Study to Select Value Chain and Analyze Selected Value Chain

Presentation on Value Chain Assessment
Study Objectives

Value Chain Selection

Analysis of Selected Value Chains

Ensure Sustainable Livelihoods to the project beneficiaries

Reduce pressure on Natural Resources
Specific Objectives

• The study was conducted in two phases:

Phase 1: Value Chain Selection
• Output: Select three value chains

Phase 2: Value Chain Analysis
• Output: Detail Value Chain Analysis of three selected value chains

Market Study for Ecotourism
Process of Value Chain Selection

Step
- Secondary Literature Review and KII
- Screening through Cut-off Criteria
- Field Investigation
- Validation

Tools
- Relevant secondary documents, CREL project documents
- Interview project staffs
- Value chains that deplete forest and/or wetland directly will be ineligible for selection
- In-depth interviews, FGD, Primary survey
- Ranking exercise, Validation workshop

Output
- First List of Value chains & One Cut-off Criteria & 12 Selection Criteria
- Short list of Value Chains
- Final List of Value Chains
- Three Value Chains
# Value Chain Selection Criteria

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<th>Criteria</th>
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<td>Scope for value addition (Low scope=1, High scope=5)</td>
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</table>
Tools for Data Collection & Respondents in Phase 1

- In-depth Interview
  - Government officials (Forest Department, Department of Agriculture, Department of Fishery, Department of Livestock, Jobo Unnayan)
  - CMC Members, Local Chairman
  - Forward Market Actors: Collector (Faria), Trader (Bepari), Wholesaler (Arotdar)
  - Backward Market Actors: Input seller (Seed Seller, Fertilizer seller, Chemical & Medicine seller etc.)
  - Research Institute
  - NGOs Staffs
  - CREL Regional staffs

- FGD
  - Community People (VCF Members, CMC Members, CPG members, NS)

- Primary Survey
  - Beneficiary Profiling (VCF Members)

CREL Livelihood Officer & MDO directly participated in most of the interviews with Innovision Team.

CREL Livelihood Officer & MDO directly participated in most of the FGD with Innovision Team.

CREL Livelihood Facilitators conduct the survey.
## Ranking Exercise for Southeast Zone2

<table>
<thead>
<tr>
<th>Criteria</th>
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<th>Tailoring</th>
<th>Embroidery</th>
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<th>Capsicum</th>
<th>Floriculture</th>
<th>Apiulture</th>
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Process of Value Chain Analysis

**Literature Review**
Secondary literature, Project document

**In-depth Interviews**
- Key informant interviews, forward/backward market actors, private sector
- CREL Livelihood Officer & MDO directly participated in most of the interviews with Innovision Team

**Questionnaire Surveys**
- Producers of selected value chains, project beneficiaries
- CREL Livelihood Facilitators conduct the questionnaire surveys

**Strategy Workshop**
Findings sharing, Strategy Discussion

**Data Analysis**
Case analysis, tabular analysis, averages, extrapolation, etc.
Outcome of Value Chain Analysis

Value Chain Functions
- Input Suppliers
- Producers
- Market Intermediaries
- Support Actors

End Market Analysis
Demand/Supply Situation
Constraints Analysis
Opportunities

Strategies for promoting Value Chains to target beneficiaries
Southeast Zone 2
Outline

→ Geographic scope
→ Beneficiary mapping
→ Tools for data collection & respondents
→ People we have interviewed
→ Rational for selecting the value chains
→ Value Chain Analysis: Strawberry, Capsicum and Medicinal Plants
→ Value Chain Analysis: Dress and Cap making
→ Value Chain Analysis: Floriculture and Apiculture
→ Value Chain Analysis: Eco-tourism
→ Tentative outreach through the selected value chains
→ Potential trades for the beneficiary
# Geographic Scope

<table>
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<tr>
<th>Zone</th>
<th>District</th>
<th>Upazila</th>
<th>Site</th>
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<tbody>
<tr>
<td>Southeast</td>
<td>Cox’s Bazar</td>
<td>Chakari</td>
<td>Medhakachapia &amp; Fasiakhali National Park</td>
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<tr>
<td>Zone 2</td>
<td></td>
<td></td>
<td>Teknaf Wild Life Sanctuary</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Himchari National Park</td>
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</table>
Beneficiary Mapping

→ Beneficiary locations
Tools for Data Collection & Respondents

In-depth Interview

- CMC Members
- Forward Market Actors: Collector (Faria), Trader (Bepari), Wholesaler (Arotdar)
- Backward Market Actors: Input seller (Sewing & Dress Making Materials Seller, Seed Seller, Fertilizer Seller, Pesticide Seller etc.)
- Private Company
- NGOs and Government Staffs
- Service Providers
- CREL Regional staffs

Questionnaire Survey

- Producers of the selected value chains

KII

- Government officials (Department of Agriculture, Department of Forestry, Jobo Unnayan, Krishi Bank, )
People We have Interviewed

**Backward Linkage**
- Strawberry, Capsicum
  - 5 seed, fertilizer & retailers
- Dressmaking
  - Dress and Cap making input seller
- Flower
  - Flower cutting sellers
- Eco-tourism
- Service provider
- Resort owners
- Hotel Association

**Producers**
- Strawberry
  - 3 Strawberry producers
- Capsicum
  - 2 Capsicum farmer
- Dressmaking
  - 24 Dressmaker
- Floriculture
  - 2 Floriculturists
- Eco-tourism
  - 2 Tour operators
  - 4 Resort owners

**Forward Linkage**
- Strawberry, Capsicum
  - Faria
  - Arotdar
- Dressmaking
  - Paikar
  - Arotdar
- Flower
  - Paikar
  - Company
- Eco-tourism
  - Service provider
  - Resort owners
  - Hotel Association

**Support Function**
Agriculture officer (3), NGOs 3, Projects 2 etc.
Rational for Value Chain Selections

→ The VCs can withstand common climactic risk and dynamically and effectively respond to shifting climate impact circumstances
→ Help minimize forest resource extraction
→ Easily integrate women and youth
→ Has wider outreach due to low skills and investment requirement
→ Extremely high growth potentials
→ Quick return on investment an higher income Increase for CREL beneficiaries
→ Excellent Private Sector Participation opportunity
→ In line with development Priorities and Favorable Policies of Government
→ Excellent Synergy and Potential Collaboration
→ Low risk
→ Scopes for Value Addition by Target Beneficiaries
Value Chain Analysis: Strawberry, Capsicum and Medicinal Plants
End Market Analysis

→ **Main Market, Buyers**
  - Strawberry: Local market, local hotels, Chittagong and Dhaka Superstores
  - Capsicum: Local hotels, Chittagong and Dhaka Superstores and Markets
  - Medicinal Plants: Local *harbal* practitioners, processors in Chittagong and Dhaka

→ **Demand/Supply Situation**
  - Strawberry: high demand with poor supply
  - Capsicum: high demand with poor supply
  - Medicinal Plants: high demand poor supply

→ **Market Opportunity**
  - Strawberry: extremely high in the local area as well as in national markets
  - Capsicum: extremely high in the local area as well as in national markets
  - Medicinal Plants: can cater the local market but potential for integration in national markets

→ **Competitors**
  - Strawberry: imported strawberries, a few producers due to lack of knowledge, excellent prospect for import substitution
  - Capsicum: imported capsicum, a few producers due to lack of knowledge, excellent prospect for import substitution
  - Medicinal Plants: imported plants, a few producers due to lack of knowledge, excellent prospect for import substitution
Value Chain Function

→ **Actors include:**
  - Input suppliers: Runners for strawberry can be obtained from other farmers in the first year. The subsequent years they can use their own runners as well as become seller. The seed for capsicum is still not matured due to low demand.
  - Producers: in the local area there are about 5/10 producers producing strawberry. Major source of knowledge, sapling (runner) and market linkage
  - Traders: No exclusive trader, however, about 50 fruit traders who deals with similar products.
  - Support functions/actors: Transportation (SA Paribahan)
  - Government: Soil testing facilities are not available in Cox’s Bazar, however, AED can provide services (sample collection and analysis from Chittagong)
  - Other projects: Horticulture department has project for poverty alleviation through fruit cultivation, however, strawberry is not in their agenda.

→ **An overall current scenario**
  - The producers are promoters, trainers and providers of saplings (runners) as well as also provide market linkage functions to the new producers
  - Cost-profit analysis
Constraints Analysis

- Lack of knowledge and technology
- Lack of market orientation
- Lack of knowledge of public and private sector services
- Exploitative nature of Private sector
- Knowledge and skill act as entry barriers to new producers
- Poor awareness and market presence
- Fewer producers
- Lack of traders sourcing from local area
- Imported by National actors
- Lack of traders
- Poor market interface
- Low volume of production
- Risk averse attitude
- Producers using lower quality inputs
- Lack of quality inputs
- In appropriate products for market
- Poor bargaining power over price
- Low profit due to poor economy of scale
- Lack of bulk production
- Traders failing to get good quality and quantity of products
- Poorly organized groups
- Sourcing from large markets
- Knowledge and skill act as entry barriers to new producers
- Risk averse attitude
Opportunities

→ List out the different opportunities that are available in expanding the value chain
  - Switch to high-value crops from conventional subsistence agriculture
  - Does not require sophisticated skills
  - Does not require high investment
  - Excellent local and national market demand
  - Excellent Synergy and Potential Collaboration

→ How these can benefit the beneficiaries, in the following angles:
  - Increasing income: can increase income at least by 300%
  - Creating employment: a large number of people can participate in many different ways including service provisions such as training, runner seller, trading, storage, packaging, organic fertilizer production and selling, etc.
  - Reducing vulnerability: Risk is very low and related to any other perishable products
  - Involvement of women: Women and youth can easily participate
Discussion on Strategies & Interventions

→ Demonstration of Strawberry and Capsicum farming in Target areas
→ Training and orientation on farming, post harvest
→ Linkage with input and forward market actors as well as potential service providers specially
Value Chain Analysis:
Dress and Cap making
End Market Analysis

→ Main Market, Buyers
- Local dress sellers especially women’s inner wears such as blouse, petticoats, casual wear - maxi, etc.
- Crochet prayer caps are already linked with national and international markets (Pakistan and Oman)

→ Demand/Supply Situation
- Demand for dressmaking is very high for simple dresses especially women’s inner wears such as blouse, petticoats, casual wear - maxi, etc.
- Demand for crochet prayer caps is growing both in national and international markets (Pakistan and Oman)

→ Market Opportunity
- Opportunity to get advance contract from the buyers
- Supply of primary inputs such as cloths can be provided by the buyers
- Bag making can easily be integrated since requires no additional skills and the channel is almost same
- Crochet prayer cap producers can be engaged in other crochet caps and articles

→ Competitors
- Local dressmakers mostly male
- A few NGOs are also working on dressmaking
- Circular knit produced prayer caps which are improved quality but both demand and price are lower.
- Caps are also imported from India and China. Chinese caps in a variety designs and color are available for Tk 50-Tk 120, while caps from India are available at Tk 20-Tk 40
Value Chain Function

→ **Actors include:**
  - Input suppliers: All inputs for dress and cap making are available in the local markets
  - Producers: A large majority of the women are engaged in dress and cap making
  - Traders: Traders for caps visits local markets to collect and provide all inputs. Dressmaking traders are interested to buy local materials however, the supply from the local area is still not matured.
  - Support functions/actors: Good presence of NGO and private sector training providers in the local area
  - Government: Municipal, Department of Social Welfare, Department of Women, Department of Youth are providing training services
  - Other projects: A few NGOs are working in the local area on the issue

→ **An overall current scenario**
  - The dress making producers are not linked with the market. The Cap makers need to organize for improved price negotiation and improved market linkage
  - Cost-profit analysis
Value Chain Mapping (Sewing & Stitching/Dress Making)

Consumption
- Regional Consumer
- Local Consumer

Trading
- Regional/Local Shops (10-25)

Production
- Producer
  - (Sewing & Stitching/Dress Making)
  - (647)
  - (Vol. 388,200)

Input Supply
- Input Supplier (Local) (15-20)
- Input Supplier (National) (20-45)

Support Services
- Training from Municipality
- Financial Support from Micro Credit NGOs

Regional Consumer → Local Consumer: 100%
Regional/Local Shops (10-25) → Producer: 20%
Producer → Input Supplier (Local) (15-20): 80%
Input Supplier (Local) (15-20) → Input Supplier (National) (20-45): 15%
Limited access to market

Lack of market orientation

Exploitative nature of Private sector

Producers using lower quality inputs

Lack of knowledge of public and private sector services

In appropriate products for market

Lower profit due to poor economy of scale

Poor bargaining power over price

Lack of bulk production

Traders failing to get good quality and quantity of dresses

Less motivated to increase production area

Low volume of production

Lack of information

Inadequate marketing services

Dependent on local neighborhood markets

Trust based transactions act as entry barriers to new producers

Trust based transactions act as entry barriers to new producers

Male dominated tailors

Poorly organized groups

Lack of knowledge of public and private sector services

Lack of quality products

Male dominated tailors

Lack of bulk production

Traders failing to get good quality and quantity of dresses

Lack of information

Inadequate marketing services

Dependent on local neighborhood markets

Trust based transactions act as entry barriers to new producers

Male dominated tailors

Lack of market knowledge

Lack of traders sourcing from local area

Sourcing from large markets

Poorly organized groups

Constraints Analysis
Opportunities

→ List out the different opportunities that are available in expanding the value chain
  – Opportunity to integrate embroidery and other products such as hajarbuti, etc., can once they learn to interface with the market
  – Simple bags with embroidery, block print can be added
  – May link with local and national boutique house in the future

→ How these can benefit the beneficiaries, in the following angles:
  – Increasing income: can increase income at least by 100%
  – Creating employment: a large number of women of any age can participate
  – Reducing vulnerability: Risk is very low since they can start working with firm orders
Discussion on Strategies & Interventions

→ Training and orientation on quality and meeting deadlines
→ Linkage with forward market actors
→ Linking with service providers specially GO, NGO and Municipal
Value Chain Analysis: Floriculture and Apiculture
End Market Analysis

→ **Main Market, Buyers**
  - Local market as well as urban markets in Chittagong and Dhaka

→ **Demand/Supply Situation**
  - The current market size is Tk 10 billion and flower is being cultivated in 2,500 acres of land across the country

→ **Market Opportunity**
  - The industry is growing by 10-15 per cent every year
  - Rising demand in the local area as well as in national markets

→ **Competitors**
  - Imported flower, particularly the ones that are not produced in the local area
Value Chain Function

→ **Actors include:**

- Input suppliers: Cuttings for rose can be obtained from other farmers in the first year. The subsequent years they can use their own cuttings as well as become seller.
- Producers: in the local area there are about 200 producers producing mostly rose. Major source of knowledge, cuttings and market linkage
- Traders: Exclusive flower trader rising.
- Support functions/actors: Transportation (SA Paribahan)
- Government: Soil testing facilities are not available in Cox’s Bazar, however, AED can provide services (sample collection and analysis from Chittagong)
- Other projects: Horticulture department has project for poverty alleviation through ornamental flower cultivation, however, rose is not in their agenda.

→ **An overall current scenario**

- The producers are promoters, trainers and providers of cuttings as well as also provide market linkage functions to the new producers
- Cost-profit analysis
Value Chain Mapping (Flower Cultivation)

**Consumption**
- Local Consumer (Cox’s Baazar, Teknaf & Chittagong)
- National Consumer (Dhaka-Shahabag)

**Trading**
- Regional Buyer / Flower Shops (Cox’s Bazaar, Teknaf & Chittagong) (29)
- National Buyer / Flower Shops (Dhaka-Shahabag) (45)

**Production**
- Producers (120)
  - Tk 48,000,000; Avg. Price per Pcs. 2 Tk. (Winter Season Production: 24,000,000 Pcs. in 100 Acre Land; 2000 Pcs. Per Acre)

**Input Supply**
- Input Supplier (Local) (Fertilizer, Cutting, Pesticides, Tools) (15-20)
- Input Supplier (National) (Initial Rose Flower Cutting)
Lower profit due to poor economy of scale

Inappropriate products for market

Poor bargaining power over price

Lack of bulk production

Traders failing to get good quality and quantity of products

Lower profit due to poor economy of scale

Lack of quality inputs

Risk averse attitude

Low volume of production

Poor market interface

Lack of traders sourcing from local area

Imported by National actors

Lack of information

Poor awareness and market presence

Fewer producers

Lack of market orientation

Lack of knowledge of public and private sector services

Producers using lower quality inputs

Exploitative nature of Private sector

Knowledge and skill act as entry barriers to new producers

Lack of knowledge and technology

Constraints Analysis
Opportunities

→ List out the different opportunities that are available in expanding the value chain
  - Switch to high-value crops from conventional subsistence agriculture
  - Does not require sophisticated skills
  - Does not require high investment
  - Excellent local and national market demand
  - Excellent Synergy and Potential Collaboration

→ How these can benefit the beneficiaries, in the following angles:
  - Increasing income: can increase income at least by 300%
  - Creating employment: a large number of people can participate in many different ways including service provisions such as training, runner seller, trading, storage, packaging, organic fertilizer production and selling, etc.
  - Reducing vulnerability: Risk is very low and related to any other perishable products
  - Involvement of women: Women and youth can easily participate
Discussion on Strategies & Interventions

→ Demonstration of Strawberry and Capsicum farming in Target areas
→ Training and orientation on farming, post harvest
→ Linkage with input and forward market actors as well as potential service providers specially
Value Chain Analysis: Eco-tourism
Priority Sites

→ Potential sites on a map

- **Himchari:**
  - Near to primary tourist hub Cox’s Bazar
  - Already known to the tourist
  - Scope for value addition
  - CMC and VCF are well organized

- **Teknaf Wildlife Sanctuary**
  - Infrastructure well developed
  - Scope for value addition
Actors

Provide an overview of the actors

Actors will include:
- **Tour operators:** Well organized for Himchari NP is in their agenda, however, TWS is not
- **Transport owners, operators:** Well organized, easily available for Himchari NP, TWS is not
- **Tour guides:** Not available and not organized
- **Service providers:** For Himchari NP basic service providers are present, TWS complete lacks any service provider
- **Forest department gunmen:**
- **Resort owners:** No particular resorts are available within the premises for both HNP and TWS
- **Tourists:** Average annual tourist visits in Himchari is about 500,000, while in TWS is about 5,000
Community Engagement Possibilities

→ Potential of trade or services that can contribute to the Ecotourism industry

- Souvenir shops
- Snacks bar
- Accommodation
- Tourists guide
- Rental of binoculars, photographic equipments and services
- Tame animal ride specially elephants
Market Opportunities

→ Private sector engagement possibilities
  - Resort development
  - Ropeway
  - Animal breading

→ Facilities development
  - Ropeways, resting places, watch towers

→ Financing opportunities
  - Sponsorship from private sectors through CSR activities

→ Promotional activities
  - Engage in promotional activities
Tentative Outreach Through The Selected Value Chains
# Table describing the site-wise tentative outreach through the selected value chains

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<th>Value Chains</th>
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<th>Himchari</th>
<th>Teknaf</th>
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<tbody>
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<td></td>
<td>Fasiakhali</td>
<td>Medhakochopia</td>
<td>Choddogram Khondokar para</td>
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<td>60% agriculture</td>
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<td>40% salt</td>
<td>20% handicrafts</td>
<td>40% handicrafts and sewing</td>
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<td>40% handicraft, sewing and others</td>
<td>50% salt and others</td>
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<td>Engagement through proposed VC intervention</td>
<td>Sewing, Dress Making, Hand Crocheted Prayer Caps Making</td>
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<td>Strawberry and Capsicum</td>
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<td>Floriculture</td>
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<td>25%</td>
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<td>Eco-Tourism: Himchari and Teknaf</td>
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<td>Skills Development, other trade and employment</td>
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<tr>
<td>TOTAL</td>
<td>100%</td>
<td>100%</td>
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Site-wise Tentative Outreach through the Selected Value Chains

- **Sewing, Dress Making, Hand Crocheted Prayer Caps Making**
  - Fasiakhali: 40%
  - Medhakoch opia: 30%
  - Chainda Khondokar para & Choddoogra m: 40%
  - Shilkali: 30%
  - Whykkyong: 50%
  - Naitang para & Pallan para: 40%

- **Strawberry and Capsicum**
  - Fasiakhali: 20%
  - Medhakoch opia: 30%
  - Chainda Khondokar para & Choddoogra m: 10%
  - Shilkali: 50%
  - Whykkyong: 20%
  - Naitang para & Pallan para: 30%

- **Floriculture**
  - Fasiakhali: 20%
  - Medhakoch opia: 25%
  - Chainda Khondokar para & Choddoogra m: 10%
  - Shilkali: 10%
  - Whykkyong: 5%
  - Naitang para & Pallan para: 10%

- **Eco-Tourism:**
  - Himchari and Teknaf: 0%

- **Skills Development, other trade and employment**
  - Fasiakhali: 20%
  - Medhakoch opia: 15%
  - Chainda Khondokar para & Choddoogra m: 20%
  - Shilkali: 10%
  - Whykkyong: 15%
  - Naitang para & Pallan para: 10%
## Site-wise Tentative Outreach Through the Selected Value Chains (Beneficiaries')

<table>
<thead>
<tr>
<th>Value Chains</th>
<th>Chakaria</th>
<th>Himchari</th>
<th>Teknaf</th>
<th>Chakaria</th>
<th>Himchari</th>
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<th>Chakaria</th>
<th>Himchari</th>
<th>Teknaf</th>
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<tbody>
<tr>
<td>Sewing, Dress Making, Hand Crocheted Prayer Caps Making</td>
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<td>173</td>
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<td>Skills Development, other trade and employment</td>
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<td>2123</td>
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</table>
Potential Trades for the Beneficiary
Potential Trades

→ List down the trades
  - Boat building
  - Boat repairing
  - Boat engine repairing
  - Cyber café operator
  - Hotel support staff

→ Rational for selecting these trades
  - High opportunity for employment
  - Skills can eventually make them entrepreneurs (engine repairing)

→ Who are the target beneficiaries & why?
  - Youths age from 18 - 30

→ Mention the areas where the beneficiaries can be engaged and show the income increase opportunities
  - Initially work as apprentice

→ How the project can intervene?
  - Develop linkage with employers
  - Provide basic literacy training
  - Develop trustworthiness

→ Give a prediction of potential outreach through the selected trades
  - Can be arranged in all the working sites of CREL
  - A large number of youths can be engaged
Thank You!