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# AGRICULTURE OUTLOOK



PLANNING & RESEARCH DEPARTMENT  
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## EXECUTIVE SUMMARY

Picking/harvesting/crushing of cotton, rice, potato, sugarcane and sowing of wheat/ seasonal vegetables were the major field operations in most of the agricultural areas of the country during the month. Farmers have mostly completed sowing of Rabi crops in irrigated areas. Weeds removing operation is in progress in early grown wheat crops in areas of Sindh and Punjab.

Main commodities of exports during October, 2019 were Knitwear (Rs. 42,833 million), Readymade garments (Rs. 37,319 million), Bed wear (Rs. 33,857 million), Cotton cloth (Rs. 27,976 million), Rice others (Rs. 15,752 million), Cotton yarn (Rs. 14,078 million), Towels (Rs. 11,147 million), Rice Basmati (Rs. 9,692 million), Made-up articles (excl. towels & bed wear) (Rs. 9,396 million) and Fish & fish preparations (Rs. 7,814 million). Main commodities of imports during October, 2019 were Petroleum products (Rs. 61,605 million), Petroleum crude (Rs.56,624 million), Natural gas, liquified (Rs.35,223 million), Fertilizer manufactured (Rs.30,014 million), Power generating machinery (Rs.27,219 million), Electrical machinery and apparatus (Rs. 25,439 million), Plastic materials (Rs. 24,109 million), Palm oil (Rs. 22,481 million), Iron and steel scrap (Rs. 22,149 million), Iron and steel (Rs. 21,997 million).

Above normal precipitation is expected in western and northern parts of Pakistan, whereas southern parts will have below normal rainfall. Below normal temperature is predicted in the northern parts of the country, while above normal temperature is expected over southwestern parts of Pakistan. A cold wave may approach during the third and fourth week which may cause significant drop in daily night temperatures in most parts of the country.

On average, 15% water shortage against average system usage is anticipated during the current Rabi season. Fertilizer off-take during Rabi 2019-20 is given below in the table. Urea consumption is estimated around 2,956 thousand tonnes against 3,033 thousand tonnes in previous season showing a decrease of about 2.6 percent over Rabi 2018-19. DAP off take is expected to increase by 16.4 percent over Rabi 2019-20.



The State Bank of Pakistan (SBP) has approved the provincial indicative annual disbursement target of Rs. 1,350 billion for FY 2019-20 which is 15% higher from the last year's disbursement of Rs. 1,174 billion. Out of the total target, Rs. 705 billion have been allocated to five major commercial banks, Rs. 113 billion to specialized banks, Rs. 253.6 billion to 14 domestic private banks and Rs. 55 billion to five Islamic banks. For catering the needs of small farmers, Rs. 184 billion to 11 microfinance banks and Rs. 39 billion to 12 MFIs/RSPs for current fiscal year 2019-20.

During first four months of FY 2019-20 i.e. July-Oct 2019, the agri lending institutions have disbursed agri. loans of Rs. 347 billion which is 25.7 percent of the annual target of Rs. 1,350 billion. The outstanding portfolio of agri loan has increased by Rs. 77 billion i.e. from Rs. 486 billion to Rs. 563 billion as at end October 2019 compared with corresponding date last year.

It may be mentioned that in last fiscal year (FY 2018-19), banks disbursed Rs. 1,174 billion which was 21% higher than the disbursement of Rs. 972.6 billion of FY 2017-18. During Jan- Nov 2019, ZTBL has disbursed Rs. 72879.636 million.

## **CURRENT CROP SITUATION**

Picking/harvesting/crushing of cotton, rice, potato, sugarcane and sowing of wheat/ seasonal vegetables were the major field operations in most of the agricultural areas of the country during the month. Farmers have mostly completed sowing of Rabi crops in irrigated areas. Weed removing operation is in progress in early grown wheat crops in areas of Sindh and Punjab.

### **1. Wheat Crop**

In Punjab, the sowing of wheat crop in rainfed as well as in irrigated areas has been almost completed. Germination and early growth of sown crop is reported satisfactory, however further rains are required for its proper growth both in irrigated and rainfed areas. Tillage practices are ongoing in lower part of Sindh province. Cultivation of wheat crop in the province has almost completed, while sowing of wheat crop after sugarcane harvesting is still in progress and will continue during the month of December in plain areas of KP. Wheat crop is in germination/early growing stage in Balochistan.

The government has increased the support price of wheat to Rs.1,365 per 40 kilograms from Rs.1,300. The rise is significant as it came after a gap of five years. The government factored in the global wheat situation, import-export parity, cost of production and domestic producer prices while increasing the wheat price. A farmer who produces 32.5 maunds (1 maund = around 37kg) per acre, which is the average yield for the last five years, would be investing a little over Rs. 35,512 and selling the produce for Rs. 44,362, thus making a profit of Rs. 8,850 per acre.

Wheat seed availability for sowing Rabi 2019-20 is 415322.66 mt which will fulfill 38.07% of the total seed requirement i.e 1090925 mt. Wheat seed availability in Punjab is 369249.17 mt (45.89%),



Sindh 29780.06 mt (20.97%), Khyber Pakhtunkhwa 6101.43 mt (6.435) and Balochsitan is 10192 mt (20.63%).

## 2. Cotton

In Punjab and Sindh, picking/harvesting of cotton crop has been almost completed and good yield is expected this year in Punjab.

Target for the area under cotton for the year 2019-20 as fixed by FCA was 2895 thousand hectares and production target was 13,440 thousand bales. The target of crop area and production could not be achieved.

### Targets and estimated Achievement of Area, Production and Yield of Cotton: 2019-20

Province	Area under Production (000 hectares)			Production(000 bales)		
	Target	Achievement*	Deviation (%)	Target	Achievement*	Deviation (%)
<b>Pakistan</b>	2895	2697.015	-6.838	13440.2	12720	-24.108
<b>Punjab</b>	2145	2044	-4.7086	8640	6200	-28.240
<b>Sindh</b>	640	615	-3.9062	4600	3900	-15.217
<b>KP</b>	10	0.1	-99	200	100	-50
<b>Balochsitan</b>	100	37.915	-62.085			

*\*Provisional, 1 bale=170 kg approx.*

*Source: FCA*

This year cotton target could not be achieved due to competitiveness of other crops like sugarcane, maize and rice. The Government facilitated PB Ropes for the management of Pink Ball Worm but the weather conditions provided conducive environment for Pink Ball Worm in some areas where farmers were unable to use PB Ropes insecticides because of high cost.

In the month of July and August 2019, international cotton prices dropped down and affected local prices. Lower cotton prices resulted in reduced investments on management of cotton like pesticide and fertilizers.

In a recent meeting on crop assessment, Sindh reported a drop of 30% in the expected cotton crop while Punjab reported a drop of 15% over last year's production. The cotton crop has witnessed a decrease of 29 percent in its yield since FY12. The principal reason of low yield this year is the low number of plants per acre (need to increase 50 percent more plants per acre).

Other reasons behind reduction in cotton output include unavailability of quality seed, pest resistant seed, outdated technology, water shortage, low profitability and lack of awareness of farmers regarding cotton production as well as competing crops and government policies or the lack thereof.

The average farm gate price of "Phutti" this season has been Rs. 3600 per 40 kg and ginning cost is approximately Rs. 700 per bale plus 7% wastage. Whereas the sale price of cotton is almost Rs. 9200



per 40 kg. This huge difference in marketing and risk margin is kept by ginners and market profiteers and resultantly farmers suffer huge losses.

### 3. Sugarcane

In Punjab, Harvesting/crushing of sugarcane crop is in full swing and good yield is expected. Harvesting of sugarcane is in progress in KP.

Target for the area under sugarcane for the year 2019-20 fixed by FCA was 1.178 million hectares and production 68.157 million tons. According to estimates cropped area is lower than the targets by 10%; production is also low by 5.7% whereas yield increases up to 4.8%. However, the sugarcane area and production will be less than the area and production of the year 2018-19 probably due to sale issue and irregular returns to the farmers. Hence, these issues need to be handled properly. Strict price equivalence should be developed so that farmers get a proper price based upon sugar recovery. There should be a rational policy distribution of profit between growers and the industry.

#### Targets and estimated Achievement of Area, Production and Yield of Sugarcane: 2019-20

Country	Area under Production (000 hectares)			Production(000 tonnes)			Yield kg/ha		
	Target	Achievement	Deviation (%)	Target	Achievement	Deviation (%)	Target	Achievement	Deviation (%)
Pakistan	1178	1060	-10	68702	64771	-5.7	58297	61103	4.8
Punjab	753	661	-12.19	44906	42218	-6	59636	63846	7.1
Sindh	31	287	-7.38	18339	16985	-7.3	59157	59157	0
KP	115	110	-3.28	5411	5524	2.08	47232	49851	5.5
Balochistan	0.9	0.87	-3.33	45	44	-2.2	50555	51149	1.17

Source: FCA

### 4. Rice

Harvesting of rice completed and good yield is reported in Punjab, Sindh and KP. The Federal Committee for agriculture (FCA) has fixed country level target of rice area 2.87 million hectares and production target 7.431 million tons for 2019-20. As per the final estimates of Provincial Agriculture Departments, rice area is reported as 3.03 million hectares whereas production is reported at 7.70 million tons (both are 5.55 percent and 3.62 percent respectively higher than the target).

#### Targets and estimated Achievement of Area, Production and Yield of Rice: 2019-20

Country	Area (000 hectares)			Production(000 tonnes)			Yield kg/ha		
	Target	Achievement	Deviation (%)	Target	Achievement	Deviation (%)	Target	Achievement	Deviation (%)
Pakistan	2877	3036	6	7432	7701	3.6	2583	2536	-1.82
Punjab	1869	2029	9	4000	4267	6.6	2140	2103	-1.74
Sindh	770	780	1.3	2710	2746	1.33	3159	3159	-0.01
KP	63	63	0.06	148	155	5.2	2348	2469	5.14
Balochistan	175	164	-6.17	574	533	-7.23	3280	3243	-1.13

Source: FCA



## 5. Maize

Harvesting of maize crop has been completed in Punjab and KP. Above normal yield has been obtained this year.

The Federal Committee for Agriculture (FCA) has fixed country level maize production target for 2019-20 crop at 6.29 million tons. As per final estimates of the Provincial Agriculture Departments, maize production is reported at 6.93 million tons, which is 10.05 percent higher than the target.

### Targets and estimated Achievement of Area, Production and Yield of Maize: 2019-20

Country	Area (000 hectares)			Production(000 tonnes)			Yield kg/ha		
	Target	Achievement*	Deviation (%)	Target	Achievement*	Deviation (%)	Target	Achievement*	Deviation (%)
Pakistan	1321	1386.46	4.95	6297	6930	10.05	4767.25	4998.91	4.86
Punjab	845	913.6	8.12	5398	6021.8	11.56	6388.17	6591.29	3.18
Sindh	3.7	3.54	-4.32	4.2	4.08	-2.86	1135.1	1152.5	1.53
KP	468.3	466	-0.43	890.9	901.5	1.18	1902.4	1933.2	1.62
Balochistan	4	3	-25	4.5	3.4	-24.4	1125	1133.3	0.74

*\*Provisional*

*Source: FCA*

## 6. Oilseed

In Sindh, castor oil plant is at flowering stage and condition of the crop is reported satisfactory. Rape mastered is growing normally and is reported at germination stage. The biofuel crop of Jtropa is normally growing at capsule formation stage. Harvesting of sesame and sunflower is in progress and normal to above normal yield is expected

In Punjab, sowing of oil seeds has been completed and its germination is reported satisfactory. Sowing of Lentil crop is in progress. The germination of early sown crop is satisfactory

A mega project titled “National Oilseeds Enhancement Program” has been approved by Executive Committee of the National Economic Council (ECNEC). Under this project a subsidy of Rs.5000 for seed and inputs will be provided to oilseed growers. Furthermore, 50% subsidy on machinery like planter, drills, harvester and combined headers will be provided to growers/service providers. Following targets for the year 2019-20 have been proposed on the basis of seed availability in the upcoming season.





## Production Plan for Oilseed 2019-20:

Crop	Province	Proposed Targets ( 2019-20)		
		Area(000 ha)	Production (000 tonnes)	Yield (kg/ha)
Canola	Punjab	17.6	29.7	1685
	Sindh	2.85	3.43	1206
	KP	0.44	0.30	622
	Balochsitan	2.2	1.4	676
	<b>Pakistan</b>	<b>23</b>	<b>35</b>	
Sunflower	Punjab	30	59.43	1981
	Sindh	75	77	1028
	KP	1.2	1.9	1598
	Balochsitan	2.1	3.1	1500
	<b>Pakistan</b>	<b>108</b>	<b>141</b>	
Mustard	Punjab	176	257	1456
	Sindh	46	48	1056
	KP	12	5.47	468
	Balochsitan	15	11	753
	<b>Pakistan</b>	<b>249</b>	<b>322</b>	

## 7. Horticulture

- In KP, Growth of orchards is satisfactory and good yield of citrus is expected.
- In Balochistan, all varieties of apples have developed colour and picking of the fruit is in progress. Winter vegetables reported in normal condition and are now available in the market.
- In Sindh, Seasonal fruits like Guava and Banana are in good condition, Cheeko is in flowering stage and Apple Stone (Bare) are at fruit formation stage. Inter-culturing and pruning is near to end in mango orchards. Farmyard manure has been applied. Harvesting of Papaya crop is ongoing and condition is good, prices are high and no pest attack has been reported. Harvesting of onion crop has started in some areas of Sindh and transplanting has also been started. Picking of green chilies started in sindh.
- In Punjab, harvesting of winter vegetables including potato is in progress. The growth of citrus orchards is reported satisfactory and good yield is expected this year. Sowing of Gram has been completed and its germination is reported satisfactory.





## MARKETING OF CROPS

Crop	Marketing
Onion	It is grown in all four provinces and remained available in market whole year. Nowadays, onion is being supplied from Sindh Province to other parts of the country.
Potato	It is also grown in all provinces and is being supplied from Punjab province
Tomato	It is also grown in all provinces and is being supplied from Sindh Province.
Red Chili	It is mostly grown in Southern Punjab and Sindh. Nowadays, chili is being supplied in markets from Sindh province.

Source: Agriculture Marketing Roundup, Gov. of Punjab

## AGRI TRADE SITUATION

### EXPORTS:

- According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during October, 2019 amounted to Rs. 315,698 million (provisional) as against Rs. 276,276 million (provisional) in September, 2019 and Rs. 247,217 million during October, 2018 showing an increase of 14.27% over September, 2019 and of 27.70% over October, 2018.
- In terms of US dollars the exports in October, 2019 was \$ 2,024 million (provisional) as compared to \$ 1,769 million (provisional) in September, 2019 showing an increase of 14.41% and by 6.75% as compared to \$ 1,896 million in October, 2018.
- Exports during July - October, 2019 totaled Rs. 1,186,705 million (provisional) as against Rs. 913,880 million during the corresponding period of last year showing an increase of 29.85%.
- In terms of US dollars the exports during July - October, 2019 totaled \$ 7,547 million (provisional) against \$ 7,270 million during the corresponding period of last year showing an increase of 3.81%.
- Main commodities of exports during October, 2019 were Knitwear (Rs. 42,833 million), Readymade garments (Rs. 37,319 million), Bed wear (Rs. 33,857 million), Cotton cloth (Rs. 27,976 million), Rice others (Rs. 15,752 million), Cotton yarn (Rs. 14,078 million), Towels (Rs. 11,147 million), Rice Basmati (Rs. 9,692 million), Made-up articles (excl. towels & bed wear) (Rs. 9,396 million) and Fish & fish preparations (Rs. 7,814 million).



**Statement showing exports of selected agri commodities during the month of October, 2019:**

SL. NO.	COMMODITIES	UNIT	* OCTOBER,2019			* SEPTEMBER,2019		
			** QUANTITY	VALUE		** QUANTITY	VALUE	
				RUPEES	DOLLARS		RUPEES	DOLLARS
GRAND TOTAL				315,698	2,024,366		276,276	1,769,000
A	FOOD GROUP	-		58,554	375,466		52,009	333,014
	1.RICE	M.T	301,488	25,444	163,155	249,803	21,513	137,748
	a) BASMATI	M.T	66,384	9,692	62,148	64,101	9,280	59,420
	b) OTHERS	M.T	235,104	15,752	101,007	185,702	12,233	78,328
	2.FISH & FISH PREPARATIONS	M.T	20,087	7,814	50,106	17,438	6,740	43,156
	3.FRUILTS	M.T	31,348	3,605	23,117	45,787	5,405	34,608
	4.VEGETABLES	M.T	53,128	2,804	17,980	59,709	2,398	15,354
	5.LEGUMINOUS VEGETABLES (PULSES)	M.T	0	0	0	0	0	0
	6.TOBACCO	M.T	1,169	588	3,770	275	138	884
	7.WHEAT	M.T	1,887	64	410	2,060	69	442
	8.SPICES	M.T	2,202	1,295	8,304	1,350	832	5,327
	9.OIL SEEDS, NUTS AND KERNELS	M.T	7,405	1,279	8,201	6,540	1,210	7,748
	10.SUGAR	M.T	45,593	2,823	18,102	62,469	3,976	25,458
	11.MEAT AND MEAT PREPARATIONS	M.T	7,510	4,160	26,675	6,894	3,593	23,006
	12.ALL OTHER FOOD ITEMS	-		8,678	55,646		6,135	39,283

(\* ) Provisional rupee value converted into us dollar on average monthly exchange rate provided by sbp. October, 2019 (1\$=rs.155.949085 ), September, 2019 (1\$=rs.156.176407) and October,2018 (1\$=rs.130.383058). ( \*\* ) quantity data has been estimated where ever it is found necessary.

note:- some difference may occur in percentage change with respect to rupees & dollars.

Source: <http://www.pbs.gov.pk/>

**Imports:**

- Imports into Pakistan during October, 2019 amounted to Rs. 635,282 million (provisional) as against Rs. 591,111 million (provisional) in September, 2019 and Rs. 626,031 million during October, 2018 showing an increase of 7.47% over September, 2019 and of 1.48% over October, 2018.
- In terms of US dollars the imports in October, 2019 was \$ 4,074 million (provisional) as compared to \$ 3,785 million (provisional) in September, 2019 showing an increase of 7.64% but decreased by 15.14% as compared to \$ 4,801 million in October, 2018.
- Imports during July - October, 2019 totaled Rs. 2,409,104 million (provisional) as against Rs. 2,383,480 million during the corresponding period of last year showing an increase of 1.08%.
- In terms of US dollars the imports during July - October, 2019 totaled \$ 15,323 million (provisional) as against \$ 18,966 million during the corresponding period of last year showing a decrease of 19.21%.
- Main commodities of imports during October, 2019 were Petroleum products (Rs. 61,605 million), Petroleum crude (Rs.56,624 million), Natural gas, liquified (Rs.35,223 million), Fertilizer manufactured (Rs.30,014 million), Power generating machinery (Rs.27,219 million), Electrical machinery and apparatus (Rs. 25,439 million), Plastic materials (Rs. 24,109 million), Palm oil (Rs. 22,481 million), Iron and steel scrap (Rs. 22,149 million), Iron and steel (Rs. 21,997 million).

**Statement showing imports of selected agri commodities during the month of October, 2019:**

SL. NO.	COMMODITIES	UNIT	* OCTOBER,2019		* SEPTEMBER,2019			
			** QUANTITY	VALUE		** QUANTITY	VALUE	
				RUPEES	DOLLARS		RUPEES	DOLLARS
<b>GRAND TOTAL</b>				635,282	4,073,650	591,111	3,784,893	
A.	<b>FOOD GROUP</b>	-		75,805	486,088	62,409	399,606	
	1. MILK, CREAM & MILK FOOD FOR INFANTS	MT	5,353	2,738	17,557	3,316	1,456	9,323
	2. WHEAT UNMILLED	MT	0	0	0	0	0	0
	3. DRY FRUITS & NUTS	MT	3,087	818	5,245	1,601	413	2,644
	4. TEA	MT	17,778	6,291	40,340	16,128	5,774	36,971
	5. SPICES	MT	12,155	1,893	12,139	10,844	2,141	13,709
	6. SOYABEAN OIL	MT	2,262	252	1,616	12,902	1,391	8,907
	7. PALM OIL	MT	257,557	22,481	144,156	261,736	21,968	140,661
	8. SUGAR	MT	301	30	192	385	34	218
	9. PULSES (LEGUMINOUS VEGETABLES)	MT	79,144	5,668	36,345	62,770	4,645	29,742
	10. ALL OTHERS FOOD ITEMS			35,634	228,498		24,587	157,431

(\* ) Provisional rupee value converted into us dollar on average monthly exchange rate provided by sbp. October, 2019 (1\$=Rs.155.949085), September, 2019 (1\$=Rs.156.176407) and October,2018 (1\$=Rs.130.383058). (\*\* ) quantity data has been estimated where ever it is found necessary.

note:- some difference may occur in percentage change with respect to rupees & dollars.

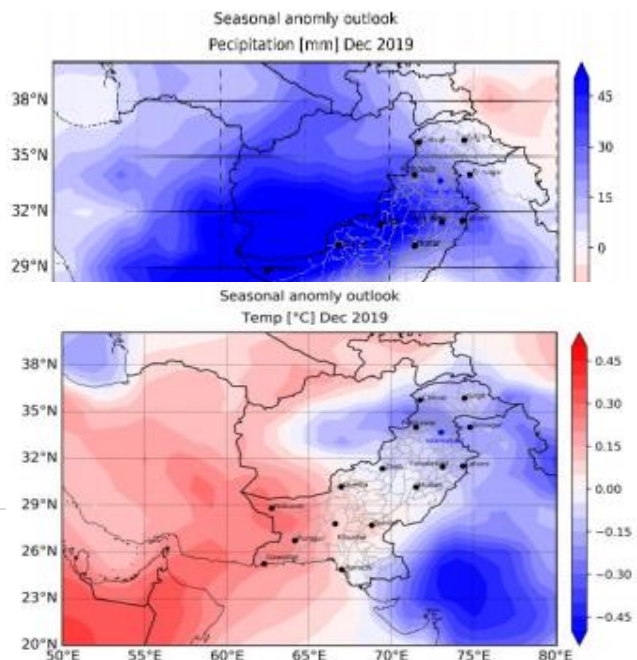
Source: <http://www.pbs.gov.pk/>

**WEATHER OUTLOOK**

**Synoptic situation:** Currently, El-Niño Southern Oscillation (ENSO) is prevailing in neutral phase and this condition will continue for next 1 to 2 months. The North Atlantic Oscillation (NAO) is in negative phase and is likely to shift in positive phase after mid-December. The Madden-Julian Oscillation (MJO) currently lies over phase-1 and is expected to move in phase-2 from second week of December. Indian Ocean Dipole (IOD) is also prevailing in positive phase and is likely to continue during next month.

On the basis of above discussed global atmospheric and oceanic conditions, following are the main features of weather outlook in December 2019:

**1. Precipitation:** Above normal precipitation is expected in western and northern parts of Pakistan, whereas southern parts will have below normal rainfall. Three to four western disturbances are likely to approach during the month, which may cause light to moderate rainfall at scattered places of Western, Central and Northern parts of the country. Second and fourth weeks are predicted to be wetter as





compared to rest of the days of the month. The snowfall is also likely to occur over high mountains in north Balochistan, Kashmir and Northern areas of Pakistan.

**2. Temperature:** Below normal temperature is predicted in the northern parts of the country, while above normal temperature is expected over southwestern parts of Pakistan. A cold wave may approach during the third and fourth week which may cause significant drop in daily night temperatures in most parts of the country

Source: <http://nwfc.pmd.gov.pk>

### 3. Province wise Seasonal Weather Outlook:

**Punjab:** Above normal rain may fall along the western border while below normal rainfall is predicted along eastern parts of the province. Shallow to dense fog may persist in central and major southern chunk of the Punjab. The rainfall spell during second half of this month will cause to reduce the chances of dense fog in plain areas of Punjab.

**Khyber Pakhtunkhwa (KP):** Fair changes of precipitation in the first week in KP province. Night temperature may fall 2-3 degree from normal in northern parts of the province.

**Balochistan:** Above normal rainfall is expected in the northwestern parts of the province with snowfall is over northern parts of the Balochistan.

**Sindh:** Normal to slightly below normal rainfall is likely to occur in upper parts of Sindh. Temperatures may drop 1-2 degree below normal over Sindh. Shallow to moderate fog is expected in plain areas of the province.

**GB and AJK:** Above normal rainfall with heavy snowfall is expected over GB, while normal to slightly below normal precipitation is expected over AJK and surrounding areas.

### 4. Impacts base Weather Outlook:

- Snowfall accumulation may be enhanced above normal precipitation.
- The above normal rainfall during the month may also cause to decrease the chances of dense fog/smog in plain areas of Sindh and Punjab.
- The extent of Smog is likely to decrease during the month in the smog prone areas of the Punjab.
- Due to the below normal temperatures there are more chances of frost over the agricultural lands.

Source: <http://nwfc.pmd.gov.pk>

## DROUGHT SITUATION

Wet conditions prevailed over some places in the northern parts of the country. During the month of November, the good rains in the agricultural plains of Khyber Pakhtunkhawa and Punjab proved



useful for sowing of Rabi crops. The month of November was fairly good for drought prone areas of Sindh and Balochistan, giving good relief over there. All stakeholders are requested to make all efforts to watch water availability situation across rain-fed areas of Sindh and Balochistan especially

Province	Average System Usage (MAF)	Estimated Water availability for current Rabi (MAF)	Excess(+)/Less(-) than Average System Usage	
			(MAF)	(%)
Punjab	19.935	16.933	-3.002	-15
Sindh	15.042	12.779	-2.263	-15
KP	0.706	0.706	0	0
Balochsitan	1.027	1.027	0	0
Paksitan	36.710	31.444	-	-

in previously drought affected areas.

Source: <http://nwfc.pmd.gov.pk>

## WATER SITUATION

### Anticipated Water Availability Position for Rabi 2019-20

On average, 15% water shortage against average system usage is anticipated during the current Rabi season.

### Anticipated Water availability Position for Rabi 2019-20:

During the month of November 2019, water inflow, outflow and level of Rawal, Khanpur, Tarbela and Mangla dams are shown in Fig. 1 & 2. An increasing trend in inflow has been observed in Rawal, Khanpur, Tarbela and Mangla dams.

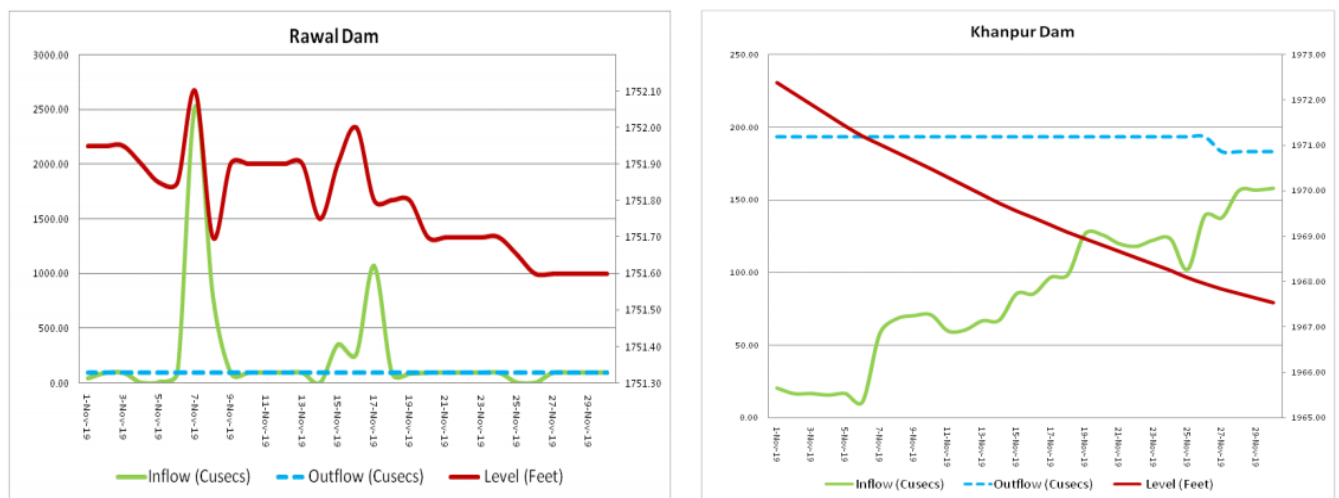


Figure 1: Water inflow, outflow and level of Rawal and Khanpur Dams



**Figure 2: Water inflow, outflow and level of Tarbela and Mangla Dams**

Sources: 1. Federal Committee on Agriculture 2. Pakistan Meteorological Department.

## FERTILIZER SITUATION

### 1. Fertilizer Off-take during Rabi 2019-20 (Estimated)

Fertilizer off-take during Rabi 2019-20 is given below in the table. Urea consumption is estimated around 2,956 thousand tonnes against 3,033 thousand tonnes in previous season showing a decrease of about 2.6 percent over Rabi 2018-19. DAP off-take is expected to increase by 16.4 percent over Rabi 2019-20. The total off-take of all fertilizers in the previous year Rabi season was 4,241 thousand against 4,410 thousand tones estimation for forthcoming Rabi 2019-20 with 3.8 percent forecasted increment.

#### Estimated Fertilizer off take during Rabi 2019-20 (Oct-March)

(000 tonnes)

Province	Urea	DAP	TSP/MAP	SOP/MOP	Total
Punjab	2,007	1034	21	22	3,084
Sindh	727	277	5	7	1,016
KP	136	52	2	2	192
Balochistan	86	29	2	1	118
<b>Pakistan</b>	<b>2,956</b>	<b>1,392</b>	<b>30</b>	<b>32</b>	<b>4,410</b>
Rabi 2018-19	3,033	1,164	9	35	4,241
%age change over Rabi 2017-18	-2.6	16.4	70	-9.4	3.8

### 2. Estimated Supply Demand Situation during Rabi 2019-20

Rabi 2019-20 is expected to start with inventory of 523 thousand tonnes of urea. Total availability of urea will be 3,349 thousand tones comprising of 523 thousand tones of opening balance and 2,826 thousand tones of domestic production. Urea off-take is expected to be around 3,956 thousand



tones. Total availability of DAP will be 851 thousand tones against expected off-take of 1392 thousand tones. Total availability of potash fertilizers (SOP/MOP) will be 36 thousand tones against expected off take of 32 thousand tones. Supply/Demand gap in DAP and SOP/MOP will be met by imports through private sector during Rabi 2019-20.

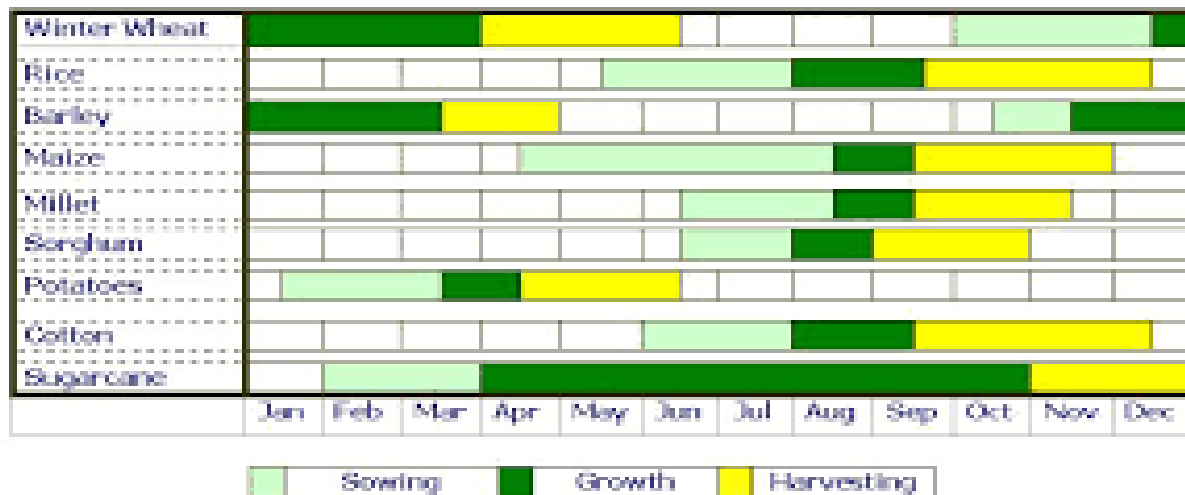
### Estimated Fertilizer Supply/Demand in Rabi 2019-20 (Oct-March)

(000 tonnes)

Province	Urea	DAP	TSP/MAP	SOP/MOP	Total
Opening Inventory	523	318	5	31	877
Imported Supplies	0	180	0	0	180
Domestic Production	2,826	353	0	5	3,184
Total availability	3,349	851	5	36	4,241
Off-take	<b>2,956</b>	<b>1,392</b>	<b>30</b>	<b>32</b>	<b>4,410</b>
Estimated Inventory	393	-541	-25	4	-169

### CROP CALENDAR

Crop Calendar of Pakistan







### Crop Calendar for Punjab:

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												
Lady's finger												
<b>ORCHARDS</b>												
Mango												
Citrus												
Apple												
Grapes												
Strawberry												
Peaches												
Banana												
Pomegranate												
Guawa												



**Crop Calendar for Sindh:**

<b>GENERAL CROPS</b>	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 for Khyber Pakhtunkhwa:**

<b>GENERAL CROPS</b>	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	Olive			
Mong					Olive	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
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
Onion		Olive	Olive	Olive	Olive	Olive	Olive			Olive	Olive	Olive
Melon		Purple	Purple	Purple	Purple	Purple	Purple		Purple	Purple		
Cucumber		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		
Squash		Olive	Olive	Olive	Olive	Olive	Olive					
Bitter Gold		Purple	Purple	Purple								
Chillies			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
Ladies finger		Red	Red	Red								
<b>ORCHARDS</b>												
Mango												
Citrus												
Apple		Brown	Brown	Brown	Brown	Brown	Brown					
Grapes		Light Blue	Light Blue	Light Blue	Light Blue	Light Blue						
Strawberry												
Peaches			Light Purple	Light Purple	Light Purple							
Banana												
Pomegranate			Yellow	Yellow	Yellow	Yellow						
Guawa												



### Crop Calendar for Balochistan:

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			Brown	Brown	Brown							
Tobacco												
Corn												
Gram	Dark Blue	Dark Blue	Dark Blue									
Sunflower			Blue	Blue	Blue							
Sorghum			Blue	Blue	Blue							
Rape seed	Red	Red										
<b>VEGETABLES</b>												
Potato			Light Pink	Light Pink	Light Pink	Light Pink	Light Pink	Light Pink	Light Pink			
Tomato	Red	Red	Red	Red	Red	Red	Red	Red	Red		Red	Red
Cabbage				Light Green	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		Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
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	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	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green
Bitter Gold		Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple
Chillies			Black	Black	Black	Black	Black	Black	Black	Black	Black	Black
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
Guava												



**ESSENTIAL AGRI COMMODITIES PRICES: CPI BY COMMODITY GROUPS AND COMMODITIES  
(2007-08=100)**

Item and Specification	Weight	Index Numbers			% Change in Oct 2019 over			
		Oct 2019	Sep 2019	Oct 2018	Sep 2019	Oct 2018		
<b>General</b>	<b>100.00</b>	<b>260.46</b>	<b>257.88</b>	<b>234.49</b>	<b>+</b>	<b>1.00</b>	<b>+</b>	<b>11.08</b>
<b>Food and non-alcoholic Beverages</b>	<b>34.834</b>	<b>272.00</b>	<b>268.40</b>	<b>240.50</b>	<b>+</b>	<b>1.34</b>	<b>+</b>	<b>13.10</b>
1 Wheat	0.3477	228.90	223.80	203.64	+	2.28	+	12.40
2 Wheat Flour	4.1648	239.38	236.53	214.19	+	1.20	+	11.76
3 Wheat Product	0.0959	232.34	229.94	214.54	+	1.04	+	8.30
4 Besan	0.1500	289.12	287.21	267.01	+	0.67	+	8.28
5 Rice	1.5821	212.83	211.97	200.65	+	0.41	+	6.07
6 Cereals	0.1563	282.07	280.60	264.48	+	0.52	+	6.65
7 Bakery & Confectionary	1.1550	251.21	250.36	229.04	+	0.34	+	9.68
8 Nimco	0.4574	271.47	270.22	260.78	+	0.46	+	4.10
9 Meat	2.4303	353.34	351.19	318.04	+	0.61	+	11.10
10 Chicken	1.3596	203.96	234.94	194.00	-	13.1	+	5.13
11 Fish	0.2970	245.43	238.89	220.02	+	2.74	+	11.55
12 Milk Fresh	6.6800	310.95	307.48	286.97	+	1.13	+	8.36
13 Milk Products	0.6338	301.25	299.75	278.92	+	0.50	+	8.01
14 Milk Powder	0.1129	279.18	276.83	248.64	+	0.85	+	12.28
15 Eggs	0.4555	226.07	193.57	222.28	+	16.7	+	1.71
16 Mustard Oil	0.0952	177.83	176.83	164.90	+	0.57	+	7.84
17 Cooking Oil	1.7538	162.87	161.26	142.23	+	1.00	+	14.51
18 Vegetable Ghee	2.0714	173.41	171.59	148.48	+	1.06	+	16.79
19 Dry Fruits	0.2543	319.07	315.54	292.79	+	1.12	+	8.98
20 Fresh Fruits	1.8649	252.92	259.76	243.57	-	2.63	+	3.84
21 Pulse Masoor	0.2712	180.45	178.17	158.64	+	1.28	+	13.75
22 Pulse Moong	0.2336	326.77	324.54	218.49	+	0.69	+	49.56
23 Pulse Mash (Washed)	0.2098	258.11	255.93	205.28	+	0.85	+	25.74
24 Pulse Gram	0.2361	305.76	300.69	266.59	+	1.69	+	14.69
25 Gram Whole	0.1616	264.94	264.28	265.11	+	0.25	-	0.06
26 Beans	0.0269	289.76	277.06	246.97	+	4.58	+	17.33
27 Potatoes	0.4452	293.22	280.62	215.48	+	4.49	+	36.08
28 Onion	0.5093	464.37	443.96	216.58	+	4.60	+	114.41
29 Tomatoes	0.4172	210.34	183.90	240.62	+	14.3	-	12.58
30 Fresh Vegetables	1.7543	390.76	350.59	291.33	+	11.4	+	34.13
31 Sugar	1.0445	265.31	267.31	197.97	-	0.75	+	34.02
32 Gur	0.0220	351.36	347.56	262.49	+	1.09	+	33.86
33 Honey	0.0446	423.27	418.15	356.59	+	1.22	+	18.70
34 Sweet Meat	0.2483	294.14	293.35	273.59	+	0.27	+	7.51
35 Beverages	1.1990	248.51	246.59	235.01	+	0.78	+	5.74
36 Jam, Tomato Ketchup & Pickles	0.2454	252.88	252.16	235.37	+	0.29	+	7.44
37 Condiments	0.2656	315.44	314.61	288.04	+	0.26	+	9.51
38 Spices	0.5441	302.62	299.46	269.25	+	1.06	+	12.39
39 Tea	0.8377	338.69	334.55	308.83	+	1.24	+	9.67

Source: [www.Pbs.gov.pk](http://www.Pbs.gov.pk)



## NEWS & TRENDS

- State Bank of Pakistan (SBP) has amended its Prudential Regulations of Agriculture Financing, SME Financing, and Corporate and Commercial Banking by allowing banks to accept electronic warehouse receipts as collateral for lending against storage of agriculture produce and commodities. This is a major move towards addressing the challenge of access to finance to farming community. It would benefit small farmers who usually find it difficult to access credit from banks due to non-availability of agricultural land as collateral. Further, Ware House Receipt financing would provide liquidity to commodity market and help in improving food security and price stability.
- The government of Pakistan has signed an agreement with the Asian Development Bank (ADB) worth \$1.3 billion for budgetary support and reforms. Under the agreement, ADB has committed to providing \$1 billion towards the Economic Stabilization Programme which aims to improve exchange rate management, strengthen public financial management, restore allocative efficiency of scarce public resources and reduce the social impacts of macroeconomic stability measures. Out of the total \$1.3 billion loan, \$300 million have been set aside for reforming the energy sector and the Financial Stability Programme. This aims to address energy shortfalls as well as policy related shortcomings in the country's energy sector.
- The Consumers Price Index-based inflation on year-on-year (YoY) basis witnessed an increase of 12.7 percent in November 2019 from 116.18 points in November 2018 to 130.90 points. The CPI on month-on-month basis went up by 1.34 percent in November to 130.90 points from 129.16 points in October 2019. According to Pakistan Bureau of Statistic (PBS), CPI general in October 2019 increased by 11.04 percent, which was recorded at 5.7 percent in November 2018. According to PBS on MoM basis, CPI general recorded an increase of 1.34 percent in November 2019 against an increase of 1.8 percent in October, while CPI witnessed a reduction of 0.1 percent in November 2018.
- According to adviser to Prime Minister on Commerce, Textile, Industry and Production, sugar will now only be exported under special conditions and not as a regular item on the export agenda. Sugar will only be exported after thoroughly checking the amount of it produced in the year, and if the production is in excess of the demand, only then it would be exported. The government would provide subsidy on sugar at utility stores.
- Locusts continued to ravage through crops and trees in Shikarpur and Mirpurkhas districts, stripping large swathes of fields of vegetation. The insects attacked and destroyed the Rabi crops in various union councils and villages, including Mian Sahib, Jagan, Fatehpur Katto, Humayun, Shahal Sadhayo, Rahimabad, Peer Bux Shujrah, Sultankot and the adjoining areas. The reports from the affected areas suggested that the swarm swiftly and vigorously devoured the recently cultivated wheat crop in Shikarpur district and its adjoining localities. The locusts' swarm has inflicted heavy damages to the crops of wheat, guava, vegetables and others in a considerably vast area of the district. In Mirpurkhas, the locusts in a large quantity



attacked the crops in taluka Jhuddo, Kot Ghulam Mohammad and Sindhri, damaging the crops of wheat, sugar cane, chilli, onion and others.

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## زرعی سفارشات برائے کسان

### گندم

☆ چھیتی کاشت ہر صورت 15 دسمبر سے پہلے مکمل کر لیں اور غیر معمولی تاخیر سے بچنے کے لیے جہاں ضروری ہو خشک بوائی کریں۔  
☆ چھیتی کاشت کے لیے شرح بیج (منظور شدہ 50 تا 60 کلوگرام) فی ایکڑ اضافہ کے ساتھ استعمال کیا جائے تاکہ پیداوار میں خاطر خواہ کمی نہ ہو پائے۔

☆ آبپاش علاقوں میں کمزور 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 بوقت کاشت استعمال کریں۔

☆ کپاس، مکئی اور کماڈ کے بعد کاشت کی گئی گندم 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۔

☆ جڑی بوٹیوں کی تلفی لگا کر کرتے رہیں۔ چونکہ جڑی بوٹیاں پیداوار میں 50 فیصد تک کمی لاسکتی ہے مزید فصل میں دیگر وسائل کے ضیاع کا بھی باعث بنتی ہیں۔

### 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 پر مٹ / 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، مونڈھی فصل اور اگیتی پکنے والی، اقسام پہلے برداشت کریں۔ اس کے بعد درمیانی پکنے والی اقسام کی برداشت کریں۔  
☆ مونڈھی فصل رکھنے کے لیے کماڈ کو یکم جنوری کے بعد برداشت کریں۔

### روغن دار اجناس

☆ سورج مکھی کی کاشت کے لیے بھاری میرا زمین کا انتخاب کریں۔ کلراٹھی اور بہت ریتیلی زمین کاشت کے لیے موزوں نہیں ہے۔  
☆ کینولا اقسام کی بوائی جلد از جلد مکمل کریں۔ کاشت تروترو میں کریں۔ بیج ایک تا ڈیڑھ انچ گہرائی پر کاشت کریں۔ شرح بیج ڈیڑھ تا دو کلوگرام فی ایکڑ رکھیں۔

☆ سرسوں، توریا، رایا اور کینولہ کی اقسام پر اگر تیلہ یا لشکری سنڈی وغیرہ کا حملہ نظر آئے تو محکمہ زراعت کے زرعی ماہرین سے مشورہ کر کے کیمیائی ادویات کا سپرے کریں۔

☆ اچھے اگاؤ کے لیے صاف ستھرے دوغلی اقسام کے بیج 2 کلوگرام فی ایکڑ استعمال کریں۔

## دالیں

☆ چنے کی فصل کا باقاعدگی سے معائنہ کرتے رہیں اگر فصل میں ٹوکے 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 مرجھاؤ، جھلساؤ، کنگلی، مسور کی پھپھوندی زیادہ اہم ہیں۔ اس کے علاوہ ان پر دیمک، ٹوکا، چور کیڑا، رس چوسنے والے کیڑے مثلاً ست تیزا، سفید مکھی، تھرپس، لشکری سنڈی کا بھی حملہ ہو سکتا ہے۔ لہذا ان سے بچاؤ کے لیے سفارش کردہ زہروں کا سپرے کریں۔

## چارہ جات

☆ برسیم کی کاشت جلد از جلد مکمل کر لیں اور شرح بیج 8 کلوگرام فی ایکڑ رکھیں۔

☆ بوقت کاشت ڈیڑھ بوری ڈے اے پی فی ایکڑ استعمال کریں۔ اگر بوئی بذریعہ چھٹے اور کھڑے پانی میں کی گئی ہو تو پہلی آبپاشی بوئی کے 7 دن بعد کریں تاکہ اگاؤ اچھا ہو۔

☆ برسیم کے بیج کو بوئی سے پہلے جراثیمی ٹیکہ لگائیں یا پچھلے سال والے برسیم کے کھیت سے 80 کلوگرام مفید جراثیم والی مٹی لاکر فی ایکڑ کے حساب سے کھیت میں مکس کریں۔

## سبزیات و باغات

☆ چھوٹی اور نازک 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 پالک، دھنیا، میتھی وغیرہ جبکہ 3 سے 5 مرلہ کے پلاٹ میں ان سبزیوں کے علاوہ گوبھی، ٹماٹر، گاجر، شلجم، مولیٰ وغیرہ لگائیں جاسکتی ہیں۔

☆ درمیانے موسم میں پکنے والی 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

Source: Zarat nama, Government of Punjab (Farmers' Advisory)

Fauji Fertilizer Company Limited (Farmers' Advisory Service)

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