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## Policy Brief on Rural SME Competitiveness and Sustainability Strategy for Balochistan

GRASP • PAKISTAN

**GROWTH FOR RURAL  
ADVANCEMENT AND  
SUSTAINABLE PROGRESS**

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### 1. Introduction

Agricultural SMEs are central to Pakistan's economy. About 68% of Pakistan's population is directly or indirectly engaged with agriculture, which contributes 21% to the country's GDP, where livestock and horticulture account for 70% of national value-added agriculture. In Sindh, agriculture provides livelihoods to about 56% of rural inhabitants, and the province contributes about 23% to national agricultural value-added<sup>1</sup>.

Given the sector's role in gender inclusive employment, food security and macro economy, improving the competitiveness of agricultural SMEs can help Pakistan achieve Agenda 2030 and Sustainable Development Goals (SDGs) on poverty, hunger, gender, decent work and climate. Rural development, therefore, needs targeted support to public and private sectors, enabling rural SMEs and agribusinesses to become more competitive by making improvements at all levels of value chain, and ensuring conducive institutional and regulatory environment.<sup>2</sup>

### 2. Situation Analysis

There is a dire need to strengthen the implementation framework of agriculture sector policy and measures in the province. Weak adoption of modern farming practices, high post-harvest losses and outdated technology are some of the cross-cutting characteristics that mark Sindh's rural economy leading to low farm productivity and limited value addition at the SME level amid a weak regulatory environment and institutional framework.

In addition, the policy formulation process would benefit from the adoption of an integrated approach. The sectoral and cross-sectoral programs as well as the federal and provincial regulations and policies are often not synchronized which otherwise should complement and supplement each other for enhancing

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<sup>1</sup> International Trade Centre, May 2020, Competitiveness of rural SMEs and their resilience to Covid-19 crisis: evidence from Sindh, Pakistan. Hereafter: ITC 2020

<sup>2</sup> Rural SMEs are construed to be small scale farmers, input suppliers, or small processors where small and medium horticulture and livestock units are defined as: horticulture – small, up to 16 acres & medium, above 16 acres to 64 acres; livestock cattle – small, 1 – 5 animals & medium, 6 – 25 animals; and livestock goats – small, less than 30 animals & medium, 30 – 100 animals.

enterprise competitiveness and promoting economies of scale in public investment schemes<sup>3</sup>.

The policies that have been developed would have benefited immensely from detailed researched inputs to address the technological, economic, commercial and cultural needs of the firms. The process of dialogue and consultation with the stakeholders has significant room for improvement to become adequate and systematic. On the flipside, despite being large in number, SMEs in general and rural SMEs in particular do not have a voice in policy formulation or implementation to ensure that rules and regulations accommodate their specific needs.

Farmers also have weak bargaining power due to lack of cooperative organization, declining farm size, distance from market, lack of competition between buyers, reliance on buyers for credit. As a consequence, farmers' revenue is very poor relative to the market price of their produce, even though there isn't significant value addition across the farm to market value chain. Education levels in Sindh's rural areas are substantially low, the state of which can be gauged by the fact that about 85% of farmers in the country are illiterate, and 90% do not have middle level education, which is a basic requirement for understanding information provided on good agricultural practices.

With the exception of few, most business support organizations in Sindh's public and private sector are unable to effectively engage with constituents, conduct needs assessment; lack knowledge and skills to plan, implement, and monitor cascaded key performance indicators; lack robust standardized systems and processes for collecting, recording, assessing and reporting results; and do not have in place knowledge management processes and disciplines while client management systems are often rudimentary<sup>4</sup>.

From the perspective of livestock and horticulture, a few observations stand out: production practices are basic resulting in low yields; production units are small leading to low economies of scale; quality of inputs is poor and farmers are not abreast with best practices both to produce high volumes and to be environmentally sustainable; value chain is poorly developed with value captured by low value intermediaries; insufficient interaction with non-farm agribusinesses; and reliance on informal sources of credit or personal savings rather than bank credit which makes them vulnerable to economic shocks.<sup>5</sup>

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<sup>3</sup> Food and Agriculture Organization, Feb 2020, Review of Agricultural Policies, Sindh and Balochistan. (internal study)

<sup>4</sup> International Trade Centre, undated, Cubed Institutional Assessment of Business Support Organization: Balochistan and Sindh provinces of Pakistan.

<sup>5</sup> Support to horticulture and livestock will not be complete without also ensuring basic inputs and public goods necessary for rural SMEs. Therefore, a focus on water resource development, electricity, irrigation, unprotected knowledge and know-how becomes important. Fisheries sector is not covered in this policy brief as it requires a specific analysis and face its own specific challenges.

## Backdrop to Covid-19

Assessing the impact of Covid-19 on Sindh's rural economy is impaired by the fact that Pakistan does not officially produce sub-national GDP estimates on annual basis. The problem is amplified because various official surveys and census, such as Census of Economic Establishments, Agricultural Machinery census; Livestock Census; Mouza/Village Census and Agriculture Census, have not been updated for at least a decade; fifteen years in some cases. For this it is best that federal and provincial bureaus of statistics should come together to discuss this priority subject.

Independent studies estimate agriculture to be somewhat affected from the pandemic<sup>6</sup>. The overall GDP loss in Sindh for fiscal year 2019-20 was estimated in the range between \$2.25 billion to \$2.31 billion in two analyzed scenarios by Planning & Development Department (P&DD), Government of Sindh (GoS). In Industrial sector, estimated losses ranged between \$0.69 billion to \$1.89 billion while in services sector losses were in the range around \$0.52 billion to \$0.87 billion. In agriculture, losses ranged from \$0.18 to \$0.42 billion. To stimulate economic activity, GoS is trying to formulate a post-pandemic recovery strategy.

### 3. Methodology

To analyze the competitiveness of SMEs in Sindh, this policy brief relies on ITC's SME competitiveness grid which focuses on the firms' capacity to compete by meeting current market requirements; to connect to buyers, suppliers, and institutions to obtain information and knowledge; to respond to market forces by investment in human or financial capital; to ensure long term competitiveness through gender inclusiveness and environment sustainability. These capacities have been assessed both at firm level and at the level of business ecosystem and regulatory environment, summary findings of which are in the next section.

To this end, in December 2019, ITC collaborated with Institute of Business Administration (IBA) Sukkur to survey agribusinesses and farmers in 11 districts across the province. A follow-up phone-based survey concerning incidence of Covid-19 was carried out in May 2020. In September 2020, ITC also collaborated with a local think tank Sustainable Development Policy Institute (SDPI) to conduct a rapid review of regulatory and institutional response by Sindh government to Covid-19.

This policy brief is the first step in the process of developing a Rural SME Competitiveness and Sustainable Strategy in Sindh.

### 4. Findings

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<sup>6</sup> Ahmed V, Jamali S, Arshad M, 2020, Analysis of regulatory and institutional response by federal and provincial governments of Sindh and Balochistan during Covid19 and policy options to augment emergency response and revive rural economy (internal study).

### State of competitiveness in agri-food markets<sup>7</sup>

Most agriculture produce is sold at tight margins in local markets. This makes it especially important that farmers and agribusinesses produce more with what land, labour and machines they have. Currently, average yield in the province is low and post-harvest losses are high – over 35% for fruits and vegetables. More than a third of horticulture farmers report lack of quality inputs as the biggest challenge towards meeting output targets, followed by obsolete methods of planting.

In the case of livestock, whilst 49% of livestock are estimated to be fed only through grazing and scavenging, the fact that the majority of interviewed farmers sourced water from multiple sources is testament to widespread challenges accessing essential inputs. Animal health, livestock housing and nutrition are some of the key areas that warrant attention, although given the environment of dairy and milk prices being set by government officials, the incentives for private sector investments in these areas are limited.

### Connecting small farms with value chain

In Sindh, much of the connectivity issue of value chains such as logistics and business support services is fragmented and underdeveloped. About 43% of farmers surveyed said transport logistics were the most significant infrastructure-related obstacle they faced. Whilst about 50% farmers said that they received good quality inputs, just half reported that they received their inputs on time.

There is limited pre-existing field-level expertise or experience in agricultural extension; field-level public extension is thin whereas about 75% of agri-businesses do not provide any service to farmers, be it extension, packaging, storage or market information. Although, 80% farmers in Sindh use mobile phone to gather information on market pricing, survey results indicate that about 85% of farm output is bought by *arthis* and *beopari* middlemen, where in most cases, there is no written contract between them. About 77% of farmers surveyed did not belong to any farmer association, and those that did said its quality was poor.

### Enhancing competitiveness of rural SMEs

There are opportunities to upgrade the participation of SMEs in agricultural value chains in Sindh considering that their ability to take advantage of their potential is constrained by limited price incentives or financial support, weak technical and entrepreneurial skills, and poor access to agro-processing technology. Evidence highlights the mismatch between formal commercial financing and primary producers and agri-business enterprises in rural districts of Sindh, and the potential to harness formal registration to help producers gain better access to markets to grow their business.

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<sup>7</sup> ITC 2020

Although surveyed SMEs seem satisfied with the skills of their employees, other data suggest that basic financial literacy and numeracy skills are often limited in rural areas of Sindh. Experience elsewhere suggests that such foundational skills are critical to entrepreneurial success. About 73% of the surveyed farmers had implemented some form of new technique or technology to improve production. However only a small percentage of the firms (12%) conducted branding and packaging activities, whereas most value addition amounts to processing or adoption of basic quality protocols.

### Social & environmental challenges to rural economy

In terms of climate-induced challenges, Sindh faces risks of rise in temperatures, increased frequency and intensity of rainfall and drought periods. About 74% of the farmers surveyed said they had lost their produce to excessive rains, while 10% lost it to droughts in the previous year. Water shortages and land degradation have been worsened by the use of unsustainable irrigation practices, which lower the water table and induce waterlogging and salinity in the soil. Just 5% of interviewed farmers had adopted water and soil conservation measures.

On the gender equality front, Sindh's female labour force participation rate is only 13.5%, and the average income of women workers is around one-fifth that of men. While women are highly active in pre and post-harvest activities and livestock rearing, their involvement, often unappreciated and informal, remains limited within the bounds of farms. Their role in selling of agriculture commodities and value addition is quite low. As much as 97% of women get their information regarding market opportunities from men in the families, and have limited access to technologies and techniques for crop production, livestock management, poultry husbandry, and so forth. Going forward, gender mainstreaming may be regarded as a priority for measures formulated by line department of agriculture and livestock.

### Impact of Covid-19 and post-pandemic recovery

In Sindh, about 98% of agribusinesses and 94% of farms interviewed in May 2020 said their business operations had been affected by the pandemic, with half of them reporting as being strongly affected. Lockdown-induced market closures led to fall in incomes and restaurant closures. About 46% of farms temporarily reduced employment, and about 86% used their own savings to cope with the pandemic. Outside of Ehsaas Emergency Cash Fund, most other relief measures announced by federal government were not applicable to livestock and horticulture farmers, whereas those that were applicable to agri-businesses could not be availed due to low awareness.

In Sindh, agriculture sector services, such as movement of farm machinery and labour for harvesting, was exempted from the lockdown. Likewise, distribution and retail of pesticides, chemicals and fertilizer in the province was largely unaffected by lockdown. However, regular breeding services to poor livestock farmers

suffered from Covid-19 as several important tasks such as bovine semen collection, distribution of bovine semen, and artificial insemination were disturbed during the lockdown.

## 5. Policy recommendations

The competitiveness of private enterprises in Sindh will heavily depend upon improvements to national-level business climate. In this regard, national initiatives including those by the central bank, federal-government's support through SMEDA or planned national-level SME policy will play a critical role in growth and sustainability of firms in Sindh. Federal initiatives to spur growth of startups including Kamyab Jawan program and micro finance schemes could also play a role in this direction as well. The timely implementation of the Prime Minister's schemes for Sindh and other projects through federal public sector development program will help improve overall productivity in horticulture and livestock sectors.<sup>8</sup>

Sindh offers a forward-looking Agriculture Policy (2018-2030) which covers horticulture, crops, and livestock whereas policy formulation process for livestock has been initiated.<sup>9</sup> SAP 2018-2030 is oriented towards *inter alia* strengthening of markets, promotion of competition, and introduction of new technologies across the value chain to address growth, poverty and climate change. In light of policy vision and direction, following are some of the key recommendations GoS may consider. The recommendations here are not just intended for the Sindh Agriculture Policy (SAP). In fact, they are to deal with the broader set of issues and challenges mentioned above, and eventually tie up together in the call for action which is essentially a rural SME strategy.

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<sup>8</sup> Details of these projects are provided in annual PSDP 2020-21 report: [https://www.pc.gov.pk/uploads/archives/PSDP\\_2020-21.pdf](https://www.pc.gov.pk/uploads/archives/PSDP_2020-21.pdf)

<sup>9</sup> The policy document does not cover irrigation which is addressed in the recently prepared Irrigation Strategy. A separate livestock policy may be considered in the future.

Need for change	Proposed action	Responsibility	On-going initiatives
<b>General interventions proposed for both livestock &amp; horticulture sectors</b>			
<b>1.1 Addressing the gaps in regulatory ecosystem for both sectors</b>	<p>Undertake legislative work on updating and modernizing acts, rules &amp; regulations. Harmonization of policy actions required across complimentary sub-sectors, including measures and procedures for land-use, sustainable management of farmlands. The latter necessitates policy measures for efficient water management, administration and conservation, including procedures on water rights, uses &amp; diversions, pricing &amp; subsidy</p>	<p>Line departments of Agriculture, Livestock, Fisheries, and Irrigation. P&amp;DD may support</p>	<p>Under proposed action 'updating and modernizing acts' GRASP is supporting agriculture department on following areas;</p> <ol style="list-style-type: none"> <li>1. Review/update Sindh Seed Act</li> <li>2. Review/update Sindh Godown Act</li> <li>3. Review/Update of Fertilizer Act</li> <li>4. Review/update of Wholesale Market Act</li> <li>5. Review/update of Sindh Agriculture Policy</li> <li>6. Review/update of Pesticide Act</li> </ol> <p>FAO is currently supporting agriculture department to develop water policy for Sindh under Sindh Water and Agriculture Transformation (SWAT) Project, and also aims to develop action plan for SAP and livestock department (to implement livestock policy action imbedded in SAP 2018)</p>

			Livestock department has ambitions to have a separate livestock policy but no active initiative in currently in place at the moment. GRASP is supporting them to develop Livestock Enterprise Development Strategy
	<p>Expedite work on regulatory improvements under existing agriculture policy and practice. Prepare a medium term actionable plan for livestock sector, executed by delivery units within line depts.</p> <p>Support from federal government may also be available as Ministry of National Food Security and Research has prioritized help to livestock sector</p>	<p>Line departments of livestock and agriculture. Sindh Food Authority and local government department may also support in managing livestock markets and slaughter houses on-ground.</p> <p>For support from federal government: Ministry of</p>	Action plan for livestock sector is supported by FAO and JICA

		National Food Security & Research, and Ministry of Water Resources	
<b>1.2 Use public private partnerships (PPP) for the provision of public goods</b>	Develop vanilla PPP structures for provision of public goods aimed at increasing competitiveness of horticulture and livestock. These may include: PPP for various certifications and standards such as grading and food safety risks (e.g. foot and mouth disease certification for livestock); logistics and market infrastructure; provision of electricity including from bio-gas and solar power solutions for farms and agri-businesses; and provision of minimum internet infrastructure. In line with SAP, draft the vanilla PPP structures for setting up agro-processing parks and for various training and extension programs	Line departments of livestock and agriculture, PPP Unit in finance department, investment department (for advice on any financial institutions whose support may be sought)	
<b>1.3 Improve farmers' bargaining power</b>	Form farmer groups leading towards strong associations that help toward bargaining with agri-businesses and middlemen, and also provide critical input toward policymaking and its administration	Departments of livestock, agriculture, local government, rural development in collaboration	

	Formal registration to help farmers and producers in the supply chain can help gain better access to markets.	with Agribusiness Support Fund and Sindh Irrigation and Drainage Authority (SIDA)	
<b>1.4 Strengthen farmers' skill towards competitiveness, strengthening of value chain, and sustainability</b>	Roll out <i>train-the-trainers</i> outreach programmes on basic reading writing, counting, accounting, quality inputs, marketing, branding, niche markets, packaging, storage, primary processing, market mapping, logistics, smart phone usage, etc. with sustainability integral to all process. Training may be executed in support with organizations on the ground and district commissioners	Departments of livestock; agriculture; and environment, climate change & coastal development	
	Roll out basic numeracy and literacy courses for famers with a special focus on women in farm sector	Agriculture, livestock, and education departments with SIDA	
	Create smartphone-based training ecosystem in Urdu and Sindhi languages to train livestock and horticulture farmers on various aspects indicatively enlisted above	Agriculture and livestock extension departments and Sindh Abadgar Board to use mobile technology to	

		disseminate information	agriculture department to establish ICT unit which can also be strengthened further since SAGP is closing in couple of months
<b>1.5 Improve gender equality</b>	Undertake legislation for minimum wage of female workers	Labour department and finance department	
	Include women in agriculture extension services. Selection of female farmers for subsidies and training	Departments of livestock and agriculture. P&DD to guide regarding gender lens in agriculture programs in Annual Development Program	Sindh women agriculture workers law was passed in Dec 2019 concerning their pay and minimum wages. Good opportunity to support to develop action plan and implementation strategy. Capacity building could be provided to the agriculture department on implementation
<b>1.6 Access to finance for farmers</b>	Create a regulatory framework and encourage financial inclusion and lending by banks and fintech sector for agriculture  Cash and credit schemes coupled with awareness raising and increased outreach may be introduced. Additionally, insurance against emergency situations may also be	Central bank; relevant line departments; Sindh Enterprise Development Fund	SBP has issued a policy guideline to all banks to establish desk to facilitate women entrepreneurs and farmers. Can be good opportunity to support agriculture credit providers

	built into existing and new financial products		
<b>1.7 Effective utilization of government resources</b>	Design criteria, rules & implementation framework for transparent, targeted subsidies for inputs such as seeds, fertilizer, animal nutrition	Departments of livestock, agriculture, and finance department	
<b>1.8 Informal rural SMEs</b>	Registration of informal rural SMEs could enable them over time to access certain crucial benefits and eventually become part of formal value chains	SIDA could support in line with the existing initiative of forming and registering farmer organizations	SIDA has formed and registered 345 farmer organizations
<b>Horticulture Sector</b>			
<b>2.1 Capitalizing on Sindh Agriculture Policy (2018-30)</b>	Activating the Agriculture Policy Implementation Commission for finalization of detailed strategies and action plans as per policy	Agriculture, Supply and Prices department	
<b>2.2 Harmonize Agriculture Produce Act 1939 in practice with other legislative efforts in draft e.g. Agricultural Procedure Markets Act 2019 and Sindh</b>	Conduct a study to evaluate these Acts in light of the measures for improved marketing system under SAP. The study will help to identify the gaps and ways to bridge these	Agriculture, Supply and Prices department	

<b>Wholesale Agricultural Produce Markets (Development and Regulation) Act 2010</b>			
<b>2.3 Reduce information asymmetry</b>	Create mobile-based information sharing ecosystem to allow farmers access to best information about prices in various markets	Agriculture, Supply and Prices Department	GRASP supporting AMIS development in Sindh, it includes creation of mobile apps for information sharing (engaging mobile companies)  ICT unit of agriculture department is also supporting this under Sindh Agriculture Growth project (SAGP)
<b>2.4 Better pricing for farmers</b>	Revisit the role of middlemen (arthis) through proper legislation, including registration, training and licensing / certification (minimum set of standards for middlemen to operate in the market)	Agriculture, Supply and Prices Department	
<b>2.5 Improve logistics to prevent post-harvest losses</b>	GoS may introduce fiscal incentivizes to promote investments in value chain infrastructure	Departments of transport, agriculture and P&DD	
<b>2.6 Improve quality of products to increase competitiveness</b>	Introduce registration and certification of privately-operated pack houses / collection centres / value added centres and privately	Agriculture department, Sindh Food Authority (SFA),	

	operated wholesale markets with government in a supervisory role	Sindh Health Care Commission, PQSCA, Plant protection Department, Quarantine Department	
	Introduce minimum, value-chain-wide accepted quality and grading standard for fruits and vegetables		
	Develop and implement customized Good Agriculture Practice in line with global standards		
<b>Livestock Sector</b>			
<b>3.1 A formal policy/strategy document is needed to offer vision and drive growth and development in the sector. This will also act as a guiding document for potential investors</b>	Efforts are underway to formulate livestock policy. GoS may consider fast tracking the process to support post-pandemic recovery	Departments of livestock, and P&DD	
<b>3.2 Improve nutrition and clean-in-place practices at livestock farms</b>	Strengthen livestock extension services with emphasis on women as extension staff	Livestock department	
	Certification and legislation of Village Animal Health Workers for introduction of minimum set of standards		
	Increase prevalence of contracts between upstream and downstream		

	value chain actors to help sharing of information and training of livestock farmers by dairy and meat businesses		
<b>3.3 Improve quality of meat to increase competitiveness</b>	Legislation for privately operated certified slaughterhouses with government/local regulator in a supervisory role	Livestock & Fisheries department, SFA, PQSCA, local government department, Karachi Metropolitan Corporation	GRASP supporting the livestock department to develop manual (including SoPs) for slaughter houses
<b>3.4 Foster competition in dairy market</b>	Deregulate milk prices currently regulated by Local Government Department	Sindh Cabinet, Local Government department	
<b>3.5 Promote formalization of dairy market</b>	Promote packaged & branded milk by raising awareness and facilitating small scale pasteurization units	Departments of livestock, industries, investment, and SFA	
<b>3.6 Streamline coordination between livestock and agriculture policies</b>	Design mechanism to improve coordination between the concerned departments (i.e. agriculture, livestock and fisheries departments) both at policy and implementation level	Sindh Cabinet, relevant line departments	

## 6. Conclusion

Vibrant rural SMEs are critical to absorb Sindh's workforce, develop rural economy, and reduce poverty by increasing the agricultural output with consistency of quality to meet rising domestic demand and to tap the export potential.

The province requires an effective support from federal government and central bank to improve overall business climate and regulatory regime for domestic commerce. An early formulation of federal SME policy could help clear the funding, finance, and inclusion related challenges. All this will be in line with the ambitions laid down in the National Financial Inclusion Strategy; priority SDGs framework of the Planning Commission; upcoming Strategic Trade Policy Framework - envisages growth in export of fruits, vegetables and processed food and beverages<sup>10</sup>. Such an approach also compliments the Prime Minister's vision for rural SMEs and chicken and eggs production initiative<sup>11</sup>, distributing livestock animals across rural women population<sup>12</sup>; and the recently launched Honey Tsunami Program<sup>13</sup>. The provincial government can provide policy certainty for the medium to longer term through an effective rural SME strategy.

As a policy document, SAP offers comprehensive approach to key reform objectives. However, an effective rural SME strategy with clear medium-term outputs and outcomes is needed to be spelled out by GoS alongside specific action plans and roles and responsibilities of relevant departments.

To this end, the above recommendations will yield effective implementation of both SAP and the livestock policy (currently in the works) by ensuring a coherent regulatory framework drafted through dialogue and consultation. The recommendations here are not just intended for the SAP. In fact, they are to deal with the broader set of issues and challenges mentioned above, and eventually tie up together in the call for action which is essentially a rural SME strategy.

While most of our recommendations are specific to horticulture and livestock sectors, it is important to note that there are also some structural

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<sup>10</sup> <https://nation.com.pk/24-May-2020/strategic-trade-policy-framework-to-increase-exports-to-dollar-46b-in-5-years>

<sup>11</sup> <https://tribune.com.pk/story/1860121/1-following-pms-chicken-egg-vision-govt-kicks-off-poultry-campaign>

<sup>12</sup> <https://www.thenews.com.pk/print/617618-more-good-news-for-people-buffaloes-cows-and-goats-for-women-says-pm>

<sup>13</sup> <https://www.dawn.com/news/1597047>

recommendations which will require attention of provincial leadership. Most notably, these include the need to improve essential capabilities for demand and use of evidence for policy decisions in line departments; to plug data gaps which impinge timely decision making; and the need to create mechanisms for, and hold, structured public private dialogue, which is necessary to help businesses see longer term gains in these sectors.

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ABOUT THE PROJECT: "GROWTH FOR RURAL ADVANCEMENT AND SUSTAINABLE PROGRESS (GRASP)"

ITC is the lead implementing agency for the "Growth for Rural Advancement and Sustainable Progress" project, funded by the European Union (EU). The project objective is to support gender inclusive income and employment generation, enhanced productivity and profitability of SMEs involved in primary production, service provision, and value addition in and around selected clusters of production. GRASP will intervene in two of the agriculture sectors i.e. Livestock and Horticulture sectors in Sindh and Balochistan. For complementary survey results please visit: [www.intracen.org/GRASP/](http://www.intracen.org/GRASP/). For preparation of this policy brief and proposed recommendations, ITC has collaborated with Sustainable Development Policy Institute ([www.sdpi.org](http://www.sdpi.org)).