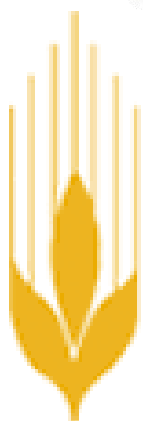


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AGRICULTURE OUTLOOK

JANUARY, 2020



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EXECUTIVE SUMMARY

According to National Agroment Center, Pakistan Meteorological Department (PMD), picking/harvesting/crushing of sugarcane, seasonal vegetables and fruit orchards especially citrus and apple remained the major field activities in most of the agricultural plains of the country during the month of December. Sowing of wheat crop for the Rabi season 2019-20 has been completed in all parts of the country. The crop is now at tillering stage in Sindh & Balochistan and seedling stage in Punjab & Khyber Pakhtunkhaw. Cotton crop could not achieved target of cultivation due to weather and pest attack on the crop. Arrivals of seed cotton into ginning factories of Punjab and Sindh province remained low as compared to previous year.

Harvesting of sugarcane's crop autumn season 2018-19 has been completed in Punjab and KP and now is under crushing process. Sowing of the same for spring season 2019-20 has been started in Punjab and farmers have been advised to prepare their land for sowing operation. Among minor crops, growth of oil seeds (brassica) is reported as satisfactory in Punjab and no serious insect pest attack has been reported so far. Sowing of sunflower is in progress in Punjab. PMD has reported that sowing of winter vegetables was completed in Punjab during the reported period. However, their harvesting and picking is in progress and available in market of Sindh and Balochistan provinces.

In December, 2019, normal to above rains were reported in most of the agriculture plains of the country. Light to moderate rainfalls were reported in first half of the month. Highest amount of rainfall was reported as 50 mm at Narowal followed by 44 mm at Kotli. Lowest temperature ranged from -27°C to -9.8 °C was recorded at Skardu. Severe type of frost with dense fog was also reported in plain areas of the country. Hence farmers are advised to protect their nurseries from server frost injury effect. The outlook for the month of January, 2020 shows that normal to slightly above normal rainfall is expected in most parts of the country particularly over the north and western parts.

The exports showed a decreasing trend of 1.14% in December, 2019 as compared to November 2019 but got an increase of 8 percent as compared to December 2018. The exports were stood at 308.851 billion as reported by Pakistan Bureau of Statistics. Pakistan's imports were also showed an increase of 0.12% over November, 2019 and by 0.55% over December, 2018. According to National Fertilizer Development Center, off-take of most of fertilizers like Urea, DAP and NP remained lowest as compared to previous years and this position would be increased as the gas prices are going high.

CURRENT CROP SITUATION

Wheat

According to National Agromet Center, Pakistan Meteorological Department currently, sowing of Rabi crops have been completed in all over the country. The wheat crop is at tillering stage in Punjab, Sindh and at third leaf stage in Balochistan. While, delayed seed germination is reported in Khyber Pakhtunkhwa due to low rainfall. The crop is under soil moisture stress. No serious insect pest attack has been reported across the country.



According to experts, current spell of rain would strengthen wheat growth and development across the country. More tillers will be developed. The blessed shower would positively impact the output of wheat, which is one of the major cash crop in the country and is a major source to fulfill the domestic needs of staple food to a large population. Province wise targets of wheat area and production are given below:

Wheat Targets 2019-20 fixed by FCA			
Province	Area (000 Hec)	Production (000 Mt)	Yield (kg/ ha)
Punjab	6,560.0	19,660.0	2997.0
Sindh	1,150.0	3,800.0	3304.3
Khyber Pakhtunkhwa	900.0	2,570.0	2855.6
Balochistan	550.0	1,000.0	1818.2
Pakistan	9160.0	27030.0	2950.9

Table 1. Targets of wheat area and production for the year 2019-20

Cotton

The cotton could not achieve its target of 2.145 million hectares for cultivation and production. Production reached up to 12.72 million bales as reported by Provincial Agri. Department. According to a report released by Pakistan Cotton Ginner's Association as on December 1st 2019 arrivals of seed cotton into ginning factories witnessed a shortfall of 20.5% to 7.447 million bales as compared to 9.367 million bales recorded in the corresponding period last year. The arrivals in Punjab are declined by 24.1 percent and reached up to 4.141 million bales. Similarly, the arrivals in Sindh also showed decrease of 15.5 percent. However, the districts of Ghotki, Mirpur Khas, and Badin depicted growing tendency as compared to previous year. The decline in production both in Punjab and Sindh has been occurred owing to weather and pest attack.

Table-4: SEED COTTON ARRIVALS AS ON 01st DECEMBER, 2019**(Bales)**

Heads	2019-20 (Season)			2018-19 (Season)		
	Punjab	Sindh	Total	Punjab	Sindh	Total
Arrivals	4,141,096	3,306,448	7,447,544	5,453,117	3,913,821	9,366,938
Sales to Exporters	0	50,430	50,430	2800	90,778	93,578
Sales to Textile Mills	3,284,315	2,689,777	5,974,092	4,140,813	3,172,051	7,312,864
Sales to T.C.P	-	-	-	-	-	-
Unsold Stock	588,750	339,070	927,820	1,012,246	272,080	1,284,326
Un-ginned Stock	268,031	227,171	495,202	297,258	378,912	676,170

Source: Pakistan Cotton Ginners Association.

Estimates of Cotton Crop Volume 2019-20 Season	
Province	Expected Production (million bales)
Punjab	6.800
Sindh	3.900
Balochistan & Khyber Pakhtunkhaw	0.095
Pakistan	10.800

Targets for Area and Production of Cotton Crop 2019-20

Sr. No.	Province	Area (Million Hectare)	Production (million bales)
1.	Punjab	2.145	7.90
2.	Sindh	0.640	4.60
3.	Khyber Pakhtunkhaw	0.010	0.02
4.	Balochistan	0.100	0.20
5.	Total of Pakistan	2.895	12.72

Source: Provincial Agriculture Department

Sugarcane

According to officials, total sugarcane cultivated area in 2019-20 was 1.06 million hectares against an area of 1.1 million hectares the year before.

- **Autumn Crop**

Harvesting of the autumn sugarcane crop has been completed in Punjab and KP and now is under crushing process. Punjab and Sindh Government has announced 192 and 190 per mound support prices for the ongoing fiscal year respectively. However, the farm gate price is 182 and 180 per mound respectively in both provinces.

Production in the year 2019-20 remained decreased and stood at to 64.77 million tons as compared to 67.17 million tons the year before showing a decrease of 3.8 percent due to increase in area for cultivation of rice and maize.

- **Spring Crop**

Sowing for spring season cultivation has also been started in various localities of the country. Farmers have been advised to start bed preparation process and arrange necessary inputs for example arrangement of buds and tillage implements.

Maize

According to National Agroment Center, PMD autumn maize crop is at maturity stage in Punjab and reported satisfactory. However, its harvesting has been completed in KP. Cultivated area of maize crop saw an increase of 1.53 percent after cultivated on an area of 1.386 million hectares with the production of 6.93 million tons. Area and production increased due to higher domestic price because of its utilization in feed and wet milling and industries.

Minor Crops

- Sowing of oil seeds (Brassica) crop has been completed and crop's growth is reported satisfactory in Punjab. No serious pest/insect attack has also been reported.
- Harvesting of soya bean, seasum and sesame has been completed in Sindh.
- Sunflower is in sowing stage in Punjab. Farmers are advised to complete seed sowing operation before the end of January. Use only recommended hybrid seeds to obtain high production.
- Punjab Agriculture Department has reported satisfactory chickpea crop's growth. Farmers are advised to frequently apply water for irrigation purpose.
- Fodder crops like alfalfa and Barseem are in growing stage and reported satisfactory. Farmers are advised to apply light irrigation to reduce frost injury on leaves.

Fruits & Vegetables

- The sowing of winter vegetables like Cabbage, Cauliflower, Potato, Onion, Lettuce leaf, Radish, Turnip, Peas, Spinach, Fenugreek, Beets, and Coriander has been completed in Punjab. However, their harvesting and picking are in progress and these are available in market in Sindh & Balochistan.
- Seasonal fruits like Guava, Banana, Cheeko are in good condition. Cheeko and Apple Stone (Bare) are at fruit formation stage in Sindh province.
- Harvesting and marketing of fruits belong to citrus group is in full swing in Punjab, KP and Sindh areas.

WATER SITUATION

In cusecs

Barrages*	Mean Inflow/U/S Discharge	Mean Outflow/D/S Discharge
Guddu	23,722	14,276
Chashma	18,600	15,900
Taunsa	16,764	16,764
Kalabagh	27,939	26,089
Panjnad	6,481	6,481
Sukkur	11,634	11,634
Kotri	2,099	2,099

*Estimates as on 09.01.2020

In cusec

Rim Stations*	Mean Inflow/U/S Discharge	Mean Outflow/D/S Discharge
Indus at Tarbela	17,000	8,000
Kabul Inflow at Nowshera	8,540	
Jehlum at Mangla	10,425	1,420
Chenab at Marala	18,920	18,920

*Estimates as on 09.01.2020

Source: www.pakirsa.gov.pk

WEATHER SITUATION

Variable weather conditions were prevailed in the country during the month of December 2019. Winter rains generally starts from the end of the reported month. Therefore, normal to above rains were reported in most of the agricultural plains of the country. Light moderate rainfalls were reported in the first half of the month in Punjab, Gilgit-Baltistan, Azad Jammu & Kashmir and Khyber Pakhtunkhaw. Dry weather was also reported throughout the country in the last of the month in most parts of the country. Highest amount of rainfall was reported as 50 mm at Narowal followed by 44.2 mm at Kotli and 43 mm at Malamjabba.

The mean daily Relative Humidity (R.H) remained normal to above normal in most of the agricultural plains except at Tandojam, Peshawar, Quetta and Gilgit where it was observed below

normal. It is evident that moisture conditions remained satisfactory. Soil moisture conditions have been improved but still more rains are required for proper growth of cereals especially wheat crop.

Most agriculture plains remained cooler in this month. Mean daily temperature remained below normal (by 1-5°C) in most of the agricultural plains of the country except Quetta. Lowest Temperature ranged from -27 °C to -9.8 °C was recorded at Skardu during the last month of the year. Mean daily temperature ranged between 11 to 12°C in Khyber Pakhtunkhaw, around 11°C in Potohar plateau, in remaining parts of Punjab it ranged between 11 to 13°C, 15 to 16°C in Sindh, -04 to 04°C in Gilgit-Baltistan region and it was observed 07°C in the high elevated agricultural plains of Baluchistan represented by Quetta valley.

FOG Situation

Severe type of frost with dense fog was also reported in plain areas of the country. Hence farmers are advised to protect their nurseries from server frost conditions.

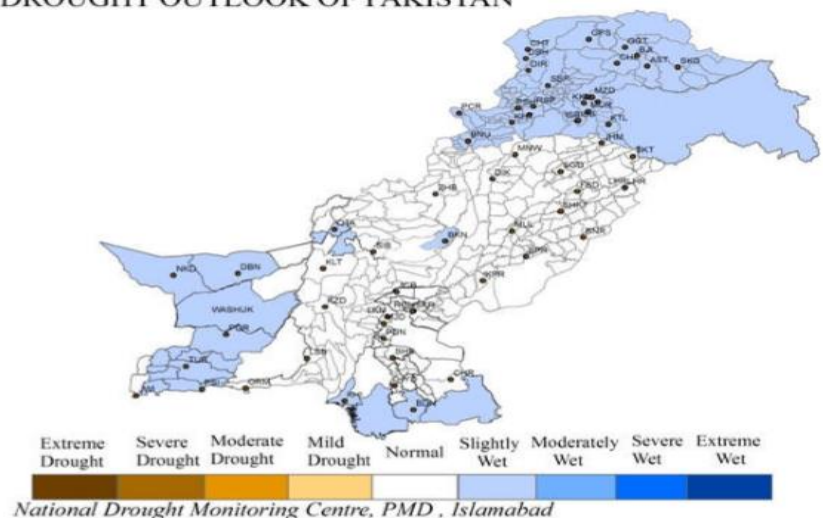
Weather outlook for January 2020

Winter rainfall is expected to be above normal embedded with few heavy snowfall events in most of the northwestern and upper parts of the country. Positive precipitation anomalies are predicted for the western region and high altitudes of the country. Normal precipitation is predicted for Sindh province, lower parts of Punjab and coastal areas of Balochistan. Rainfed plains of the Balochistan and Potohar plateau are expected to receive 20mm to 40mm precipitation. Other parts of the country would receive less amount of rainfall. Nights will become cooler and frost can be observed in the early morning. The mean relative humidity may vary from 50 % to 65%. The crop growth may be retarded due to low temperature. However, it would be beneficial for cereals especially wheat crop to attain more tillers. The day time temperatures may range between 16°C to 20°C in Northern Punjab and upper Khyber Pakhtunkhaw while in the low elevation plains are likely to experience them from 20°C to 24°C.

DROUGHT SITUATION ANALYSIS

Wet conditions were prevailed over some places in the northern parts of the country. During the month of December, the rains in the agricultural plains of Khyber Pakhtunkhaw and Punjab gave relief to the crops.

DROUGHT OUTLOOK OF PAKISTAN



Drought Outlook for January 2020

As normally Balochistan and Sindh provinces remained under drought conditions. Luckily, the month of December remained good for both of provinces, as light to moderate rainfall gave some relief to these provinces. Hence, minor conditions of drought are expected in the month of January.

MONTHLY AVERAGE PRICES OF AGRI COMMODITIES

Description	Unit	Average Price in PKR		increase or decrease over last month
		Dec-19	Nov-19	a-b
		a	b	
Wheat	10kg	425.43	406.79	+18.64
Wheat Flour	10kg	458.31	462.72	-4.41
Rice Basmati Broken	1kg	82.9	82.53	+0.37
Rice Irri-6(Punjab/Sindh)	1kg	61.5	61.06	+0.44
Milk, Fresh, Un-boiled	1ltr	94.4	93.97	+0.43
Citrus (Kinnow)	Dozen	120	0	
Bananas	Dozen	65.92	59.97	+5.95
Pulse Masoor, Washed	1kg	137.98	135.41	+2.57
Pulse Moong Washed	1kg	198.37	190.9	+7.47
Pulse Mash Washed	1kg	209.03	204.56	+4.47
Pulse Gram Washed	1kg	139.94	137.32	+2.62
Potatoes	1kg	47.51	48.8	-1.29
Onion	1kg	73.84	84.05	-10.21
Tomatoes	1kg	131.11	194.96	-63.85
Garlic	1kg	286.85	289.83	-2.98
Sugar Refind	1kg	71.08	72.61	-1.53
Mustard Oil	1kg	206.61	205.26	+1.35
Eggs Hen (Farm)	1 Dozen	121.78	113.88	+7.9
Vegetable Ghee, Tin	2.5kg	582	573	+9.0

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 Balochistan Province to other parts of the country.
Potato	It is also grown in all provinces and is being supplied from Balochistan and KP province
Tomato	It is also grown in all provinces and is being supplied from Balochistan and KP Province.
Red Chilli	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*

APPROVED CROP CALENDAR

Crop name (alphabetically)	Nursery time	Sowing time	Reaping time
Barley		1 st Oc. To 30 th Nov.	1 st April to 30 th June
Berseem		1 st Sep. to 31 st Oct.	1 February to April 30
Brinjal	whole July	whole August	1 st Nov. to 31 st Dec.
Corn (common)		1 st June to 31 st July	1 st Oct. to 30 th Nov.
Corn (spring)		Whole February	1 st June to 31 st July
Cotton		1 st April to 31 st May	1 st Oct. to 30 th Nov.
Cucumber		1 st May to 30 th June	1 st Aug. to 3 rd Sep.
Flower cabbage, cabbage		1 st Sep. to 31 st Oct.	1 st Dec. to 28 th Feb.
Garlic		1 st Oct. to 30 th Nov.	1 st April to 31 st May
Gram		1 st Oct. to 30 th Nov.	whole April
Guwara		1 st June to 31 st July	1 st Oct. to 30 th Nov.
Lucson		1 st Sep. to 31 st Oct.	1 st Feb. to 30 th April
Masoor		1 st Oct. to 30 th Nov.	whole April
Mong, mash		whole July	whole October
Oats		1 st Oct. to 30 th Nov.	1 st Feb. to 31 st March
Okra		1 st April to 30 th June	1 st July to 30 th Sep.
Onion	1 st July to 30 th Oct.	1 st Dec. to 31 st Jan.	1 st April to 31 st May
Peanuts		1 st April to 31 st May	whole November
Peas		whole October	1 st March to 31 st April
Pepper	whole February	1 st March to 31 st April	1 st Aug. to 31 st Dec.
Potato (Kharif)		1 st Aug. to 30 th Sep.	whole December
Potato (Spring)		whole Feb.	Full June
Rapeseed		whole October	whole April
Rice	1 st April to 31 st May	Whole June	1 st Sep. to 31 st Oct.
Sorghum (Kharif)		whole march	1 st May to 30 th June
Sorghum (Zaid Kharif)		1 st June to 31 st July	1 st Oct. to 30 th Nov.
Soybean (Kharif)		whole June	1 st Oct. to 30 th Nov.
Soybean (spring)		1 st Feb. to 31 st March	1 st June to 31 st July
Spinach		1 st Sep. to 31 st Oct.	1 st Dec. to 28 th Feb.
Sugar beets		1 st Oct. to 30 th Nov.	1 st April to 31 st May
Sugarcane (Autumn)		Whole September	1 st Sep. to 31 st Oct.
Sugarcane (Spring)		1 st Feb. to 31 st March	1 st Nov. to 31 st Dec.
Sunflower		whole February	1 st June to 31 st July
Tobacco	1 st Jan. to 28 th Feb.	1 st Feb. to 31 st March	1 st July to 30 th Sep.
Tomato	whole July	1 st August to 30 th Sep.	1 st Nov. to 31 st Dec.
Tomato (Rabi)	whole October	1 st Nov. to 31 st Dec.	1 st April to 31 st May
Turnip		1 st Sep. to 31 st Oct.	1 st Dec. to 28 th Feb.
Wheat		15 th Sep. to 30 th Nov.	1 st April to 31 st May

Note: sowing and harvesting time of crops can be changed according to region and weather conditions.

COUNTRY WISE AREA & PRODUCTION OF CROPS DURING FY 2019-20

Crop	Area in 000 hectare	Production “000 tons	Yield Kg/hec
Kharif Crops			
Maize	1,386.46	6,930.78	4,999
Rice	3,036.45	7,700.83	2,536
Sugarcane	1,060.04	64,771.3	60,960
Mash bean	13.67	6.80	498
Mung Bean	185.72	133.03	716

Source: Estimates of Federal Committee on Agriculture, Rabi Season 2019-20

IMPORT & EXPORT SITUATION

Exports

- According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during December, 2019 amounted to Rs. 308.851 billion (provisional) as against Rs. 312.420 billion (provisional) in November, 2019 and Rs. 286.802 million in December 2018. Hence, decrease of 1.14% over November, 2019 but an increase of 8% over December, 2018 was reported.
- Exports during July-December, 2019 totaled Rs. 1,805.99 billion (provisional) as against Rs. 1,466.16 billion during the corresponding period of last year showing an increase of 24.88%.
- Main commodities of exports during November, 2019 were Knitwear (Rs. 41.460 billion), Bed wear (Rs. 30.368 billion), Readymade garments (Rs.38.943 billion), Cotton cloth (Rs. 26.152 billion), Cotton yarn (Rs. 41.788 billion), Rice others (Rs. 22.924 billion), Rice Basmati (Rs.8.471 billion), towels (Rs. 10.157 billion), Made-up articles (excl. towels & bed wear) (Rs. 8.855 billion) and Fish & fish preparations (Rs. 8.849 billion).

Imports

- Imports into Pakistan during December, 2019 amounted to Rs. 612.971 billion (provisional) as against Rs. 612.215 billion (provisional) in November, 2019 and Rs. 609.596 billion during December, 2018 showing an increase of 0.12% over November, 2019 and by 0.55% over December, 2018.
- Imports during July-December, 2019 totaled Rs. 3,626.44 billion (provisional) as against Rs. 3,604.706 billion during the corresponding period of last year showing an increase of 0.60%.
- Main commodities of imports during November, 2019 were Petroleum products (Rs.71.442 billion), Natural gas, liquefied (Rs.22.182 billion), Petroleum crude (Rs.46.662 billion), Plastic materials (Rs.26.742 billion), Palm oil (Rs. 26.473 billion), Electrical machinery and apparatus (Rs.46.964 billion), Mobile phone (Rs. 17.203 billion) and Aircrafts, ships & boats (Rs.3.473 billion).

Series	* December, 2019		* November, 2019		% Change in December, 2019 over November, 2019	
	Rs	\$ (1 \$=Rs.155.18)	Rs	\$ (1 \$=Rs.155.36)	Rs.	\$
Exports	308,851	1,990	312,420	2,011	-1.14	-1.04
Imports	612,971	3,950	612,215	3,940	0.12	0.25
Balance of Trade	-304,120	-1,960	-299,795	-1,929	1.44	1.61

Series	* December, 2019		December, 2018		% Change in December, 2019 over December, 2018	
	Rs.	\$ (1 \$=Rs.155.18)	Rs.	\$ (1 \$=Rs.138.471)	Rs.	\$
Exports	308,851	1,990	286,802	2,072	7.69	-3.96
Imports	612,971	3,950	609,596	4,405	0.55	-10.33
Balance of Trade	-304,120	-1,960	-322,794	-2,333	-5.79	-15.99

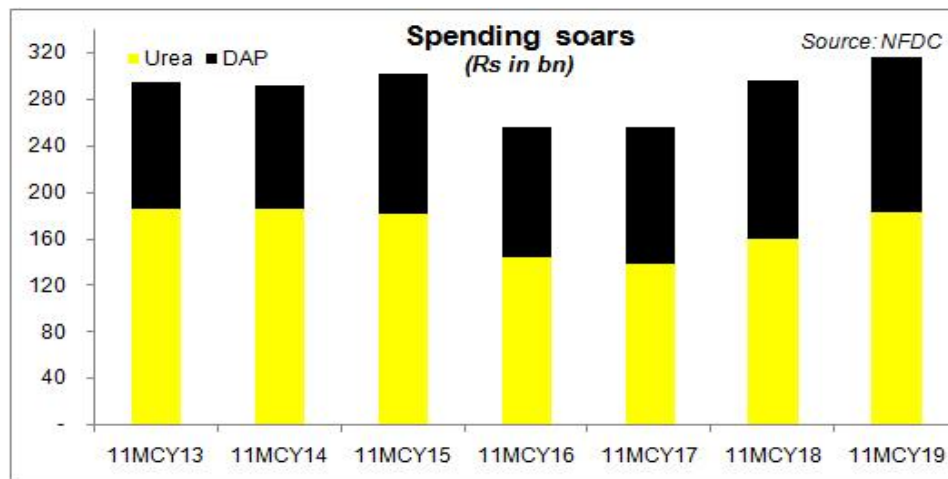
Series	* July - December, 2019		July - December, 2018		% Change in July - December, 2019 over July - December, 2018	
	Rs	\$	Rs.	\$	Rs	\$
Exports	1,805,999	11,535	1,446,166	11,181	24.88	3.17
Imports	3,626,440	23,163	3,604,706	27,952	0.60	-17.13
Balance of Trade	-1,820,441	-11,628	-2,158,540	-16,771	-15.66	-30.67

Source: Pakistan Bureau of Statistics

FERTILIZER OFF-TAKE SITUATION

According to National Fertilizer Development Center (NDFC), Urea off-take remained at Rs. 4.9 million tons during the 11 months of the calendar year 2019. The availability was calculated at 3,349 thousand tons which comprised of 523 thousand tons of opening balance and 2,826 thousand tons of domestic production. This figure depicted lowest off-take situation since last three years. The promising crop targets would be missed and delayed due to this reduction in use of fertilizer. The

first two months of ongoing Rabi season 2019-20 showed lowest off-take in past almost ten years. This reduction in off take was due to raised in prices gradually since CY 10.



Source: Business Recorder

Similarly, application of DAP could not get better position. In fact at 1.8 million tons, it has been recorded the lowest 11M off-take since CY15. Prices of DAP have been increased by 10 percent over last year, but the damage seems to have been done more by the higher urea prices, which have gone up by 20 percent over last year. The latest increase after the Gas Infrastructure Development Cess (GIDC) fiasco has also slowed down the off-take.

NEWS TRENDS

Locust attack reports in Cholistan

- Punjab Agriculture Department has reported partial attack of locust on crops in some areas of Cholistan desert. Director General, Punjab Agriculture Extension Department told that the Government is fully prepared and is actively working to control locust attack. The team is also organizing awareness programs in various areas in this regard.
- Punjab Government is taking exigent steps for the development of Agriculture Sector in the Province. This was said by the Deputy Commissioner Sargodha, while addressing a meeting on Performance of Livestock Department. According to him, the Chief Minister Punjab is working under the Agriculture emergency program for the betterment and prosperity of agriculture sector. He was briefed that cultivation of wheat crop has been completed. Whereas, harvesting of citrus crop is being sold and exported at international market successfully. The meeting was further told that under the vision of Prime Minister Work on six projects was continued of which included agricultural emergency program, subsidy on seeds of wheat and Canola, exhibiting plots of wheat and sugarcane, subsidy on fertilizers, loans on the production of Rabi and Kharif crops and Kitchen Gardening. At same time he directed agriculture authorities to organize seminars and programs to raise awareness among farmers' especially small growers. Industrialists were also directed by him to introduce best quality seeds for achieving best production targets in agriculture centers.

- Pakistan's top agriculture show "CAC Pakistan Exhibition-2019" occurred on December 06, 2019 at Expo Centre Lahore. The mega event was attended by thousands of visitors from all over the country and abroad and showed interest in agri products displayed at over 100 stalls, set up by 68 Chinese and 50 Pakistani companies. This was the 5th edition of CAC Pakistan Exhibitions, which met a historic success as Pakistani and Chinese exhibitors had joined hands and pledged to work together to give the desired strength to the agriculture sector of Pakistan.



FARMERS ADVISORY IN URDU

Sources:

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