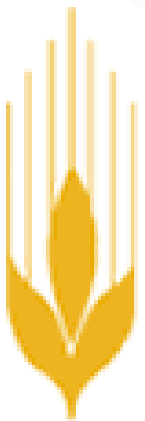


Vol.4, ISSUE XI, 2019

# AGRICULTURE OUTLOOK

November, 2019



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## **EXECUTIVE SUMMARY**

Kharif season is going to end and Kharif crops like cotton, rice, sugarcane and maize are at maturity stage in most places of the country. Rabi crops like wheat, oil seeds, and pulses are in growing position. Some farmers have started land preparation for sowing Rabi crops especially on fallow lands. Beside, sowing of winter vegetables is also in progress.

During the ongoing FY 2019-20 cotton could not meet the target of plantation on 2.895 m hectares due to increase in the area of cultivation for sugarcane, delay in harvesting of wheat and shortage of irrigation water. Cotton Crop Assessment Committee has revised production of cotton crop from 15 million bales to 10.2 million bales as 6 percent of sowing target has been missed and incidence of insect pest attack.

Wheat crop is at sowing stage and farmers have been advised by Punjab Agriculture Department (PAD) to cultivate only approved and recommended varieties to obtain maximum per acre yield. According to PAD best time of sowing is 10<sup>st</sup> November to 30<sup>th</sup> November, after that productivity of the crop decreases in a constant manner. Rice crop is at harvesting stage and its marketing is in progress. Sugarcane being a Kharif crop is at sugar accumulation stage. Harvesting has been started in some areas of Punjab. Crop growth remained satisfactory and is growing well.

Maize crop is also at maturity and harvesting stage in KP, while it is in growing stage in Punjab. Its marketing has also been started since last month. Besides, wheat farmers are also growing Rabi crops like pulses, gram and oilseeds. Federal Committee on Agriculture has fixed the production targets of these crops. Among vegetables Potato, tomato and onion are in sowing stage in Punjab and Sindh. Banana and Papaya were also reported in good conditions and are at harvesting stage in Sindh province.

Vegetables like potato, tomato and onion are being supplied from Balochistan and Khyber Pakhtunkhwa for marketing purpose. However red chilli is being supplied from Sindh province in the market in these days.

National Agromet Center (NAMC), PMD reported light to moderate amount of rainfall in Punjab, Khyber Pakhtunkhwa and Gilgit-Baltistan, Azad Jammu & Kashmir; while light rainfall was reported in Baluchistan. Dry weather conditions were also reported in Sindh and Balochistan provinces. Smog conditions in the country have also been observed in Lahore and it would be consistent in coming days unless rainfall.

Total fertilizer off-takes were clocked-in at 683 thousand tons, which are down 8% YoY and 18% MoM basis by the National Fertilizer Development Center (NFDC). Total industry production has been rose by 15%YoY to 726k tons during September 2019 as compared to 631k tons recorded during corresponding month of last year. Market share of FFC, EFERT, FFBL and FATIMA remained at 43%, 23%, 9% & 8% respectively.

Pakistan's Exports were reported at Rs. PKR 276 billion in September 2019, which are found low as compared to August PKR 294 billion of the same year. While the imports showed an increase of PKR 2 billion from PKR 591 billion in September to PKR 589 billion in August.

## CURRENT CROP SITUATION

### 1. Cotton

Currently, cotton crop is at maturity stage and farmers have started picking of cotton from plants. Unfortunately, cotton crop's situation is not satisfactory and production will be very far behind the target. Attack of insects like Thrips, white fly, and pink bollworm has also been reported due to humid conditions in Sindh province.



The Cotton Crop Assessment Committee (CCAC) has revised downward cotton production target by around 33 percent, i.e. 10.2 million bales against the initial target of 15 million bales set for the current season 2019-20. The committee has explained that missing of sowing target by over 6 percent, incidence of insect & pests, high input prices and high temperature led the revision of the production target. Province wise assessment of cotton crop is presented in the table as below:

Table-1: FIRST ASSESSMENT OF COTTON CROP 2019-20 SEASON (Bales = 170 Kg)	
Province	Expected Production (million bales)
Punjab	6.200
Sindh	3.900
Baluchistan & Khyber PakhtunKhwa	0.100
<b>Pakistan</b>	<b>10.200</b>

Source: First Meeting of Cotton Crop Assessment Committee, held on 04.10.2019.

During the ongoing FY 2019-20 Cotton was cultivated on an area of 2.513 million hectares and could not meet the target of 2.895 million hectares. Reasons behind this decline in area of cultivation are preference of farmers to cultivate sugarcane in cotton growing areas, delay in harvesting of wheat and shortage of water for irrigation. Production in Sindh has been reported a drop of 30 percent in the expected cotton crop while in Punjab a drop of 15 percent is reported over last year's production.

**Table-2: TARGETS FOR AREA AND PRODUCTION OF COTTON CROP 2019-20**

S. No	Province	Area (Million Hectares)	Production (Million bales)
1.	Punjab	2.145	7.90
2.	Sindh	0.640	4.60
3.	Khyber Pakhtunkhwa	0.010	0.02
4.	Baluchistan	0.100	0.20
<b>Total of Pakistan</b>		<b>2.895</b>	<b>12.72</b>

Source: Provincial Agriculture Departments.

**Table-3: SOWING POSITION OF COTTON CROP IN PUNJAB AND SINDH (Million Hectares)**

Province	Target 2019-20	Area Sown		% Change Over	
		2019-20	2018-19	Target	Last Year
Punjab	2.145	1.860	1.888	86.7%	-1.5
Sindh	0.640	0.615	0.448	96.0%	+37.3
Khyber Pakhtunkhwa	0.010	0.00010	0.00016	1.0%	-37.5
Baluchistan	0.100	0.038	0.037	38.0%	+2.7
<b>Total</b>	<b>2.895</b>	<b>2.513</b>	<b>2.373</b>	<b>86.8%</b>	<b>+5.9</b>

Source: Provincial Agriculture Departments.

According to All Pakistan Textile Mills Association (APTMA) short fall of 33 percent in cotton production translates to a drop of 2 percent in GDP as well as the requirement of importing of around 5 million bales thereby increasing the import bill very substantially. The expected quality of cotton is also much worse than last year.

According to Pakistan Central Cotton Committee (PCCC) report, the cotton production has witnessed a decrease of 32 percent for the year 2019-20 which has caused a loss of more than 2 percent of the GDP to the economy for this year alone. The importance of the textile industry can be assessed from the fact that it is contributing \$13.3 billion in exports (60 percent of total exports), 8.5 percent in GDP and employs over 10 million people with many more dependents in 2018-19.

## 2. Wheat

Cultivation of wheat crop has been started in many parts of the country. Farmers of Barani areas have been advised by the Punjab Agriculture Department (PAD) to use only approved and recommended varieties for cultivation and to achieve maximum per acre yield.

According to Federal Committee on Agriculture (FCA) Govt. has fixed wheat production target at 27.03 million tons for 2019-20 on an area of 9.16 million hectares. Last year, wheat production was stood at 25.194 million tons. The Committee has also decided that the Punjab will produce 19.66 million tons, Sindh will produce 3.8 million tons, Khyber Pakhtunkhwa will produce 2.57 million tons and Balochistan will produce 01 million tons of wheat.



Currently about 7.07 million tons wheat is available in stock. Out of it, Punjab has 4.43 million tons, Sindh 0.8 million tons, Khyber Pakhtunkhwa 0.127 million tons, Pakistan Agricultural Storage and Services Corporation (PASSCO) 1.71 million ton while Balochistan did not procure.

### 3. Sugarcane

Sugarcane crop is at sucrose accumulation or near to maturity stage. Farmers are harvesting their crop in some areas of Punjab province. The crop growth situation is generally satisfactory mainly because of increase in irrigation water supply from last year and availability of other crop inputs. FCA has fixed the production target up to 64.77 million tons from an area of 1.06 m.hec. Higher sugar prices from last year may result in better economic returns for the upcoming season. This may work as a driving force for farming community to practice effective crop husbandry measures for high net returns. Comparison of sugar prices of September 2019 and 2018 are given below:

Market	2019	2018	Difference	
	Price (Rs. per 100 kg)			% change
Lahore	7236.4	4750.0	2486.4	52.3
Rawalpindi	7322.3	5269.3	2053.0	39.0
Faisalabad	7100.0	5311.1	1788.9	33.7
Multan	7113.8	5118.9	1994.9	39.0
Gujranwala	7147.6	5197.7	1949.9	37.5
Sargodha	7330.0	5205.0	2125.0	40.8

Source: www.amis.pk

### 4. Rice

Currently, harvesting of rice has almost been completed and the crop is at marketing stage in the country. Crop condition was generally satisfactory and no severe hazards were reported to effect rice crop productivity. Farmers are advised to store harvested crop at 10-13% moisture level in the grains. Rice crop was estimated at 7.7 million tons from an area of 3.04 m.hec by FCA. Production in 2019-20 has showed an increase of 6.93 percent over the last year production at 7.2 million tons.

## 5. Maize

Harvesting and marketing of the crop is in progress in most areas of KP. While, the autumn crop is growing well in Punjab and farmers are being advised to supply all necessary inputs along with irrigation water, otherwise the quality as well size of the grain would not be developed properly. The Maize production for 2018-19 was estimated at 6.93 million tons against the target of 1.386 million tons which depicts increase of 400 pc.

## 6. Minor Crops

- According to Punjab Agriculture Department (PAD), Gram and Lentil are at sowing stage. The FCA has fixed production target of Gram and lentil at 225.5 thousand tons and 8.7 thousand tons respectively. Farmers are advised to use recommended cultivars to avoid attack of disease and insects.
- Harvesting of Kharif crops like Mung bean, Peanut and Soybean is almost finished.
- Oilseed crops like Brassica and Canola are also in sowing stage.
- Cultivation of pearl millet, sorghum has been completed in Sindh for fodder purpose.
- Maize and cowpea both two crops are growing normally. Condition and yield of orchards and summer vegetables are also reported satisfactory

## 7. Fruits & Vegetables

- Tomato, potato, peas, bitter gourd, cucumber and onion are in sowing stage in Punjab and Sindh.
- Harvesting of Brinjal, Tori and Chili are in process in Sindh.
- Banana and Papaya crop conditions are in good and crop is in harvesting stage in Sindh.

## COUNTRY WISE AREA & PRODUCTION OF CROPS DURING FY 2018-19

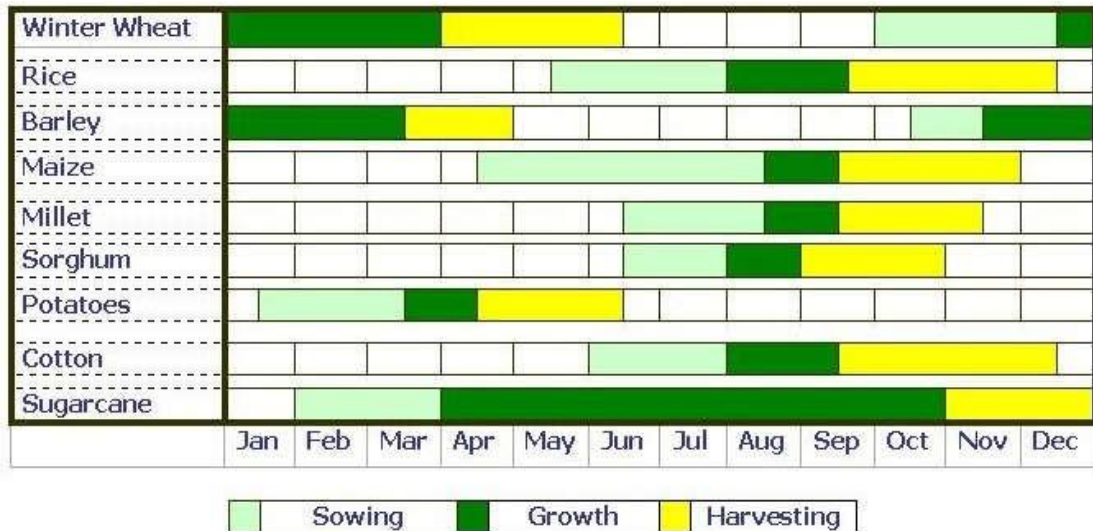
Crop	Area in 000 hectare	Production "000 tons
Wheat	8,740	25,195
Maize	1,318	6,309
Rice Basmati	2,810	7,202
Rice Irri	645	1,781
Sugarcane	1,102	67,174
Chickpea	377	857
Mash bean	14	6.9
Masoor bean	12	6.4
Mung Bean	163	118
Onion	151	2,123
Potato	196	4,579
Tomato	63	588
Red Chilli	65	149

## MARKETING OF CROPS

Crop	Marketing
<b>Onion</b>	It is grown in all four provinces and remained available in market whole year. Nowadays, onion is being supplied from Balochistan Province to other parts of the country.
<b>Potato</b>	It is also grown in all provinces and is being supplied from Balochistan and KP province
<b>Tomato</b>	It is also grown in all provinces and is being supplied from Balochistan and KP Province.
<b>Red Chilli</b>	It is mostly grown in Southern Punjab and Sindh. Nowadays, chilli is being supplied in Markets from Sindh province.

Source: Agriculture Marketing Round up Gov. of Punjab, Pakistan

## CROP CALENDAR PAKISTAN





## Crop Calendar Punjab

GENERAL CROPS	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Wheat	Yellow	Yellow	Yellow									Yellow
Cotton				Green	Green	Green	Green	Green	Green			
Rice					Yellow	Yellow	Yellow	Yellow	Yellow			
Sugarcane		Grey	Grey	Grey	Grey				Grey	Grey		
Tobacco	Brown	Brown	Brown									Brown
Corn				Orange			Orange	Orange	Orange			
Gram	Dark Blue	Dark Blue	Dark Blue									
Sunflower	Grey	Grey	Grey									
Sorghum		Blue	Blue	Blue	Blue							
Rape seed		Pink	Pink								Pink	Pink
<b>VEGETABLES</b>												
Potato		Light Orange	Light Orange						Light Orange	Light Orange	Light Orange	Light Orange
Tomato		Pink	Pink	Pink								
Cabbage									Light Grey	Light Grey	Light Grey	Light Grey
Cauliflower	Light Green						Light Green	Light Green	Light Green	Light Green	Light Green	Light Green
Carrot										Light Orange	Light Orange	
Peas	Light Blue									Light Blue	Light Blue	Light Blue
Onion		Dark Green	Dark Green	Dark Green								
Melon		Purple	Purple	Purple								
Cucumber	Light Blue	Light Blue	Light Blue									
Water-melon		Dark Blue	Dark Blue	Dark Blue	Dark Blue							
Squash		Grey	Grey	Grey								
Bitter Gold		Purple	Purple	Purple								
Chillies		Dark Purple	Dark Purple	Dark Purple	Dark Purple							
Brinjal		Light Green	Light Green	Light Green	Light Green	Light Green			Light Green	Light Green	Light Green	Light Green
Lady's finger		Red	Red	Red								
<b>ORCHARDS</b>												
Mango		Yellow	Yellow	Yellow				Yellow	Yellow			
Citrus		Green	Green	Green				Green	Green	Green		
Apple												
Grapes												
Strawberry	Dark Brown	Dark Brown	Dark Brown									Dark Brown
Peaches												
Banana												
Pomegranate							Grey	Grey	Grey			
Guava										Dark Blue	Dark Blue	Dark Blue

## Crop Calendar Sindh

GENERAL CROPS	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Wheat												
Cotton												
Rice												
Sugarcane												
Tobacco												
Corn												
Gram												
Sunflower												
Sorghum												
Rape seed												
<b>VEGETABLES</b>												
Potato												
Tomato												
Cabbage												
Cauliflower												
Carrot												
Peas												
Onion												
Melon												
Cucumber												
Water-melon												
Squash												
Bitter Gold												
Chillies												
Brinjal												
Ladies finger												
<b>ORCHARDS</b>												
Mango												
Citrus												
Banana												
Pomegranate												
Guawa												

## Crop Calendar Khyber Pakhtunkhwa

GENERAL CROPS	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Wheat	Yellow											Yellow
Cotton					Green	Green	Green	Green	Green			
Rice					Yellow	Yellow	Yellow	Yellow	Yellow			
Sugarcane			Purple	Purple	Purple	Purple			Purple	Purple		
Tobacco			Brown	Brown	Brown							
Corn			Light Blue	Light Blue	Light Blue	Light Blue						
Gram	Dark Blue	Dark Blue	Dark Blue									
Sunflower			Olive	Olive	Olive	Olive	Olive	Olive				
Mong					Olive	Olive	Olive	Olive				
Sorghum			Blue	Blue	Blue							
Rape seed	Pink	Pink										
<b>VEGETABLES</b>												
Potato				Pink	Pink	Pink	Pink	Pink	Pink	Pink		
Tomato					Red	Red	Red	Red	Red		Red	Red
Cabbage				Light Green	Light Green	Light Green	Light Green	Light Green				
Cauliflower												
Carrot												
Peas		Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Onion		Olive	Olive	Olive	Olive	Olive	Olive	Olive		Olive	Olive	Olive
Melon		Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple
Cucumber		Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Water-melon		Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Squash		Olive	Olive	Olive	Olive	Olive	Olive	Olive	Olive	Olive	Olive	Olive
Bitter Gold		Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple
Chillies			Dark Purple	Dark Purple	Dark Purple	Dark Purple	Dark Purple	Dark Purple	Dark Purple	Dark Purple	Dark Purple	Dark Purple
Brinjal			Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green
Ladies finger		Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red
<b>ORCHARDS</b>												
Mango												
Citrus												
Apple		Brown	Brown	Brown	Brown	Brown	Brown	Brown	Brown	Brown	Brown	Brown
Grapes			Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Strawberry												
Peaches			Light Purple	Light Purple	Light Purple	Light Purple	Light Purple	Light Purple	Light Purple	Light Purple	Light Purple	Light Purple
Banana												
Pomegranate			Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Guawa												

## Crop Calendar Balochistan

GENERAL CROPS	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Wheat												
Cotton												
Rice												
Sugarcane												
Tobacco												
Corn												
Gram												
Sunflower												
Sorghum												
Rape seed												
RAPE SEED												
VEGETABLES												
Potato												
Tomato												
Cabbage												
Cauliflower												
Carrot												
Peas												
Onion												
Melon												
Cucumber												
Water-melon												
Squash												
Bitter Gold												
Chillies												
Brinjal												
Ladies finger												
ORCHARDS												
Mango												
Citrus												
Apple												
Grapes												
Strawberry												
Peaches												
Banana												
Pomegranate												
Guawa												

## AVERAGE PRICES OF AGRI. COMMODITIES

Price in PKR

Sr. No	Description	Unit	September 2019	October 2019
1.	Wheat flour	20 kg	872	894
2.	Rice Basmati Broken	1 kg	81.63	81
3.	Mutton	1kg	870	882
4.	Rice Irri-6 (Punjab/Sindh)	1 kg	60.54	60.80
5.	Chicken Farm	1 kg	202	172
6.	Milk, Fresh non boiled	1 liter	93.49	94
7.	Egg Hen, Farm	Dozen	97.85	114
8.	Mustard Oil	1 kg	201.14	202
9.	Vegetable Ghee Loose	1 kg	183.42	183
10.	Bananas	Dozen	66.92	60
11.	Pulse Masoor washed	1 kg	126.40	129
12.	Pulse Moong washed	1 kg	170.45	176
13.	Pulse Mash Washed	1 kg	181.78	185
14.	Pulse Gram washed	1 kg	132.11	144
15.	Potatoes	1 kg	41.20	44
16.	Onions	1 kg	72.02	76
17.	Tomatoes	1 kg	50.92	86
18.	Sugar Refined	1 kg	75.02	81
19.	Gur Average Quality	1 kg	113.67	113
20.	Salt Powder	1 kg	12.50	13
21.	Garlic	1 kg	258.09	265

## WEATHER SITUATION

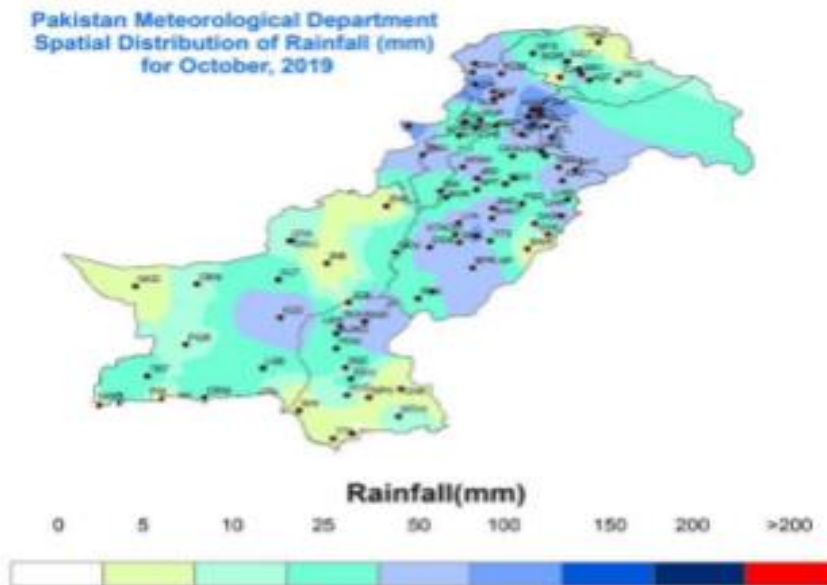
### Past Weather Situation

According to National Agromet Center (NAMC), Pakistan Metrological Department (PMD) Punjab, Khyber Pakhtunkhwa and Gilgit-Baltistan, Azad Jammu & Kashmir light rainfall received light to moderate rainfall, while light rainfall was reported in Balochistan. As per statistics shown in table

below highest amount of rainfall was recorded at Dir (105.0 mm) followed by Muzaffarabad (75 mm) and Chakhoti (16.20 mm) in the last month of the year.

Dry weather conditions were also reported in Sindh and Balochistan province. During the past month Shaheed Benazirabad has been reported as hottest month where temperature reached up to 40.5 °C followed by Lasbela where temperature reached up to 39.5 °C.

Table:1					
Sr. No.	Station	Rainfall (mm)	Sr. No.	Station	Rainfall (mm)
1	Dir	105.0	11	Garhi Dupatta	57.3
2	Tandali	81.5	12	Kotli	57.0
3	Muzaffarabad City	75.0	13	Murree	56.8
4	Pattan	69.0	14	Bandi Abbaspur	55.1
5	Chakothe	67.3	15	Malam Jabba	52.0
6	Bahawalpur City	66.2	16	Rohri	52.0
7	Parachinar	63.5	17	Sialkot (AP)	51.4
8	Sialkot Cantt	60.2	18	Besham	50.6
9	Fort Munro	58.6	19	Haraman	50.4
10	Kakul	57.7	20	Mirkhani	50.0



**Figure 1: Rainfall distribution for the month of October-2019**

## SMOG Situation

Moderate Smog conditions have been reported in some areas of Punjab especially Punjab's provincial capital Lahore. According to experts, lowering temperature and high amount of humidity are major factors that are helping pollutants to suspend in air. It has also been observed that farmers from Indian Punjab also burnt their rice crop residue.

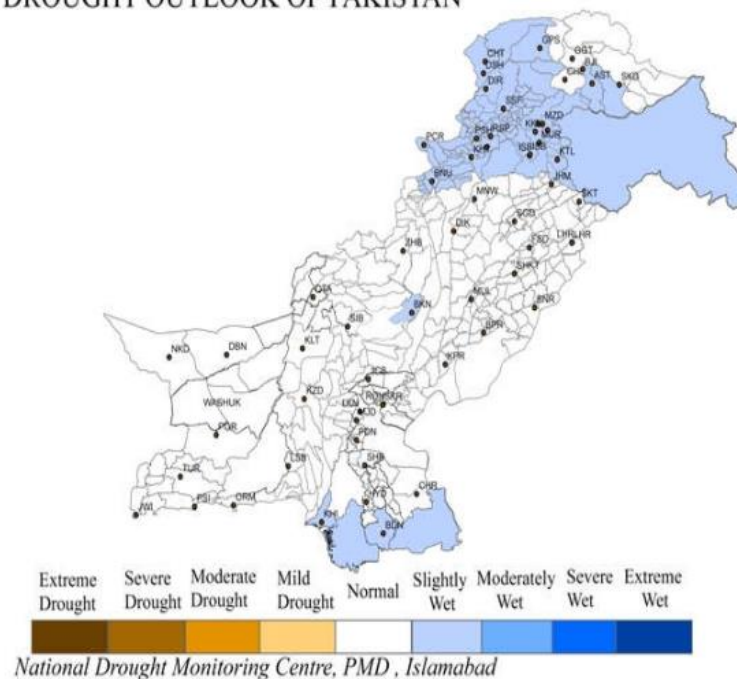
## Weather outlook for November 2019

According to Pakistan Metrological Department normal to slightly above normal precipitation over central and extreme northern parts of the country is expected in ongoing month. Third and early days of fourth weeks are predicted to be wetter as compared to rest of the days of the month. One to two spells of light to moderate rainfall are expected during the month. Westerly wind system will approach northern parts of the country and may cause snowfall over mountains. For Gilgit Baltistan and Kashmir, slightly above normal rainfall is predicted for November, 2019. In Khyber Pakhtunkhwa, normal precipitation is projected over upper parts and slightly above normal over southern chunk of the province. There are chances of normal precipitation over Punjab, Balochistan and Sindh provinces.

## Drought Situation

The month of October was fairly good for drought prone areas of Sindh and Balochistan as wet conditions were prevailed over some places of lower Sindh and northern parts of the country. During the month of October, the rains in the agricultural plains of Khyber Pakhtunkhwa and Punjab also gave relief to the crops.

### DROUGHT OUTLOOK OF PAKISTAN



## Out look

All stakeholders are requested to make all efforts to watch water availability situation across rain-fed areas of Sindh and Balochistan especially in previously drought affected areas.

### Advice for Farmers:

- Farmers of wheat growing areas are advised to sow their crops in time to get the optimum yield. The best suitable time for wheat cultivation is 1<sup>st</sup> November to 20<sup>th</sup> November.
- Wheat cultivation is in progress in most of the rain-fed areas. Farmers of rain-fed areas are advised to sow their crops before 15<sup>th</sup> November to get maximum yield. After this time the yield of wheat crop may decrease gradually.
- Farmers of irrigated areas are advised to harvest Kharif crops, including cotton well in time so that timely sowing of Rabi crops, especially wheat may be possible without any delay.

## WATER SITUATION

In cusec

Rim Stations*	Mean Inflow	Mean Outflow
Indus at Tarbela	27,700	55,000
Kabul Inflow at Nowshera	9,000	0
Jhelum at Mangla	14,288	40,000
Chenab at Mrala	10,840	5,000
Total	61,828	114,840

\* Estimates as on November 05, 2019

Barrages*	Inflow	Outflow
Chashma	56,281	54,000
Taunsa	46,203	46,003
Panjnad	8,880	4,680
Guddu	46,465	38,880
Sukkur	35,170	10,490
Kotri	10,293	1,968
Kalabagh	72,498	66,498

\*Estimates as on November 05, 2019

**Source:** *Water Development and Power Development Authority (WAPDA)*



## FERTILIZER OFF-TAKE SITUATION

Sr. No.	Fertilizer	Unit	Rate in PKR
1.	Sona Urea	50kg	2,014.00
2.	Other Urea	50kg	2,003.33
3.	Calcium Ammonium Nitrate	50kg	1,802.00
4.	S. Super Phosphate, Gr. 18%	50kg	1,090.67
5.	Sulphate of Potash	50kg	4,381.67
6.	Nitro. Phosphate	50kg	2,811.33
7.	Di. Ammonium Phosphate	50kg	3707.33
8.	NPK	50kg	3028.33

- National Fertilizer Development Center (NFDC) released fertilizer data for September 2019 wherein total fertilizer off-takes clocked-in at 683k tons, down 8% YoY/18% MoM.
- With regards to production activity during the month, total industry production rose 15%YoY to 726k tons during September 2019 as compared to 631k tons recorded during corresponding month of last year.
- Industry urea sales arrived at 405k tons (-16%YoY) during September 2019 as compared to 482k tons recorded during the same month of last year. Similarly on a MoM basis, volumes were significantly below August 2019 sales (-35% MoM).
- Decline in urea off-takes is primarily attributed to higher urea pricing after withdrawal of Gas Infrastructure Development Cess (GIDC) ordinance by the government, leading to manufacturers increasing urea prices by PKR200/bag, thereby adversely affecting urea volumes during the month.
- With regards to company-wise performance, major fertilizer producers witnessed a decline during September 2019 with Fauji Fertilizer FFC's urea volume clocking-in at 175k tons (-22%YoY/-25%MoM) whereas Engro Fertilizer EFERT's off-takes were also down 44%YoY/50%MoM to 94k tons.
- Moreover, Fauji Fertilizer Bin Qasim FFBL's off-takes arrived at 37k tons during the month (-49%YoY/-16%MoM). However, Fatima Fertilizer FATIMA recorded notable growth of 138% YoY with total urea off-takes arriving at 34k tons whereas on a MoM basis its off-takes fell 66%.
- Consequently, market share of FFC, EFERT, FFBL and FATIMA arrived at 43%, 23%, 9% & 8% respectively.

## TRADE SITUATION

### Exports

- According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during September, 2019 amounted to Rs. 276,276 million (provisional) as against Rs. 294,329 million (provisional) in August, 2019 and Rs. 213,771 million during September, 2018 showing a decrease of 6.13% over August, 2019 but an increase of 29.24% over September, 2018.
- Exports during July - September, 2019 totaled Rs. 871,007 million (provisional) as against Rs. 666,663 million during the corresponding period of last year showing an increase of 30.65%.
- Main commodities of exports during September, 2019 were Knitwear (Rs. 37,180 million), Bed wear (Rs. 31,324 million), Readymade garments (Rs. 31,216 million), Cotton cloth (Rs. 27,278 million), Cotton yarn (Rs. 13,669 million), Rice others (Rs. 12,233 million), Rice Basmati (Rs. 9,280 million), Towels (Rs. 8,600 million), Made-up articles (excl. towels & bed wear) (Rs. 7,439 million) and Fish & fish preparations (Rs. 6,740 million).

### Imports

- Imports into Pakistan during September, 2019 amounted to Rs. 591,111 million (provisional) as against Rs. 589,960 million (provisional) in August, 2019 and Rs. 545,496 million during September, 2018 showing an increase of 0.20% over August, 2019 and by 8.36% over September, 2018.
- Imports during July - September, 2019 totaled Rs. 1,773,822 million (provisional) as against Rs. 1,757,449 million during the corresponding period of last year showing an increase of 0.93%.
- Main commodities of imports during September, 2019 were Petroleum products (Rs. 65,984 million), Natural gas, liquefied (Rs.56,967 million), Petroleum crude (Rs.53,643 million), Plastic materials (Rs. 22,920 million), Palm oil (Rs. 21,968 million), Iron and steel scrap (Rs. 20,542 million), Iron and steel (Rs. 16,899 million), Electrical machinery and apparatus (Rs. 16,594 million), Mobile phone (Rs. 16,487 million) and Aircrafts, ships & boats (Rs. 14,638 million).

(Rupees in Million) (U.S. Dollars in Million)

Series	* September, 2019		* August, 2019		% Change in September, 2019 over August, 2019	
	Rs.	\$ (1 \$=Rs.156.17)	Rs.	\$ (1 =Rs.158.07)	Rs.	\$
Exports	276,276	1,769	294,329	1,862	-6.13	-4.99
Imports	591,111	3,785	589,960	3,732	0.20	1.42
Balance of Trade	-314,835	-2,016	-295,631	-1,870	6.50	7.81

Series	* September, 2019		September, 2018		% Change in September, 2019 over September, 2018	
	Rs.	\$ (1 \$=Rs.156.1)	Rs.	\$ (1 \$=Rs.124.08)	Rs.	\$
Exports	276,276	1,769	213,771	1,723	29.24	2.67
Imports	591,111	3,785	545,496	4,396	8.36	-13.90
Balance of Trade	-314,835	-2,016	-331,725	-2,673	-5.09	-24.58

Series	* July - September, 2019		July - September, 2018		% Change in July - September, 2019 over July - September, 2018	
	Rs	\$	Rs.	\$	Rs.	\$
Exports	871,007	5,522	666,663	5,374	30.65	2.75
Imports	1,773,822	11,249	1,757,449	14,165	0.93	-20.59
Balance of Trade	-902,815	-5,727	-1,090,786	-8,791	-17.23	-34.85

## NEWS TRENDS

### The Free Trade Agreement (FTA) between Pakistan and China has dented India's cotton yarn exports

According to an official Report, Indian Cotton Yarn Exports have been declined by a massive 38.8 percent during the period of six months from April to September 2019. Major factor of this decline is Free Trade Agreement (FTA) between Pakistan and China that was signed in April on goods worth \$64 billion that mostly pertained to textile products including cotton yarn. During the period of April to September, 2019 Pakistan's Cotton Yarn Exports have been recorded at 422 kgs valued at \$ 1.27 billion compared to 654 million kgs valued at \$2.08 billion recorded in the same period last year. Under the new FTA, China would open up 90 percent of its market for Pakistani goods whereas Pakistan would share 65pc of its market with Chinese exports.

### National Programme for Enhancing Profitability' to Increase Wheat Productivity

A project "National Program for Enhancing Profitability" to increase productivity of wheat across the country has been launched by the Federal Government. Under this initiative, use of common cultivars would be replaced with use certified seed having rust resistance against wheat varieties. In this regard, Department of Agriculture has formulated a five-year action plan under Agriculture Emergency to cope with future food challenges of the country. The share of Punjab government will be Rs 9,445,912 million while other three provinces would contribute Rs 12.535 million in the project. The seed replacement will be carried out through the provision of certified seed to the farmers on subsidized rates of 50 percent having land up to 12.5 acres up to maximum 5 acres of land and the subsidy would be provided to the farmers on first come basis.

## **Prime Minister to Inaugurate Mega Agriculture Sector Schemes Soon: KP Minister**

Provincial Minister for Agriculture and Livestock KP, Mohibullah Khan has told that Prime Minister Imran Khan would soon inaugurate mega projects in agriculture and livestock sectors and a sum of Rs. 85 billion would be spent to uplift the sector in next four years. He expressed these views while presiding over a review meeting on the implementation of Agriculture Emergency Programme initiated under Public Sector Development Programme (PSDP) and Annual Development Programme (ADP). According to him, Government Agriculture University Swat and Agriculture Training Institute (ATT) in Swat are being implemented in the Province. In addition, projects related to Livestock will be initiated soon in near future.

## **Balochistan Govt to Initiate Modernization of Agriculture**

The Balochistan government has initiated radical steps to modernize dilapidated agriculture sector of the province and to introduce latest equipment and techniques to cope with the drought areas of the province. The province has huge potential in the agro sector but water scarcity and prolonged drought had badly destroyed the agriculture of the province. The spokesperson of the Government said that agriculture is the backbone of the country's economy and it provides almost 39.5% employment opportunities to the country's workforce.

He told that the incumbent provincial government under the leadership of Chief Minister Jam Kamal Khan has been working to increase agricultural output by devising out of the box and effective solutions.

Under this initiative, in the first phase, proper training on latest parameters would be imparted to Agriculture Department officers at divisional headquarters. In the second phase, these trained officers would train and support the farmers to shift their agriculture practices on modern methods of farming. "Water shortage is the most serious problem in Balochistan as the province is not getting its due share of water," he said adding that the government would resolve the issue soon to ensure provision of water to the sector. Increasing agriculture production and controlling water shortage would bring prosperity in the province and a new era of development will start in the province. In order to improve underground water level, the government is working to construct more dams in the province and that will help to meet the water shortage.

### **Sources:**

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## زرعی سفارشات برائے کسان سموگ

زراعت میں سموگ کے اثرات 2 سے 3 ماہ نومبر کے شروع سے لے کر جنوری کے آغاز تک ظاہر ہوتے ہیں۔ خاص طور پر ماہ نومبر میں نومبر میں تو یہ انتہائی سطح پر پہنچ جاتے ہیں۔ اس سے ربیع فصلوں کی بیجائی اور خریف فصلوں کی برداشت میں بھی مشکلات کا سامنا کرنا پڑتا ہے۔

لہذا کسانوں کو چاہیے کہ وہ مندرجہ ذیل سفارشات پر عمل پیرا ہوں:

☆ سموگ کی زیادتی کی صورت میں پودوں اور فصلات کی کٹائی وقتی طور پر روک دیں۔

☆ فصلوں اور خاص طور پر باغات پر پانی کا پیرے کریں۔

☆ کھادوں کا متناسب اور متوازن استعمال کریں۔ کمیائی کھادوں کی بجائے نامیاتی کھادوں کا استعمال کیا جائے۔

### گندم

گندم کی اچھی پیداوار حاصل کرنے کے لیے گندم کی کاشت کا موزوں ترین وقت 10 نومبر تا 30 نومبر ہے۔ کیونکہ اسکے بعد کاشت کی گئی گندم کی پیداوار میں بتدریج کمی آنا شروع ہو جاتی ہے۔

30 نومبر تک بوائی کے لیے شرح بیج 40 تا 50 کلوگرام فی ایکڑ رکھیں، جبکہ یکم نومبر تا 15 دسمبر تک بوائی کے شرح بیج 50 تا 55 کلوگرام فی ایکڑ رکھیں۔

بیج کو بوائی سے پہلے زرعی ماہرین کے مشورہ سے تھائیوفینٹ میتھائل بحساب 2 تا 2.5 کلوگرام بیج یا امیڈا کلوپرڈ + ٹیوکونازول بحساب 4 ملی لٹرن فی کلوگرام بیج لگا کر کاشت کریں تاکہ کانگیاری، کرنال، بنٹ، گندم کی بلاسٹ وغیرہ بیماریوں سے بچا جاسکے۔

صرف منظور شدہ اقسام ہی کاشت کریں۔ بارانی علاقوں کے لیے چکوال 50، این اے ارسی 2009، پاکستان 2013، دھرابی 2011، بارانی 2017، جنگ 2016 اور احسان 2016 کو 15 نومبر تک کاشت کریں۔

آپاش علاقوں میں لاٹانی 2008، فیصل آباد 2008، آس 2011، ملت 2011، آری 2011، اجالا 2016، گلکسی 2013، بورلاگ 2016، جوہر 2016، گولڈ 2016، فخر بھکر اور این این گندم-1 کاشت کریں۔

### مسور اور چنا

مسور کی کاشت 10 نومبر تک جلد از جلد مکمل کر لیں۔ شرح بیج 10 تا 12 کلوگرام فی ایکڑ رکھیں۔

منظور شدہ اقسام نیاب مسور 2002، نیاب مسور 2006، پنجاب مسور 2009، مسور 93، چکوال مسور اور مرکز 2009 کا بیج کاشت کریں۔

بوائی کے وقت ایک بوری ڈی اے پی + 1/2 بوری ایس او پی یا ایک بوری ٹریپل سپرفاسفیٹ + 1/2 بوری یوریا + ایک بوری ایس او پی آڑھائی بوری ایس ایس پی (18%) + آدھی بوری یوریا + آدھی بوری ایس او پی فی ایکڑ کاشت کریں۔

آپاش علاقوں میں چنے کی کاشت 15 نومبر تک جاری رکھیں۔ صحت مند اور خالص بیج اچھی فصل کی بنیاد ہے۔ اس لیے محکمہ زراعت کی منظور شدہ اقسام کاشت کریں۔ شرح بیج 30 کلوگرام فی ایکڑ رکھیں۔

### دھان

دھان کی اچھی پیداوار کے لیے مناسب وقت (جب دانوں میں 20 سے 22 فیصد نمی رہ جائے) پر کٹائی اور پھڈائی بہت ضروری ہے۔ کٹائی کے بعد فصل کو جلد از جلد منڈی پہنچائیں۔ اگر سنور کرنا ہو تو اچھی طرح دھوپ میں 12 تا 13 فیصد نمی پر سنور کریں۔

### روغن دار اجناس

کینولا کی بوائی جلد از جلد مکمل کر لیں، کاشت تروت میں کریں اور بیج 2 انچ سے زیادہ گہرائی پر کاشت نہ کریں۔ کینولا کی کاشت کے لیے شرح بیج 2 تا 2.5 کلوگرام فی ایکڑ رکھیں۔ اسی کا بیج آپاش علاقوں میں 6 کلوگرام اور بارانی علاقوں میں 8 کلوگرام فی ایکڑ رکھیں۔

### چارہ جات

برسیم کی کاشت جاری رکھیں۔ شرح بیج 8 کلوگرام فی ایکڑ رکھیں۔ شام کے وقت کاشت کرنے سے برسیم کی فصل کا اگاؤ اچھا ہوتا ہے۔ ڈیڑھ بوری ڈی اے پی یا 4 بوری ایس ایس پی (18%) + آدھی بوری یوریا کاشت کے وقت ڈالیں۔ لوسرن کی کاشت شروع کریں۔ اس وقت کاشت 15 اکتوبر تا 15 نومبر ہے۔ چھٹہ کی صورت میں شرح بیج 6-8 کلوگرام فی ایکڑ رکھیں اور بذریعہ ڈرل یا کیر کاشت کے لیے شرح بیج 4-6 کلوگرام فی ایکڑ رکھیں۔ جئی کی کاشت کے لیے شرح بیج 32 کلوگرام فی ایکڑ رکھیں اور ایس 2000، پی ڈی 2 ایل وی 65، این اے ارسی جئی اور سرگودھا جئی 2011 اچھی پیداوار دینے والی اقسام ہیں۔

### سبزیات و باغات

پیاز کی زمری کی کاشت کا وقت آخر نومبر تک ہے۔ اور کھیت میں پیڑی کی منتقلی دسمبر، جنوری تک ہوتی ہے۔ پیاز کا تین کلوگرام فی ایکڑ بیج استعمال کریں۔

اس وقت ٹنل میں کریلہ، کھیرا، اور ٹماٹر کی کاشت کا وقت 15 نومبر تک کی جاسکتی ہے۔

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

2) Fauji Fertilizer Company Limited (Farmers' Advisory Services)

پلاننگ اینڈ ریسرچ ڈیپارٹمنٹ

ہیڈ آفس، زرعی ترقیاتی بینک لمیٹڈ

اسلام آباد