

# AGRICULTURE OUTLOOK

Volume VIII, ISSUE 8, 2023

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**PLANNING & RESEARCH DEPARTMENT  
ZARAI TARAQIATI BANK LIMITED  
HEAD OFFICE, ISLAMABAD**



<b>S. No</b>	<b>CONTENT</b>	<b>Page</b>
1	EXECUTIVE SUMMARY	3
2	CURRENT CROP SITUATION	4
2.1	Rice Crop	4
2.2	Cotton Crop	4
2.3	Maize Crop	4
2.4	Sugarcane Crop	4
2.5	Oil Seeds and Lentils	4
2.6	Horticulture	4
3	WEATHER SITUATION	5
4	DROUGHT SITUATION	6
5	WATER AVAILABILITY/ DAMS FLOW DATA	7
6	AVERAGE PRICES OF AGRI. COMMODITIES	7
7	TRADE SITUATION	9
8	FERTILIZER OFFTAKE SITUATION	10
9	NEWS TRENDS	10
10	AGRO ADVISORY SERVICES	12



## 1. EXECUTIVE SUMMARY

Initial growth and development of Rice crop has been observed/reported satisfactory. Satisfactory monsoon rains have positively affected the crop growth and development in most parts of the country. Early sowing cotton crop picking has been started. Maize spikes are in the process of Grain formation stage early rainfalls at the start of this month found beneficial for the growth and development of maize grains. Growth of sugarcane was reported satisfactory. Growth of Sesame is reported normal and is growing at flowering stage. Threshing of linseed, castor oil and safflower is completed and ground nut is growing at vegetative stage. Overall production of Banana and other fruits is reported well. Chemical spraying on citrus orchards against insects and fungus attacks was in progress.

During July 2023, light to moderate as well as heavy rainfall was received across the country whereas Gilgit Baltistan, isolated western parts of Khyber Pakhtunkhwa, Balochistan and some areas of Sindh province received trace or zero rainfall during the month.

As mentioned by Pakistan Bureau of Statistics (PBS), during the month of July 2023 prices of most of Agri. commodities were increased over June 2023. Among these products, Tomatoes, Fresh Vegetables, Wheat Flour, Sugar, Potatoes. Gur, Beverages, Milk Fresh Rice, Pulse Mash, Beans, Wheat Products, Meat, Honey, Cigarettes and Mustard Oil.

As reported by Pakistan Bureau of Statistics (PBS), exports from Pakistan during July, 2023 amounted to Rs. 581,102 million (provisional) as against Rs. 675,280 million in June, 2023 and Rs. 493,786 million during July, 2022 showing a decrease of 13.95% over June, 2023 but increased by 17.68% over July, 2022.

As published by the National Fertilizer Development Centre (NFDC), total nutrients offtake during July, 2023 was about 411 thousand tonnes, which was 32.6 per cent higher than July 2022. Offtake of Nitrogen, Phosphate and Potash respectively increased by 31.2, 39.2 and 58 per cent as compared to July last year.



## **2. CURRENT CROP SITUATION**

### **2.1. Rice Crop**

In Punjab, the initial growth and development of Rice crop has been observed/reported satisfactory. Satisfactory monsoon rains have positively affected the crop growth and development in most parts of the country. Monsoon rainfalls in Punjab and Sindh provinces have done positive impact of tillering and growth of Rice crop. Farmers are applying second doze of Nitrogen fertilizers. In some districts of Punjab province Rice blast disease and leaf folder insect attack has been reported the agricultural extension staff in Punjab province is arranging agricultural workshops for farmers to guide them about the control of rice pests and diseases.

### **2.2. Cotton Crop**

In Punjab early sowing cotton crop picking has been started. During the month, although good rain has been reported in some parts of Sindh but still some regions of the province are under water stress. Department of Agriculture Punjab province is imparting trainings to cotton farmers for insect pest management.

### **2.3. Maize Crop**

In Punjab, Maize spikes are in the process of Grain formation stage early rainfalls at the start of this month found beneficial for the growth and development of maize grains. In KP, Sowing of Hybrid/open pollinated varieties of maize has completed in the province. Hoeing, weeding and application of second dose of fertilizer are in progress. In Gilgit maize crop is growing at normal pace.

### **2.4. Sugarcane Crop**

In Punjab and Sindh, growth of sugarcane was reported satisfactory. In some areas of Punjab termite attack was found in sugarcane crop. The growth of the sugarcane crop has reported much better due to good rains. In KP, growth of sugarcane was going normal.

### **2.5. Oil Seeds and Lentils**

In Punjab & Sindh, Growth of Sesame is reported normal and is growing at flowering stage. Threshing of linseed, castor oil and safflower is completed and ground nut is growing at vegetative stage. In KP, harvesting of sunflower is in progress and normal yield is expected. Sowing of mung/mash has completed in hilly areas and is in progress in plane areas. In Balochistan, growth of sunflower was at flowering stage

### **2.6. Horticulture**

- In Sindh Overall production of Banana and other fruits is reported well



- In Punjab, Chemical spraying on citrus orchards against insects and fungus attacks was in progress.
- In KP, Condition of fruit orchards is reported satisfactory. Harvesting of garlic was in progress.
- In Gilgit Baltistan, Condition and yield of orchards and summer vegetables is reported satisfactory.

Source:

- *Monthly Bulletin, National Agromet Centre, Pakistan Meteorological Department*
- *Directorate of Agricultural information Punjab, Sindh, KP*
- *Department of Agricultural Extension Balochistan*
- *Agriculture Bulletins, Pakistan Metrological Department*

### 3. WEATHER SITUATION

#### Rainfall/Precipitation:

During July 2023, Light, to moderate as well as Heavy rainfall was received across the country whereas Gilgit Baltistan, isolated western parts of Khyber Pakhtunkhwa, Balochistan and some areas of Sindh province received trace or zero rainfall during the month.

#### Chief amounts of monthly rainfall recorded across Pakistan during July, 2023

Sr. No.	Station	Rainfall(mm)	Sr. No.	Station	Rainfall(mm)
1	GULSHAN-E- RAVI-LAHORE	958.02	11	MURREE	415.51
2	SHAHI QILLA-LAHORE	940.02	12	BUNER	411.5
3	LAHORE, AIRPORT	668.72	13	RAWALAKOT	400.9
4	SAMNABAD-LAHORE	483.02	14	MUZAFFARABAD	392.1
5	BALAKOT	477	15	GUJRANWALA	386.5
6	RAWALPINDI	463	16	CHAKWAL	365.93
7	ISLAMABAD,ZEROPOINT	453.91	17	HARAMAN	350.2
8	KASUR	442.03	18	JHELUM	346.4
9	KAKUL	427	19	PADIDAN	327.61
10	SIALKOT CANTT	422.42	20	MALAMJABBA	319

#### Relative Humidity

The mean daily Relative Humidity (RH) remained above normal over most parts (Selected locations) of the country particularly in lower Khyber Pakhtunkhwa, Potohar region, Central & Southern Punjab, Quetta valley and Gilgit Baltistan. However, normal to below normal values recorded at the selected locations of Sindh. Maximum value of mean RH observed as 76% at Faisalabad, 75% at Jhelum and 73% at Lahore.

#### Temperature Situation during July, 2023

Temperature plays a vital role in the growth and development of agricultural crops. Thermal regime particularly the day time temperatures remained below normal over most parts of the country including northeastern belt of Gilgit Baltistan, Kashmir, Punjab, Khyber Pakhtunkhwa, Baluchistan and upper Sindh. Whereas, nearly normal temperatures observed over northwestern belt of



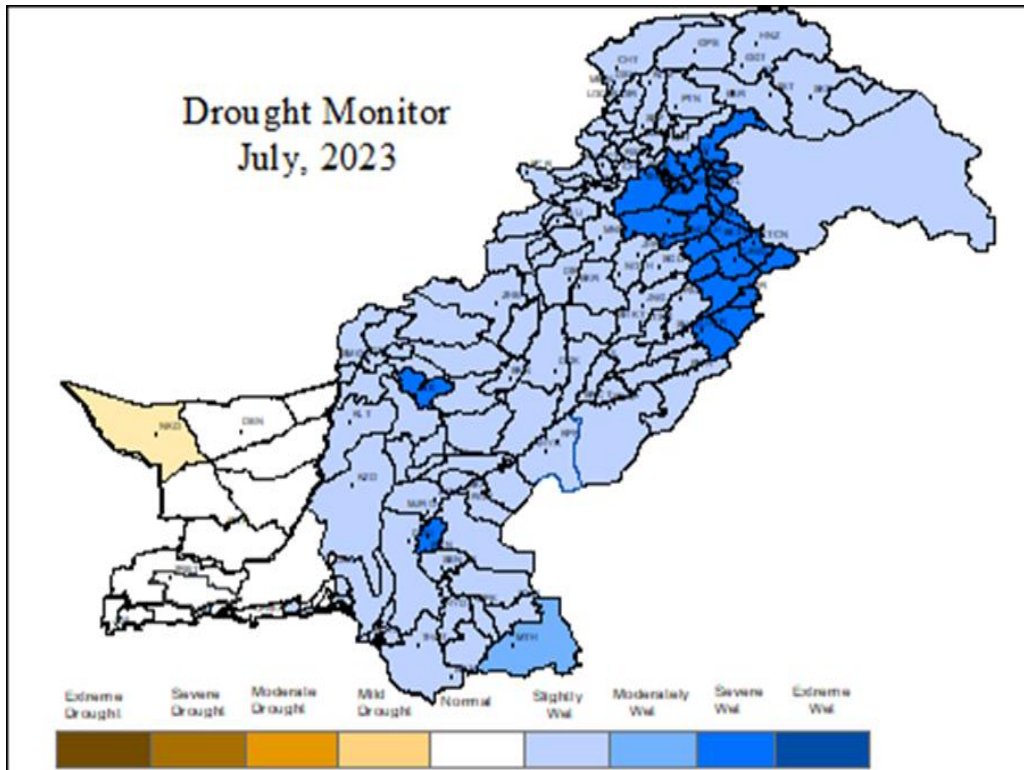
Baluchistan and lower parts of Sindh. Some coastal areas surrounding Sindh and Baluchistan recorded above normal temperatures. The highest temperatures observed over some western and eastern parts of Baluchistan particularly Nokkundi, Dalbadin, Sibbi and Jacobabad. Whereas, lowest temperatures recorded over Murree and Astore.

### Weather Prediction during August 2023

Overall, prediction in August, heating has slightly decreasing trend due to the lowering solar angle. However, the easterly currents are still prevailing in the subcontinent, which may result in a number of dust/wind storms and precipitation events. August marks a substantial addition to Kharif season rainfall which would provide satisfactory amount of water for agricultural use. The particular areas of eastern belt of Khyber Pakhtunkhwa, northeastern Punjab and western belt of Kashmir would receive considerable amount of precipitation. However, fewer rains occur over the rest parts particularly western Baluchistan, southern Punjab along the adjoining areas of Sindh, Gilt Baltistan and northern belt of Khyber Pakhtunkhwa & Kashmir.

### 4. DROUGHT SITUATION

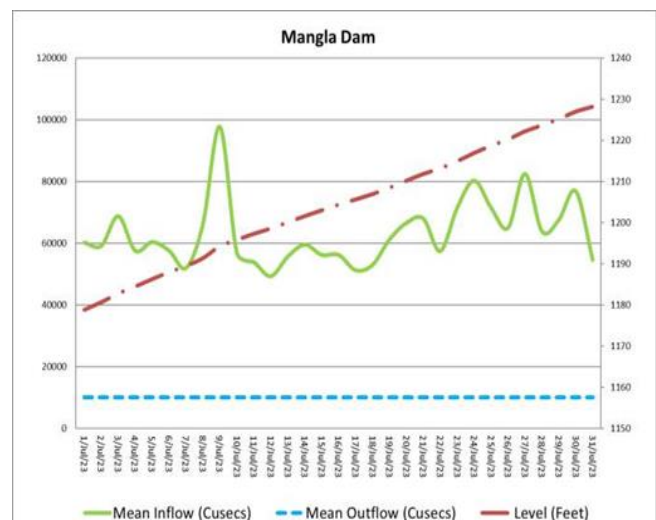
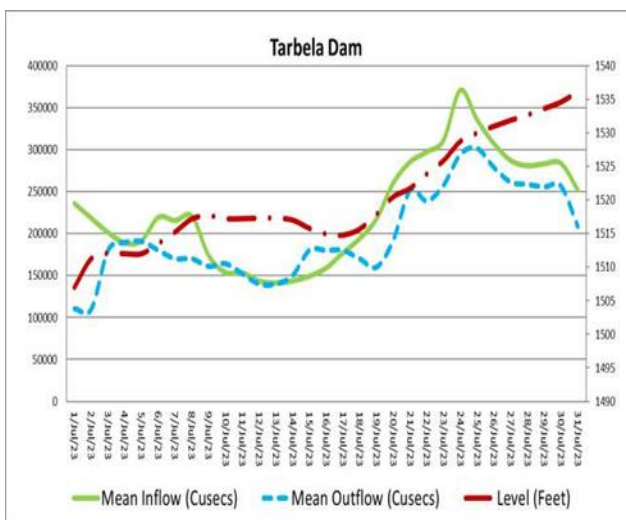
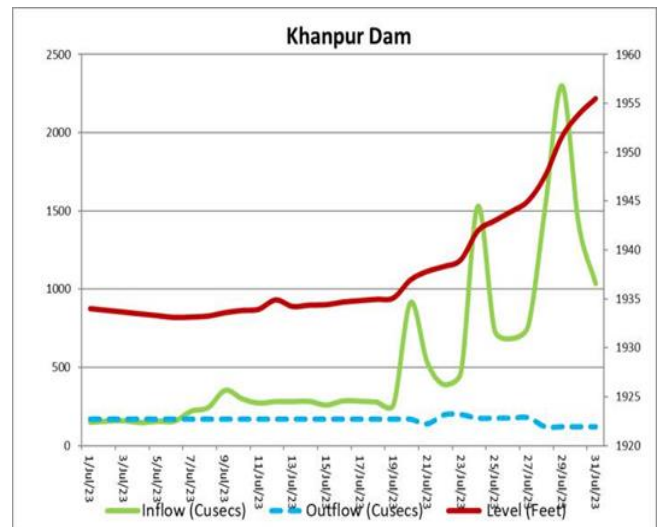
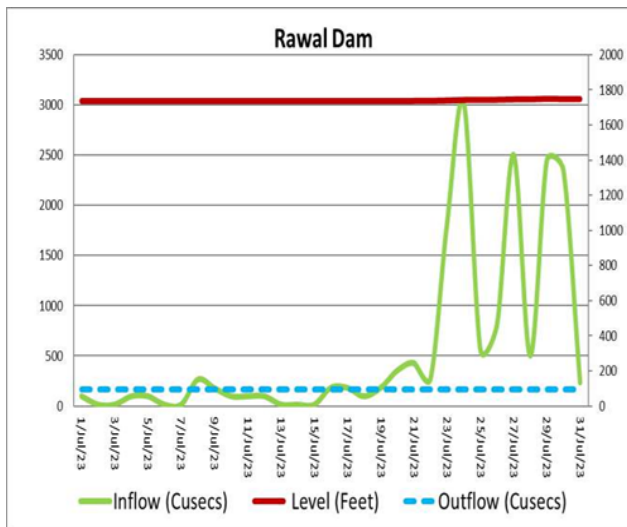
The spatial drought monitor map based on the output results from different drought monitoring indices and Pakistan Meteorological Department ground station data across Pakistan. In Balochistan province, previously moisture-stress areas of Nokundi area is still under moisture stress while in Sindh province Tharparkar district is moderately wet, and got some relief due to above-normal rain over there.



Source: <http://www.ndmc.pmd.gov.pk/>

## 5. WATER AVAILABILITY/DAMS FLOW DATA:

In July 2023, water inflow, outflow and levels of the Rawal, Khanpur, Tarbela and Mangla dams are shown in Figure given below. The level at Terbela, Mangla and Khanpur reservoirs has raised while at other major reservoirs, conditions are gradually improved as compared to last years.



Source: <http://www.ndmc.pmd.gov.pk/>

## 6. AVERAGE PRICES OF AGRI. COMMODITIES

According to Pakistan Bureau of Statistics (PBS), Consumer Price Index (CPI), During the month of July 2023 prices of most of Agri. commodities were increased over June 2023. Among these



products, Tomatoes, Fresh Vegetables, Wheat Flour, Sugar, Potatoes. Gur, Beverages, Milk Fresh Rice, Pulse Mash, Beans, Wheat Products, Meat, Honey, Cigarettes and Mustard Oil.

Conversely, commodities like Wheat Flour, Bananas, Pulse moong, Gur and Garlic showed declining trend in pricing over the month. While Detail are given below in table:

S.No	Description	Unit	Average Prices			%change July 23 over	
			July, 23	June, 23	July, 22	June, 23	July, 22
1	Wheat Flour Bag	20 Kg	2818	2535.89	1237.93	11.13	127.64
2	Rice Basmati Broken	1 Kg	212.62	206.51	119.26	2.96	78.28
3	Rice IRRI-6/9 (Sindh/Punjab)	1 Kg	153.95	149.73	88.49	2.82	73.97
4	Bread plain (Small Size)	Each	107.15	106.74	73.01	0.38	46.76
5	Beef with Bone	1 Kg	787.99	775.25	673.49	1.64	17
6	Mutton	1 Kg	1650.49	1629.73	1388.56	1.27	18.86
7	Chicken Farm Broiler (Live)	1 Kg	428.92	451.37	281.24	-4.97	52.51
8	Milk fresh (Un-boiled)	1 Ltr	178.96	174.51	136.02	2.55	31.57
9	Curd (Dahi) Loose	1 Kg	207.43	201.04	154.92	3.18	33.89
10	Powdered Milk NIDO 390 gm	Each	739.18	736.26	535.99	0.4	37.91
11	Eggs Hen (Farm)	1 Dozen	256.81	257.35	195.71	-0.21	31.22
12	Mustard Oil (Average Quality)	1 Kg	541.51	544.05	529.77	-0.47	2.22
13	Cooking Oil DALDA or Other Similar	Each	3124.14	3199.16	2856.97	-2.34	9.35
14	Vegetable Ghee DALDA/HABIB 2.5 kg	Each	1467.05	1513.74	1406.64	-3.08	4.29
15	Vegetable Ghee DALDA/HABIB	Each	567.17	582.58	571.82	-2.65	-0.81
16	Bananas (Kela) Local	1 Dozen	147.76	203.72	110.22	-27.47	34.06
17	Pulse Masoor (Washed)	1 Kg	274.8	277.38	300.61	-0.93	-8.59
18	Pulse Moong (Washed)	1 Kg	263.26	269.75	189.75	-2.41	38.74
19	Pulse Mash (Washed)	1 Kg	468.25	453.95	324.44	3.15	44.33
20	Pulse Gram	1 Kg	240.48	243.96	222.42	-1.43	8.12
21	Potatoes	1 Kg	91.91	84.52	56.26	8.74	63.37
22	Onions	1 Kg	58.97	60.67	82.33	-2.8	-28.37
23	Tomatoes	1 Kg	90.53	51.94	73.02	74.3	23.98
24	Sugar Refined	1 Kg	140.03	122.73	87.88	14.1	59.34
25	Gur (Average Quality)	1 Kg	199.63	179.91	132.13	10.96	51.09
26	Salt Powdered	Each	55.79	53.58	36.39	4.12	53.31
27	Chilies Powder NATIONAL 200 gm Pa	Each	251.17	215	215	16.82	16.82
28	Garlic (Lehsun)	1 Kg	354.36	335.47	317.81	5.63	11.5

Decrease in Prices

Increase in price

Source: Pakistan Bureau of Statistics.

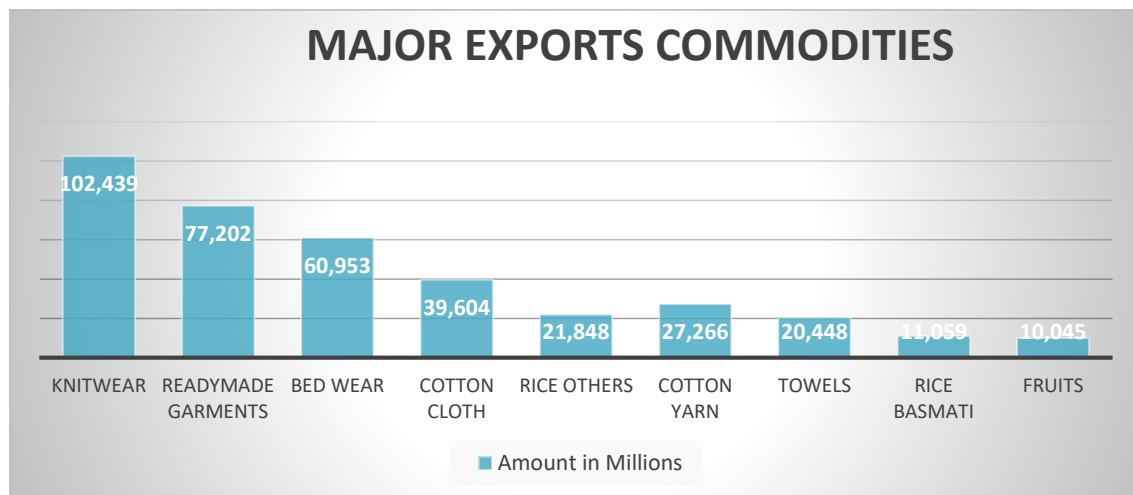




## 7. TRADE SITUATION

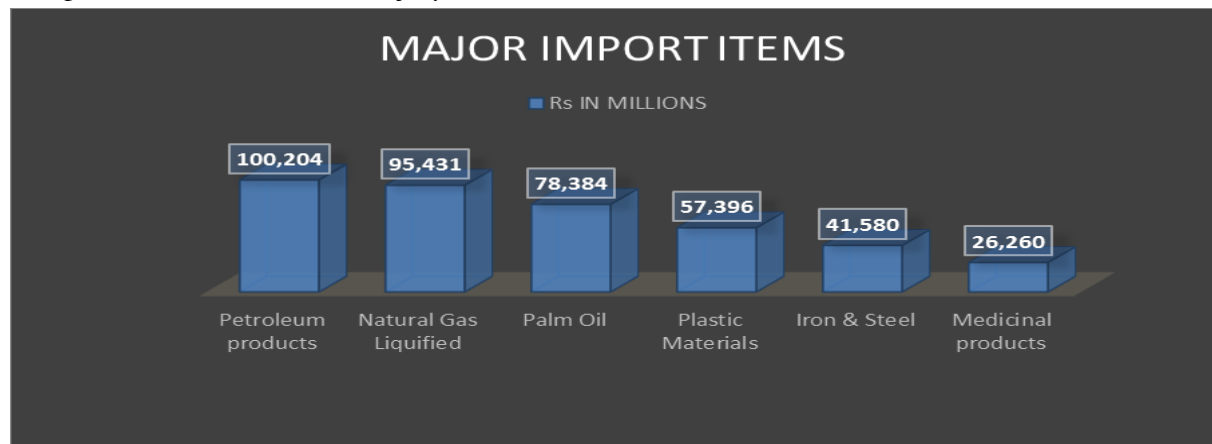
### Exports:

- According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during July, 2023 amounted to Rs. 581,102 million (provisional) as against Rs. 675,280 million in June, 2023 and Rs. 493,786 million during July, 2022 showing a decrease of 13.95% over June, 2023 but increased by 17.68% over July, 2022.
- In terms of US dollars, the exports in July, 2023 were \$ 2,068 million (provisional) as compared to \$ 2,356 million in June, 2023 showing a decrease of 12.23% and by 8.09% as compared to \$ 2,250 million in July, 2022.



### Imports

- Imports into Pakistan during July, 2023 amounted to Rs. 1,041,138 million (provisional) as against Rs. 1,209,177 million in June, 2023 and Rs. 1,093,124 million during July, 2022 showing a decrease of 13.90% over June, 2023 and of 4.76% over July, 2022.
- In terms of US dollars the imports in July, 2023 were \$ 3,705 million (provisional) as compared to \$ 4,219 million in June, 2023 showing a decrease of 12.18% and by 25.62% as compared to \$ 4,981 million in July, 2022.



Source: Pakistan Bureau of Statistics

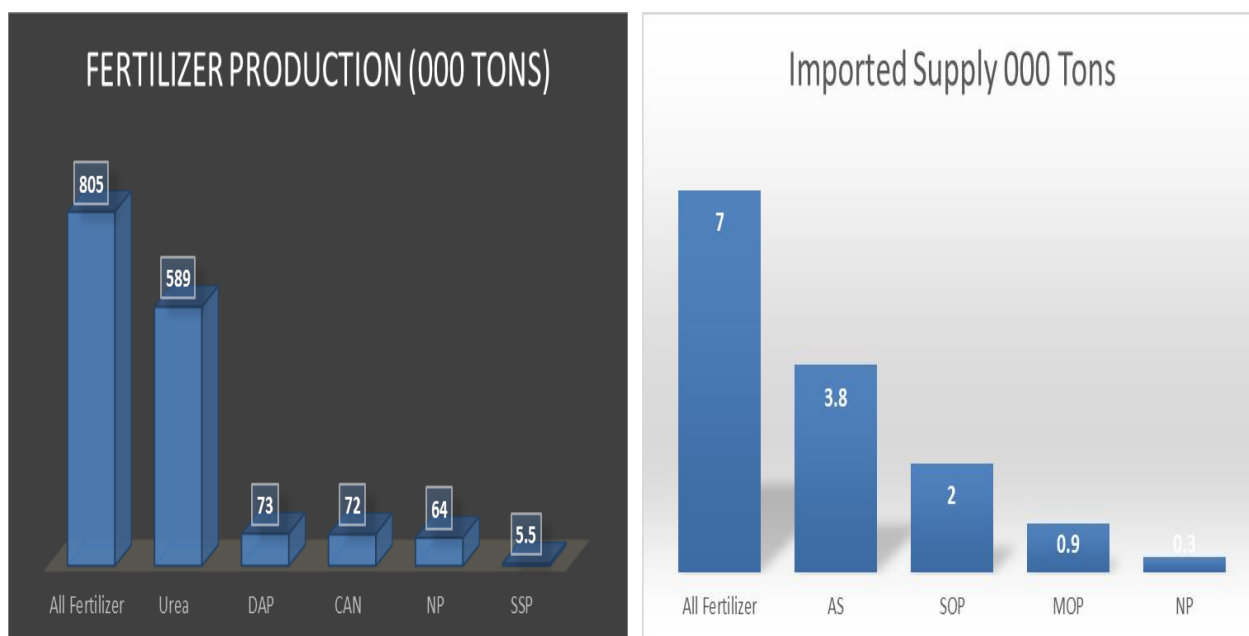


## 8. FERTILIZER OFFTAKE SITUATION

- ❖ Total nutrients offtake during July, 2023 was about 411 thousand tonnes, which was 32.6 per cent higher than July 2022.
- ❖ Offtake of Nitrogen, Phosphate and Potash respectively increased by 31.2, 39.2 and 58 per cent as compared to July last year.
- ❖ Urea offtake during July 2023 was 629 thousand tonnes which registered an increase of 36.0 per cent.
- ❖ DAP offtake was 113 thousand tonnes; increased by 67.7 per cent over July 2022.

### FERTILIZER PRODUCTION AND IMPORTED SUPPLIES:

Production of all fertilizer products during July 2023 was 805 thousand tonnes. Out of this, urea production was about 589 thousand tonnes (73.2 per cent share in total production).



Source: National Fertilizer Development Centre

## 9. NEWS TRENDS

- The Punjab Seed Council (PSC) on Friday approved eight new seeds of different crops for general cultivation including six new varieties of cotton and two varieties vegetables meeting the prescribed SOPs. The approval was accorded at the 57th meeting of the Punjab Seed Council held on Friday with the provincial Minister for Agriculture in the chair. In the meeting, MD Punjab Seed Corporation presented 16 new types of seeds of various agricultural commodities of public and private sector for approval of general cultivation. The minister Punjab did not approve eight varieties due to not receiving DNA fingerprint report or other unavoidable reasons.



- Agri financing hits record Rs1.78trn in FY23. With a 25 percent impressive growth, the financial institutions disbursed all-time high Rs 1.776 trillion under agriculture financing during the last fiscal year (FY23) amid State Bank of Pakistan's efforts and PM's Kissan Package. Overall, the financial institutions have achieved 98 percent of the agriculture credit target of Rs 1.819 trillion set by State Bank for the last fiscal year. The outstanding portfolio of agriculture credit also registered a growth of 10 percent and reached Rs 760 billion at the end of June 2023 compared to Rs 691 billion at the end June 2022. The disbursement of Rs 1.776 trillion in FY23 is also 25 percent higher than agricultural financing of Rs 1.419 trillion disbursed in FY22.

According to SBP, the unprecedented performance in FY23 is owed to the collective efforts of the financial institutions and various initiatives taken in the backdrop of several challenges including the devastating floods of 2022, rising input costs and monetary tightening in recent years. Among the various initiatives, SBP's Champion Bank Model and Agriculture Credit Scoring Model played a key role in supporting financial institutions in extending agriculture financing, particularly in the underserved areas where significant growth was registered in FY23. In addition, the strategic guidance of Agricultural Credit Advisory Committee (ACAC) coupled with rigorous monitoring of financing by SBP provided further support in accelerating agriculture finance.

**Sources:** *Business Recorder*

## 10. AGRO ADVISORY SERVICES FOR FARMERS

### زرعی سفارشات برائے کسان

حالیہ بارشوں کے پانی کو محفوظ کرنے کے لیے ڈھلوان کی مخالف سمت گہرا بل چائیں، کھیتوں کو ہموار رکھیں، دھت بندی مضبوط کریں اور جزی بوٹیاں تکف کریں۔ اس مقصد کے لیے دیسی کھاد یا سبز کھاد کا استعمال بھی بڑھایا جاسکتا ہے کیونکہ اس سے وتر زیادہ دیر تک محفوظ رہ سکتا ہے۔

#### مکئی

- ☆ مکئی کی اجمعی اقسام کی کاشت 20 اگست تک مکمل کر لیں، جبکہ ہارانی علاقوں میں مون سون کی بارشوں کے مطابق کاشت کریں یا درے کے موسم خزاں میں ہائپر ڈ اقسام کا بہترین وقت کاشت وسط اگست ہے۔
- ☆ ڈزل سے کاشت کی صورت میں 12 سے 15 کلوگرام کھیسلیوں پر کاشت کی صورت میں 8 سے 10 کلوگرام اور بلور چارہ 40 سے 50 کلوگرام نیٹریک ایگز استعمال کریں۔
- ☆ مکئی کی بہترین پیداوار کے لیے 3 سے 4 ٹرائی کوبر کی گلی سٹری کھاد زمین کی تیاری کے وقت ضرور ڈالیں۔

#### کپاس

- ☆ حالیہ مون سون بارشوں کی وجہ سے جن کھیتوں میں زیادہ پانی کھلے ہوئے تو اس کے نکاس کا بروقت انتظام کریں۔ کھیت کے ایک طرف لمبائی کے رخ دھت چوڑی چارٹ گیری کھائی کھود کر پانی جمع کر لیں۔
- ☆ زیادہ درجہ حرارت ہونے اور زیادہ ٹینڈے گلنے کی وجہ سے فصل کا پھل گرنا شروع ہو جاتا ہے۔ اس سے بچاؤ کے لیے نائٹروجنی کھاد کے استعمال کے علاوہ زمین میں بوران اور زنک کی مکئی پائی گئی ہو وہاں بوران اور زنک کا استعمال بذریعہ پیرے کریں۔
- ☆ اگر کپاس کی فصل بارشوں کی وجہ سے سفید کھسی سبزیتا تھرپس اور ٹی بگ کا حملہ ہوا اور یہ نقصان کی معاشی حد سے بڑھ رہا ہو تو پھٹے میں دو پار پیسٹ سکاؤٹنگ کریں اور نکلے زراعت کے مقامی عملہ کے سفارش کردہ زہروں کا سپرے کریں۔

#### دھان

- ☆ زنک کی زیادہ کمی کی صورت میں لاب لگانے کے 10 دن بعد تک زنک سلیفٹ 33% والا 6 کلوگرام یا زنک سلیفٹ 21% والا 10 کلوگرام فی ایکڑ چھو دیں۔
- ☆ لاب کی منتقلی کے 35 دن بعد نائٹروجنی کھاد کا بقیہ حصہ ڈالنے سے پہلے 4 سے 5 دن کے لیے فصل کو ہلکا سا سوا دیں اس کے بعد کھاد کا چھو دیکر پانی لگا دیں۔
- ☆ ناقص پانی سے سیراب ہونے والی زمینوں میں اچھے نتائج حاصل کرنے کے لیے چیم بحساب 5 پوری فی ایکڑ چھو دیں۔

#### سبزیات و باغات

- ☆ ٹماٹر اور گوبھی کی پھیری کی کاشت جاری رکھیں۔
- ☆ ٹماٹر کی منظور شدہ اقسام رومہ گنڈ، پاکت نقیب اور دولتی اقسام دار اور سالار وغیرہ کاشت کریں۔
- ☆ پھول گوبھی کی منظور شدہ اقسام فصل آباد نمبر 1، 2، 3، 4 وغیرہ کاشت کریں۔
- ☆ ترشادہ پھلوں کے پودوں کو نائٹروجن کی تیسری قسط ڈالیں۔

Source: Zaraf Nama, Directorate of Agricultural Information

پلاننگ اینڈ ریسرچ ڈیپارٹمنٹ

زرعی ترقیاتی بینک لمیٹیڈ

ہیڈ آفس، اسلام آباد



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