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**FEASIBILITY STUDY OF
AGRICULTURAL PRODUCTS'
EXPORT PRODUCTION VILLAGES (EPVs)
IN SELECTED RURAL DISTRICTS IN NEPAL**

FINAL REPORT

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FEASIBILITY OF AGRICULTURAL PRODUCTS' EXPORT PRODUCTION VILLAGES (EPVs) IN SELECTED RURAL DISTRICTS IN NEPAL

I. INTRODUCTION

A. Background

As one of the main elements of its technical co-operation with Nepal, UNDP and the HMG Nepal designed a Poverty Reduction Programme in 1997 aimed at strengthening planning and implementation of the poverty reduction programmes during the Ninth Plan period (1997-2002). Two key components of the poverty reduction programme of the UNDP are the Micro-Enterprise Development Programme (MEDEP) and the Participatory District Development Programme (PDDP). Experiences learned from these two projects have suggested that effectiveness of efforts can be enhanced if they focus on a selected number of target sectors and districts.

MEDEP was started with an objective of producing existing product for the existing market. MEDEP's principle in developing micro-enterprises is based on the "output oriented demand driven process" in implementing its activities in the selected districts in partnership with service delivery organisations in the micro-enterprise sector (MEDEP, 2001). MEDEP has been able to create rural base economy taking advantage of local resources, indigenous skills and know-how and existing market demand (Sharma, 2000). In this endeavour, MEDEP has experienced that the poor micro-producers can join-in group and produce a marketable volume if they are supported to establish a forward link to the market. While MEDEP was working on identifying a resource base of the local community, many such resources like vegetables, vegetable seeds, ginger, dhakka clothes, allo fibres, and so forth were also seen which could enter the export market if some kind of entrepreneurial skills could be developed among the local producers. From this experience of MEDEP, it was thought that this potentiality should be worked out. In order to benefit from potential export opportunities, International Trade Centre (ITC) commissioned the present study to evaluate the feasibility of developing export production villages in poor districts and villages in Nepal.

The feasibility study will be completed in three steps. Step 1: assessment of the production potential, problems and constraints of the supply side based on the guidelines given in the "Orientation Kit" provided by ITC; Step 2: assessment of the export potential of the short listed products to selected target markets from demand side; Step 3: preparation of a consolidated report on the findings and recommendations gained through Steps 1 and 2, and prepare a draft of the project document if the project seems feasible. Step 1 for fresh vegetables, ginger and vegetable seeds was completed by the national consultant on July 2002. Step 2 is to be completed by the international consultant with the assistance of national consultant. This report is an outcome of Step 2.

B. Specific Objectives of the Study

The specific objectives of this study are as follows.

- ÿ Review the preliminary feasibility study on agricultural products conducted under Step 1.
- ÿ Validate the production technology, constraints in production and prospects for export.
- ÿ Assess the demand for identified products in the target market.
- ÿ Assess the existing system of trade and distribution channels.

C. Limitations of the Study

This study is based on the survey of Delhi, Kolkata and Dhaka markets for ginger, vegetables and vegetable seeds. In the original proposal, Siliguri market of India was also planned to be studied. However, when the international consultant arrived in Kathmandu and finalised the visit schedule, there was not enough time to arrange a trip to Siliguri. In addition, the air ticket provided to the international consultant by ITC Geneva did not also include Siliguri. When an attempt was made to go to Siliguri as well while going to Biratnagar (Nepal), the time required by the security clearance procedure of UNDP/Nepal and the visa procedure of Indian Embassy made it difficult for the team to manage time. In addition, the duration of survey was very short – one day for fresh ginger in Delhi, one day for dry ginger (sutho) in Delhi, one and half day for fresh vegetables in Kolkata, two days for fresh vegetables, ginger and vegetable seeds in Dhaka. Hence, the observation in the market is just a point in time and thus comparative analysis could not be carried out. The discussions are based on a simple market observation and thus are more qualitative.

II. METHODOLOGY

A. Conceptualisation of the Assignment

The TORs for both international and national consultants were provided by the ITC prior to the arrival of the international consultant. The national consultant prepared the itinerary for the study to be conducted by the international consultant with the assistance of national consultant. The itinerary was approved by MEDEP as well as UNDP and was sent to ITC for final approval. After the itinerary was finally approved by the ITC, the international consultant was sent to Nepal. Upon the arrival of the international consultant, an orientation meeting was held on 9 December 2002 in UNDP to clarify the official procedures and the itinerary. Another meeting was held in MEDEP the following day to discuss the modality of establishing EPV in Nepal. The invitees in the meeting were NPMs of MEDEP, PDDP, LGP, officiating desk officer (enterprise development) from UNDP/Nepal, international consultant and the national consultant. National consultant presented the works done so far and the objectives of the current mission and its working procedures.

The present assignment is to examine the demand side feasibility of the products identified as feasible ones for the identified pockets as good for

establishing EPVs. Hence, this study has attempted to examine the size and type of demand for these products in the target markets.

B. Selection of Target markets for this Study

In the Step 1 of this endeavour, there were some target export markets as well identified for the identified products from the selected pockets. Among them, the mission decided, in line with the endorsed itinerary, to make a study in New Delhi mainly for fresh and dry gingers, Kolkata mainly for fresh vegetables of eastern parts of Nepal, and Dhaka mainly for vegetable seeds.

As the eastern Nepal was identified as the very potential zone for export of fresh vegetables in general and off season vegetables for both Kolkata and Dhaka markets, and the Dharan-Basantapur highway corridor was found to be the important vegetable growing area coupled with Delhi traders' explanation that there is a lot of fresh ginger coming to Delhi (Azadpur market), it was decided that a short field visit of the Dharan and Biratnagar markets be also made to appraise the supply side study findings of Step 1.

This study relied heavily on the observation of the target markets by the experts and personal interviews of the related traders and producers in the target market and trade support institutions in the supply side. A short list of persons met and organizations visited is presented in Appendix 2.

C. Gathering of Relevant Information

This study is based more on the format provided by the ITC for gathering information from the field as well as from the target markets and the trade support institutions. The survey for this study was conducted jointly by international and national consultants as follows (detailed itinerary of the mission is presented in Appendix 1).

- 9-14 December 2002 : Visit of various production research, extension and trade support institutions in Kathmandu
- 15-18 December 2002 : Visit of Delhi market to see the feasibility of Nepalese vegetables in general and for fresh and dry gingers in particular.
- 18-20 December 2002 : Visit of Kolkata market to see the feasibility of Nepalese vegetables in general and off-season cauliflower, cabbage, tomato and beans in particular.
- 20-23 December 2002 : Visit Dhaka market to see feasibility of Nepalese vegetables and vegetable seeds in general and radish and beans seeds in particular.
- 24 December 2002 : Review of accomplishments in UNDP, and visit of AEC
- 25-26 December 2002 : Visit of Biratnagar and Dharan markets to study off-season vegetable production and marketing
- 27 December : Joint meeting in MEDEP

III. REVIEW OF STEP I (SUPPLY SIDE) STUDY ON FEASIBILITY OF ESTABLISHING EXPORT PRODUCTION VILLAGE

A. Introduction

A rigorous study on the feasibility of establishing export production villages of fresh vegetables, a ginger and vegetable seed was carried out by the national consultant in Step 1. There are three volumes of study report—Volume I: Fresh Vegetables; Volume II: Ginger; and Volume III: Vegetable seed. These reports have been prepared in line with the ITC's guidelines and thus are very comprehensive. At the outset of the mission, a meeting was held in MEDEP. The meeting was participated by NPMs of MEDEP and LGP, representative from UNDP and other staff of MEDEP. The main objective of the meeting was to discuss the modality of EPRP and establishing EPVs in Nepal. The mission was guided by the suggestions given in the meeting.

B. Major Findings of the Study

Findings of the Step 1 study regarding the identified commodities, production pockets, concentration of poor producers, and R&D facilities to support production are summarised in Table 1. The physical infrastructures in the production pockets have been also assessed. It shows that the available infrastructures and R&D facilities can support the production of commodities in the identified pockets. Each production pocket is linked with the Service Centre of the respective District Agriculture development Office. Against the recent national poverty statistics [38 percent (NPC, 2002)], there are sizeable numbers of poor producers in the identified pockets fitting with the objective of EPRP.

The production potential assessment shows that production can be at least doubled in each pocket (Table 2). The increased production is expected to come from increased area under production as well as increased productivity. As the identified commodities are high value ones, the increased area will come from the replacement of traditional cereal crops by high value crops.

The production of fresh vegetables in the identified pockets can fetch good market only when the production is done in the recommended seasons (off-season in the target markets). Hence, the production needs to be planned accordingly. However, ginger and vegetable seeds are produced in the main season.

Grading and packaging of fresh vegetables as well as ginger is still traditional and thus cannot get the premium price in the market.

The financial analysis shows that there is positive net return in all the identified commodities and pockets (Table 3). In most of the selected pockets and identified commodities, the share of labour cost is more than 50 percent in the total cost of production. Hence, it has a greater potential in generating employment as well.

Table 1: Potential Commodities and Selected Production Pockets

Crops	District	Production pocket	Major production group and/or marketing group involved	Poor producers in the pocket (%)	Access to physical infrastructure				Research and production service linkages with the production pockets
					Road	Electricity	Telephone	Collection centre	
Cauliflower	Dhankuta	Sindhuwa	Sindhuwa Multipurpose Cooperatives, Sindhuwa, Dhankuta	32	√	√	√	√	Horticulture Research Station, Paripatle, Dhankuta (HRS) Regional Agricultural Research Station (RARS), Pakhribas, Dhankuta
	Tehrathum	Basantapur	Basantapur Multipurpose Cooperatives, Basantapur, Tehrathum	35	√	√	√	√	
Cabbage	Dhankuta	Sindhuwa	Sindhuwa Multipurpose Cooperatives, Sindhuwa, Dhankuta	32	√	√	√	√	HRS, Paripatle, RARS, Pakhribas
	Tehrathum	Basantapur	Basantapur Multipurpose Cooperatives, Basantapur, Tehrathum	35	√	√	√	√	
Beans (pole)	Dhankuta	Patlekhola to Budhimorang	Guthitar Fresh Vegetable Producer Group, Dhankuta Tambar Multipurpose Cooperatives, Laworbote, Dhankuta	33	√	√		√	HRS, Paripatle, RARS, Pakhribas
Tomato	Dhankuta	Patlekhola to Budhimorang	Guthitar Fresh Vegetable Producer Group, Dhankuta Tambar Multipurpose Cooperatives, Laworbote, Dhankuta	33	√	√		√	HRS, Paripatle, RARS, Pakhribas
	Palpa	Madan Pokhara	Madan Pokhara Multipurpose Agricultural Marketing Cooperatives Ltd., Madan Pokhara, Palpa	25	√	√	√		
	Dhanusha	Bengadabar	Bengadabar Fresh Vegetable Producers' Group, Bengadabar, Dhanusha	40	√	√	√	√	Horticulture Centre, Sarlahi

Watermelon	Dhanusha	Vutahi Paterwa	Hariyali Farmers' Group, Vutahi Paterwa, Dhanusha	35	√	√	rented at Batase	Horticulture Centre, Sarlahi
Ginger	Palpa	Palung Mainadi	Marketing group called as depot supported by Rural Economic Development Association (REDA)	40	√	√		Horticulture Centre, Palpa
	Nawalparasi	Ruchang	Ginger producers' group, Ruchang supported by Himalayan Community Development Forum (HICODEF)	49	3 hrs to road head			Horticulture Centre, Palpa
Vegetable seeds - polebean	Kaski	Arva Kalika	Seed Producers' Group	25	√	√		Horticulture Research Station Pokhara, Kaski and Regional Agricultural Research Station, Lumle, Kaski
Vegetable seeds – radish		Harpan	Seed Producers' Group	25	2 hrs to road head	√		Horticulture Research Station Pokhara, Kaski and Regional Agricultural Research Station, Lumle, Kaski

Table 2: Potential Supply of Identified Commodities from Selected Pockets

Crops	District	Production pocket	Existing area under production (ropani)	Possibility of expanding area under production (ropani)	Existing production (mt)	Possibility of expanding production	Time of production (time of supply)	Packaging arrangement
Cauliflower	Dhankuta	Sindhuwa	150	450	112.5	360	Mid July – Mid Dec	Bambo baskets (tokaries) – 35-40 kg baskets for export to Siligudi and Bangladesh – 50-60 kg baskets for Dharan and Biratnagar markets
	Tehrathum	Basantapur	150	450	112.5	360	Mid July – Mid Dec	Bambo baskets (tokaries) – 35-40 kg baskets for export to Siligudi and Bangladesh – 50-60 kg baskets for Dharan and Biratnagar markets
Cabbage	Dhankuta	Sindhuwa	400	800	960	2000	Mid July – Mid Dec	Gunny bags
	Tehrathum	Basantapur	200	500	480	1250	Mid July – Mid Dec	Gunny bags
Beans (pole)	Dhankuta	Patlekhola to Budhimorang	500	750	400	600	Mid March – Mid June and September – October.	Gunny bags

Tomato	Dhankuta	Patlekhola to Budhimorang	700	1400	2450	4900	Early June – Mid Dec	Beer cartoons (10 kg and 25 kg sizes) (made of cardboards) for export to Siligudi and Bangladesh Bamboo baskets (tokaries) (50-60 kg size) for Dharan and Biratnagar markets.
	Palpa	Madan Pokhara	300	900	600	1800	Mid April – Mid Nov	Plastic crates (25 kg) for local sale and Butwal markets Bamboo baskets (tokaries) (70-80 kg size for distant markets)
	Dhanusha	Bengadabar	500	1000	900	1800	Mid Sep – Mid Jan	Bamboo baskets (30-40 kg size)
Watermelon	Dhanusha	Vutahi Paterwa	1300	2600	2730	5460	second week of April – Third week of June	Heaped in trucks or carts
Ginger	Palpa	Palung Mainadi	3000	9000	2000	6000	October – February	Gunny bags for long distance, and bamboo baskets for shot distance marketing
	Nawalparasi	Ruchang	4000	8000	2400	4800	October – February	Gunny bags for long distance, and bamboo baskets for shot distance marketing
Vegetable seeds - polebean	Kaski	Arva Kalika			7	40		Gunny bags and cloth bags
Vegetable seeds – radish		Harpan			14	42		Gunny bags and cloth bags

Table 3: Financial Feasibility of Undertaking Export Oriented ProductionCosts and returns per ropani¹ of land from vegetable production in the selected production pocketsUnit: NRs²

Description	<u>Cauliflower</u> Sindhuwa- Basantapur	<u>Cabbage</u> Sindhuwa- Basantapur	<u>Pole bean</u> Guthitar- Dulghat, Dhankuta	<u>Tomato</u> Guthitar- Dulghat, Dhankuta	<u>Tomato</u> Madan Pokhara, Palpa	<u>Tomato</u> Bengadabar, Dhanusha	<u>Watermelon</u> Vutahi Paterwa, Dhanusha	<u>Ginger</u> Ruchang, Nawalparasi	<u>Pole bean seeds</u> Arva Kalika, Kaski	<u>Radish seeds</u> Harpan, Kaski
Costs (a)										
Labor cost	3000	3375	2647	5625	5640	6030	3750	2165	1480	1740
Other cost	4026	3982	3165	8870	6574	3751	924	2828	1780	781
Total cost	7026	7357	5812	14495	12214	9781	4674	4993	3260	2521
Cost Rs/kg	9.36	3.06	7.26	4.14	6.1	5.43	2.23	8.32		
Return (b)	10125	14400	7200	19250	18000	14400	7350	6600	3600	3500
Net return (c = b – a)	3099	7043	1388	4755	5786	4619	2676	1607	340	979

Source: Key informants survey of the production pockets, 2002

¹ ropani ≈ 500 m²² 1 US\$ = NRs 78 (July 2002)

C. Major Conclusions of the Study

From the findings and discussions, the following conclusions have been drawn.

- ÿ The finding shows that the expected fresh vegetable EPV will cover about 33 percent poor people in the community. Similarly, ginger will cover about 44 percent and vegetable seeds will cover about 25 percent poor producers in the community. If one grows fresh vegetable, ginger and vegetable seeds in two ropani land in the selected pockets, s/he will get more than NRs8300. This level of income have been analysed as significant income to alleviate producers from their poverty.
- ÿ It has been argued that the programme should not bring any conflict in the distribution of EPR programme benefits, as the poverty will be well addressed.
- ÿ All the selected areas and commodities are feasible for export production. These commodities in the selected respective areas show only the feasibility from the supply that these commodities can be produced; there is ample opportunity to expand area under cultivation and thus increase the level of production to meet economies of size for export.
- ÿ It was found that there is a lack of business culture in the producer farmers in the selected production pockets. There should develop a business culture in both producer farmers and traders (exporters) to establish a well-functioning production and export. As NGOs are found well associated with the producer groups, these NGOs can function as a bridge to establish such business linkages between the producers and traders.
- ÿ As the EPV will not be implemented in all the selected pockets and crops, it would be better to examine the present level of production, technology adoption, infrastructure, and developed entrepreneurial capacity of the producers. For example, in vegetable production programme, it would be better to start the EPV project in the corridor of Dharan – Basantapur highway producing cauliflower in Sindhuwa – Basantapur sector and tomato and pole bean in the Patlekhola – Budhimorang sector. Then on priority basis, the project should expand in Palpa for tomatoes, and Bengadabar for tomatoes and finally to Vutahi Paterwa for watermelon.

D. Evaluation of the Study Report

The Step 1 study has very comprehensively assessed the production potential, problems and constraints of the supply side of the identified commodities in the selected pockets. The reports have nicely shown the poverty situation of the producers and have clearly explained the potentiality of the EVP in achieving the objectives of EPRP. It has further discussed at length about the impact of the proposed EVP on the environment and women.

The individual commodity study report has presented the level of technology and the improvement needed to launch EVP kind of programme. It has diagnosed the potential NGOs who may become partners for the implementation of proposed EVPs.

IV. ASSESSMENT OF THE SELECTED TARGET MARKETS FOR THE EXPORT OF THE SHORT LISTED PRODUCTS

A. Ginger Market (New Sabji Mandi Azadpur, New Delhi)

New Sabji Mandi Azadpur Market is a very big fresh vegetable market in New Delhi. This market was visited to assess the market for fresh ginger in Delhi. Fresh ginger traded in this market exhibits the following characters.

Ginger Trading in the Market:

- The market is working purely by demand and supply forces.
- There are various qualities of fresh gingers being marketed.
- The quality of ginger was found to be examined stepwise as size, form/shape, cleanliness, colour, fibre, and smell and/or taste.
- There are all sorts of ginger being traded in the market. Nevertheless, the best ranking gingers were big in size (15-20 cm long, 8-12 cm width, and 3-5 cm thick), grown in red or yellow soils, cleaned in water, and having a golden colour look on the rhizome tips. After meeting these criteria, few traders were also found to check the fibre and smell as well. Hence, even if the ginger is fibreless and has a strong smell and taste, the buyers do not look into it if it does not meet the first three criteria.
- Traders think that gingers coming from Bangalore (Cochin), Dimapur, Tinsukia are better ones.
- Ginger is packed in 60 kg gunny bags.
- All the bags loaded in the truck contain uniform quality gingers. A sample bag is down loaded from the truck and is displayed on the ground. An interested buyer may ask the agent to download another sample bag to confirm the quality of the ginger in the truck. Then the traders and the commission agents negotiate on the price.
- Wholesale market price is not announced verbally. Price negotiation during trading takes place by signals on fingers between the shaking-hands of the two traders covered by the handkerchief.
- On the day of the visit of this market (16 Dec 2002), the wholesale price per kilogram of fresh ginger was IRs³10-12 for bigger ones and IRs8-9 for medium and smaller sized ones.

³ 1IRs = NRs1.6

- Ginger is traded by the commission agents. The rate of commission is six per cent.
- The commission agents then prepare the necessary documents and send the money to the supplier. Handling costs (labour charges) in the market is also charged to the supplier.



Market arrival and display of fresh ginger in New Sabji Mandi, Azadpur, New Delhi



Price negotiation and best quality of ginger in New Sabji Mandi, Azadpur, New Delhi

Case with the Nepalese Fresh Ginger:

- * There was a lot of Nepalese ginger as well in the Azadpur market. Traders are familiar that these gingers come to Delhi market mainly from Fikkal, Dharan, Khaireni and Dang. In fact, Dharan and Khaireni are the shipping points only and Fikkal and Dang are production areas as well. Though some of the traders told that ginger coming from Dang was better, some told that ginger coming from Khaireni was better and others told that ginger coming from Dharan was better, most of the traders told that ginger coming from Fikkal was better in quality in terms of size and look.
- * Traders, however, told that the Nepalese gingers are of inferior quality. As traders showed to the mission in the markets, Nepalese gingers were a bit smaller in size, not washed and soils were still intact, not graded and thus looking medium or smaller in average size.

- * Nepalese gingers are mostly packed in 80 kg bags (some even more or less than 80 kg as well) and are thus difficult to handle. The standard size in the market is 60 kg bags.
- * Nepalese ginger is a bit dry on the rhizome surface and do not exhibit golden colour on the tips of the rhizomes.
- * Nepalese supply is not regular.
- * There are no Nepalese commission agents. Nepalese gingers are also traded by the Indian commission agents.



Nepalese ginger in agricultural produce market Dharan: mixed grades in different sized bags

Traders' Suggestions:

- Nepalese farmers should produce bigger rhizomes.
- In order to produce bigger rhizomes, may need to plant the Dimapur or Tinsukia type varieties.
- Ginger should be cleaned.
- Nepalese traders should follow proper grading and packaging.
- They should pack in 60 kg gunny bags.
- In view of the transportation costs and the price the product can fetch, they should bring the bigger ones to Delhi market and medium ones to Lucknow and Kolkata.

B. Dry Ginger (Sutho) Market (Khari Bavli Market, Delhi)

Khari Bavli Market is a very big spices market in Delhi. This market was visited to assess the market for sutho in Delhi. Sutho traded in this market exhibits the following characters.

Sutho Trading in the Market:

- Sutho market is operating fully by demand and supply forces.

- There are only white suthos being transacted in Delhi market. White suthos are sun-dried gingers. However, there are different qualities of suthos being transacted in the market.
- There are mainly Chinese, Indian and Nepalese suthos being transacted in the market.
- Chinese suthos are without skin and are white. Indian suthos produced in Banglore (Cochin) are also white but are having some skins attached. It is also pressed at processing and thus looks a bit flat. Nepalese suthos look greyish-white but do not have any skin intact.
- Big size, clean and white suthos without skin are considered better in the market. After these criteria are met, then some traders were found checking the fibre and smell as well.
- Chinese sutho is considered as the best followed by Cochin, Nepalese and the Indian local.
- On the day of visit in the market (17 Dec 2002), the wholesale price of Chinese sutho was around IRs50/kg, while that of Cochin sutho was around IRs45/kg, Nepalese sutho was IRs32/kg, and very low quality greyish brown around IRs25/kg.
- Sutho is traded by commission agents. The rate of commission is six percent.
- The commission agents then prepare the necessary documents and send the money to the supplier. Handling costs (labour charges) in the market is also charged to the supplier.
- No smoked suthos (red/black) were found in Delhi market. It was told that such suthos are sold in Uttar Pradesh and Bihar Markets.

Case with Nepalese Sutho:

- * Nepalese suthos look grayish in colour and thus are not much liked by the consumers.
- * Nepalese suthos are smaller or average in size.
- * Nepalese suthos are of mixed grades. The different quality ones (in terms of size and colour) are mixed.
- * Nepalese suthos are packed in bigger bags containing more than 60 kg.
- * There is no regular supply of Nepalese suthos.
- * However, Nepalese suthos are also known to be not treated in chemicals.
- * Nepalese suthos are popular for their strong flavour.



Chinese sutho

Indian sutho

Nepalese sutho

Chinese Indian Nepalese

Traders' Suggestions:

- Do not dry sutho in the field directly touching the ground.
- The size of suthos should be bigger.
- Do proper grading and packing.
- In view of transportation costs and the price sutho can fetch in the market, only bigger ones should be brought to the Delhi market.
- By any means, the sutho should look white in colour.

C. Fresh Vegetable Market (Sial Dah Vegetable Market, Kolkata)

Sial Dah Fruits and Vegetable Market is a very big wholesale market that operates almost the whole day. This market was visited to assess the market for fresh vegetables in Kolkata. Fresh vegetables traded in this market exhibit the following characters.

Fresh Vegetable Trading in the Market:

- Sial Dah market is fully operating by demand and supply forces.
- There are various products coming from various parts of India as well as from Nepal and China.
- October to March is the main season of vegetable supply from local production.
- Summer and rainy seasons (May to mid September) are the lean periods of vegetable supply from the local production.
- In the main season, cauliflowers and cabbages produced in the suburbs of Kolkata are brought to the market in trucks with all the older leaves as well. In cauliflower, the outer older leaves are used to wrap the curd.
- However, in the other seasons, cauliflowers and cabbages coming from distant markets are packed in tokaries (bamboo baskets).
- Tomato is brought in wooden boxes. These boxes are 25 kg capacity and contain 22-24 kg tomatoes. Suppliers are paid only for 20 kg per box and the rest is adjusted as various kinds of handling losses.
- Tomatoes being sold in the market are almost the hybrid ones and the traders told that it is the same the whole year.

- Beans are traded in gunny bags as well as tokaries.
- Fresh vegetables are traded by the commission agents, and the rate of commission is from 6 to 6.25 percent.
- The price varies directly with the quality overtime.
- The commission agents then prepare the necessary documents and send the money to the supplier. Handling costs (labour charges) in the market is also charged to the supplier.



Cabbage arrives in gunny bags



Cauliflower arrives with whole leaves



Tomatoes are very uniform quality



Tomatoes arrive in wooden boxes

Case with the Nepalese Vegetables:

- * Supply is not regular.
- * Not graded, especially in tomato.
- * Packaging is poor.
- * Due to high cost of transportation, Nepalese vegetables cannot compete in price during the main season (October to March). Nepalese vegetables can get better market during summer and rainy season (May to July).

Traders' Suggestions:

- Emphasize the supply of Nepalese vegetables during summer and rainy seasons.
- Contact the traders in the market.
- Exchange information on the quality, quantity, and timing of supply.
- Do proper grading and packing.
- The supply should be regular.

D. Fresh Vegetables Market (Sham Bazaar, Kaoran Bazaar, and New Market Dhaka)

Sham Bazaar, Kaoran Bazaar, and New Market are the major fresh vegetable wholesale markets in Dhaka. These markets were visited to assess the market for fresh vegetables in Dhaka. Fresh vegetables traded in these markets exhibit the following characters.

Fresh Vegetable Trading in the Market:

- Market is fully competitive operating by demand and supply forces.
- There are various vegetables coming from various countries as well (India, China, Thailand, Nepal).
- As in the case of Kolkata, Nepalese vegetables can get better market only during summer and rainy seasons (May to September).

Case with the Nepalese Vegetables:

- * Dhaka traders do not have much information about Nepalese vegetables. A few of them have some experience like that of Kolkata traders as follows.
- * Supply is not regular. Suppliers are not complying with the quantity discussed in the terms of agreement.
- * Products are not graded, especially tomato.
- * Vegetables are not packed properly.

Traders' Suggestions:

- Traders in Dhaka are ready to deal with Nepalese vegetables as well provided there is sizeable quantity, regular supply and well graded and packed.
- Traders should comply with the terms of agreement in the supply of vegetables.
- This supply should match with the period of lean production in Dhaka.

E. Vegetable Seeds Market (Siddique Bazar, Kawran Bazar and Motijhil Bazar, Dhaka)

Siddique Bazar, Kawran Bazar and Motijhil Bazar are the major vegetable seed markets in Dhaka. In Siddique Bazar alone there are so many seed traders (more than 50) along the same street and lane. These markets were visited to assess the market for vegetable seed in Dhaka. Vegetable seeds traded in these markets exhibit the following characters.

- The vegetable seed market is very competitive.
- Vegetable seeds come from various countries.
- Most of the traders have their own technical staff and the processing facilities.
- Some of the seed companies are carrying even the varietal development works.
- Most of the seeds are sold on either laminated pouches or cans. The pouches and cans are well labelled with colour photographs.
- Only a few retailers sell seeds on loose and from the containers.
- Most of the vegetable seeds in Dhaka market are hybrids.



Vegetable seeds in Dhaka market are mostly packed in tins or laminated pouches

Case with the Nepalese Vegetable Seeds:

- * Vegetable seed production in Nepal for Dhaka traders is carried out on gentlemen agreement, and there is no formal written agreement made.
- * So far, only radish-seeds have been exported to Bangladesh. Nepalese radish seeds have done well in Bangladesh and so far there have been no complain by the fresh vegetable growers on the quality of Nepalese radish seeds.
- * There are various Nepalese vegetable seed traders exporting seeds to Bangladesh. Similarly, there are various vegetable seed traders in the market who are importing vegetable seeds from Nepal.
- * Nepalese vegetable seeds are exported to Bangladesh on bulk in cloth and gunny bags. These seeds are repacked in laminated pouches or cans in Dhaka.

Traders' Suggestions:

- Bangladeshi vegetable traders want to go in joint venture with Nepalese vegetable seed producers and traders.
- Besides Minoearly radish seeds, they are willing to produce other vegetable crop seeds as well.
- They want to have a collaborative germplasm exchange and varietal demonstration programs.
- They are ready to go with written agreement as well on contract vegetable seed production.

F. Overall Assessment of the Targeted Export Market

There have been three major target markets for various products. Delhi market has been targeted for ginger as well as sutho. Kolkata market has been targeted for fresh vegetables in general and cauliflower, cabbage, tomato and French beans in particular. And, Dhaka market has been targeted mainly for vegetable seeds and fresh vegetables in general.

The targeted markets are all very big markets in India. In all markets, there are a large number of traders and nobody can influence price. Population in each of these cities is more than that of the whole Nepal. Hence, even a small percentage of the demand of these markets would be sufficient for Nepalese production envisaged to come from the proposed EPVs. What seems really required is to produce for the targeted market and be competitive in quality and price.

V. ASSESSMENT OF TRADE SUPPORT INSTITUTIONS

A. Introduction

It was thought of that the research and development, marketing, and policy related institutions should be visited to get information on the existing problems and their suggestions on the remedial measures. The institutions visited were as per the itinerary presented in Appendix 1. In addition, some related businessmen, scientists and processors were also contacted. In each of such meetings, the findings of the Step 1 study and the objectives of the Step 2 study were explained. The major areas of discussion and findings are presented in the following sections.

B. Research and Development

Research and development works on fresh vegetables is limited to government institutions only and there is no private sector involved in research and development. Furthermore, research on fresh vegetable is concentrated more on varietal development and production agronomy. Major researches are carried out by Nepal Agricultural Research Council (NARC), which is a government supported autonomous organization. Research farms are established in many locations and seem to be sufficient to carry required adoptive researches.

Extension related activities are carried out by the Department of Agriculture. It has Agriculture Development Offices in all districts. In each district, there are several service centres. Technical services in production are provided from these centres. At the central level, the extension programme is planned and coordinated by the Vegetable Development Directorate (VDD).

Farmers have been using hybrid seeds in major vegetables in most of the commercial production pockets. However, despite the demand for hybrid seeds, there has been no hybrid variety developed in Nepal. Hybrid seeds are imported from abroad. NARC is about to release some hybrid lines in tomato.

Most of the open pollinated varieties are produced in Nepal. Nepal even exports some vegetable seeds. It has been exporting radish seeds to Bangladesh and India. In fact, Nepal has a comparative advantage in producing temperate vegetable seeds in the SAARC region. Nepal has already identified the potential pockets for vegetable seed production. There are sufficient trained farmers and the technicians involved in production. VDD has a good network of vegetable seed production. There are quite a large number of vegetable seed traders as well who, with the help of VDD, produce their own seed with the contract farmers.

C. Marketing

Marketing of fresh vegetables and ginger is done on individual basis. Though fresh vegetables and ginger production have reached a commercial scale, there has not been any contract production yet. Hence, the supply is not guaranteed. Nevertheless, information obtained from the extension programme on the

quantity of seed used and the area planted gives fairly enough information for marketing planning.

There is no processing equipment for drying and sorting. And there are no proper storage facilities. Except the removal of rotten ones, there is no grading being practiced. There is no proper packaging, and products are brought to the market on traditional tokaries and dokos (bamboo baskets). Vegetables are hauled to the road heads on human back. Then, are transported to the market centres either on trucks or on roofs of public buses. Hence, due to lack of grading and proper packaging, long distance transportation and marketing is affected accordingly.

Even in ginger and sutho, grading is not done. Due lack of grading, the price fetched is low. Hence, the cost of transportation per unit price of product becomes high making it less competitive in the market.

Marketing is supported by AEC, FNCCI, FNCSI by providing market information and supports to participate in the national as well as international fairs and exhibitions. In addition, these organizations help in lobbying their interest.

Marketing Development Directorate (MDD) of the Department of Agricultural and the Agri-Business Promotion and Statistics Division of the Ministry of Agriculture and Cooperatives (MOAC) support the marketing through designing appropriate policies and facilitating the official process for the marketing of agricultural commodities. The Ministry of Industry, Commerce and Supplies (MOICS) is the policy formulator and Trade Promotion Centre (TPC) is the trade facilitator. However, there is no single agency, which can provide export service for agricultural products.

D. Plant Quarantine Service

Nepal has plant quarantine service available at all major exit points along the Indian border in the south. The plant quarantine offices have their own buildings and laboratories. Though not sufficient, there are some equipment as well. There are permanent government staff. Plant quarantine service is rendered as governed by the Plant Quarantine Act 2029 (1972) and Plant Quarantine Regulations 2031 (1975). These plant quarantine offices are providing quarantine certificates as required by the exporters. These services available currently seem sufficient to support the proposed EPVs.

VI. CONCLUSIONS

From the findings of this study and discussions, the following conclusions have been drawn.

- Review of Step 1 study shows that the available infrastructures and R&D facilities can support the production of commodities in the identified pockets. Against the recent national poverty statistics [38 percent (NPC, 2002)], there are sizeable numbers of poor producers in the identified pockets fitting with the objective of EPRP.

- The production potential assessment shows that production can be at least doubled in each pocket. The increased production is expected to come from increased area under production as well as increased productivity.
- The production of fresh vegetables should be for the off-season in the target markets to fetch a good price. However, ginger and vegetable seeds should be produced in the main season.
- Grading and packaging of fresh vegetables as well as ginger is still traditional and thus cannot get the premium price in the market. Hence, proper grading and packaging should be encouraged.
- The financial analysis shows that there is positive net return in all the identified commodities and pockets. As the share of labour cost is more than 50 percent in the total cost of production, it has a greater potential in generating employment as well.
- It was found that there is a lack of business culture in the producer farmers in the selected production pockets. There should develop a business culture in both producer farmers and traders (exporters) to establish a well-functioning production and export. As NGOs are found well associated with the producer groups, these NGOs can function as a bridge to establish such business linkages between the producers and traders.
- As recommended by various traders in the targeted markets, Nepalese producers and thus the traders should improve their production and supply as follows.

Ginger:

- Nepalese farmers should produce bigger rhizomes. For this they may plant the Dimapur or Tinsukia type varieties.
- Ginger should be cleaned.
- Nepalese traders should follow proper grading and packaging.
- They should pack in 60 kg gunny bags.
- In view of the transportation costs and the price the product can fetch, they should bring the bigger ones to Delhi market and medium ones to Lucknow and Kolkata.

Sutho:

- Do not dry sutho in the field directly touching the ground.
- The size of suthos should be bigger.
- Do proper grading and packing.
- In view of transportation costs and the price sutho can fetch in the market, only bigger ones should be brought to the Delhi market.
- By any means, the sutho should look white in colour.

Fresh Vegetables:

- Emphasize the supply of Nepalese vegetables during summer and rainy seasons.
- Contact the traders in the market.
- Exchange information on the quality, quantity, and timing of supply.
- Do proper grading and packing.
- The supply should be regular.

Vegetable Seeds:

- Bangladeshi vegetable traders want to go in joint venture with Nepalese vegetable seed producers and traders.
 - Besides Minoearly radish seeds, they are willing to produce other vegetable crop seeds as well.
 - They want to have a collaborative germplasm exchange and varietal demonstration programs.
 - They are ready to go with written agreement as well on contract vegetable seed production.
- As the fresh vegetable producer farmers are using imported hybrid seeds and Nepal has not started producing hybrid seeds, the arrangement of vegetables seeds should be planned in advance to guarantee the supply of seed in time.
 - Nepal has a comparative advantage in producing temperate vegetable seeds in the SAARC region. Nepal has already identified the potential pockets for vegetable seed production and has sufficient trained farmers and the technicians, it is quite feasible to expand vegetable seed production programme.
 - There is no processing equipment for drying and sorting. And there are no proper storage facilities. Except the removal of rotten ones, there is no grading being practiced. There is no proper packaging and products are brought to the market on traditional tokaries and dokos (bamboo baskets). Hence, grading and packaging should be encouraged to facilitate long distance transportation and marketing.
 - There are well-established trade support institutions and thus the proposed EPV will not require any new institution to be formed. Even the plant quarantine service providing offices are already there in operation.

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APPENDIX 1

Itinerary of International and National Consultants

Date: December 2002		Agency to visit	Persons to meet	Remarks
9: Monday	Arrival of International Consultant to Kathmandu	UNDP	Enterprise Development Officer (EDO) (Ms. Kanti Risal), UNDP/Nepal	Briefing about the programme
10: Tuesday	9:30 – 11:00	Embassy of Bangladesh		Visa for Bangladesh
	11:00 – 11:30	MEDEP		Environment setting
	11:30 – 13:30	Meeting at MEDEP	Dr. L. Pun – National Programme Manager (MEDEP), Ms. Geeta Pandey – Gender and Training Specialist, Mr. Ram K. Pokharel – National Programme Manager (LGP), EDO (Ms. Kanti Risal)	Discussion on the modality of EPRP and establishing EPVs in Nepal.
	13:30 – 14:30	Launch break		
	14:30 – 15:00	Ministry of Commerce and Industry	Dr. Niranjana Baral – Joint Secretary	Discussion on the implementation modality of EPVs.
11: Wednesday	9:00 – 10:30	Embassy of India		Visa for India
	11:00 – 12:00	Trade Promotion Centre	Mr. Deb Bahadur Rokaya – Executive Director, Mr. Naresh Chandra Lamichane – Deputy	Discussion on trade policies and promotional activities
	12:15 – 13:15	Federation of Nepalese Chamber of Commerce and Industry	Mr. K. B. Tamrakar – Executive member FNCCI	Discussion on the procedural matters and problems in the export of Nepalese agricultural produce.
	13:15 – 14:00	Launch break		
	14:00 – 15:00	Federation of Nepalese Cottage and Small Industries	Mr. Basu Dev Giri – President	Discussion on the small and cottage industries development policies and problems
	15:15 – 16:15	Nepalese Chamber of Commerce	Mr. Rajesh Kaji Shrestha	Discussion on trade policies and promotional activities
	16:15 – 17:00	Embassy of India		Visa for India
	15:00 – 16:15	Agro-Enterprise	Dr. Dev Bhakta Shakya – Executive	Discussion on the identified traders and markets

		Centre, FNCCI	Director	in India and Bangladesh for the said purpose.
	16:15 – 17:00			
12: Thursday	9:30 – 11:00	Vegetable Development Directorate	Mr. Surath Babu Aryal – Director, Mr. Lok Nath Deoju – Chief Spice development Officer, Dr. Kedar B. Budathoki – Chief of the Horticulture Research Division, NARC	Discussion on the production feasibility and research and extension supports on fresh vegetables and ginger.
	11:30 – 12:30	Agribusiness promotion and Statistics Division, MOAC	Mr. Asheswor Jha – Joint Secretary	Discussion on the tentatively selected areas and crops.
	12:30 – 13:30	Launch break		
	14:00 – 15:00	Marketing Development Division	Mr. Binesh B. Bista – Director, Marketing Development Directorate	Discussion on the export feasibility of the identified commodities
	15:15 – 16:30	UNDP		Financial arrangement
13: Friday	9:30 – 11:30	Royal Thai Embassy		Discussion on the market exploration
	12:00 – 13:00	Ministry of Industry and Commerce	Mr. Prachanda Man Shrestha	Discussion on the export feasibility of identified products.
	13:00 – 14:00	Lunch break		Fly to Bangladesh
	14:00 – 15:00	Seed Entrepreneurs' Association Nepal (SEAN)	Mr. Durga Dahal – President, Messrs Durga Adhikari, Damoder Poudel, Rajendra Shrestha	Discussion on the export feasibility of vegetable seeds to Bangladesh and India
	15:30 – 16:30	UNDP		Security clearance for Delhi and Biratnagar
14: Saturday	07:00 – 09:00	Kalimati Fruit and Vegetable Wholesale Market visit		Observation on Nepalese vegetable marketing mechanisms, quality and packaging techniques
	09:00 – 10:00	Manakamana Seed Concern	Mr. Kabi Krishna Amatya	Discussion on the vegetable trading with Bangladesh
	10:30 – 11:30	Tukucha Vegetable Wholesale Market		Observation on Nepalese vegetable marketing mechanisms, quality and packaging techniques
	12:00 – 13:00	Khusibu Vegetable Wholesale Market		Observation on Nepalese vegetable marketing mechanisms, quality and packaging techniques
	13:00 – 14:00	Lunch break		
	14:30 – 16:00			Planning for trip to India
	16:00 – 15:00		Mr. Bindu Dhoj Adhikari	Discussion on the export feasibility of agricultural products from Nepal
15: Sunday	08:00 – 14:00			Review of accomplishments made so far
	17:00			Departure for Delhi

16: Monday	07:00 – 16:00	New Subji Mandi Azadpur, Delhi		Market study for fresh ginger
17: Tuesday	07:00 – 16:00	Khari Baoli Market, Delhi		Market study for dried ginger Visited NAFED, Met with Mr. Surinder Kalia
18: Wednesday	08:00			Left Delhi for Kolkata (flight was delayed by 2 hours)
	14:00 – 15:00	Seahdah Market, Kolkata		Market study
19: Thursday	07:00 – 10:00	Seahdah Market, Kolkata		Market study
	10:00 – 11:00	Regional Office of National Agricultural Cooperative Marketing Federation of India Ltd. (NAFED) 12-C, Lord Sinha Road, Kolkata	Mr. K. C. Bhomik – Regional Manager	Discussion on the market linkage
	11:00 – 12:00	Branch Office of National Agricultural Cooperative Marketing Federation of India Ltd. 20-B, Abadul Hamid Street, Kolkata	T. K. Roy – Branch Manager	Discussion on the policy related issues in vegetable trades
	13:00 – 14:00	Lunch break		
	14:00 – 15:00	Sealdah market, Kolkata	Met various traders	Discussion on the trade linkage and the periods of comparative advantage
20: Friday	08:00 – 11:00	Kolkata suburb vegetable production area	Met various farmers	Study of vegetable production in the suburb of Kolkata
	13:30			Left Kolkata for Dhaka
	16:00 – 19:00			Planning for market study in Dhaka
21: Saturday	07:00 – 09:00	Sham Bazar, Dhaka		Study of fresh vegetable market
	10:00 – 11:30	Agricultural Marketing Department, Dhaka	Ms. Shanaz Begum, Mr. Akramul Hoque, Dr. P. R. Mathema	Discussion on the vegetable trade mechanism between Bangladesh and Nepal
	12:00 – 13:00	PRAN GROUP Property Heights, 12 R K Mission Road	Pran group executives	Discussion on the possible vegetable and spices imports by Pran Group

	13:00 – 14:00	Lunch break		
	14:00 – 18:00	Kawran and Siddique Bazar	Met various vegetable seed traders	Discussion on the vegetable seed trade problems and prospects between two countries
22: Sunday	07:00 – 09:00	Kawran Bazar and New Market		Discussion on the vegetable trade mechanism between Bangladesh and Nepal
	10:00 – 11:30	East West Seed (Bangladesh) Ltd. Anchor Tower 1/1 B, Sonargaon Road, Dhaka	M. Gul Hossain – General Manager, and Md. ali Afzal Deputy Project Manager	Discussion on joint venture vegetable seed production and trades
	12:00 – 13:00	Lunch break		
	13:30 – 18:00	Siddique Bazaar and Motijheel Bazar	Met various vegetable seed traders	Discussion on the prospects of expanding vegetable seed trade
23: Monday	08:00 – 10:00			Review of works accomplished in Dhaka
	13:30			Left Dhaka for Kathmandu (the flight was delayed for 3 hours)
24: Tuesday	08:00 – 10:30			Review
	11:00 – 12:00	UNDP	Mr. Erik Bryld and Ms. Kanti Risal	Briefing of India and Bangladesh visits
	12:00 – 13:00	UNDP		Security clearance for Biratnagar and Dharan
	13:00 – 14:00	Lunch		
	14:00 – 16:00	Agro Enterprise Centre, FNCCI, Teku	Dr. Dev Bhakta Shakya – Executive Director	Discussion on the vegetable export problems and policies
	17:00 – 19:00		Mr. Bindu Dhoj Adhikari	Discussion on the feasibility of penetrating Indian vegetable and spices markets
25: Wednesday	09:00			Left Kathmandu for Biratnagar (the flight was delayed by 2 hours)
	11:30 – 12:00			Transportation arrangement
	12:00 – 13:30	Fruits and Vegetable Wholesale Market Biratnagar		Observation of the marketing mechanism, quality of produce, grading and packaging techniques
	13:30 – 14:00	Lunch		
	14:00 – 15:00	District Agricultural Development Office, Morang	Mr. Daman B. Dhungana – Chief Agriculture Development Officer	Discussion on the export production of vegetable
	15:00 – 16:00	Plant Quarantine Office Biratnagar		Discussion on the quarantine procedures

	16:30			Left Biratnagar for Dharan
26: Thursday	07:00 – 09:00	Agricultural produce Market Dharan		Observation of the marketing mechanism, quality of produce, grading and packaging techniques
	09:00 – 10:30	Agricultural produce Market Dharan	Mr. Hari P. Shrestha and Jagadish Mahato – Members marketing Executive Committee	Discussion on the market operation and export promotion
	10:30			Left Dharan for Tarahara
	11:15 – 12:15	Regional Agricultural Research Centre Tarahara		Observation on Research Support for Export Production
	12:15			Left Tarahara for Biratnagar
	13:00 – 13:30	Lunch		
	14:30			Left Biratnagar for Kathmandu (the flight was delayed by 2 hours)
27: Friday	9:00 – 13:00	MEDEP Office		Review of accomplishments
	13:00 – 14:00	Launch		
	14:00 – 16:00	MEDEP Office	Dr. L. Pun – National Programme Manager (MEDEP), Mr. R. K. Pokharel, EDO	Progress review and discussion on the approach and final modality of EPVs
28: Saturday	08:00 – 10:30			Wrap-up discussion
	13:50			International Expert left Kathmandu for Thailand

APPENDIX 2
LIST OF PERSONS MET

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