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Reflection and Value Chain Characterization of Pulses in Pakistan: A Case study of Larkana and Sindh

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Abstract:

The current research investigates the Reflection and Value Chain Characterization of Pulses in Pakistan: A Case study of Larkana and Sindh. Pulses are mostly purchased in summer and second half of the day from grocery and supermarkets/super stores. Quantity bought by the consumers ranges ½ kg-2 kg depending on the type of grocery shop, stores, etc. cleanliness, packing and price are considered important attributes by the super stores and supermarkets. Grading, sorting and packing are done at the supermarkets and superstores whereas no or little value addition relating activities are done at grocery shops. However, one owner of grocery shop reported that he used to keep pulses in glass boxes in order to having shining and brightness to attract the customers. Size of grain, origin of pulses, cleanliness, packing and price are very much important for customers while buying mung bean and chick peas as reported by the retailers. Wholesaler point view Freshness, size of grain and cleanliness of the pulses are top priority of the wholesaler. If any dust are broken of pulses specially lentil, Mungbeans and chickpeas the price will be low. Chemical free is also important for wholesaler. Chickpeas size of the grain, cleanness, freshness and color on top priority Lentil and Mungbeans: cleanness, freshness and color on top priority. Although wholesalers demand the quality produce of the pulses (based on size of the grain, waste, moisture, etc.) from merchants and or farmers, they care very little during selling the produce to the daal factories or millers. This implies absence of price incentives for selling the quality produce to the processors. In spite of these facts, the processors deduct the amount paid to the wholesalers for waste, moisture and damaged or broken pulses. This implies that there is a need to sensitize and build confidence among the processors and wholesalers that value addition would be beneficial to all the value chain actors. Merchant and farmers are other important value chain actors and we don't see value addition relating activities at farmers' and merchants' ends. Interventions at the farm level needs immediate attention to start value addition as doing this will reduce cost of value addition at later stages of value chain of pulses. However, this happens only if price incentives for value addition are ensured to farmers and merchants. visits Farooq daal Mill is located at SITE area Larkana. The mill owner Farooq was not there but there manager Usman Ali brief about Daal mill. Reliability of supply, size of the grain cleanness, fresh on the top priority of the daal mill.

Keywords: Reflection, Value Chain Characterization, Pulses in Pakistan

Introduction

In the chain characterization the poor management practices were carried out the pulses value chain. A poor management practices activities at factory level as well as retail and wholesale level. The value of the customers was not understand in the chain. A short term price based relationship is built in the consumer level.

Chain characterization Commodity Specific Chain characterization

Mungbeans

Mungbeans are cultivated in Larkana ie. RatoDero, NauDero and Dokri area. From last couple of years the trend of Mungbeans cultivation as a third main crop after chickpea and Wheat is increasing day by day. The total area for pulse crops is about 130 areas and 10 percent of the total cultivated area. In this area irrigated land is used for these crops. Mungbeans is cultivated by broadcasting of seed method in Larkana district. Mostly farmers purchased seed from local market, few of the farmers purchased seed from the Punjab. Yield per acre in Sindh is very low 10-12 mounds/ acre. Availability water is the most constraints for Mungbeans growers in Larkana District. In Dokri and NauDero area farmers identified some issues diseases (fungus) and pests in Mungbeans.

Mungbeans are also sources of feeding animals and used in household consumption mostly farmers are used with lentil and rice bread in winter season. In Sindh private seed companies are not involve in seed production or Government of Sindh seed cooperation are mainly focus on Rice and wheat seed production not in pulses.

Government of Pakistan focus on to improve the yield of Mungbeans by supply of quality of seed to the farmers and to improve the Mungbeans value chain with the support of private and foreign donors.

Lentil

Lentil is one of the healthy foods. In early 800 B.C in middle east. Lentil has many health benefits like fiber, lower cholesterol, and protect against diabetics. Lentil is grown in Village Aghani ten farmers were identified during our base line survey. during our NauDero Larkana. By product of Lentil like husk and straw is used for animal feed. During our survey lentil cost of production is very low compare to the wheat and other crops. From last couple of years the yield of lentil is very low 4-5 mounds per/acre. It was observed that in last five years the trend of lentil growing is declining. The recent surge in the prices DAP and other input cost and unavailability of good quality of seed in Sindh province and unstable market prices of lentil Government very little interest of Government interest in pulses crop.

Lentil by products are used for animal fodder, factories are using by products and commercially sell in the market and earn money. In Larkana twice a week most of the families are using lentil in their diet.

Chickpeas

Chickpeas are excellent source of dietary fiber, which is vital healthy digestion. In one cup of chickpeas you will get 12.5 grams of fiber. Chickpeas is growing in various areas of Larkana, i.e RatoDero, Larkana and Dokri. In RatoDero and NauDero chickpea is growing in large scale. The product flow system is same as lentil village traders play a key role in produced from farmer to end user. In Larkana District 90 percent of the white chickpeas are cultivated only 10 percent of the farmers are growing Black chickpeas.

Black chickpeas are used in salad and in dinner diet. Farmers of Larkana identified some constraints like blight issue in local varieties. One of progressive chickpea grower Liaqat Abbasi he shared his experience that last year he purchased American white chickpeas seed from Karachi and it was 98% resistant to blight and other issues.

Research Methodology

Data were collected from various retail, wholesale, Processor, agent in different cities of Sindh Pakistan. A well-structured and pre-tested questionnaire was prepared with the help of the experts and project team and Before starting the survey, the enumerators were rigorously trained in various areas and for one day by the project team responsible for the baseline survey in Larkana District. In first few visits I checked them whether they are collecting information according to the questionnaire. Focus group discussion was carried out to get information from farm level. Value chain analysis of pulses is carried out to identify the current practices, opportunities for improving value chain at different levels of value chain of pulses. For this purpose, the high end-stores, superstores and grocery shops were visited in Larkana, Hyderabad and Karachi. Wholesalers, merchants, processors (*Daal Factory*) and farmers were contacted for detailed study of value chain of mung beans, chickpeas and Lentil.

Results

Post harvested losses range 20-25% because of poor labor and management in Larkana district. Mostly chickpeas growers are using tradition farming practices and using manual harvesting. Lack of technological advance practices like machine use harvesting.

In recent survey many progressive farmers willing to pay for harvester machines but in the market machines are not available for chickpeas. Many farmers reported 25% loss of falling grains of chickpeas. In Larkana famers produced and sell through middle man to Daal factory. Middle man enjoys 30% of the profit of the farmers with out doing any thing. He invested money in providing inputs to the farmers. In the recent trend analysis chickpeas are widely used in different value added practices in Arabic and Lebanese dishes Hamas, Baba Gouch and Falafal. Chickpeas also used in basin.

Chickpeas also packed in different home brands labels like Imtiaz, Bin Hashim. Max Bachat and Carrefour retail stores

In Sindh popular dish of Chickpeas called Pali which is very tasty. This is also available in tin Packed and very famous in western world. Pali is one of the favorite dishes in Pakistan chickpeas leaves used for cooking and serve with rice bread. Chickpeas leaves are very costly in the month of August to January price range 200-240/K.g and mostly farmers in Larkana and Sukkur region gets better market of chickpeas leaves. Chickpeas consumption in different festivals, Eid and Maharam.

Constrains of producing chickpeas mainly, availability good quality of seed, lack of improved varieties, lack of irrigation, facilities, high transportation cost, poor marketing. No innovation and modern agriculture practices. The middle main share 20-30%, retailer, 10, wholesaler, 11% in pulses.

Possible Intervention

Farmers Direct sell to factory no middleman involvement

Quality of seed provided to farmers level to produce good quality of pulses

Sorting and grading at Farm level

Recommendations

One of the most significant challenges faced by the pulse production industry in Sindh-Pakistan is achieving adequate dissemination of improved seed varieties. The lack of such dissemination has severely limited gains in productivity in recent years. Particular attention should therefore be paid to strengthening the seed supply in the sector, notably through identification and development of varieties of pulses that are suitable for the identified regions and that are in line with international market requirements. Improved seeds will then be distributed through farmers' associations. A stronger involvement of the private sector will also be encouraged to ensure regular supply of the quality seeds necessary for the good development of the industry.

Also related to enhancing the use of quality inputs, and in addition to seed supply, an important element under this strategic objective will be to ensure that the sector has access to a strong base of inputs, in particular pesticides and fertilizers that are suitable for specific soil characteristics and pulse varieties. A plan to improve availability of these products for pulse farmers will be developed.

Pilot farm initiatives for production and harvesting of the identified pulses will also be established, providing a platform for the exchange of best practices with farmers' organizations. Following this initiative, a vast programme to scale up production (sowing and harvesting) of the identified pulses will be undertaken in the previously identified regions.

Finally, strengthening the sector will be achieved by improving postharvest management and ensuring that the crop is handled and stored properly.

Structured investment promotion efforts for sector development (processing) will also be organized as part of this strategic objective. An important step will be to promote technology transfers to allow Sidh-Pakistann investors interested in pulse processing to develop their activities, namely through the setting up and supply of processing machinery should provide on subsidy basis.

Finally, investment will be promoted by inviting investors, explaining the investment opportunities, providing sector information and matchmaking with local producers

In Sindh province pulses sector is still little-known internationally, a key step towards achieving this objective is to ensure structured export development and promotion efforts. Building the capacities of commercial attachés concerning pulses and their processed products will be conducted in this regard, and regular trade missions to selected target markets for business owners from the sector will be organized. Specific market development plans for these priority target markets will also be designed and implemented.

In addition, and in order to enable local exporters to meet international buyers, participation in trade meets and international and bilateral trade fairs will be strengthened, notably through closer collaboration with international pulses sector agencies..

The development of reliable market information systems will ensure the continuous growth and global reach of the sector. This objective will be achieved through providing timely and relevant trade information for value chain stakeholders, including detailed market reports.

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