

AGRICULTURE OUTLOOK

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

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1. EXECUTIVE SUMMARY

Sowing of rabi crops get momentum in December. The rainfall in the month of December would help to accelerate sowing of rabi crops in Khyber Paktunkhwa and upper parts of Punjab. Harvesting of kharif crops like maize, mung bean, sugarcane, peanut, sunflower, soybean, rice and cotton is almost finished.

During the month of November 2023, Light to moderate rainfall events were reported across the country where as most of the areas in Balochistan and Sindh received trace to zero rainfall during the month. Less to No Precipitation over most of the areas of Balochistan, Sindh and Cholistan region in Punjab province have raised the moisture stressed conditions in previously moisture stressed areas over there. During the month of December 2023, overall, a tendency for normal to slightly above normal rainfall is expected in most parts of the country. Temperatures are forecasted to remain slightly above normal nationwide.

As mentioned by Pakistan Bureau of Statistics (PBS), during the month of November 2023, prices of Tomatoes (60.42%), Potatoes (14.92%), Tea (12.95%), Onions (12.32%), Dry Fruits (7.91%), Fish (7.75%), Eggs (7.15%), Fresh Vegetables (4.47%), Beverages (0.83%), Honey (0.68%), Readymade food (0.53%), Meat (0.36%), Butter (0.29%), Sweetmeat (0.28%) and Milk Powder (0.16) were increased over October 2023.

As reported by Pakistan Bureau of Statistics (PBS), exports during July – November, 2023 FY2023-24 totaled Rs. 3,502,147 million (provisional) as against Rs.2,660,653 million during the corresponding period of last year showing an increase of 31.63%. Imports during July – November, 2023 FY2023-24 totaled Rs. 6,220,305 million (provisional) as against Rs. 5,806,628 million during the corresponding period of last year showing an increase of 7.12%.

As published by the National Fertilizer Development Centre (NFDC), Urea and DAP offtake was respectively 611 and 278 thousand tonnes that increased by 4.8 and 17.7 percent over November 2022. Total nutrient offtake during November 2023 was 543 thousand tonnes, which increased by 12.4 percent over November 2022. Nitrogen, phosphate and potash offtake increased by 8.3, 22.4 and 286.8 percent, respectively.



2. CURRENT CROP SITUATION

2.1. Wheat Crop

In Punjab and Sindh, wheat crop is at tillering stage whereas, in KP and Balochistan, sowing of wheat has been completed.

2.2. Maize Crop

In Punjab, Sindh and KP, harvesting of maize has been completed. Crop condition is reported satisfactory in these provinces.

2.3. Sugarcane Crop

The germination of September cultivated sugarcane crop has been completed. For the control of weed, weedicide spray is in progress in KP and Punjab. In Sindh, the sugarcane crop is at tillering stage.

2.4. Oil Seeds

- Canola is at flowering stage in Punjab and KP whereas it is at ripening stage in Sindh.

2.5. Horticulture

- Sowing of winter vegetables has been completed.
- Due to snowfall in Gilgit Baltistan, no fruit and vegetables have been sown.

Source:

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

3. WEATHER SITUATION

Rainfall/Precipitation

During November 2023, normal to above normal rains reported from most parts of the country particularly the coastal areas surrounding Pasni, northwestern belt of Punjab, eastern parts of Khyber Pakhtunkhwa and a few isolated locations of Baluchistan & Sindh whereas below normal rainfall is expected over northwestern Khyber Pakhtunkhwa and northwestern parts of the country.

Table-1: Chief amount of rainfall recorded across Pakistan during the month of November, 2023					
Sr.No.	Station	Rainfall(mm)	Sr.No.	Station	Rainfall(mm)
1	PASNI	94	11	G.DOPATTA	44
2	CHAKLALA AIRBASE	83.02	12	ISLAMABAD,ZEROPOINT	43.92
3	ATTOCK	75	13	MUZAFFARABAD CITY	41.3
4	BALAKOT	74	14	Kalam	40.2
5	KAKUL	72	15	BARKHAN	36
6	MALAMJABBA	68	16	CHAKWAL	31.8
7	MURREE	57.01	17	JHELUM	29.3
8	MIANWALI AIRBASE	47.01	18	KOTLI	29
9	KAMRA AIRBASE	46.72	19	SIALKOT	25.02
10	MANGLA	45	20	QUETTA	14.81

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 Punjab and Quetta valley. Below normal values are recorded over South Punjab and Gilgit Baltistan. However, mixed trend has been Sindh. Maximum value of mean RH observed as 72% at Jhelum, 70% at D.I Khan, 69% at Sargodha, and Faisalabad each. Maximum number of days with mean RH greater than or equal to 80% observed at Sargodha for 03 days.

Temperature Regime during November, 2023

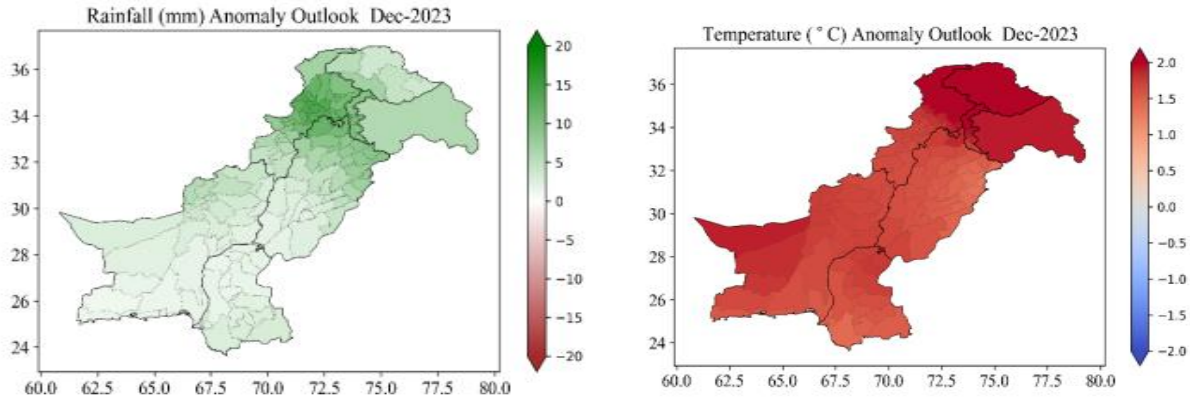
Temperature plays a vital role in the growth and development of crops. Thermal regime particularly the night time temperatures remained above normal in most parts of the country mainly the northwestern parts of Baluchistan. Whereas, slightly above normal temperatures are recorded over the western belt of Baluchistan. However, below normal temperatures observed over some southeastern parts of Baluchistan particularly Lasbella.

The Lowest temperatures observed over the northeastern parts of the country including Gilgit Baltistan and Kashmir. The night time temperature remained above normal (at selected locations) with maximum departure of 2.8°C in Punjab, 4.5°C in Quetta valley and 3.5°C in D.I Khan in Khyber Pakhtunkhwa whereas mixed trend has been observed in Sindh. However, nearly normal to slightly above normal in Gilgit-Baltistan with a maximum departure of 1.3°C and 1.3°C in Potohar region. Mean monthly temperature (at selected locations) ranged between 17 to 21°C in Khyber Pakhtunkhwa, 17 to 20°C in Potohar plateau, 20 to 22°C in remaining parts of Punjab, 21 to 23°C in agricultural plains of Sindh, 5 to 12°C in Gilgit-Baltistan region and it was observed 13.2°C in the high elevated agricultural plains of Baluchistan represented by Quetta valley.

Weather Prediction during December 2023

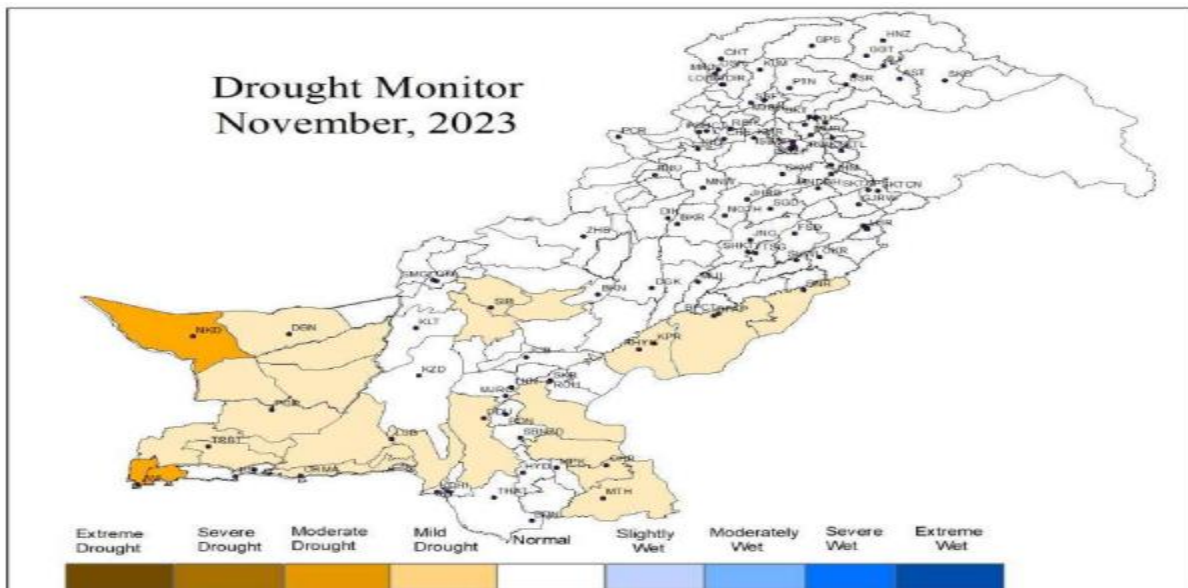
During December 2023, nearly normal to slightly above rainfall (snowfall over the high mountain in

upper Khyber Pakhtunkhwa) is likely over most parts of the country particularly the central parts of Khyber Pakhtunkhwa. During December 2023, above normal mean temperature is likely over most parts of the country particularly over western Baluchistan and northern parts of the country including upper Khyber Pakhtunkhwa, Gilgit Baltistan and 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 is represented below. Moderate Drought conditions may be observed in Nokundi, Jiwani, Gwadar while Mild Drought conditions may be observed in Sibi, Dalbandin, Kharan, Turbat, Jiwani, Awaran districts and coastal areas of Balochistan. In Sindh, Johi, Dadu, Tharparkar, Umerkot, Sanghar, Chorr districts while Cholistan in Punjab Mild Drought conditions may be observed.



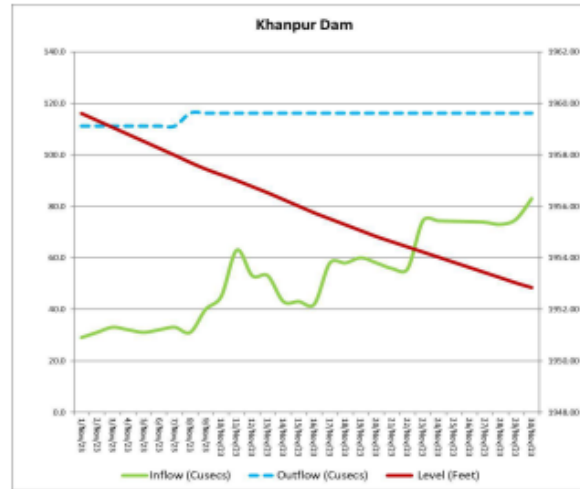
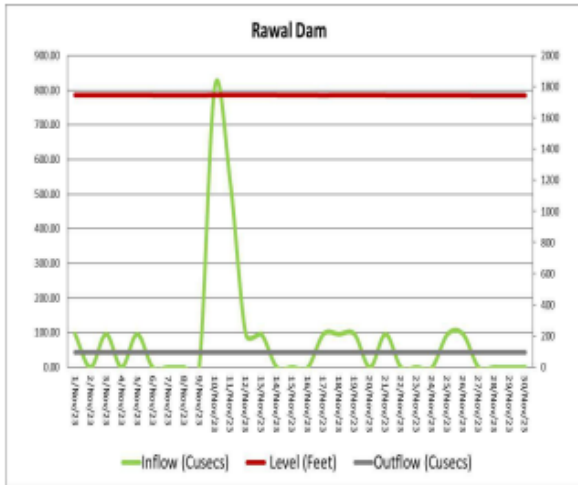
Keeping in view the forecast for December 2023, drought-affected areas of Sindh, Balochistan and Punjab Province may not get enough relief as compared to the previous month.

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

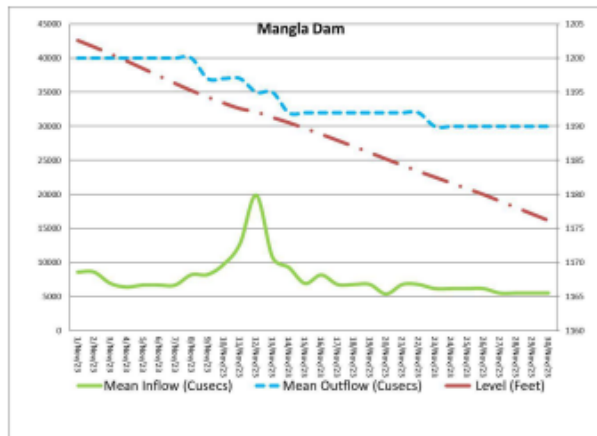
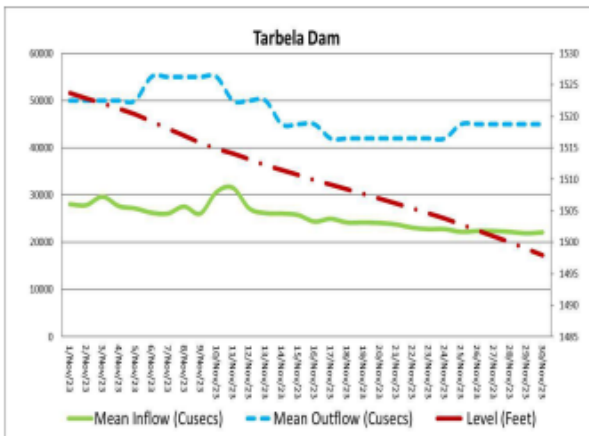


5. WATER AVAILABILITY/DAMS FLOW DATA

In the month of November 2023, water inflow, outflow and levels of the Rawal, Khanpur, Tarbela and Mangla dams are shown below. The level at Terbela, Mangla and Khanpur reservoirs has dropped while at other major reservoir Rawal no change observed.



Water inflow, outflow and level of Rawal and Khanpur Dams



Water inflow, outflow and level of Tarbela and Mangla Dams


6. AVERAGE PRICES OF AGRI. COMMODITIES


- i. CPI inflation General, increased to 29.2% on year-on-year basis in November 2023 as compared to an increase of 26.8% in the previous month and 23.8% in November 2022. On month-on-month basis, it increased to 2.7% in November 2023 as compared to an increase of 1.0% in the previous month and an increase of 0.8% in November 2022.
- ii. CPI inflation Urban, increased to 30.4% on year-on-year basis in November 2023 as compared to an increase of 25.5% in the previous month and 21.6% in November 2022. On month-on-month basis, it increased to 4.3% in November 2023 as compared to an increase of 1.1% in the previous month and an increase of 0.4% in November 2022.

- iii. CPI inflation Rural, increased to 27.5% on year-on-year basis in November 2023 as compared to an increase of 28.7% in the previous month and 27.2% in November 2022. On month-on-month basis, it increased to 0.4% in November 2023 as compared to an increase of 0.9% in the previous month and an increase of 1.3% in November 2022.

Detail are given below in table:

S. No.	Description	Unit	Average Prices			%change Nov 23 over	
			Nov 23	Oct 23	Nov 22	Oct 23	Nov 22
1	Wheat Flour Bag	20 Kg	2787.37	2756.81	1517.14	1.11	83.73
2	Rice Basmati Broken (Average Qualit	1 Kg	226.40	230.99	127.69	-1.99	77.30
3	Rice IRR1-6/9 (Sindh/Punjab)	1 Kg	160.76	168.06	99.31	-4.34	61.88
4	Bread plain (Small Size)	Each	115.47	114.77	84.47	0.61	36.70
5	Beef with Bone (Average Quality)	1 Kg	820.57	809.77	691.86	1.33	18.60
6	Mutton (Average Quality)	1 Kg	1703.68	1688.54	1431.15	0.90	19.04
7	Chicken Farm Broiler (Live)	1 Kg	358.19	349.12	282.40	2.60	26.84
8	Milk fresh (Un-boiled)	1 Ltr	185.31	185.43	145.60	-0.06	27.27
9	Curd (Dahi) Loose	1 Kg	215.71	215.75	168.78	-0.02	27.81
10	Powdered Milk NIDO 390 gm Polyba	Each	822.89	823.45	632.16	-0.07	30.17
11	Eggs Hen (Farm)	1 Dozen	333.88	314.59	253.67	6.13	31.62
12	Mustard Oil (Average Quality)	1 Kg	502.74	512.60	523.44	-1.92	-3.95
13	Cooking Oil DALDA or Other Similar	Each	2834.43	2928.87	2768.31	-3.22	2.39
14	Vegetable Ghee DALDA/HABIB 2.5 k	Each	1361.52	1392.21	1370.08	-2.20	-0.62
15	Vegetable Ghee DALDA/HABIB or Ot	Each	514.74	534.92	527.91	-3.77	-2.49
16	Bananas (Kela) Local	1 Dozen	111.36	116.41	102.36	-4.34	8.79
17	Pulse Masoor (Washed)	1 Kg	320.98	323.01	262.44	-0.63	22.31
18	Pulse Moong (Washed)	1 Kg	276.47	279.57	246.27	-1.11	12.26
19	Pulse Mash (Washed)	1 Kg	520.96	529.88	366.33	-1.68	42.21
20	Pulse Gram	1 Kg	229.43	234.86	233.06	-2.31	-1.56
21	Potatoes	1 Kg	106.92	98.13	73.02	8.96	46.43
22	Onions	1 Kg	127.42	106.10	176.20	20.09	-27.68
23	Tomatoes	1 Kg	161.49	112.80	205.30	43.16	-21.34
24	Sugar Refined	1 Kg	138.79	148.93	90.68	-6.81	53.05
25	Gur (Average Quality)	1 Kg	204.95	224.45	135.50	-8.69	51.25
26	Salt Powdered (NATIONAL/SHAN) 80	Each	67.50	63.67	45.08	6.02	49.73
27	Chilies Powder NATIONAL 200 gm Pa	Each	400.00	400.00	218.67	0.00	82.92
28	Garlic (Lehsun)	1 Kg	552.38	520.20	336.31	6.19	64.25
29	Tea Lipton Yellow Label 190 gm Pack	Each	588.93	549.46	381.53	7.18	54.36

Increase in Prices 

Decrease in price 

Source: Pakistan Bureau of Statistics.

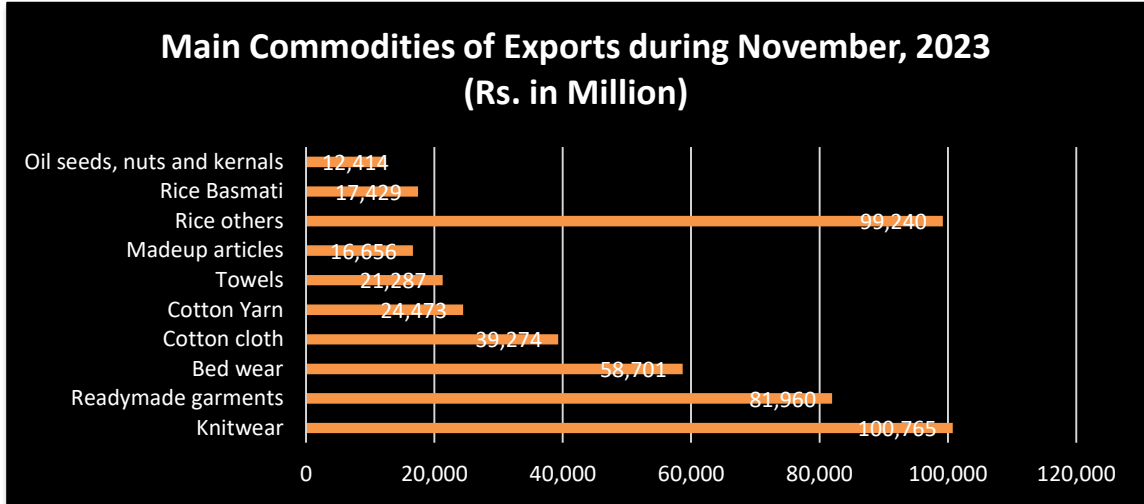
7. TRADE SITUATION

Exports

- i. According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during November, 2023 amounted to Rs.734,541 million (provisional) as against Rs. 754,073 million in October, 2023 and Rs. 531,001 million during November, 2022 showing a decrease of 2.59% over October, 2023 and but increased by 38.33% over

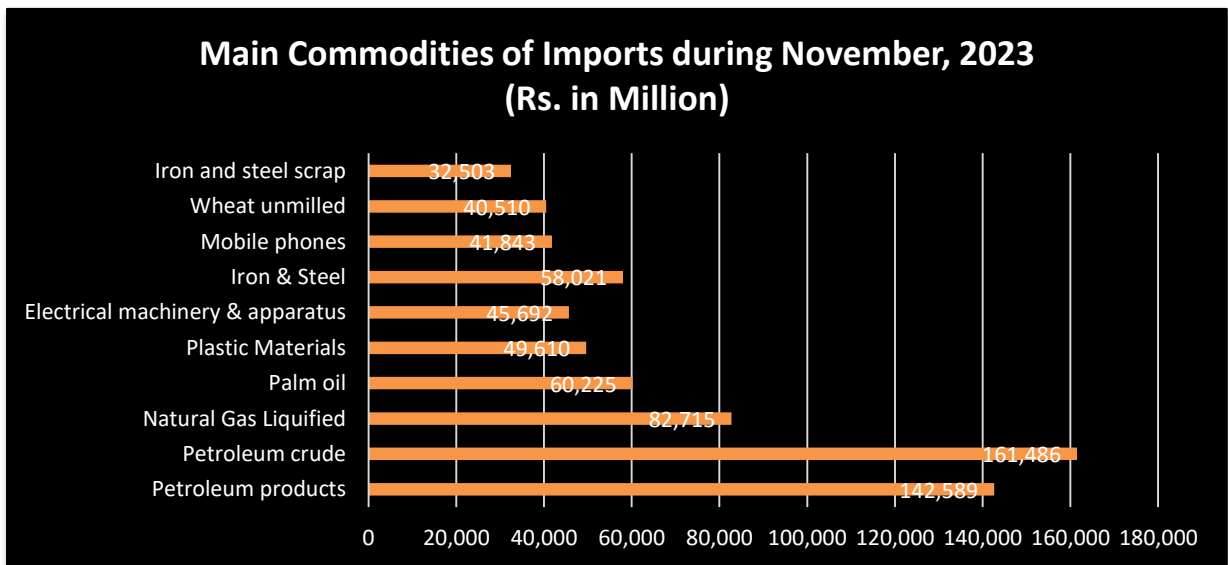
November, 2022.

- ii. In terms of US dollars the exports in November, 2023 were \$ 2,573 million (provisional) as compared to \$ 2,690 million in October, 2023 showing a decrease of 4.35% but increased by 7.70% as compared to \$ 2,389 million in November, 2022.



Imports

1. Imports into Pakistan during November, 2023 amounted to Rs. 1,295,968 million (provisional) as against Rs. 1,363,574 million in October, 2023 and Rs. 1,145,885 million during November, 2022 showing a decrease of 4.96% over October, 2023 but increased by 13.10% over November, 2022.
2. In terms of US dollars the imports in November, 2023 were \$ 4,539 million (provisional) as compared to \$ 4,864 million in October, 2023 showing a decrease of 6.68% and by 11.93% as compared to \$ 5,154 million in November, 2022.



Source: Pakistan Bureau of Statistics

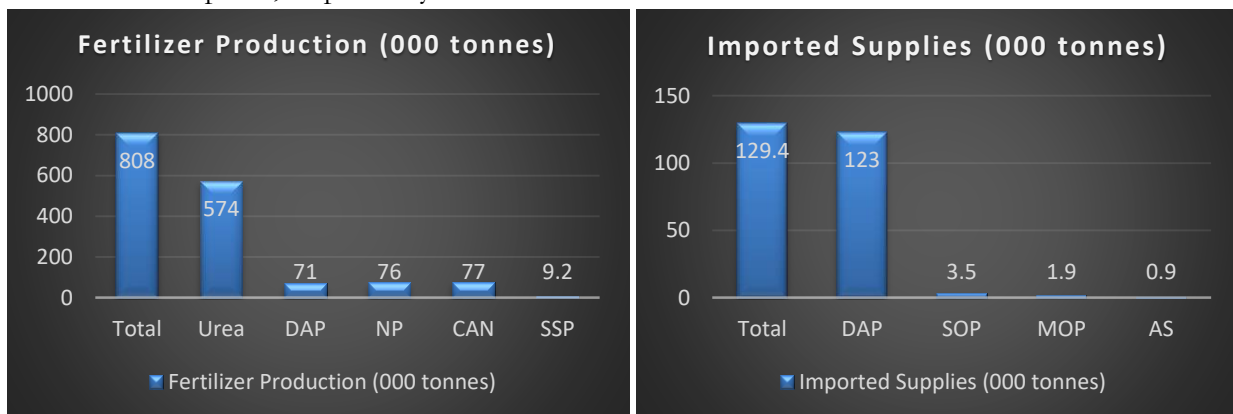


8. FERTILIZER OFFTAKE SITUATION

- Total nutrient offtake during November 2023 was 543 thousand tonnes, reflecting an increase of 12.4 percent over November 2022.
- In nutrient terms, nitrogen offtake increased by 8.3 percent.
- Phosphate and potash offtake increased by 22.4 and 286.8 percent, respectively over November, 2022.
- Urea offtake during November 2023 was 611 thousand tonnes, which increased by 4.8 percent over November 2022.
- DAP offtake was 278 thousand tonnes, 17.7 per cent higher than November last year.

Fertilizer Production and Imported Supplies

Total domestic fertilizer production during November 2023 was 808 thousand tonnes. Urea and DAP production were 574 and 71 thousand tonnes, respectively. Production of other products i.e. CAN, NP and SSP were 77, 76 and 9.2 thousand tonnes, respectively. Total imported supplies were 129.4 thousand tonnes comprising 123, 3.5, 1.9 and 0.9 thousand tonnes of DAP, SOP, MOP and Ammonium Sulphate, respectively.



Source: National Fertilizer Development Centre

9. NEWS TRENDS

- The interim prime minister, addressing the National Farmers' Convention as the chief guest, appreciated the collaborative work of ministries and departments for achieving various milestones under the umbrella of the Special Investment Facilitation Council (SIFC) and stressed the need to expedite various initiatives, according to a press release issued by the PM Office's Media Wing. Chief of Army Staff (COAS) General Syed Asim Munir was the guest of honour on the occasion. The event was attended by federal ministers, agricultural experts and senior government officials. The COAS, in his address, emphasised that the farmers were the backbone of the country's agriculture sector. "It's your untiring hard work, toil and determination that plays a pivotal role in ensuring food security for millions of Pakistanis. You make us and the entire nation proud," he added. He said the climate change and water scarcity were realities that challenged Pakistan's food security and necessitated use of technology and



close government-public collaboration as being done under the SIFC. “Pakistan is endowed with immense potential and abundant resources. Together, we will navigate through these challenging times, by the grace of Allah, and attain our goals across every sector, InshaAllah,” he added. The COAS said the dividends of all initiatives by the SIFC would help Pakistan come out of the economic crisis. “United, we as a resilient nation will lead Pakistan towards a progressive and prosperous future, InshaAllah,” he added.

- The Punjab Agriculture department has prepared a comprehensive plan for the promotion of farming mechanisation in the province. Under the plan, 22 types of machinery including tractors, and harvesters would be provided to farmers at subsidised rates. The plan was reviewed in a meeting held under the chairmanship of Chief Secretary Punjab Zahid Akhtar Zaman at Civil Secretariat. The Chief Secretary Punjab said that agriculture is the backbone of the country’s economy and the Punjab government is taking all possible steps to improve this important sector in the province. Increase in productivity is not possible without the use of modern technology. The farm mechanisation would increase crop production and reduce losses. The use of machinery to destroy crop residues would also help control smog.
- The government of Sindh has decided to take action against those who are stockpiling urea fertilizer and selling it at high prices. The decision was made at a meeting held under the chairmanship of Sindh Chief Secretary and was attended by Agriculture Secretary, Karachi Commissioner and Director General Extension. Other Divisional Commissioners and Deputy Commissioners also participated in the meeting. A detailed briefing was provided during the meeting regarding the demand for urea fertilizer and its supply to farmers. The Agriculture Department officials highlighted that penalties, amounting to Rs. 4 million have been imposed against 175 hoarders in the province. Furthermore, licenses of 41 dealers have been suspended. Division Commissioners also gave a briefing on measures to ensure the supply of fertilizers at discounted prices. Chief Secretary Sindh directed all Deputy Commissioners to ensure 100% stock verification of urea fertilizer in their respective districts. Strict action will be taken against the hoarders of urea.
- The World Soil Day, observed throughout the world on December 05 every year on the call of Food and Agriculture Organization (FAO) of the United Nations, was celebrated in a befitting manner in the provincial metropolis by the agriculture department. The department arranged an awareness seminar at the Punjab Institute of Soil Fertility and a walk was organized at Thokar Niaz Beg with the objective of raising awareness about the health and fertility of the earth.

Sources: *Business Recorder*

زرعی سفارشات برائے کسان

مکندم

- ☆ مچھتی کاشت ہر صورت وسط دسمبر سے پہلے جہاں ضروری ہو وہاں خشک بوائی کر کے مکمل کر لیں۔ مزید شرح (منظور شدہ 50 تا 60 گرام) فی ایکڑ اضافہ کے ساتھ استعمال کیا جائے۔
- ☆ آپاش علاقوں میں کم از کم زمین میں 2 بوری ڈی اے پی ایک بوری یوریا اور ایک بوری ایس او پی جبکہ اوسط زمین میں 1.25 بوری ڈی اے پی + ایک بوری یوریا اور ایک بوری ایس او پی اور زرخیز زمین کے لیے سوا بوری ڈی اے پی؛ ایک بوری یوریا اور ایک بوری ایس او پی فی ایکڑ بوت کاشت استعمال کریں۔
- ☆ کپاس مٹی اور کماڈ کے بعد کاشت کی گئی مکندم کو پہلا پانی کاشت کے 20 تا 25 دن بعد اور دھان کے بعد کاشت کی گئی فصل کو 35 تا 45 دن بعد پانی لگائیں۔

کماڈ

- ☆ بہار یہ کاشت فصل کی کٹائی کے لیے 25 سے 30 دن قبل پانی دینا بند کر دیں اور فصل کی کٹائی سطح زمین سے آدھا تا ایک انچ اوپر تک کریں۔
- ☆ فصل کی کٹائی شوگر ملز کی طرف سے پرمٹ/اجازت نامہ ملنے کی صورت میں کریں کٹائی کے بعد زیادہ دیر فصل رکھنے کی صورت میں وزن میں کمی واقع ہو سکتی ہے۔
- ☆ ستمبر کاشت؛ موغھی فصل اور گھٹی پکنے والی اقسام پہلے برداشت کریں۔ اس کے بعد درمیانی پکنے والی اقسام برداشت کریں۔
- ☆ موغھی فصل رکھنے کے لیے کماڈ کو کم جنوری کے بعد برداشت کریں۔

روغن دار اجناس

- ☆ سورج کھئی کی کاشت کے لیے بھاری میرا زمین کا انتخاب کریں۔ کلر شمی اور بہت رتیلی زمین کاشت کے لیے موزوں نہیں ہے۔
- ☆ کیٹولا اقسام کی بوائی جلد از جلد مکمل کریں۔ کاشت تروت میں کریں۔ بیج ایک تا ڈیڑھ انچ گہرائی پر کاشت کریں۔ شرح بیج ڈیڑھ تا دو کلوگرام فی ایکڑ رکھیں۔
- ☆ سروسوں تو ریا ریا اور کیٹولا کی اقسام پر اگر حیلہ یا لشکری سنڈی وغیرہ کا حملہ نظر آئے تو محکمہ زراعت کے زرعی ماہرین سے مشورہ کر کے کیسیائی ادویات کا سپرے کریں۔

دالیں

- ☆ چنے کی فصل کا باقاعدگی سے معائنہ کرتے رہیں اگر فصل میں ٹو کے کا حملہ نظر آئے تو سفارش کردہ زہروں کا سپرے کریں۔
- ☆ مسورا اور چنے کی فصل پر مختلف بیماریاں حملہ آور ہوتی ہیں۔ جن میں مرجھا چھلساؤ کنگلی اور؛ مسور کی پھونڈی زیادہ اہم ہیں۔ اس کے علاوہ ان پر دیمیک؛ ٹو کا چور کیٹرا؛ رس چونسے والے کیٹھے مثلاً ستیلا؛ سفید کھئی؛ تھرپس؛ لشکری سنڈی کا بھی حملہ ہو سکتا ہے۔ لہذا ان سے بچاؤ کے لیے سفارش کردہ زہروں کا سپرے کریں۔

سبزیات و باغات

- ☆ چھوٹی اور تازک سبزیوں کو سردی اور کورے سے بچانے کے لیے پلاسٹک شیٹ کا استعمال کریں۔
- ☆ چھوٹے پلاٹوں میں ایسی سبزیات کاشت کی جائیں جو کافی دیر تک پیداوار دیں مثلاً لپک؛ دھنیا؛ میتھی وغیرہ جبکہ 3 سے 5 مرلہ کے پلاٹ میں ان سبزیوں کے علاوہ گوہی نمائٹ؛ گاجر؛ شلجم؛ مولی وغیرہ لگائیں۔
- ☆ درمیانے موسم میں پکنے والے ترشادہ پھلوں کی اقسام کی فروخت شروع کریں۔
- ☆ باغات کو کورے سے بچائیں اور فاسفورس اور پوناش والی کھاد کی پوری مقدار دسمبر میں ڈالیں۔

Agro Advisory Services for Farmers

Source: Zarat Nama, Directorate of Agricultural Information

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