AGRICULTURE OUTLOOK





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Executive Summary

According to Pakistan Meteorological Department (PMD) growth of wheat crop has been reported as satisfactory and crop is near to maturity in Punjab and Khyber Pakhtunkhwa. Punjab Government has established procurement centers in various divisions of province, where gunny bags are being distributed. Sowing of cotton crop has been completed in Sindh province. However, cultivation is being initiated in Punjab province.

During the month of March of the ongoing fiscal year, sowing of spring sugarcane crop has been completed and crop is at growing stage. During the FY 2018-19 sugarcane crop cannot attain proper size as compared with last year crop due to less sown area and shortage of irrigation. Harvesting of oil seed crop and green gram has been started in some areas of the Punjab province.

Onion, Tomatoes and Red chilies are being supplied in Markets from Sindh Province. The month of March received normal to above normal rains in most of agricultural plains of the country except Rawalpindi in Pothowar Region, Sargodha & Lahore in Central Punjab and Skardu in GB, where rainfall reported below to normal. It is expected that the month of April will receive normal rainfall.

The month of March was fairly good for drought prone areas of Baluchistan, as it received rainfall. While moderate drought conditions are still prevailing over southern parts of Sindh. Meteorological Department has predicted that drought conditions will prevail as no rainfall is expected in Sindh.

The first half nine months of this FY 2018-19 the trade deficit has been shrunk to \$23.67 billion during first nine months of current fiscal year as compared with the deficit of \$27.21 billion in the corresponding period of the last fiscal year. The import bill during the first nine months was also declined by 8 percent to \$40.75 billion as compared with \$44.28 billion in the same period of the last fiscal year. This was only due to imposition of regulatory duty on luxury and non-essential items during the last budget and followed in the supplementary budget helped in curtailing import growth.

CURRENT CROP SITUATION

1. Wheat Crop

According to Pakistan Meteorological Department (PMD), Growth of wheat Crop is reported as satisfactory in both rain fed and irrigated areas of Punjab, Khyber Pakhtunkhaw (KP) and Baluchistan provinces. The crop is reported at early/full maturity stage in most of the agriculture plains of the Punjab and KP at the end of this month.

Harvesting of the wheat crop has been reported in some areas of the Punjab Province. However, it has been completed in Sindh Province with expectation of good yield.

According to Punjab Government, Wheat procurement has been initiated in Khanewal, Multan Sargodha, Rawalpindi and Multan Division. Procurement centers have also been established in various districts under these Divisions. Distribution of gunny bags has also been initiated in Punjab province.

2. Cotton Crop

Cultivation of cotton crop has been started in some places of Badin, Neukot, Jhudho and Talukas. Farming community of Punjab is preparing their land for sowing of cotton seeds. Farmers are advised to complete sowing up to 31st May in Punjab by using recommended varieties of BT as well as Non BT cotton of Punjab Agriculture Department.

According to report released by Pakistan Cotton Ginners Association (PCGA) as on 1st March 2019 the arrivals of seed cotton in ginning factories witnessed shortfall of 6.80 percent to 10.74 million bales as compared to 11.52 million bales registered in the corresponding period of last year. Arrivals in Punjab are declined by 9.34% to 6.592 million bales. The arrivals in Sindh are also declined by 2.5 percent to 4.15 million bales as compared to 4.253 million bales in the same period of last year. However, the districts of Upper Sindh like Khiar Pur, Sukkur and Ghotki depicted improving tendency as compared to the corresponding period of last year.

Seed Cotton Arrivals as on 1st March, 2019

(Bales)

Heads		2018-19 (Season)	2017-18 (Season)			
neaus	Punjab	Sindh	Total	Punjab	Sindh	Total	
Arrivals	6,592,812	4,149,063	10,741,381	7,271,323	4,253,258	11,524,581	
Sales to Exporters	3300	99,030	102,330	25,850	190,765	216,615	
Sales to Textile Mills	5,684,936	3,748,894	9,433,830	6,724,051	3,855,283	10,579,334	
Sales to T.C.P	-						
Unsold Stock	884,961	300,422	300,422	506,062	203,046	709,108	
Un-ginned Stock	12,121	717	19,838	15,360	4,164	19,524	

3. Spring Sugarcane

Pakistan Meteorological Department (PMD) has reported that harvesting/crushing of winter sugarcane crop has been completed in KP. During 2018-19 sugarcane crop cannot attain proper size as compared to last year crop. The reasons behind this is less area was used for cultivation and shortage of irrigation water particularly during April-June 2018.

Spring crop is at growing stage and farmers' are advised to apply light irrigation by considering weather conditions. It is advised to use 30% more nitrogen in ration crop than normal sowing crop. Apply irrigation after 15-20 days interval and adopt skip row irrigation method in case of water shortage. Adopt weed control recommended practices and cultural operation in consultancy with agriculture department. Crop is at tillering stage where irrigation is compulsory in case temperature raise.

4. Spring Maize Crop

Spring cultivation of maize crop has been completed and crop is at growing stage. Farmers are advised to irrigate crop according to weather conditions. Apply more irrigation water to the crop, if temperature is going to be raised.

5. Minor Crops

a. Oil seeds

- Harvesting of oil seed crop and green gram has been started in some areas of the Punjab province.
- Safflower is at flowering stage and growth has been reported as well in Sindh.
- Sowing of sunflower has been completed and the crop is at early vegetative stage.
- Condition of canola crop has been reported as satisfactory in Baluchistan province.
- Groundnut crop is at sowing stage in Punjab. Farmers are preparing bed for cultivation of recommended varieties.

b. Pulses

Growth of gram and lentil has also been reported satisfactory and both crops are at grain formation stage. Harvesting and marketing of chickpea is ongoing in Punjab.

6. Fruits & Vegetables

- Summer vegetables are growing satisfactory and picking of early grown verities has been started in some areas of Sindh. While in Punjab these vegetables are under cultivation process.
- Mangos are at fruit formation stage in Sindh.
- PMD reported that the growth and picking of seasonal fruits like guava, banana, cheeko are in full swing.
- Citrus crops are in growing/vegetative stages. Therefore, farmers are advised to complete training, pruning and grafting process to attain desire shapes of plants.

AREA & PRODUCTION OF CROPS

Crop	Area in 000 hectare	Production "000 tons
Wheat	8,797	25,076
Maize	1,251	5,902
Rice Basmati	2,901	7,450
Rice Irri	640	1,837
Sugarcane	1,342	82,128
Chickpea	977	324
Mash bean	15.3	7.2
Masoor bean	13.4	6.3
Mung Bean	163	122
Onion	150	2115
Potato	193	4,584
Tomato	63	588
Red Chilli	65.3	148

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

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 Chilli	It is mostly grown in Southern Punjab and Sindh. Nowadays, chilli is					
	being supplied in Markets from Sindh province. May to August will					
	cover supplied from Punjab province.					
Citrus	Season of citrus crop has been over. Only stored items are being sold in					
	markets.					

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

WEATHER SITUATION

Past Situation

Winter rains were generally continued from December to March in Pakistan. During this March, normal to above normal rains were reported in most agricultural plains of the country except Rawalpindi in Potohar Region, Sargodha & Lahore in Central Punjab and Skardu in GB where rainfall reported below normal during the month.

Mean daily temperature remained normal to slightly below (by 1-2°C) in most of the agricultural plains of the country. Mean daily temperature ranged 17 to 24°C in Khyber Pakhtunkhaw, 16 to 19°C in Potohar plateau, in remaining parts of Punjab it ranged from 19 – 20°C, 22 to 23°C in Sindh, 6 to 12°C in Gilgit-Baltistan region and it was observed 11°C in the high elevated agricultural plains of Baluchistan represented by Quetta valley.

Outlook for the Month of April

The outlook for the month of April 2019 shows that above normal rainfall is expected in the country with maximum positive anomaly in parts of northern Punjab and adjoining areas of KP and Kashmir. However, normal to below normal rainfall is expected in Sindh and the coastal areas of Pakistan

During the last week of March, light rainfall occurred at scattered places in GB and upper KP, while cold and dry weather prevailed in rest parts. This may continue with almost the same pattern in coming days as well. Keeping in view the expected weather conditions following advises are suggested for farming community:

- Farmers are advised to ensure proper removal of weeds from the Rabi crops.
- Precautions should be taken to keep the nurseries & vegetables from severe frost conditions.
- Irrigate the crops when needed.

DROUGHT SITUATION

During the month of March, 2019 rains in agriculture plains of Khyber Pakhtunkhaw and Punjab gave relief to the crops. However, some districts in Sindh remained under moderate drought conditions due to no or very less precipitation. The month of March was fairly good for drought prone areas of Baluchistan, terminating drought conditions over there; while moderate drought conditions are still prevailing over southern parts of Sindh.

According to meterological conditions no rainfall is expected in drought prone areas of Sindh like Badin, Hyderabad, sajawal, tharparker, sangharr, thatta, and umerkot. These areas would remain under moderate drought conditions.

PRICES OF AGRICULTURE COMMODITIES

Description	Unit	Average Price in PKR		
		March 2019	Feb 19	
Wheat	10kg	353.73	355.14	
Wheat Flour	10kg	394.56	395.24	
Rice Basmati Broken	1kg	78.27	78.14	
Rice Irri-6(Punjab/Sindh)	1kg	58	56.50	
Milk, Fresh, Unboiled	1ltr	87.9	87.89	
Apple	1kg	120	110	
Citrus (Kinnow)	1 dozen			
Bananas	Dozen	86	75	
Pulse Masoor, Washed	1kg	122	122	
Pulse Moong Washed	1kg	138	125	
Pulse Mash Washed	1kg	152	153	
Pulse Gram Washed	1kg	125	126	
Potatoes	1kg	21.4	21.5	
Onion	1kg	36.8	28.6	
Tomatoes	1kg	100.	109	
Garlic	1kg	180	165	

Source: Pakistan Bureau of Statistics

WATER SITUATION

Water situation as on 10.04.2019 (In cusecs)

Barrages	Mean Inflow/U/S Discharge	Mean Outflow/D/S
		Discharge
Guddu	39,202	39,202
Chashma	42,529	45,000
Taunsa	35,798	32,598
Kalabagh	63,360	58,360
Panjnad	21,464	15,464
Sukkur	34,020	10,510
Kotri	42,60	0
River		
Indus at Tarbela	38,100	25,000
Kabul inflow at Nowshera	42,400	
Jehlum at Mangla	60015	20,000
Chenab at Marala	33,633	19,133

Source: www.pakirsa.gov.pk

FERTILIZER OFF TAKES SITUATION

- As per the latest data released by National Fertilizer Development Center (NFDC) for Feb'19, urea sales increased by 5%YoY, clocking at 388k tons.
- Diammonium Phosphate (DAP) off-take in Feb'19 witnessed a decline of 60%YoY/35%MoM, clocking at 49k tons while Calcium Ammonium Nitrate (CAN) CAN/NP off-take declined by 34%YoY/57%YoY.
- Industry's urea production clocked in at 373k tons, down 6%YoY/19%MoM due to shortage of gas that led to closure of LNG based urea plants.
- Company wise, EFERT/FFBL/FATIMA exhibited decline in urea sales by 10%YoY/60%YoY/5%YoY where FFC posted an increase of 8%YoY in Feb'19.
- The industry closed month with urea inventory of 54k tons, down by 80%YoY.

000 tones	Feb 19	Jan 19	MoM	Feb-18	YoY
Industry					
Urea	388	564	-31%	370	5%
DAP	49	75	-35%	122	60%
CAN	46	78	-41%	70	34%
NP	16	54	-70%	37	57%
Total	520	794	-35%	619	16%
Urea	•	·			
EFERT	131	161	-19%	145	10%
FFC	170	196	-13%	157	8%

FFBL	11	3	279%	27	60%		
FATIMA	36	80	-55%	38	5%		
DAP							
FFBL	12	11	2%	41	72%		
EFERT	14	34	-59%	18	22%		

Source: NDFC, BIPLS Research

Wheat Fertilizer Rates per 50 kg

Date	Product	Average Rates
13-04-2019	Ammonium Nitrate	1605.00
13-04-2019	DAP	3395.00
13-04-2019	MOP	2505.00
13-04-2019	NP	2975.00
13-04-2019	NPK (زرخیز)	2655.00
13-04-2019	SOP	3912.50
13-04-2019	SSP	1210.00
13-04-2019	Urea	1800.00
13-04-2019	DAP	3395.00

Source: www.par.com.pk

IMPORTS & EXPORTS SITUATION

- According to Pakistan Bureau of Statistics, the trade deficit is shrunk to \$23.67 billion during first nine months of current fiscal year as compared with the deficit of \$27.21 billion in the corresponding period of the last fiscal year.
- The import bill during the first nine months was declined by 8 percent to \$40.75 billion as compared with \$44.28 billion in the same period of the last fiscal year.
- Experts said that the imposition of regulatory duty on luxury and non-essential items during the last budget and followed in the supplementary budget helped in curtailing import growth.
- Growth in exports remained flat. The exports were at \$17.08 billion during the period under review as compared with \$17.06 billion in the same period of the last fiscal year.
- The import bill sharply declined by 21 percent in the month of March 2019 to \$4.15 billion as compared with \$5.25 billion in the same month of the last fiscal year.
- On the other hand, the exports also fell by 11.13 percent in the month under review. Showing decline to \$1.98 billion in March 2019 as compared with \$2.28 billion in the same month of last year.

• The reduction in import bill in March 2019 resulted in narrowed trade deficit for the month. The trade deficit was contracted by 28.07 percent to \$2.17 billion in March 2019 as compared with \$3.02 billion in March 2018.

Exports, Imports and Balance of Trade During the Month of March 2019

Rs. In Million U.S.Dollars in Million

Į		U.S.Donats in Minion						
						% Change in		
	Series	* March, 2019			* February, 2019	March, 2019 over		
						February, 2019		
		Rs.	\$ Rs. \$		\$	Rs.	\$	
			(1 \$=Rs.139.16)		(1 \$=Rs.138.53)			
	Exports	275,384	1,979	261,669	1,889	5.24	4.76	
	Imports	578,273	4,155	579,039	4,18 0	-0.13	-0.60	
	Balance of	-302,889	-2,176	-317,370	-2,291	-4.56	-5.02	
	Trade							

Series	* March, 2019		March, 2018		% Change in March, 2019 over March, 2018	
	Rs.	·		\$	Rs.	\$
		(1 \$=Rs.139.16)		(1\$=Rs.112.06)		
Exports	275,384	1,979	249,551	2,227	10.35	-11.13
Imports	578,273	4,155	588,568	5,252	-1.75	-20.88
Balance of	-302,889	-2,176	-339,017	-3,025	-10.66	-28.07
Trade						

Series	* July – March		July - March		% Change in July - March, 2018 - 2019 over		
	2018 – 2019		2017	2017 - 2018		July - March, 2017 - 2018	
	Rs.	\$	Rs.	\$	Rs.	\$	
Exports	2,265,399	17,083	1,838,873	17,064	23.19	0.11	
Imports	5,381,604	40,755	4,768,999	44,281	12.85	-7.96	
Balance of Trade	-3,116,205	-23,672	-2,930,126	-27,216	6.35	-13.02	

^{*} Provisional figures based on figures provided by the Director (R&S) FBR, Islamabad. Source: Pakistan Bureau of Statistics

NEWS TRENDS

- Punjab Government has set a target of cotton cultivated on above 5,500,000 acres of land. To meet the target all possible resources are set be utilized. According to Punjab Agriculture Department, Government will follow zero tolerance policy to ensure the provision of quality fertilizers and agriculture machinery to the farmers. This decision was made in a meeting, held at Central Cotton Research Institute (CCRI) Multan. Government will ensure to stop the sale of illegal and unapproved seeds of cotton and all possible steps would be taken to achieve 15 million cotton bales. Government is also providing subsidy on high yielding cultivate 100,000 of land. cotton seed to acres **Farmers** of on Multan, Khanewal, Lodhran, Vehari, Bahawalnagar, Bahawalpur, RY Khan, DG Khan, Layyah, Muzaffargarh and Rajanpur has obtained seeds on subsidized rates i.e. Rs 1000 on each bag of approved varieties of cotton seed.
- Managing Director, Ayub Agriculture Research Institute, Faisalabad has observed that sudden change in weather is not suitable for wheat harvesting and sowing of cotton as well.
 Wheat crop is now at maturity stage, which can fall or can be under stress during intense rains and wind speed. Similarly, the rate of germination of cotton seed becomes slow at low temperature.
- A joint Pakistan-Qatar Trade and Investment Conference was held on March 10, 2019 at Doha, organized by Board of Investment Pakistan, in collaboration with Qatar Finance

Center and Embassy of Pakistan Doha. The event was jointly chaired by the Advisor for Commerce, Textile, industry & Investment, Mr. Abdul Razak Dawood and Qatar's Minister of Commerce and Industry, H.E. Ali Bin Ahmed Al Kuwari. The main goal of this event was to explore the investment opportunities in both countries in various sectors especially Tourism and Hospitality. Government of Pakistan is providing equal opportunities to investors from all over the world. A Memorandum of Understanding was also signed between Qatar Financial Center and Pakistan Stock Exchange as well.

- A first ever delegation of the Singapore Business Federation (SBF) and Enterprise Singapore (ESG) visited Pakistan on February 27, 2019 and was welcomed by the Advisor for Commerce, Textile, industry & Investment, Mr. Abdul Razak Dawood, Parliamentary Secretary for Commerce, MNA Shandana Gulzar Khan, MPA Abdul Karim Khan, Khyber Pakhtunkhwa Advisor on Industry & Investment Minister for IT, Khyber Pakhtunkhwa Mr. Kamran Bangash. The key objective of their visit was to explore opportunities for trade & investment and collaboration with Pakistan. The Delegation presented various business interests from infrastructure, energy, agro-food, textile, shipping and many others.
- The delegation was also briefed on policy reform being undertaken in the SME sector, steps towards increasing ease of doing business, intellectual property rights protection & legislation for effective transfer of technology, opportunities for investment in Pakistan's growing IT sector, SEZ's, tourism, mining, house building, alternative energy, gems, shipping, ports, agro-food business and many others.

Sources:

- www.doapunjab.gov.pk
- <u>www.pmd.gov.pk</u>
- www.pcga.org.pk
- http://www.pccc.gov.pk
- dai.agripunjab.gov.pk
- http://crs.agripunjab.gov.pk/reports

زرعی سفارشات برائے کسان

گندم

ان دنوں گندم کی فصل آخری مراحل میں داخل ہو بچکی ہے لہذافصل کی بروقت سنجال کے لیے کٹائی و گہائی سے پہلے لیبر، تھریشر،ٹریکٹر تریال یا پلاٹک، چا دراور کمبائن ہارویسڑ کا انتظام کرلیں۔

بہ اسسال میں بارشیس معمول سے زیادہ ہوئیں اور درجہ حرارت کم رہالہذ افصل کی کٹائی موتمی صورتحال کومدِ نظر رکھتے ہوئے کریں۔ ﷺ کٹائی کے بعد بھریاں قدر سے چھوٹی باندھیں اور سٹوں کارخ ایک ہی طرف رکھیں ،کھلواڑ سے چھوٹے رکھیں اور اونچے کھتوں میں کھلیان لگائیں۔

یں ہے۔ ایکے سال کی فصل کے لیے بیج موجودہ فصل کی برداشت سے کرلیں۔ برداشت سے پہلے جٹری بوٹیاں مثلاً کا نگیاری اورغیرا قسام کے یود نے نکال کرصاف کرلیں۔

كياس

﴿ كَاشْتَ كَے لِے سفارش كردہ اقسام كامعيارى، تندرست، خالص اورا چھے اگاؤوالا 8 كلوگرام ن في آ يکٹر سفارش كردہ چپھوندى کش زېرلگا كراستعال كريں -

مراح کے باس کی کاشت ترجیحا پڑڑیوں پر کریں اور مشنبی طریقہ اختیار کریں۔اگر کاشت بذریعہ ڈرل کرنی ہوتو قطاروں کا درمیانی فاصلہ اڑھائی خےرکھیں اور جب فصل کا قد ڈیٹر ھے دوفٹ ہوجائے تو پودوں کی ایک لائن چھوڑ کر دوسری لائن پرمٹی چڑھا کر پڑڑیاں بنادیں۔ خےروایتی اقسام کی کاشت کرنے کے لیے منظور شدہ اقسام کریں۔

ہے ڈرل سے کا شخصل کے لیے پہلی آبیا تی بوائی کے 30 سے 35 دن بعد اور بقیہ 12 سے 15 دن کے وقفہ سے کریں ۔ جبکہ پڑو یوں پر کا شخصل کے لیے بوائی کے بعد پہلا پانی 3 سے 4 دن بعد دوسرا، تیسرا اور چوتھا پانی 6 سے 9 دن کے وفقہ سے بقیہ پانی 12 دن سے ضرورت کے مطابق لگا کیں ۔

روروں کی مطوبہ تعداد برقر ارر کھنے کے لیے زائد پود سے چھدرائی کر کے نکال دیں چھدارئی کاممل کیا کریں 20سے 25 دن کے دوران یا پہلے پانی سے پہلے یا خٹک گوڈی کے بعد ہرحالت میں ایک دفعہ کمل کیا کریں، اپریل کا شفسل کے لیے 23 ہزار جبکہ می کا شفسل کے لیے 23 ہزار جبکہ می کا شفسل کے لیے 35 ہزار جبکہ میں ایک دفعہ کی کا شفسل کے لیے دوران کی تعداد 35 ہزار فی ایکٹر کھیں۔

بہاریکی

م فصل کو حب ضرورت مناسب وفقہ سے آبیا ٹی کریں بورا نے پر پانی کی کی نددیں، اور بورا نے پر کھیت کو بھیشہ زور حالت میں رکھیں ا ای دانہ منز میں روی مالیکن انی کھڑ انہیں ہونا ما کھ مکئی کے گٹرودیں اور کونیل کی کھی کے تد ارک کے لیے مناسب دانیز ہروں کا استعمال محکمہز راعت توسیع کے مقامی عملہ کے مشور و بے ہے کریں۔

کماو

اپریل میں 2سے 8 پانی ہے۔ 20 سے 30 دن کے وفقہ سے لگائیں۔ ایم بہاریہ کاشت کی صورت میں نائٹر وجنی کھاد کی پہلی قبط اپریل میں ڈالیں اور کھاد ڈالنے کے بعد آبیاثی کریں۔

سنريات وبإغات

ﷺ گرمیوں کی سبزیوں کی کاشت مارچ کے مہینے میں مکمل نہ ہوتکی ہوتو اپریل کے شروع میں بھنڈی، توری، ٹینڈا، ہلدی اور کریلا کی کاشت جاری رکھیں۔

ﷺ نرسری کے ذریعہ لگائی جانے والی سبزیات جامی یاململ کی چھوٹی ٹنل بنا کر کاشت کریں تا کہ چھوٹے پوسوں کو پرندوں ضرررساں کیٹروں اور بیاریوں سے محفوظ رکھا جاسکے۔

ﷺ ترشاوہ پھلوں کے بودوں میں نائٹروجنی کھاد کی دوسری قسط ڈالیں۔نائٹروجنی کھادڈ النے کے لیے 10 سال سےزائد عمر والے بودوں کے لیے بوریا بحساب 1 کلوگرام یااموینم سلفیٹ 2.5 کلوگرام یااموینم نائٹریٹ 2 کلوگرام فی بوداڈ الیں۔

اللہ بارشوں کی وجہ سے باغات میں جڑی بوٹیوں کی بھر مارہے۔لہذا جڑی بوٹیوں کے تدارک کے لیے ہل چلائیں محکمہ زراعت کے مقامی ماہرین کے مشورہ سے سفارش کر دہ جڑی بوٹی مارز ہروں کاسپر ہے کریں۔

ہامرود کے باغ میں نائٹر وجنی کھاد کی دوسری قسط ڈالنے کے لیے 10 سال سے زائد پودوں کو پوریا بحساب2 کلوگرام یاامونیم سلفیٹ بحساب4.5 کلوگرام یاامونیم نائٹریٹ بحساب3.5 کلوگرام فی پوداڈ الیس۔

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

Fauji Fertilizer Company Limited (Farmers' Advisory Services)

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