Punjab, Federal & Private)	26	16	10	28060	12436	15624	893	543	350
Govt. Mosque Schools	212			12500			217		

Source: Punjab Development Statistics 2009

According to official website of Multan City District Government the enrollment in public sector schools was as follows: Pre Primary Schools 85266, Primary Schools 205084, Middle Schools 63259, Secondary Schools 29035, and Higher Secondary Schools 1592.

Table 15: Public Sector Educational Statistics						
Level of School	Enrollment Statistics			# of Schools		
	Male	Female	Total	Male	Female	Total
Pre Primary	45505	39761	85266			
Primary	113382	91702	205084	484	783	1267
Middle	39840	23419	63259	85	107	192
Secondary	17467	11568	29035	101	31	132
Higher Secondary	615	977	1592	8	5	13
Mosque Schools				244	9	253
Total:	216809	167427	384236	922	935	1857

Source: Multan City District Govt. Official Website

Federal Bureau of Statistics provides the following data on private sector educational institutions in the district.

**Table 16: Private Sector Educational Institutions**

	# of Schools			Total	Enrollment			# of Teachers		
	Boys	Girls	Combined		Boys	Girls	Total	Boys	Girls	Total
Primary	6	1	394	401	73089	56971	130060	395	1668	2063
Middle	5	6	499	510	11866	11094	22960	1125	2901	4026
High	18	9	94	121	3083	2842	5925	638	1316	1954

Source: Federal Bureau of Statistics 1999-2000

## Population Demographics

### 2.3 Efficiency Enhancers

#### 2.3.1 Higher Education, Vocational and Technical Training – Purpose: Assesses compatibility of education and training with needs of industries/employers, and how these institutions increase workers' adaptability to changing environments, crucial for raising the value chain beyond simple processes and products.

#### Relevance of Higher Education

Presently in the public sector Bahauddin Zikriya University (BZU), Multan is the major source of higher education for not just district Multan but the surrounding districts as well. It has 8076 existing students, and department-wise existing enrollment is as follows: Department of Mass Communication 116 male and 109 female, Centre for Advanced Studies in Pure and Applied Mathematics 87 male and 111 female, Department of Commerce 411 male and 106 female, Department of Economics 70 male and 148 female, Department of Political Science & International Affairs 118 male and 78 female, Department of Computer Science 538 male and 103 female, Department of Chemistry 538 male and 220 female, Department of Statistics 101 male and 135 female, University College of Agriculture 377 male and 56 female, Institute of Management Sciences (Business Administrations) 482 male and 202 female, University Gillani Law College 478 male and 82 female, Department of Pharmacy 601 male and 210 female, University College of Engineering & Technology 532 male and 59 female, Department of Agriculture Engineering 41 male and Multan College of Arts 12 male and 57 female.

Besides, there is the Nishtar Medical College in the public sector and Al-Khair University and Preston University in the private sector, producing graduates in business management (BBA & MBA), computer sciences (BCS & MCS), accounts, etc.

These institutions do contribute to producing human resource for the industry and the public and private sector. However, link between the industry and higher educational institutions including universities and professional colleges in Pakistan is generally weak, the educational sector in general is facing multiple crises of quality and competitiveness, and district Multan is no exception. However, the higher educational institutions in Multan are amenable to have the potential for enhanced interfacing with the industry, agriculture and other sectors.

#### Relevance of Vocational and Technical Training

There are around 18 technical and professional government and private colleges presently working in the district. These include the Chenab College of Commerce, NFC Institute Of Engineering & Technological Training, Allama Iqbal College of Commerce, Allama Iqbal Technology College, Government Post Graduate College of Commerce, Government College of Technology, University of Southern Punjab, Punjab College of Information Technology, Bristol Commerce College, Muhammadan Law College, Multan Law College, Noor Law College, Central Law College, Commerce Training Institute, Vocational Institute for Women, Polytechnic for Women, etc. There are 16 vocational training institutes working under TEVTA in the district. Total enrollment in TEVTA during 2008-09 is 10344 student. Sector-wise enrollment in TEVTA institutes is as follows: Commerce sector 2803, Technical sector 6167 and Vocational sector 1374. The technical and vocational training offered by these institutions is by and large relevant to the market needs, while the quality and rigor of the training may have problems.



**Table 17: List Of These Institutions In The District And Courses Offered**

Institutes	# Of Courses Offered	Enrollment 2008-09	Courses
Commerce Sector	5	2803	
Govt. Institute Of Commerce, Shujabad	4	642	<ol style="list-style-type: none"> <li>1. B.Com (Degree)</li> <li>2. Diploma In Commerce (Diploma 2 Years)</li> <li>3. Spoken English</li> <li>4. Certificate In Computer Applications</li> </ol>
Govt. College Of Commerce, Multan	3	1519	<ol style="list-style-type: none"> <li>1. B.Com (Degree)</li> <li>2. Diploma In Commerce (Diploma 2 Years)</li> <li>3. M.Com (Master Degree)</li> </ol>
Govt. College Of Commerce, Multan Cantt	4	642	<ol style="list-style-type: none"> <li>1. B.Com (Degree)</li> <li>2. Diploma In Commerce (Diploma 2 Years)</li> <li>3. M.Com (Master Degree)</li> <li>4. Certificate In Computer Applications</li> </ol>
Technical Sector	27	6167	
Govt. Polytechnic Institute (W), Multan	4	348	<ol style="list-style-type: none"> <li>1. Dress Designing &amp; Making (G-iii)</li> <li>2. Electronics (Dae)</li> <li>3. Diploma In Commerce (Diploma 2 Years)</li> <li>4. Diploma In Office Management (Diploma One Year)</li> </ol>
Govt. College Of Technology, Multan	23		<ol style="list-style-type: none"> <li>1. Chemical (Dae)</li> <li>2. Civil (Dae)</li> <li>3. Electrical (Dae)</li> <li>4. Electronics (Dae)</li> <li>5. Mechanical (Dae)</li> <li>6. Textile Spinning (Dae)</li> <li>7. Textile Weaving Technology (Dae)</li> <li>8. Chemical (B. Tech Hons.)</li> <li>9. Chemical (B. Tech Pass)</li> <li>10. Civil (B. Tech Pass)</li> <li>11. Electrical (B. Tech Pass)</li> <li>12. Electronics (B. Tech Pass)</li> <li>13. Higher National Diploma (Chemical)</li> <li>14. Mechanical (B. Tech Pass)</li> <li>15. Auto Cad</li> <li>16. Civil Surveyor</li> </ol>

**Table 17: List Of These Institutions In The District And Courses Offered**

Institutes	# Of Courses Offered	Enrollment 2008-09	Courses
			17. Quantity Surveyor 18. Electronics Equipment Repair 19. Home Appliances & Repair 20. Industrial Electronics 21. Motor Winding 22. Plumber 23. Welder
Vocational Sector	25	1897	
Govt. Technical Training Centre, (Amts), Multan	1	40	1. Tractor Operator
Govt. Technical Training Centre, (Dmtc), Jalalpur	5	34	1. Auto & Farm Machinery 2. Carpenter 3. Turner 4. Welder 5. Wireman
Govt. Technical Training Centre, (Dmtc), Shujabad	4	43	1. Carpenter 2. Turner 3. Welder 4. Wireman
Govt. Technical Training Institute, (W), Shah Ruken-E-Alam, Multan	8	242	1. Matric Tech 2. Computer Operator (G-ii) 3. Dress Designing & Making (G-ii) 4. Hair And Skin Care (G-ii) 5. Office Management Assistant (Giii) 6. Beautician 7. Domestic Tailoring 8. Fabric Printing
Govt. Technical Training Institute, Daulat Gate, Multan	5	165	1. Draftsman Mechanical (G-li) 2. Electrician (G-11) 3. Electronics Application (Radio & Tv) 4. Machinist (G-li) 5. Welder (G-li)
Govt. Technical Training Institute, Khanewal Road, Multan	21	578	1. Auto Mechanic (G-li) 2. Draftsman Civil(G-li) 3. Draftsman Mechanical (G-li) 4. Electrical (G-li)

**Table 17: List Of These Institutions In The District And Courses Offered**

Institutes	# Of Courses Offered	Enrollment 2008-09	Courses
			5. Electronics Application (Radio & Tv) 6. Fitter General (Gii) 7. Machinist (G-li) 8. Plumber (G-li) 9. Refrigeration & Air Conditioning (G-li) 10. Welder (G-li) 11. Auto Electrician (G-iii) 12. Auto Mechanic (G-iii) 13. Draftsman Civil ( G-iii) 14. Draftsman Mechanical (G-iii) 15. Electrical (G-iii) 16. Electronics Application (Radio & Tv) (G-iii) 17. Fitter General (G-iii) 18. Industrial Electronics (G-iii) 19. Machinist (G-iii) 20. Refrigeration & Air Conditioning (G-iii) 21. Welder (G-iii)
Govt. Vocational Training Institute (W), (Rmgtc), Multan	-	22	-
Govt. Vocational Training Institute (W), (Rmgtc), Multan (New)	4	81	1. Diploma In Vocational Girls (Diploma 2 Years) 2. Certificate Vocational Girls (1 Year Certificate) 3. Beautician 4. Domestic Tailoring
Govt. Vocational Training Institute (W), Ultan (Old)	2	136	1. Diploma In Vocational Girls (Diploma 2 Years) 2. Certificate Vocational Girls (1 Year Certificate)
Govt. Vocational Training Institute (W), Shujabad	2	1374	1. Diploma In Vocational Girls (Diploma 2 Years) 2. Certificate Vocational Girls (1 Year Certificate)

Sr.#	College Name	Phone#	Offered Courses
1	Allama Iqbal College Of Commerce, Chungi No.9 Bossan Road	061-6221917, 221924, 510226	Diploma In Information Technology Diploma In Business Administration Diploma In Commerce
2	Allama Iqbal Technology College, 130-D Shamasabad Colony Eid Gah Road	0614571979	Chemical Technology Electrical Technology Electronics Technology Telecommunication Technology
3	Asia Insitute Of Technology, Near General Bus Stand Al Qaim Town Bahalpur Road	061-244758, 0300-7340459	Civil Technology Electrical Technology
4	Asia Institute Of Technology (Campus-Ii), Lasani Colony Street No. 1, Al-Qasim Town, Bahawalpur Road	061-8122516	Civil Technology
5	Bristol Commerce College, Al-Farooq Plaza Near M.C.B Gulshan Market, New Multan	061-6783851	Diploma In Commerce
6	Chenab College Of Commerce, 17-A Hassan Parwana Colony Near Chadar Wali Sarkar Dera Adda	061-4030400	Diploma In Commerce
7	Dr. Aziz Ullah Institute Of Technology, 11 Y New	061-556447	Civil Technology Electrical Technology
8	Facs College Of Computer Sciences, Nasheman Colony Boson Road	521976, 524693, 0300-6352398	Chemical Technology Electronics Technology Electrical Technology
9	Garrison College Of Technology, New Shamsabad Colony, Behind Coca Cola Factory	6527616	Civil Technology Electrical Technology

Sr.#	College Name	Phone#	Offered Courses
10	Government College Of Commerce, Qasim Pur Colony Bahawalpur Road,	234155	Diploma In Business Administration Diploma In Commerce
11	Government College Of Commerce, Azmat Wasti Road, Multan Cantt,	9200173	Diploma In Commerce
12	Government College Of Technology, Qasim Pur Colony	061-4230505-6526552	Chemical Technology Chemical Technology Civil Technology Electrical Technology Electronics Technology Mechanical Technology Textile Dyeing And Printing Technology Textile Spinning Technology Textile Weaving Technology
13	Government Polytechnic Institute For Women, Qasim Pur Colony	061-529009	Diploma In Commerce Diploma In Dress-Designing And Dress-Making Technology Diploma In Office Management Electronics Technology
14	Government Technical Training Institute For Women, Shah Rukh E Alam Colony		Technical School Certificate (Matric Tech)
15	Government Vocational Training Institute For Women, Qasim Pur Colony		Certificate In Dress Making Diploma In

Sr.#	College Name	Phone#	Offered Courses
			Vocational Girls
16	Government Vocational Training Institute For Women, Muhalla Sidique Abad Near Shesha Factory Old Shujabad Road		Diploma In Vocational Girls
17	Govt. Technical Training Institute ,Daulat Gate Chowk,	061-9200659	Technical School Certificate (Matric Tech)
18	Haq Institute Of Computer Sciences,Behind Churah Road Near Commisioner Office	589494	Diploma In Information Technology
19	International College Of Commerce,Near Chowk Kachari	061-513779	Diploma In Commerce
20	Jinnah Endeavors Institute Of Technology,Murawat House, Str # 4, Ahmad Park, Near Food Festival Plus, Khanewal Road,	061-521229, 513292	Electrical Technology Electronics Technology
21	Kasib Polytechnic Institute,242-B, Gulgasht Colony	0616520820	Auto Electrician Trade Auto-Diesel Mechanic Trade Civil Draftsman Trade Electricians Trade Machinist Trade Mechanical Draftsman Trade Pipe Fitting Trade Radio & Television Servicing Trade Refrigeration And Air-Conditioning Mechanic Trade Tracer Trade Welding Trade Surveyor Trade Civil Technology Electrical Technology
22	Khaton Industrial Center,Railway	2311	Certificate In Dress

Sr.#	College Name	Phone#	Offered Courses
	Colony		Making Diploma In Vocational Girls
23	Muhammadan College Of Commerce & Information Technology,L.M.Q Road Behind Commisioner Office	061-549318,519602	
24	Multan College Of Commerce,Vehari Road	061-526956	Diploma In Information Technology Diploma In Business Administration Diploma In Commerce
25	Multan Institute Of Technology,Ward No. 10 Cb Mazafarabad Post Office Ismailabad	061-537293, 538293	Electrical Technology
26	Multan Polytechnic Institute,2656 Masoom Shah Road	061-564343	Chemical Technology Civil Technology Electrical Technology Mechanical Technology (Power) With Specialization In Refrigeration And Air-Conditioning Technology Electronics Technology Instrument Technology Telecommunication Technology Mechanical Technology
27	Multan Swedish Institute Of Technology,319-A, Shershah Road	061-545652, 44252	Textile Spinning Technology Chemical Technology Civil Technology

Sr.#	College Name	Phone#	Offered Courses
			Computer Technology Electrical Technology Electronics Technology Mechanical Technology Telecommunication Technology
28	Multan Vocational Training Centre, Masoom Shah Road		Civil Draftsman Trade Electrician Trade Electricians Trade Radio & Television Servicing Trade Refrigeration And Air-Conditioning Mechanic Trade Refrigeration And Air Conditioning Trade Technical School Certificate (Matric Tech) Welding Trade
29	Nishtar College Of Commerce, Gulistan Colony	061-581833	Diploma In Commerce
30	Nishtar College Of Commerce & I.T, 4-Gulsitan Colony, Old Bahawalpur Road	061-4581833	Diploma In Commerce Electrical Technology
31	Pakistan Vocational Training Centre, Zikria Shopping Centre Hussain Agahi	061-4540364	Refrigeration And Air-Conditioning Mechanic Trade Refrigeration And Air Conditioning Trade
32	Petroman Training Institute Multan, Aqub Naishemun Colony, Bossan Road	522897	Diploma In Business Administration Diploma In Information



Sr.#	College Name	Phone#	Offered Courses
			Technology
33	Prime Institute Of Management Sciences, Jaleelabad Multan Cantt	061-4587336	Diploma In Business Administration Diploma In Commerce
34	Prime Institute Of Technology, 443-Altumash Road		Applied Instrumentation And Control Automation
35	Private Candidates,		Auto Electrician Trade Auto-Diesel Mechanic Trade Civil Draftsman Trade Electricians Trade Machinist Trade Mechanical Draftsman Trade Pipe Fitting Trade Radio & Television Servicing Trade Refrigeration And Air-Conditioning Mechanic Trade Refrigeration And Air Conditioning Trade Surveyor Trade Welding Trade
36	Punjab Polytechnic Institute, Opp. Wapda Colony Khanewal Road	061-552635	Chemical Technology Electronics Technology Electrical Technology
37	Rasool College Of Technology Multan, Multan	061-6221917	Computer Information Technology Computer Technology

Sr.#	College Name	Phone#	Offered Courses
			Civil Technology Electrical Technology Electronics Technology Petroleum Technology
38	Sir Syed College Of Commerce,Near Qari Hanif Mosque Old Bahawalpur Road	061-4301949	Diploma In Commerce
39	Sir Syed College Of Technology,Old Bahawalpur Road, Near Grid Station, Qasim Pur Colony	061-6243244	Civil Technology Electrical Technology
40	The National College,858-D Bossan Road	521748, 221748-4	Diploma In Computer Hardware Engineering Diploma In Information Technology Diploma In Business Administration Electrical Technology Electronics Technology Civil Technology
41	The Oxford Institute Of Technology,21-A-B Near Old Tehsil Gulgasht Colony	061-521938, 6521938	Chemical Technology Electrical Technology
42	University College Of Textile Engineering,Khanewal Road Near Edhi Village Post Office N.F.C		Textile Weaving Technology Textile Spinning Technology Textile Dyeing And Printing Technology

### **2.3.2 Goods Market Efficiency – Purpose: To understand if the district is producing the right mix of products and services given supply-and-demand conditions, and the effectiveness of trade of these goods**

#### **Number of firms in sector, presence of monopoly and corporate tax rate**

There are 613 registered industrial units<sup>23</sup> and 3,400 units of cottage industry<sup>24</sup> working in district Multan. Major industries are Beverage, Biscuits, Chemical, Cotton Ginning & Pressing, Diesel Engines, Drugs & Pharmaceuticals, Fertilizer, Fiber Glass Industry, Fire Bricks, Flour Mills, Food Industry, Foundry Products, Fruit Juices, General Engineering, Glass & Glass Products, Glue, Hatchery, Hosiery Products, Industrial/ Burn Gases, Iron & Steel Re-Rolling Mills, Leather Footwear, Looms, Motor/ Pump/ Turbines, Oil Mills, Pesticides /Insecticides, Poly Propylene Bags, Poultry Feed, Readymade Garments, Solvent Extraction, Tannery, Textile Processing, Textile Spinning, Textile Weaving, and Vegetable Ghee.

These industries are addressing local and regional needs, besides international demand in case of exports, and enjoy local advantage in terms of essential inputs.

#### **Condition of logistics infrastructure**

Seen against the large volume of trade and commerce in and out of Multan, the logistics infrastructure in the district is underdeveloped and ill-organized. A cursory look at the loading and unloading in various markets and the stage of the goods transport 'Adda' is sufficient to point to the need for extensive modernization of logistical infrastructure.

#### **Availability of transportation/logistics services**

Despite visible underdevelopment, even primitiveness (sizeable use of animal driven carts—especially in the wake of escalating fuel cost) of the logistical infrastructure, there is prompt availability with sizeable competition for transportation/logistics services at the railway station, dry port, markets, godowns, transport 'Adda' (yards), etc.

### **2.3.3 Labor Market Efficiency - Purpose: To ensure workers are allocated to their most efficient economic use and are provided with incentives to give their best effort in their jobs**

Labor market efficiency varying exists among large industries in the formal sector which have labor officer and invest in human resource evaluation and development.

#### **Wage rate, flexibility of wages, strike rates**

The minimum wage for labor fixed by the government is Rs. 6000 per month. The wage rates for unskilled and skilled labor including working hours and overtime, besides bonuses and benefits, are judiciously determined (often negotiated with workers union) in large industries. In the case of smaller industries and the informal sector, there is often lack of minimum labor wage observance, especially in the case of female workers.

Industrial strike rates in Pakistan including Multan are minimal to none ever since General Zia regime suppressed trade union movement in the country, reversing pro-labour policy of the populist-socialist Bhutto regime.

<sup>23</sup> <http://portal.punjab.gov.pk/portal/portal>

[http://www.citymultan.com/city\\_profile.html](http://www.citymultan.com/city_profile.html)

<sup>24</sup> [http://www.pie.com.pk/industrial\\_estates.php](http://www.pie.com.pk/industrial_estates.php)

### 2.3.4 Financial Market Sophistication - Purpose: This determines the allocation of the resources saved by a nation's citizens as well as financial resources entering the economy from abroad to their most productive uses

There is sizeable domestic saving in district Multan among the big farmers / landlords enjoying the benefit of tax-free agriculture sector. Their savings enter industrial and other sectors of the district economy. Besides, there are many expatriates from the district in the Middle East and elsewhere sending remittances back home, which partly convert into household savings and investment.

#### Availability and access to banking and non-banking finance

There are around two dozen different banks and financial institutions with over 200 branches working in the district. Some of these banks are offering services for SME, agriculture, trade and business financing. These banks include:

1. SME Bank's Network (Medium Term Running Finance)
2. Askari Commercial Bank: The Askari Kissan Agri Finance Program (AKAFP) has been designed to meet ON FARM / OFF FARM credit requirements of farmers. Askari Bank has Investment Banking Division. Products offered by IBD include: Strategic Advisory, Privatization Advisory, M & A Advisory, Balance Sheet Restructuring, Syndications, Project Finance, Structured Finance, Islamic Finance, Private Placements of Debt and Equity, Issuance and distribution of Term Finance Certificates, Sukuk Bonds, and Commercial Paper, Underwritings, Capital Market Hybrid Products.<sup>25</sup>
3. *Citi Bank* has Foreign Capital Market Transactions, Local Capital Market Transactions, Securitisation of foreign capital services and they are also offering Trade Finance in which Export and Import Financing Loans are available.<sup>26</sup>
4. *First Women Bank* is offering the service of Micro Financing, SME financing and Business loan for women.<sup>27</sup>
5. *National Bank* has its agriculture branch in Multan region. It offers Kissan Taqat and Kissan Dost schemes for farmers and loan up to Rs. 200,000 under Karobar scheme for business development.<sup>28</sup>
6. *Bank of Punjab* has 11 branches in Multan. It offers 20 agriculture credit products including loans for tractor financing scheme, livestock, dairy farm, poultry farms, fish farm, water scheme, corporate farming. It also gives loans to women under Lady Entrepreneur Financing Scheme.<sup>29</sup>
7. *Bank Alfalah* provides financial services in agriculture sector and to SMEs. Namely: Agri finance, Alfalah Karobar and Alfalah Milkiat<sup>30</sup>
8. *MCB* has an agriculture division that offers the following agri financing products: Shadabi Plan, Khushali Scheme (Agri Development Finance), Tractor Finance Scheme, Aabiari Scheme, Growers Finance, Dairy And Meat Plan, Murghbani Scheme, Baghbani Scheme, Mahigeri Scheme: Mahigeri Scheme.<sup>31</sup>

<sup>25</sup> <http://www.askaribank.com.pk/>

<sup>26</sup> <http://www.citibank.com/us/home.htm>

<sup>27</sup> <http://www.fwbl.com.pk/>

<sup>28</sup> <http://www.nbp.com.pk/index.aspx>

<sup>29</sup> <http://www.bop.com.pk/>

<sup>30</sup> <http://www.bankalfalah.com/creditcards/index.asp>

<sup>31</sup> <http://www.mcb.com.pk/>

9. *UBL (Cotton Ginners Advances)*<sup>32</sup>
10. *Standard Chartered Bank (Agri Deal, Kissan card)*<sup>33</sup>
11. *Faysal Bank* (agricultural finance, SME finance) Agricultural finance facilities are provided under “Faysal Khushaal Kisan Scheme.” The loans provided are for: production (agri input and working capital requirements), development (farm power, machinery, transport, irrigation, land improvement, godowns, silos, and cold storage, see processing units), and livestock (dairy farm, sheep and cattle farm, poultry farm, feed units, fish farm).
- a) Production Loans to meet cost of Agri Inputs and other Working Capital requirements involved in Orchards / Nur-series, growth of mushroom, vegetables, floriculture & Tunnel Farming etc.
  - b) Development Loans to Finance Farm Power, Farm Machinery & Equipment, Farm Transport, Farm Irrigation, Land Improvement, Godowns, Silos & Cold Storage, Seed Processing Units.
  - c) Livestock: Dairy Farm, Goat / Sheep & Cattle Farm, Cattle Feed Unit, Poultry Farming, Poultry Feed Units, Fish Farming.<sup>34</sup>
12. *Tameer Microfinance Bank*<sup>35</sup>
13. *Punjab Small Industries Corporation* (Soft loan credit scheme; mark up ration 7% for new projects, 9% for BMR/expansion, 12% for capital loans)<sup>36</sup>
14. *Zarai Traqayati Bank*: a. Supervised agriculture credit scheme: Under this scheme agriculture loans are given for short, medium and long term loans upto Rs.1.00 million per borrower/per case. The loans are sanctioned for In Fats, livestock, orchard, tractor, agricultural machinery, tubewell and irrigation facilities etc.
- b. Zarkhaiz (one window operation): Credit to purchase inputs, loans to the borrowers under One Window Operation being conducted twice a week during Rabi and Kharif seasons.
  - c. White Revolution Scheme: modernization of dairy farm through financing milk cooling tank, generator, voltage stabilizer, hot water geazer, water pump, cooling pad and other dairy equipment etc.
  - d. Sairab Pakistan Scheme: for installation of tubewells/turbines
  - e. Sada bahar scheme: For providing timely input loans for crops and working capital for poultry and fishery etc.<sup>37</sup>

### Availability of instruments and cost of financing

#### 2.3.5 Technological Readiness - Purpose: To measure the economy’s agility in adopting existing technologies to enhance its industrial productivity and commercial transactions

#### Internet, landlines, cellphones, TVs per head

<sup>32</sup> <https://www.ubl.com.pk/>

<sup>33</sup> <http://www.standardchartered.com/pk/personal/home/en/index.html>

<sup>34</sup> <http://www.faysalbank.com/>

<sup>35</sup> <http://www.tameerbank.com/>

<sup>36</sup> [http://www.psic.gov.pk/contact\\_us.htm](http://www.psic.gov.pk/contact_us.htm)

<sup>37</sup> <http://www.ztbl.com.pk/>

There are 1.91 telephone lines per 100 population, 0.77 mobile phones per 100 population, 0.47 personal computer per 100 population, 0.16 internet facility per 100 population.

**2.3.6 Market Size - Purpose: To determine if firms can exploit economies of scale. Note: with globalized and open trade, international markets have become a substitute for domestic markets**

**District population size, income levels**

This topic had already been covered above. The district has a population of around 5 million with Multan city among major cities of Punjab and Pakistan with an increasing population approaching 4 million. The district has a rich landed class with large farms, a rich industrial class, a prosperous professional class concentrated in Multan city, and a large urban and rural middle and lower middle class based in Multan city, and the poor majority comprising urban workers and landless rural population.

**Access/linkages to other markets in Pakistan, region, international**

The district is well connected with national, regional and interventional markets. Notably, mangos from the district go all over the country and are exported as well. Livestock from the district goes all over the country and processed for export. The district is surplus in vegetables, which sell in adjacent districts and in upcountry and down south Karachi markets. Its industrial outputs, e.g. textile, leather, embroidery, handicraft, etc. are marketed in the national and international markets.

**2.4 Innovation and Sophistication Enhancers**

**2.4.1 Business Sophistication – Purpose: The quality of a country’s overall business networks and of individual firms’ operations and strategies is conducive to higher efficiency in the production of goods and services**

**Access to market Information**

Innovation – Purpose: To understand that the sources of innovation, a requirement in the design and development of cutting-edge products and processes to maintain a competitive edge. The more established members of the business community in Multan have good access to market information and remain in constant contact with national and international markets. However, smaller entrepreneur and less well informed or uninformed and need support to bridge this information gap.

**Access to applied research institutions (presence of R&D)**

Applied research (R&D) institutes, e.g. the Mango Research Institute, are very few, poorly staffed and ill-equipped to cater to the range of sectors and potential in the district. Very few farmers or other industrial entrepreneurs have access to R&D support.

**Access to technical assistance**

There very limited technical support available in only a few sectors due to lack of capacity and resources of relevant government departments and institutions.

**Energy**

The district is currently is the grip of energy shortage crisis, like most other districts of Pakistan, badly affecting the quantum and quality of power dependent production.

**Other utilities such as water, telecommunications**

There is no shortage of water in the district so far due to proximity of river Chenab and the network of canals, and adequate ground water.

**Industrial zones**

The Industrial Estate of Multan is spread over an area of 714 acres in phase 1 and newly/under construction phase II on 667 acres. The phase I was established adjacent to Multan Cantonment area in 1960s. There is also the Punjab Industrial Estate Development and Management Board. Board's major responsibilities are to manage and emphasize on individual and government investors through workshops, seminars and feasibility studies with the collaboration of SMEDA and Small Industries Corporation. They are facilitating newly developed units to get NOC from concerned government departments. They are also preparing the feasibility study on sick units. There are 178 operative units and 28 under construction units in phase I and in phase II, 3 units are operative and 349 plots available. In phase I, 32 units are working on rental basis. In phase II Punjab Industrial Estate Development and Management Board required Environment Clearance Certification for the allotment of plot from Ministry of Environment.

**Transportation and Logistics (including cost and time to market)**

Intra-district farm-to-market transportation and logistics is affordable and time-efficient. Likewise, all types of overland transport options besides railways, are available in Multan city for destinations throughout the country and for exports as well.

## 3. Recommendations

District Multan is already well-positioned in terms of national and international trade in both agriculture and industrial products. But it has lot of untapped potential expand its production and exports, taking advantage of the fertile land, location, human resource, numerous institutions, local dynamism, and other supporting factors in the district. Specific recommendations are made in the sector assessment reports.





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