

AGRICULTURE OUTLOOK

Volume VIII, ISSUE X, 2023



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

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1. EXECUTIVE SUMMARY

Major crops in Punjab are wheat, cotton, sugarcane, maize and rice in particular parts. In Kharif season, cotton, rice, sugarcane, maize, seasonal vegetables and orchards are in the fields. The condition of these crops is reported good in Punjab. In Sindh cotton, rice, sugarcane, maize, seasonal vegetables and orchards are reported in good condition and cotton is under picking stages. In Khyber Pakhtunkhwa general condition of crops, vegetables and orchards is satisfactory in most parts. In Baluchistan, condition of standing crops and seasonal orchards is reported satisfactory. Most varieties of apple, grapes, sweet melons etc. have completed their maturity stages and picking/marketing of the fruit is in progress. Yield of seasonal vegetables are reported satisfactory and these are available in the market.

During the month of September 2023, light, moderate and heavy 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. Precipitation over most of the drought-prone areas of Balochistan, Nokundi were below normal while in Sindh province, Mithi, Chorr were above normal and give relief to moisture stress conditions over there.

As mentioned by Pakistan Bureau of Statistics (PBS) During the month of September 2023 prices of most of Agri. commodities were increased over August 2023. Among these products are Onions (39.32%), Pulse Masoor (19.80%), Fresh Vegetables (11.77%), Sugar (10.28%), Pulse Mash (9.46%), Beans (7.14%), Condiments and Spices (6.30%), Gur (6.27%), Pulse Moong (5.51%), Fresh Fruits (4.46%), Pulse Gram (2.90%), Milk Powder (2.61%), Milk Fresh (2.03%) and Besan (1.94%).

As reported by Pakistan Bureau of Statistics (PBS), exports during July – September, 2023 FY2023-24 totaled Rs. 2,013,533 million (provisional) as against Rs.1,603,869 million during the corresponding period of last year showing an increase of 25.54%. Imports during July – September, 2023 FY2023-24 totaled Rs. 3,560,763 million (provisional) as against Rs. 3,650,269 million during the corresponding period of last year showing a decrease of 2.45%.

As published by the National Fertilizer Development Centre (NFDC), total nutrient offtake during September 2023 was 384 thousand tonnes, Urea offtake during September 2023 was 564 thousand tonnes and DAP offtake was 106 thousand tonnes. Nitrogen offtake increased by 19 percent while phosphate and potash offtake increased by 72 and 42 percent, respectively over September, 2022.



2. CURRENT CROP SITUATION

2.1. Wheat Crop

In Barani areas of Punjab land preparation for sowing of wheat crop has been started. Farmers are advised to cultivate the recommended seed varieties. In Sindh province wheat sowing process is in progress. In Rainfed areas of KP land preparation for wheat crop is in process. In Balochistan Land preparation and sowing of wheat crop is in progress.

2.2. Rice Crop

During the month of October, 2022, In Punjab Province Condition of rice crop is reported satisfactory and harvesting of early grown varieties has been completed. Farmers have been advised to maintain optimum level of water in their fields, as excess water can cause reduction in overall production of crop. In Sindh province rice crop is at harvesting stages.

2.3. Cotton Crop

In Punjab province the growth and development of cotton crop has been observed/reported satisfactory in upper parts of the country. The early growing crop is at picking stages in southern parts of the province. In Sindh province cotton crop has been reported satisfactory. Cotton was at last picking stages in the province.

2.4. Maize Crop

Sowing of maize (autumn) has been completed. Germination and growth of the crop is reported satisfactory in Punjab province.

2.5. Sugarcane Crop

In Punjab Province Condition of sugarcane crop is reported satisfactory. However mild attacks of borer reported in some parts of central Punjab. In Sindh September Cultivation of Sugarcane crop has been completed in agriculture fields.

2.6. Horticulture

In Punjab winter vegetables growth is in progress. the seasonal vegetables including Tomato, Chilies, Onions etc are reported satisfactory in the Sindh province sowing of winter vegetables has been completed. In KP condition of orchards is reported satisfactory in most parts of the province and sowing of winter vegetables is in progress. In Balochistan Province, the vegetables and orchards especially the northern and eastern parts of the province are in sowing process. In GB the seasonal vegetables and orchards are reported satisfactory.

Source: *Monthly Bulletin, National Agromet Centre, Pakistan Meteorological Department.*



3. WEATHER SITUATION

Rainfall/Precipitation

During September 2023, Light, moderate and Heavy rainfall events reported across the country whereas Gilgit Baltistan, isolated parts of Khyber Pakhtunkhwa, Balochistan and most areas of Sindh province received trace or zero rainfall during the month.

Chief amounts of monthly rainfall recorded across Pakistan during September, 2023

Sr.No.	Station	Rainfall(mm)	Sr.No.	Station	Rainfall(mm)
1	Gulshan-e- Ravi-Lahore	349.01	11	Mangla	108
2	Lahore, Airport	307	12	Islamabad, Airport	104.32
3	Saidpur-Islamabad	246	13	Badin	102.21
4	Islamabad, Zeropoint	233.52	14	Murree	100.51
5	Shamsabad-Rawalpindi	211	15	Golra	100
6	Chaklala Airbase	179.3	16	Kakul	94.81
7	Khaar-Bajaur	150.8	17	Faisalabad Airport	93.02
8	Jhelum	130.01	18	Gulistan Colony	90
9	Narowal	121.9	19	Kotli	88.01
10	Attock	108.21	20	Malam Jabba	87

Relative Humidity

September is considered to be the final month of Kharif season as most of the seasonal crops including cotton, peanut, sugarcane & grams etc. and vegetables are sown during this season. At present, the major agricultural soils (particularly in the upper half) hold considerable reserves of the moisture contents based on the weather conditions in the recent months. Accordingly, the standing crops and vegetable/orchards are growing with satisfactory pace in most parts of the country. However, few severe weather events (heavy rainfall / hails / windstorm) observed at isolated places have damaged the seasonal vegetables and fruits. Besides, pest attacks have been reported on the standing crops especially on Cotton in south Punjab which may affect the final production from particular regions.

Temperature Situation during September, 2023

Temperature plays a vital role in the growth and development of crops. Thermal regime particularly the day time temperatures remained normal to above normal over most parts mainly the eastern half of the country especially eastern belt of Khyber Pakhtunkhwa, Gilgit-Baltistan, Kashmir, Punjab, Sindh and northeastern Baluchistan including its surrounding coastal areas as well. Whereas, below normal temperatures are recorded over the eastern belt of Punjab. However, nearly normal temperatures observed over northwestern Baluchistan and southern parts of Sindh. The highest temperatures observed over the most parts of Sindh along the adjoining areas of Southern Punjab and Baluchistan including some parts of western Baluchistan. The day time temperature remained above normal (at selected locations) with maximum departure of 2.0°C in Khyber Pakhtunkhwa,



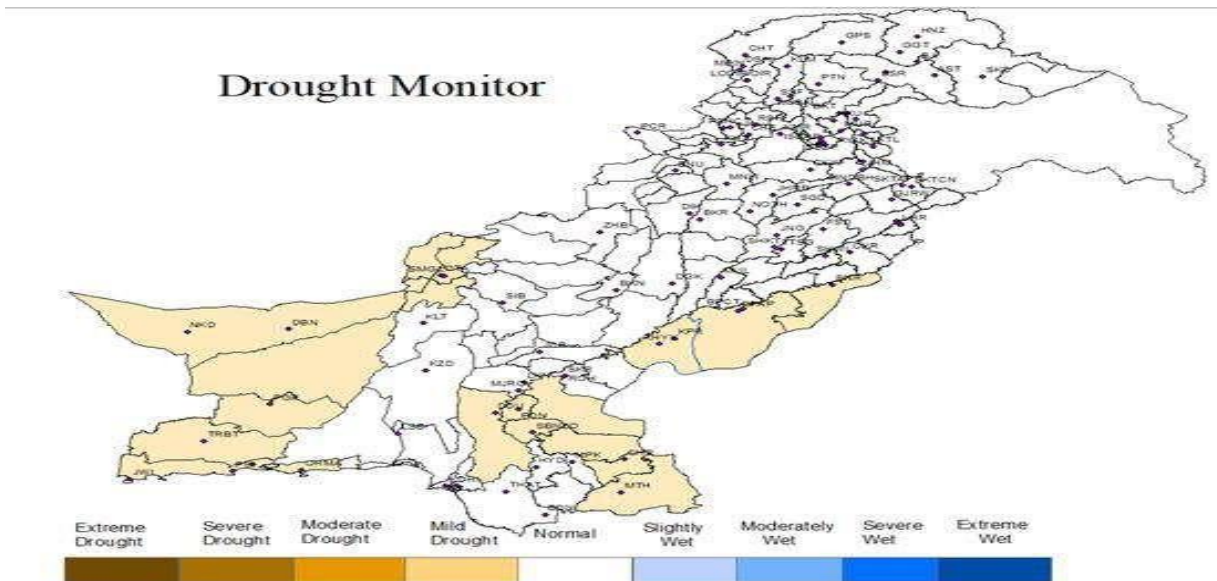
1.9°C in Potohar region, 2.5°C in Punjab and 0.8°C in Sindh. Whereas, Gilgit-Baltistan experienced temperatures within the normal to above normal range, with a departure of 1.5°C. However, nearly normal temperature over the selected location Quetta valley. Mean monthly temperature (at selected locations) ranged between 30 to 33°C in Khyber Pakhtunkhwa, 27 to 31°C in Potohar plateau, 30 to 33°C in remaining parts of Punjab, 30 to 33°C in agricultural plains of Sindh, 19 to 25°C in Gilgit-Baltistan region and it was observed 23.8°C in the high elevated agricultural plains of Baluchistan represented by Quetta valley.

Weather Prediction during October 2023

Overall a tendency for near normal rainfall is expected in most parts of the country. However, Khyber Pakhtunkhwa, comprising the northwestern part of the country is expected to receive slightly above normal rainfall during the forecast month. Temperatures are forecasted to remain slightly above normal nationwide, with maximum departure over eastern Gilgit Baltistan and western Balochistan.

4. DROUGHT SITUATION

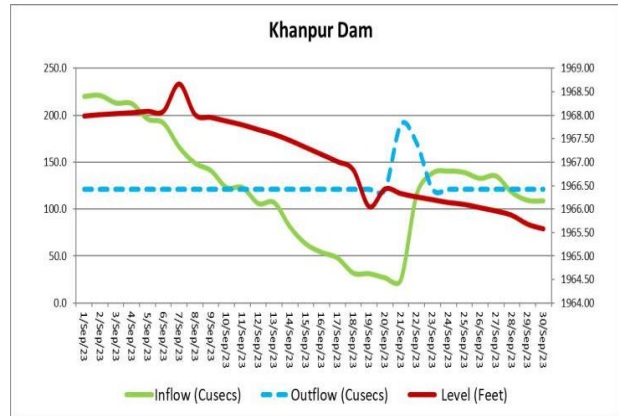
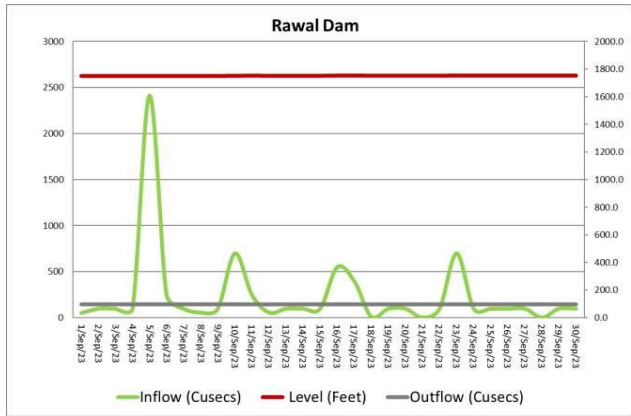
The spatial drought monitor map based on the output results from different drought monitoring indices and Pakistan Meteorological Department ground station data across Pakistan is represented below. In Sindh Province district Umerkot, Tharparkar and Sanghar, Dadu, Jamshoro, Khairpur, Shahdad Kot and Shaheed Benazirabad while in Balochistan Province district Gawadar, Harnai, Kech, Kharan, Mastung Nushki, Pishin, Panjgur, Qila Abdullah, Quetta and Washuk) and the Cholistan region (Bahawalpur, Bhawalnagar and Rahim Yar Khan) in Punjab got some relief except Changi district.



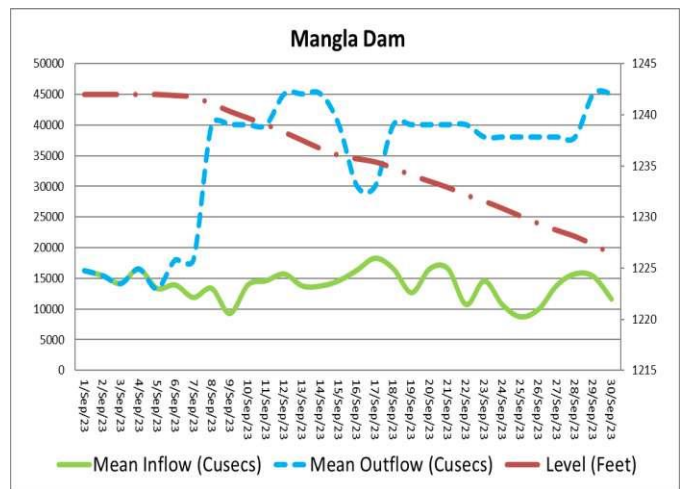
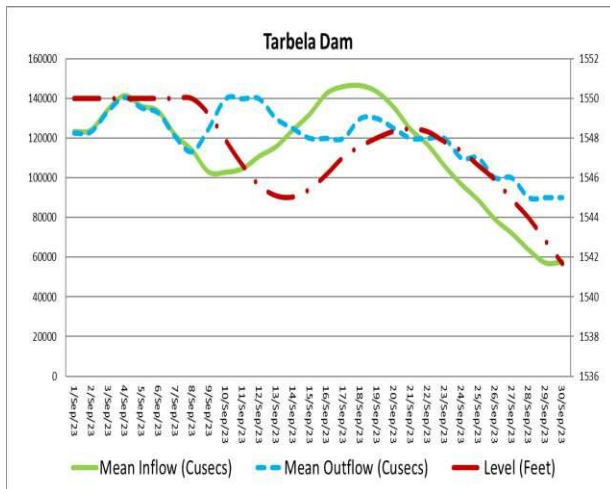
Source: <http://www.ndmc.pmd.gov.pk/>

5. WATER AVAILABILITY/DAMS FLOW DATA:

In the month of September 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 and at other major reservoirs no change due to less or zero rainfall in their catchment areas.



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 31.4% on year-on-year basis in September 2023 as compared to an increase of 27.4% in the previous month and 23.2% in September 2022. On month-on-month basis, it increased to 2.0% in September 2023 as compared to an increase of 1.7% in the previous month and a decrease of 1.2% in September 2022.
- ii. CPI inflation Urban, increased to 29.7% on year-on-year basis in September 2023 as compared to an increase of 25.0% in the previous month and 21.2% in September 2022. On month-on-



month basis, it increased to 1.7% in September 2023 as compared to an increase of 1.6% in the previous month and a decrease of 2.1% in September 2022.

- iii. CPI inflation Rural, increased to 33.9% on year-on-year basis in September 2023 as compared to an increase of 30.9% in the previous month and 26.1% in September 2022.

Detail are given below in table:

S. No.	Description	Unit	Average Prices			%change Sep 23 over	
			Sep 23	Aug 23	Sep 22	Aug 23	Sep 22
1	Wheat Flour Bag	20 Kg	2819.53	2823.53	1404.50	-0.14	100.75
2	Rice Basmati Broken (Average Qualit	1 Kg	234.25	226.30	123.31	3.51	89.97
3	Rice IRR1-6/9 (Sindh/Punjab)	1 Kg	172.65	158.45	94.44	8.96	82.81
4	Bread plain (Small Size)	Each	112.67	107.67	77.97	4.64	44.50
5	Beef with Bone (Average Quality)	1 Kg	799.39	795.03	685.29	0.55	16.65
6	Mutton (Average Quality)	1 Kg	1671.26	1658.11	1418.70	0.79	17.80
7	Chicken Farm Broiler (Live)	1 Kg	385.15	413.68	288.81	-6.90	33.36
8	Milk fresh (Un-boiled)	1 Ltr	185.19	182.09	141.73	1.70	30.66
9	Curd (Dahi) Loose	1 Kg	214.30	211.01	164.22	1.56	30.50
10	Powdered Milk NIDO 390 gm Polyba	Each	821.11	807.25	574.24	1.72	42.99
11	Eggs Hen (Farm)	1 Dozen	298.72	293.51	238.16	1.78	25.43
12	Mustard Oil (Average Quality)	1 Kg	525.18	529.01	523.36	-0.72	0.35
13	Cooking Oil DALDA or Other Similar	Each	2977.17	3039.94	2864.05	-2.06	3.95
14	Vegetable Ghee DALDA/HABIB 2.5 k	Each	1404.80	1430.63	1397.53	-1.81	0.52
15	Vegetable Ghee DALDA/HABIB or Ot	Each	544.44	550.13	541.11	-1.03	0.62
16	Bananas (Kela) Local	1 Dozen	128.73	133.52	93.49	-3.59	37.69
17	Pulse Masoor (Washed)	1 Kg	337.54	285.75	321.12	18.12	5.11
18	Pulse Moong (Washed)	1 Kg	287.61	269.94	245.60	6.55	17.11
19	Pulse Mash (Washed)	1 Kg	538.59	499.57	382.47	7.81	40.82
20	Pulse Gram	1 Kg	250.10	242.60	250.47	3.09	-0.15
21	Potatoes	1 Kg	95.35	95.08	70.69	0.28	34.88
22	Onions	1 Kg	84.39	65.96	109.02	27.94	-22.59
23	Tomatoes	1 Kg	102.11	115.42	159.62	-11.53	-36.03
24	Sugar Refined	1 Kg	165.69	154.91	87.46	6.96	89.45
25	Gur (Average Quality)	1 Kg	236.61	219.68	137.03	7.71	72.67
26	Salt Powdered (NATIONAL/SHAN) 80	Each	60.76	57.89	39.15	4.96	55.20
27	Chilies Powder NATIONAL 200 gm Pa	Each	400.00	385.66	215.84	3.72	85.32
28	Garlic (Lehsun)	1 Kg	474.45	410.30	342.25	15.63	38.63

Decrease in Prices



Increase in price



Source: Pakistan Bureau of Statistics.

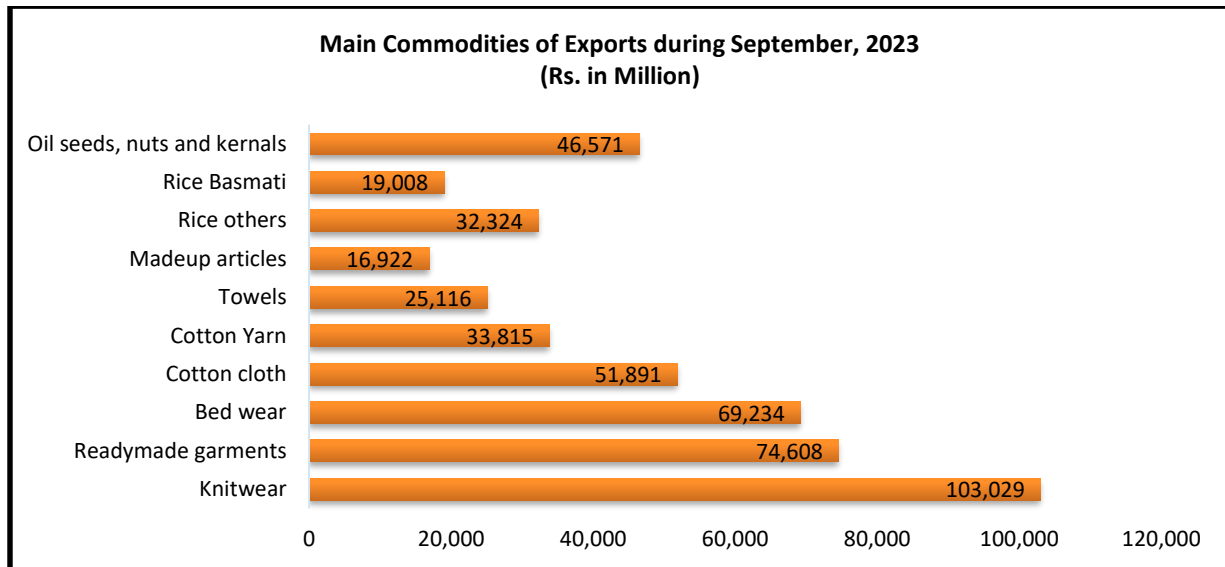
7. TRADE SITUATION

Exports

- i. According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during September, 2023 amounted to Rs.737,295 million (provisional) as against Rs. 695,136 million in August, 2023 and Rs. 561,643 million during September, 2022 showing an increase of 6.06% over August, 2023 and by 31.27% over September, 2022.
- ii. In terms of US dollars the exports in September, 2023 were \$ 2,476 million (provisional) as

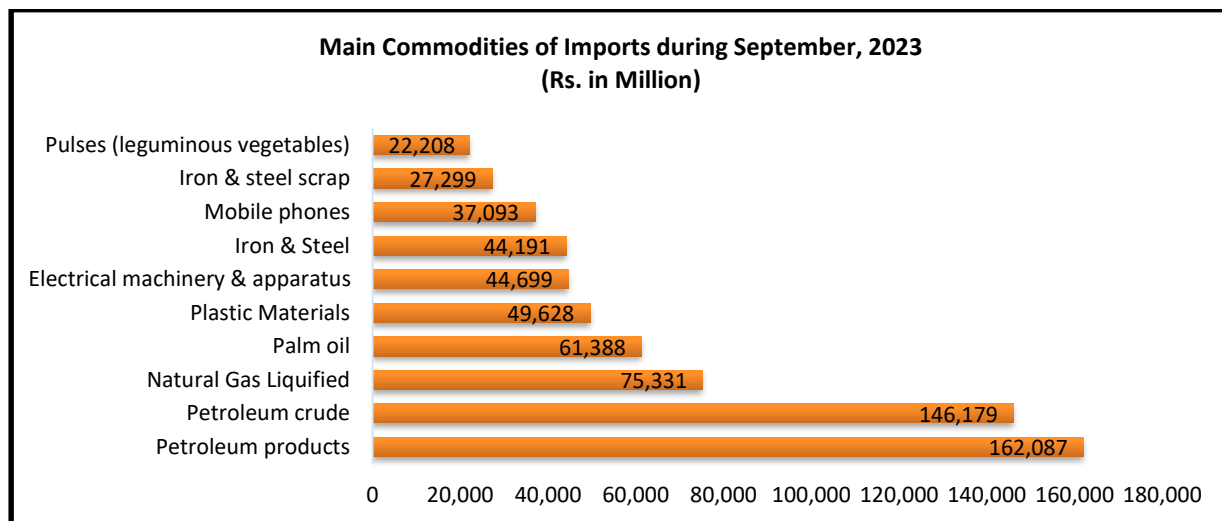


compared to \$ 2,366 million in August, 2023 showing an increase of 4.65% and by 1.60% as compared to \$ 2,437 million in September, 2022.



Imports

- Imports into Pakistan during September, 2023 amounted to Rs. 1,189,167 million (provisional) as against Rs. 1,330,458 million in August, 2023 and Rs. 1,219,956 million during September, 2022 showing a decrease of 10.62% over August, 2023 and by 2.52% over September, 2022.
- In terms of US dollars the imports in September, 2023 were \$ 3,994 million (provisional) as compared to \$ 4,528 million in August, 2023 showing a decrease of 11.79% and by 24.54% as compared to \$ 5,293 million in September, 2022



Source: Pakistan Bureau of Statistics

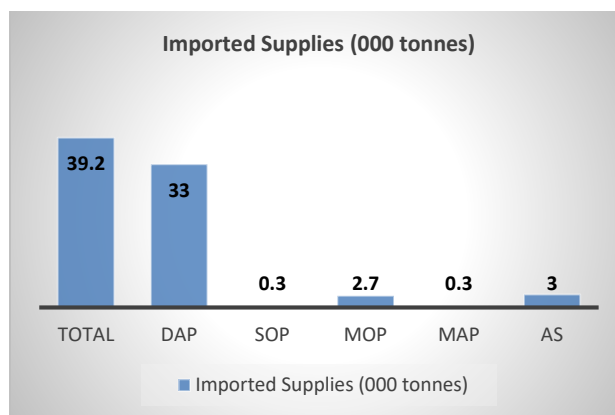
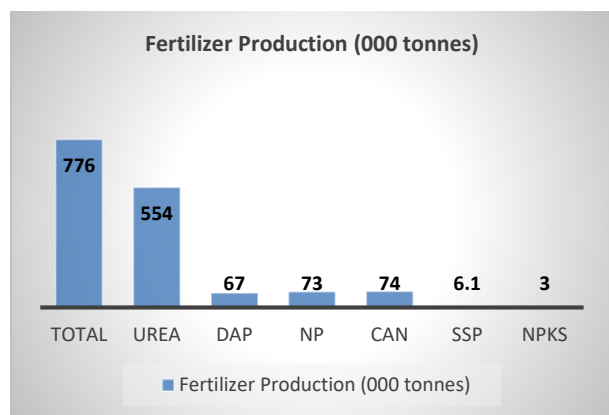


8. FERTILIZER OFFTAKE SITUATION

- ❖ Total nutrient offtake during September 2023 was 384 thousand tonnes, reflecting an increase of 26 per cent over September 2022.
- ❖ In nutrient terms, Nitrogen offtake increased by 19 percent while phosphate and potash offtake increased by 72 and 42 percent, respectively over September, 2022.
- ❖ Urea offtake during September 2023 was 564 thousand tonnes, which increased by 11.1 percent over September 2022.
- ❖ DAP offtake was 106 thousand tonnes, 68.7 percent higher than September last year which may be attributed to low offtake in September, 2022 due to floods and extra ordinary high price.

Fertilizer Production and Imported Supplies

Total domestic fertilizer production during September 2023 was 776 thousand tonnes. Urea and DAP production were 554 and 67 thousand tonnes, respectively. Production of other products i.e. CAN, NP, SSP and NPKs were 74, 73, 6.1 and 3 thousand tonnes, respectively. Total imported supplies during September 2023 were 39.2 thousand tonnes comprising 33, 3.0, 2.7 and 0.3 thousand tonnes of DAP, Ammonium Sulphate, MOP and SOP, respectively.



Source: National Fertilizer Development Centre

9. NEWS TRENDS

- According to a senior official of the Ministry of National Food Security and Research (MNFS&R), the country is likely to achieve the agriculture growth target of 3.5 percent set for 2023-24 by meeting the target of major crops including cotton and rice production which would contribute positively to the budgeted Gross Domestic Product (GDP) growth target of 3.5 percent. The increase in the production of cotton, rice as well as minor crops, and



positive growth in the livestock sector would help achieve the agriculture growth target. The official said that cotton production for 2023-24 was estimated at 11.5 million bales from an area of 2.4 million hectares, showing an increase of 126.6 percent in production over the last year. Rice production for 2023-24 is estimated at 8.64 million tons from an area of 3.35 million hectares showing an increase of 12.7 percent and 18 percent in area and production respectively over last year. The official said that sugarcane production is estimated at 78.5 million tons from an area of 1.7 million hectares showing a decrease of 10.74 percent and 10.9 percent in area and production respectively over the last year. Pakistan produced 10.3 million tons of maize showing a decrease of 6.07 percent in production and 2.40 percent in area over last year. Production of Mung bean for 2023-24 is estimated at 143.6 thousand tons from an area of 198 thousand hectares showing an increase of 6.42 percent, Maash production for 2023-24 is estimated at 5.28 thousand tons from an area of 7.36 thousand hectares showing an increase of 24.65 percent and chilies production is estimated at 1.36 thousand tons from an area of 122.1 thousand hectares showing an increase of 2.33 percent, the official further revealed. Another official in the animal husbandry section of MNFS&R said that the share of livestock in the agriculture sector is likely to increase by 64 percent.

- Secretary Agriculture Punjab has directed the farmers of Faisalabad to make more efforts in this season and bring more area under wheat cultivation and ensure more yield to achieve the sowing and production for the current season. The Secretary Agriculture Punjab hoped that collectively 16 million acres of land would be brought under cultivation of wheat in the province this year. These views were expressed by him while addressing the farmers of wheat in Faisalabad on the occasion of Mega Farmer's Day organized to make them aware about modern production technology. Addressing the seminar, he further said that reducing the production cost of farmers was top priority so that farmers can get abundant production of wheat during Rabi 2023-24. He directed the officers of the Agriculture Extension to take immediate steps to ensure the supply of quality agricultural inputs in the market. Action will be taken to save the farmers from economic exploitation.
- Federal Minister for National Food Security and Research called on Punjab Chief Minister and exchanged views over the steps that could be taken to increase different crops' production in the province. Both discussed fixing the prices of different crops and agreed on stabilizing the rate of cotton crop in collaboration with the Trading Corporation of Pakistan (TCP). The chief minister urged the federal government that in order to achieve the objective, it should purchase the crop from the TCP.

Sources: *Business Recorder*

10. AGRO ADVISORY SERVICES FOR FARMERS

زرعی سفارشات برائے کسان

گندم

- ☆ زمین کی تیاری شروع کر دیں، گلی سڑی کھاد ڈالیں اور زمین میں اچھی طرح ملا دیں۔ مزید بیج اور کھاد کا بھی انتظام کریں۔
- ☆ پنجاب کے تمام بارانی علاقوں کے لیے زراعت کی منظور شدہ گندم کی اقسام NARC 2009، BARS 2009، دھرابی 2011، پاکستان 2013، احسان 2016، فتح جنگ 2016، مرکز 19 اور بارانی 2017 کو 20 اکتوبر سے 15 نومبر تک اور چکوال 50 کو 15 اکتوبر سے 15 نومبر تک کاشت کریں۔
- ☆ پنجاب کے تمام آبپاش علاقوں کے لیے سحر 2006، آری 2011، فیصل آباد 2008، NARC 2011، گلکسی 2013، بورلاگ 2016، این این گندم 1، زنگول، اناج 2017 وغیرہ کے بیج کا انتظام کریں۔
- ☆ بروقت کاشت 30 نومبر تک کے لیے شرح بیج 40 سے 50 کلوگرام اور یکم دسمبر سے 15 دسمبر تک شرح بیج 50 سے 60 کلوگرام فی ایکڑ رکھیں۔

چنا اور مسور

- ☆ چنے کی کاشت علاقوں کی موزونیت کے مطابق 25 ستمبر تا 15 اکتوبر تک بذریعہ ڈرل یا پور کاشت کریں اور شرح بیج 30 کلوگرام فی ایکڑ رکھیں۔
- ☆ چنے کی دیسی اقسام میں بلکسر 2000، پنجاب 2008، ونہار 2000، بٹل 98، بی ایم 98 اور بھکر 2011 شامل ہیں۔
- ☆ کابلی اقسام میں CM2008، نور 91، نور 2009، نور 2013، اور ٹمن 2013 کاشت کریں۔
- ☆ ستمبر کاشتہ کماد میں کابلی چنے کی مخلوط کاشت بڑی مفید ثابت ہوتی ہے۔ اس لیے 4 فٹ کے فاصلے پر کاشتہ کماد کے درمیان بیڈ پر چنے کی دو لائنیں یا 2.5 فٹ کے فاصلے پر کاشتہ کماد میں چنے کی ایک لائن کاشت کریں۔
- ☆ مسور کی کاشت کے لیے زمین کی تیاری شروع کر دیں۔
- ☆ منظور شدہ اقسام نیاب مسور 2002، نیاب مسور 2006، پنجاب مسور 2009، مسور 93 اور چکوال مسور اور مرکز 2009 کے بیج کا بندوبست کریں۔

کماد

- ☆ فروری کاشتہ کماد کی فصل کو 20 سے 30 دن کے وقفہ سے آبپاشی جاری رکھیں۔
- ☆ جن کھیتوں میں کانگاری اور رتہ روگ کا حملہ ہو تو موڈھی فصل نہ رکھیں اور نہ ہی اس کا بیج آئندہ فصل کے لیے کاشت کیا جائے۔

☆ ستمبر کاشت کے لیے زمین کو اچھی طرح تیار کریں نیز محکمہ زراعت کی مندرجہ ذیل سفارش کردہ اقسام کاشت کریں۔

☆ اعلیٰ تیار ہونے والی اقسام

سی پی 77-400، سی پی ایف-237، اوری پی ایف-246۔

☆ درمیانی تیار ہونے والی اقسام

ایچ ایس ایف 240، ایچ ایس ایف 242، ایس پی ایف-213، ایس پی ایف-234، سی پی ایف-247، سی پی ایف 248 اور

سی پی ایف-249۔

☆ بیج اس طرح تیار کریں کہ ایک سے میں 3 سے 4 آنکھیں ہوں۔ اور کھادوں کا استعمال تجزیہ زمین کے مطابق چار بنیادی اصولوں یعنی صحیح

مقدار، صحیح انتخاب، صحیح جگہ اور صحیح وقت کے مطابق کریں۔ اس ضمن میں آپ زرعی ماہرین سے مشورہ لے سکتے ہیں۔

سبزیات

☆ آلو کی کاشت کا بہترین وقت یکم اکتوبر سے 20 اکتوبر تک ہے۔

☆ آلو کی کاشت سے پہلے بیج کی خوابیدگی کو توڑنا ضروری ہوتا ہے۔ آلو 10 تا 12 ہفتے پڑا رہنے سے خوابیدگی ختم ہو جاتی ہے۔

☆ موسم خزاں کی فصل کے لیے شرح تخم 1200 تا 1500 کلوگرام فی ایکڑ استعمال کریں۔

☆ موسم سرما کے لیے مولی، گاجرا اور شلجم کی کاشت جاری رکھیں۔ ان کے بیج بالترتیب 3 تا 5، 6 تا 8 کلو اور 1 کلوگرام فی ایکڑ استعمال

کریں۔

☆ بے موسمی سبزیوں کی کاشت کے لیے نسل ٹیکنالوجی کو اپنائیں اور سبز مرچ، شملہ مرچ کی پیوری کو جلد از جلد مکمل کر لیں۔

☆ اکتوبر کے پہلے 15 دن لہسن کی کاشت کے لیے انتہائی موزوں ہے۔ منظور شدہ اقسام لہسن گلانی دلیسی سفید اور جی ایس 1 ہیں۔

Source: 1) Ziratnama Government Of Punjab (Farmers' Advisory)

2) Monthly Agromet Bulletin, National Agromet Center, Pakistan Meterological Department.

Source: Zarat Nama, Directorate of Agricultural Information

پلاننگ اینڈ ریسرچ ڈیپارٹمنٹ

زرعی ترقیاتی بینک لمیٹڈ

ہیڈ آفس، اسلام آباد

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