

AGRICULTURE OUTLOOK

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



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EXECUTIVE SUMMARY

(Compiled by Muhammad Fakhar Imam, R&PU)

Rice Crop nurseries plantation in the field has been completed. Rice crop growth has been reported satisfactory. Monsoon rainfalls in Punjab and Sindh provinces have done positive impact of tillering and growth of Rice crop. The heavy rainfall and flood swamped through the cotton fields, flood has damaged cotton crop fields. Punjab, districts including Layyah, Mianwali, Rajanpur, Rahimyar Khan, and DG Khan were seriously affected losing thousands of bales of cotton crop. Areas of Ghotki, Daherki, Sukkar, and Naushehro Feroz, Sanghar, Bhakkar, Jhang, Shorkot, and Mianwali were also affected by floods in Punjab & Sindh provinces. Spring Maize crop has been reported satisfactory in Punjab, Sindh, and KP but in Balochistan province maize crop was vanished because of extensive rainfall and floods. Growth of sugarcane was reported satisfactory. In some areas of Punjab termite attack was found in sugarcane crop. Growth of Sesame is reported normal and is growing at flowering stage. Threshing of linseed, castor oil and safflower is completed and ground nut is growing at vegetative stage. In KP, Harvesting of sunflower is in progress and normal yield is expected. Overall production of Banana and other fruits is reported well however mango production is reported below due to earlier heat waves. In KP, Condition of fruit orchards is reported satisfactory. Harvesting of garlic was in progress. In Gilgit Baltistan, Condition and yield of orchards and summer vegetables is reported satisfactory.

During the month of July 2022, rainfall received across Pakistan. Above Normal rainfall reported from most of the places in Pakistan, while some weather stations received exceptionally high above normal rains which caused flooding in those areas.

As per estimate of Pakistan Bureau of Statistics (PBS) Consumer Price Index (CPI) for the month of June 2022 increased by 6.3% over June, 2022. Pulse Gram, Onions, Potatoes, Besan, Pulse Mash, Pulse Masoor, Eggs, Bread Cooking Oil, Rice and Vegetable Ghee increased in the country over the month of May 2022 when compared on YoY and monthly basis. Conversely, commodities like Wheat Flour, Bananas, Pulse moong, Gur and Galic showed declining trend in pricing over the month of May 2022

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during June, 2022 amounted to Rs.596,433 million (provisional) as against Rs. 513,475 million in May, 2022 and Rs.426,080 million during June, 2021 showing an increase of 16.16% over May, 2022 and of 39.98% over June, 2021.

As mentioned by National Fertilizer Development Centre (NDFC) Total nutrients offtake during June, 2022 was 483 thousand tonnes, which increased by 17.3 percent over June, 2021. Production of all fertilizer products during June 2022 was 766 thousand tonnes. Total imported supplies were 26 thousand tonnes.



2. CURRENT CROP SITUATION

(Data gathered by Muhammad Fakhar Imam, R&PU)

2.1. Rice Crop

In Punjab Rice Crop nurseries plantation in the field has been completed. Rice crop growth has been reported satisfactory. Monsoon rainfalls in Punjab and Sindh provinces have done positive impact of tillering and growth of Rice crop. Farmers are applying second doze of Nitrogen fertilizers. In some districts of Punjab province Rice blast disease and leaf folder insect attack has been reported the agricultural extension staff in Punjab province is arranging agricultural workshops for farmers to guide them about the control of rice pests and diseases.

2.2 Cotton Crop:

In Punjab province early sowing cotton crop picking has been started. The heavy rainfall and flood swamped through the cotton fields, flood has damaged has damaged cotton crop fields. Punjab, districts including Layyah, Mianwali, Rajanpur, Rahimyar Khan, and DG Khan were seriously affected losing thousands of bales of cotton crop. Areas of Ghotki, Daherki, Sukkar, and Naushehro Feroz, Sanghar, Bhakkar, Jhang, Shorkot, and Mianwali were also affected by floods in Punjab & Sindh provinces.

2.3 Maize Crop:

Spring Maize crop has been reported satisfactory in Punjab, Sindh, and KP but in Balochistan province maize crop was vanished because of extensive rainfall and floods. In Punjab, Maize spikes are in the process of Grain formation stage early rainfalls at the start of this month found beneficial for the growth and development of maize grains. In KP, Sowing of Hybrid/open pollinated varieties of maize has completed in the province. Hoeing, weeding and application of second dose of fertilizer are in progress.

2.4. Sugarcane Crop:

In Punjab and Sindh, growth of sugarcane was reported satisfactory. In some areas of Punjab termite attack was found in sugarcane crop. The growth of the sugarcane crop has reported much better due to good rains. In KP, growth of sugarcane was going normal.

2.5. Oil Seeds and Lentils:

In Punjab & Sindh, Growth of Sesame is reported normal and is growing at flowering stage. Threshing of linseed, castor oil and safflower is completed and ground nut is growing at vegetative stage. In KP, Harvesting of sunflower is in progress and normal yield is expected. Sowing of mung/mash has completed in hilly areas and is in progress in plane areas. In Balochistan, growth of sunflower was at flowering stage.

2.6. Horticulture

- In Sindh Overall production of Banana and other fruits is reported well however mango production is reported below due to earlier heat waves.
- In Punjab, Chemical spraying on citrus orchards against insects and fungus attacks was in progress.
- In KP, Condition of fruit orchards is reported satisfactory. Harvesting of garlic was in progress.
- In Gilgit Baltistan, Condition and yield of orchards and summer vegetables is reported satisfactory.

Source:

Directorate of Agricultural information Punjab, Sindh, KP

Department of Agricultural Extension Balochistan

Monthly Bulletin, National Agromet Centre, Pakistan Meteorological Department

WEATHER SITUATION

(Data compiled by Muhammad Fakhar Imam, R&PU)

Rainfall/Precipitation:

During the month of July 2022, rainfall received across Pakistan. Above Normal rainfall reported from most of the places in Pakistan, while some weather stations received exceptionally high above normal rains which caused flooding in those areas. The Chief amounts of monthly rainfall recorded across Pakistan during July 2022 are shown in Table given below:

Table-I: Chief amounts of rainfall recorded across Pakistan during July 2022					
S. No.	Stations	Rainfall (mm)	S. No.	Stations	Rainfall (mm)
1	Karachi (Masroor)	606.0	11	Lasbela	404.7
2	Islamabad, Airport	573.3	12	Mangla	391.2
3	Padidan-Sindh	535.5	13	Jhelum	383.7
4	BandiAbbaspur (AJK)	524.0	14	Chakwal	383.6
5	Gujranwala	494.0	15	Kotli	360.0
6	Haraman (AJK)	469.0	16	Murree	356.0
7	Takht Bai (KP)	456.2	17	Balakot	352.4
8	Mardan	435.7	18	Kamra Airbase	349.0
9	Gujrat	424.0	19	Kasur	344.5
10	Sialkot	423.1	20	Buner	340.7

Relative Humidity

Mean daily Relative Humidity (R.H) observed normal to slightly above normal in most of the agricultural plains of the country during the month. Maximum value of mean Relative Humidity was observed 79% at Jhelum followed by 75.2% at Rawalpindi, 74% at Sargodha and 73% at Khanpur and Tando Jam each. Number of days with mean R.H greater or equal to 80% was observed to be 16 at Jhelum and 10 at Rawalpindi and Sargodha.



Temperature Situation during July, 2022

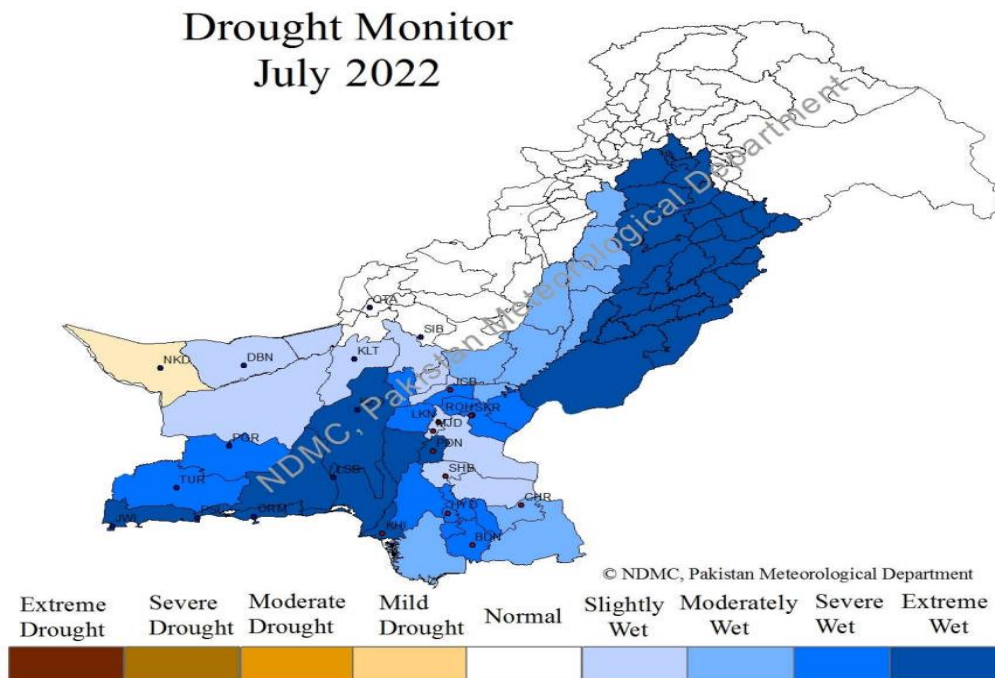
Temperature plays an important role in the growth and development of crops. Mean daily temperature remained normal to slightly below normal by 1 to 3°C in most of the agricultural plains of the country except Gilgit Baltistan. Mean daily temperature ranged 30 to 33°C in Khyber Pakhtunkhwa, 28 to 31°C in the Potohar Plateau and 31 to 34°C in the remaining agricultural plains of the Punjab. In lower Sindh it reached 33, in Gilgit-Baltistan region 25-29°C and observed 27°C in the high elevated agricultural plains of Balochistan represented by Quetta valley.

Weather Prediction during August 2022

During August monsoon rain bearing systems will produce precipitation. These rains are of immense importance for the farmers in relation to present and future crop requirements. Above normal precipitation is predicted over most parts of the country for August 2022. Northeastern Punjab, Kashmir, southern parts of Sindh as well as coastal areas of Balochistan are expected to receive above normal rainfall during the forecast month. Most parts of Khyber Pakhtunkhwa and Balochistan may receive slightly above normal whereas Gilgit Baltistan may receive nearly normal rainfall during August 2022.

DROUGHT SITUATION

Spatial drought analysis results using different indices are represented in Fig. given below. In Balochistan and Sindh above normal rains have given relief to the drought affected areas of both Sindh and Balochistan and drought conditions have been terminated except from the area around Nokkundi in west Balochistan.

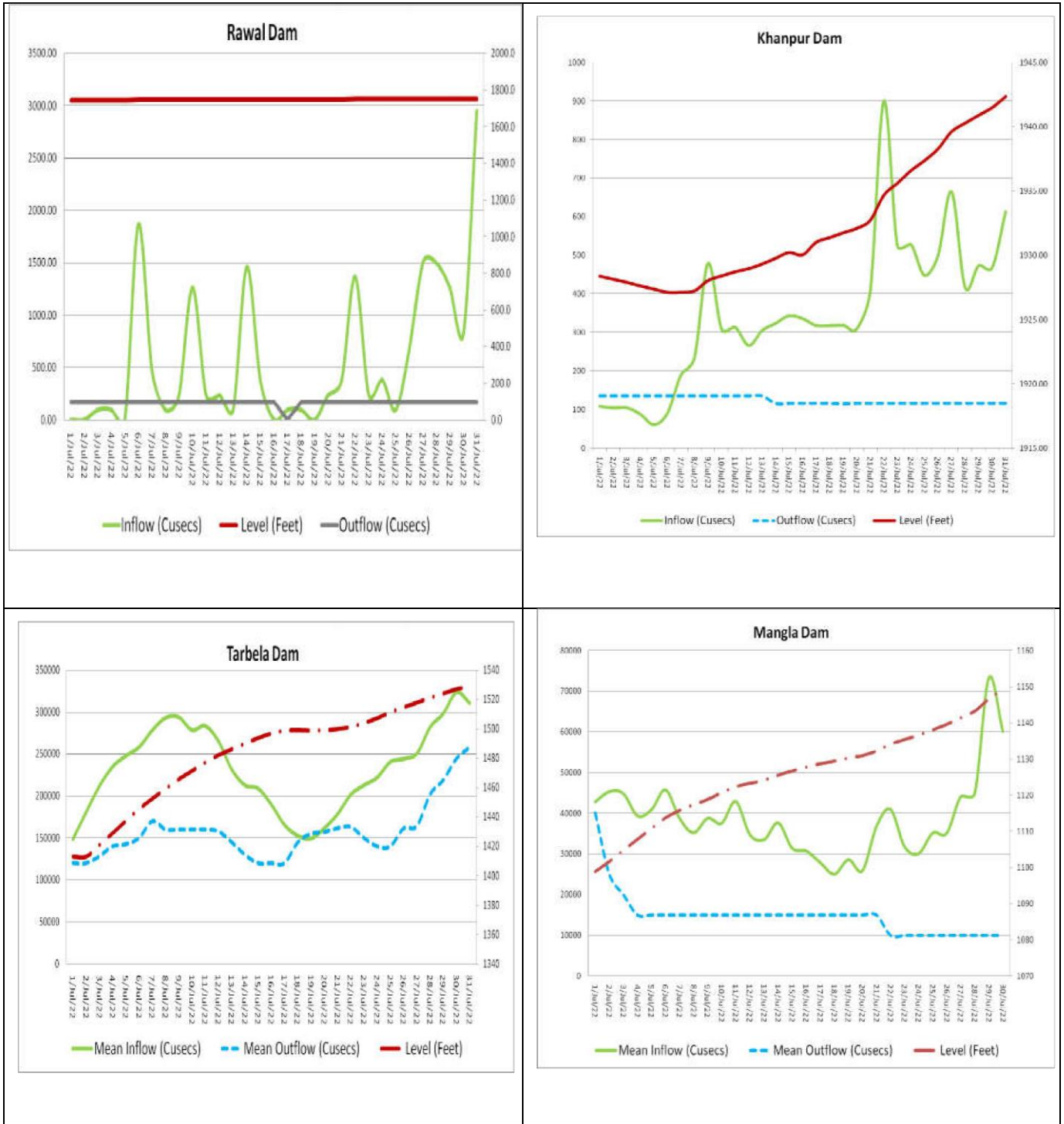


Source: <http://www.ndmc.pmd.gov.pk/>



WATER AVAILABILITY/DAMS FLOW DATA:
 (Data compiled by Muhammad Fakhar Imam, R&PU)

In July 2022, water inflow, outflow and levels of Rawal, Khanpur, Tarbela and Mangla dams are shown in Figs given below. Increase in water Inflow and level have been recorded in Rawal, Khanpur, Tarbela and Mangla reservoir.



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



AVERAGE PRICES OF AGRI. COMMODITIES

(Data compiled by Muhammad Fakhar Imam, R&PU)

- According to Pakistan Bureau of Statistics (PBS), Consumer Price Index (CPI) for the month of June 2022 increased by 6.3% over June, 2022
- Pulse Gram, Onions, Potatoes, Besan, Pulse Mash, Pulse Masoor, Eggs, Bread Cooking Oil, Rice and Vegetable Ghee increased in the country over the month of May 2022 when compared on YoY and monthly basis.
- Conversely, commodities like Wheat Flour, Bananas, Pulse moong, Gur and Galic showed declining trend in pricing over the month of May 2022

S.No.	Description	Unit	Average Prices			%change July 22 over	
			22-Jun	22-July	21-July	22-Jun	21-July
1	Wheat Flour Bag	20 Kg	1237.9	1218.1	1127.7	1.63	9.77
2	Rice Basmati Broken (Average Quality)	1 Kg	119.26	115.97	94.44	2.84	26.28
3	Rice IRRI-6/9 (Sindh/Punjab)	1 Kg	88.49	84.34	72.78	4.92	21.59
4	Bread plain (Small Size)	Each	73.01	69.51	59.24	5.04	23.24
5	Beef with Bone (Average Quality)	1 Kg	673.49	657.95	539.54	2.36	24.83
6	Mutton (Average Quality)	1 Kg	1388.5	1366.2	1112.7	1.63	24.79
7	Chicken Farm Broiler (Live)	1 Kg	281.24	292.59	187.69	-3.88	49.84
8	Milk fresh (Un-boiled)	1 Ltr	136.02	129.47	110.75	5.06	22.82
9	Curd (Dahi) Loose	1 Kg	154.92	147.01	128.04	5.38	20.99
10	Powdered Milk NIDO 390 gm Polyba	Each	535.99	533.38	490.91	0.49	9.18
11	Eggs Hen (Farm)	1 Dozen	195.71	183.70	157.19	6.54	24.51
12	Mustard Oil (Average Quality)	1 Kg	529.77	527.67	301.58	0.40	75.66
13	Cooking Oil DALDA or Other Similar	Each	2856.9	2664.7	1614.4	7.21	76.96
14	Vegetable Ghee DALDA/HABIB 2.5 kg	Each	1406.6	1312.5	810.73	7.17	73.50
15	Vegetable Ghee DALDA/HABIB or Ot	Each	571.82	546.97	319.52	4.54	78.96
16	Bananas (Kela) Local	1 Dozen	110.22	117.91	97.68	-6.52	12.84
17	Pulse Masoor (Washed)	1 Kg	300.61	278.47	156.88	7.95	91.62
18	Pulse Moong (Washed)	1 Kg	189.75	177.31	192.40	7.02	-1.38
19	Pulse Mash (Washed)	1 Kg	324.44	303.14	243.69	7.03	33.14
20	Pulse Gram	1 Kg	222.42	200.48	145.89	10.94	52.46
21	Potatoes	1 Kg	56.26	49.14	51.34	14.49	9.58
22	Onions	1 Kg	82.33	79.46	43.48	3.61	89.35
23	Tomatoes	1 Kg	73.02	79.44	64.51	-8.08	13.19
25	Gur (Average Quality)	1 Kg	132.13	130.53	135.40	1.23	-2.42
26	Garlic (Lehsun)	1 Kg	317.81	296.07	217.54	7.34	46.09

Decrease



Increase



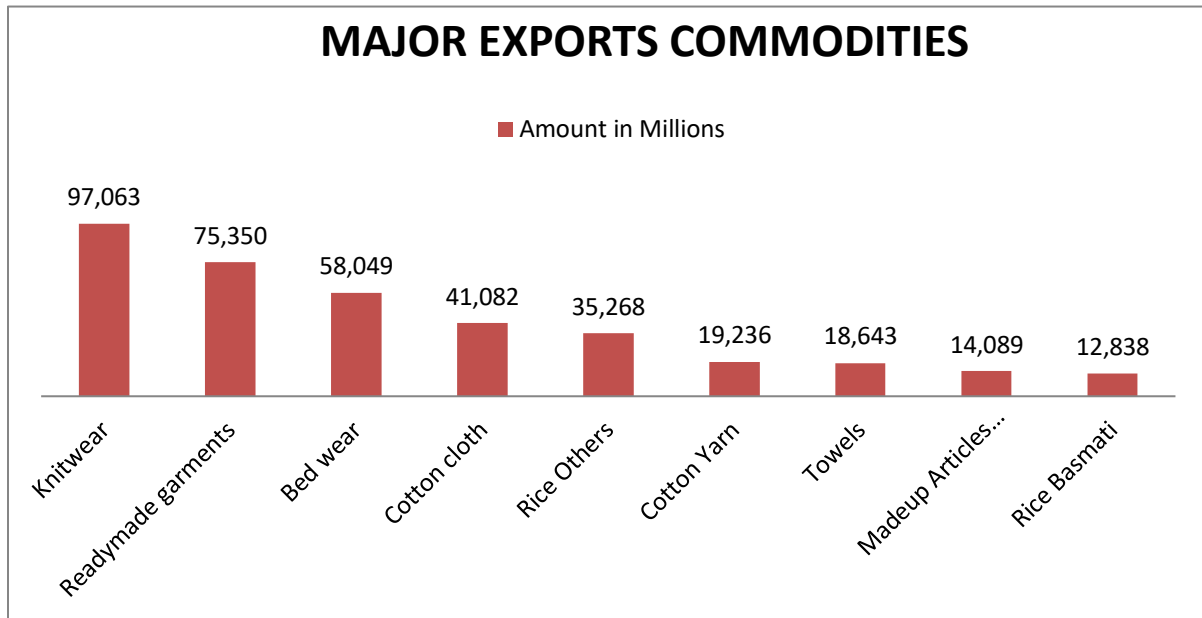


TRADE SITUATION

(Data compiled by Muhammad Fakhar Imam, R&PU)

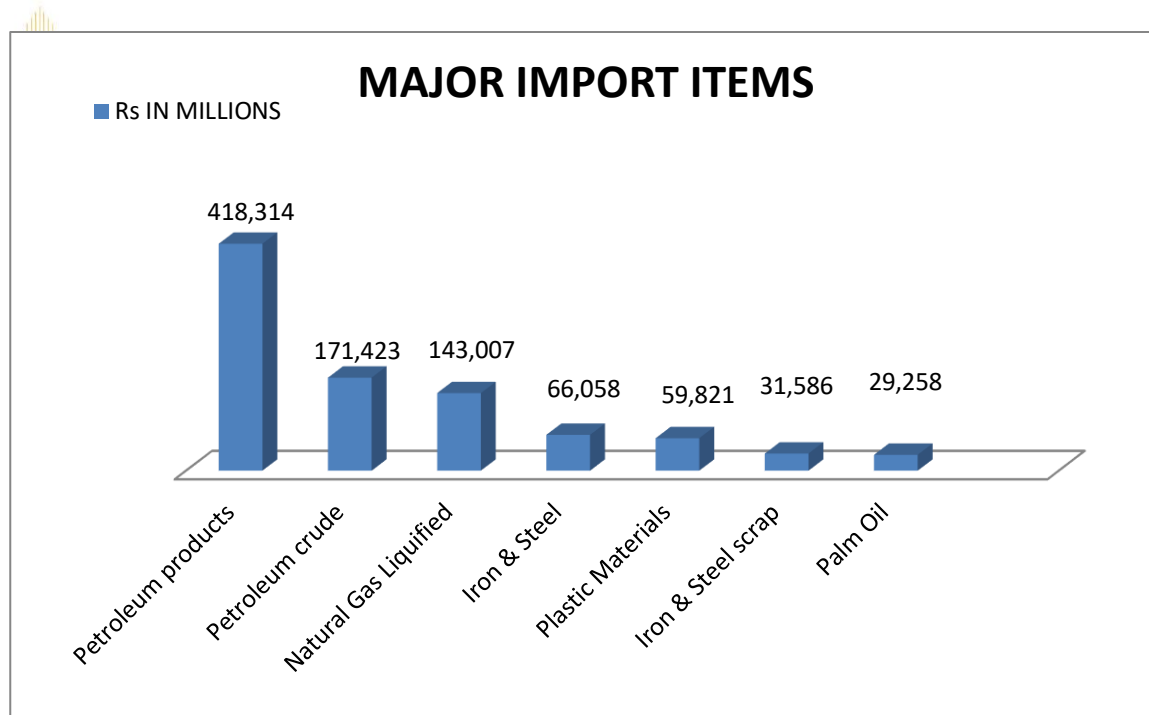
Exports:

- According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during June, 2022 amounted to Rs.596,433 million (provisional) as against Rs. 513,475 million in May, 2022 and Rs.426,080 million during June, 2021 showing an increase of 16.16% over May, 2022 and of 39.98% over June, 2021.
- In terms of US dollars the exports in June, 2022 were \$ 2,918 million (provisional) as compared to \$ 2,626 million in May, 2022 showing an increase of 11.12% and by 6.96% as compared to \$ 2,728 million in June, 2021.
- Exports during July – June, 2021 - 2022 totaled Rs. 5,663,089 million (provisional) as against Rs. 4,041,927 million during the corresponding period of last year showing an increase of 40.11%.



Imports:

- Imports into Pakistan during June, 2022 amounted to Rs. 1,610,327 million (provisional) as against Rs. 1,325,001 million in May, 2022 and Rs. 991,914 million during June, 2021 showing an increase of 21.53% over May, 2021 and of 62.35% over June, 2021..
- In terms of US dollars the imports in June, 2022 were \$ 7,880 million (provisional) as compared to \$ 6,777 million in May, 2022 showing an increase of 16.28% and by 24.06% as compared to \$ 6,352 million in June, 2021.
- Imports during July – June, 2021- 2022 totaled Rs. 14,281,447 million (provisional) as against Rs. 8,982,442 million during the corresponding period of last year showing an increase of 58.99%.



Source: Pakistan Bureau of Statistics

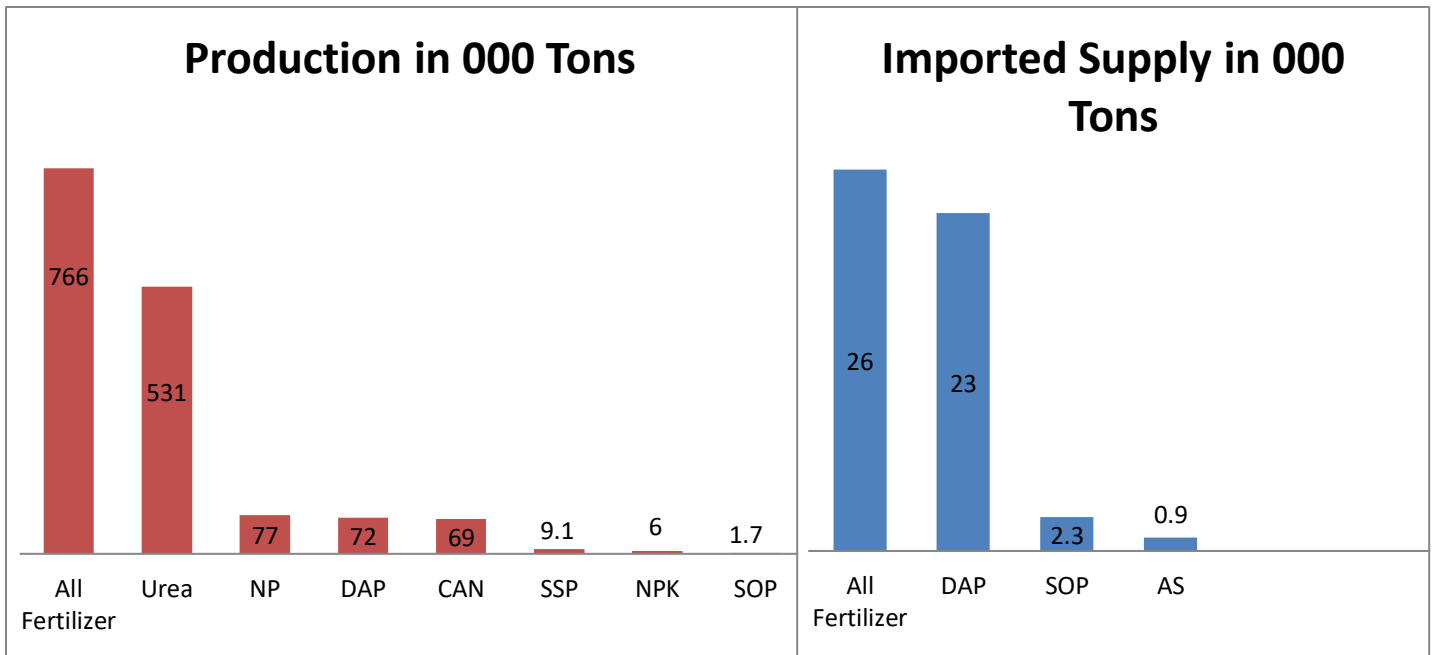
FERTILIZER OFFTAKE SITUATION

(Data compiled by Muhammad Fakhar Imam, R&PU)

- ❖ Total nutrients offtake during June, 2022 was 483 thousand tonnes, which increased by 17.3 percent over June, 2021.
- ❖ Nitrogen offtake increased by 9.3 per cent and phosphate offtake increased by 91.2 percent, while potash offtake decreased by 27.9 per cent.
- ❖ Urea offtake during June 2022 was 737 thousand tonnes showing an increase of 6.8 per cent over June 2021.
- ❖ DAP offtake was 146 thousand tonnes, which increased by 113.4 percent over June, 2021. The increase in offtake of DAP seems high because of exceptional low offtake in June, 2021.

FERTILIZER PRODUCTION AND IMPORTED SUPPLIES:

Production of all fertilizer products during June 2022 was 766 thousand tonnes. Out of which, urea production was 531, DAP 72, Nitrophos 77, CAN 69, SSP 9.1, SOP 1.7 and various grades of NPKs 6 thousand tonnes. Total imported supplies were 26 thousand tonnes, comprising 23 thousand tonnes of DAP, 2.3 thousand tonnes of SOP, and 0.9 thousand tonnes of AS, reported by the National Fertilizer Development Centre (NFDC).



Source: National Fertilizer Development Centre (NFDC)

NEWS TRENDS

(Data collected and compiled by Aamna Imtiaz R&PU)

Pakistan Rice Exports achieved ever export records:

Rice Exporters Association of Pakistan (REAP) reported highest ever export record of Pakistani rice by achieving 4.4 million tons export target in 11 months of the current financial year 2021-22, previous highest export record was of 4.16 million tons. REAP also reported that Pakistan is very close to achieving 4.8 million tons of rice export this fiscal and value wise crossing export of US 2.5 billion dollars. Quality wise Basmati Rice export this year might reach 740,000 ton to 750,000 tons at the end of the current year.

Farmers urged to adopt Chinese technologies for bumper crops

Chairman Pakistan Hi-Tech Hybrid Seed Association (PHHSA) urged the farmers to use ultra-modern Chinese agricultural technologies for getting bumper crop production to make Pakistan self-sufficient in food. Cultivators must acquaint themselves with new technologies like mechanized direct-seeded rice (DSR) which save sufficient quantum of water by 50pc and labor ranges from 13-37pc. He said DSR is technically and economically feasible, eco-friendly alternative to conventional puddled transplanted rice. He said development of new rice varieties for direct seeding along with proper management practices can help in adoption of DSR. seed priming technology can help to get rid of the problem of poor establishment of crop and can be further improved. PHHSA urged the rice growers to sow the best quality hi tech hybrid seeds for better yield to export for earning maximum profitability.



Pakistan has huge potential to become self-sufficient in tea production:

Director of National Tea and High Value Crop Research Institute, Pakistan Agriculture Research Council (PARC) reported that Pakistan has huge potential to become self-sufficient in the tea sector. If we plant tea on an additional 2,000 hectares of land offered by the government and invested by private companies, we can meet 95pc of our national demand. Pakistan's heavy reliance on import of tea is calling for enhanced capacity of production. During 2021, Pakistan imported 2,258,000 kilograms of black and green tea, costing \$596m. In the first three quarters of the current fiscal year, Pakistan's tea imports witnessed an increase of 11.95 percent as compared to the corresponding period last year. Furthermore he also elaborated that "Pakistan have 64,000 hectares of land suitable for tea plantation. But now less than eighty hectares are devoted to tea plantation. In the first year, at least we should start from 2,000 to 10,000 hectares under public-private partnership". Pakistan has the capacity of cultivate 4m plants per annum, rather to import. If you look at olive, people wait for three or four years before they get the fruit, but then the oil extracted can be sold at a very high price. The same case applies to tea". The main reason of not adopting tea farming is that "our farmers are reluctant to grow tea because it took at least 5 to 6 years for the first picking".

Sources:

- <http://www.parc.gov.pk/index.php/en/>
- <https://www.urdupoint.com/en/news/agriculture.html>
- <http://dai.agripunjab.gov.pk/>
- www.pmd.org.pk
- www.pccc.gov.pk
- <http://www.nfdc.gov.pk/>

زرعی سفارشات برائے کسان

حالیہ بارشوں کے پانی کو محفوظ کرنے کے لیے ڈھلوان کی مخالف سمت گہرا ایل چلائیں، کھیتوں کو ہوار رکھیں، دھت بندی مضبوط کریں اور جزی پونیاں تکف کریں۔ اس مقصد کے لیے دیسی کھاد یا سبز کھاد کا استعمال بھی بڑھایا جاسکتا ہے کیونکہ اس سے وتر زیادہ دیر تک محفوظ رہ سکتا ہے۔

کئی

- ☆ کئی کی اگیتی اقسام کی کاشت 20 اگست تک مکمل کر لیں، جبکہ بارانی علاقوں میں مون سون کی بارشوں کے مطابق کاشت کریں یا دیر ہے کہ موسم خزاں میں ہائبرڈ اقسام کا بہترین وقت کاشت وسط اگست ہے۔
- ☆ ذیل سے کاشت کی صورت میں 12 سے 15 کلوگرام کھسیلوں پر کاشت کی صورت میں 8 سے 10 کلوگرام اور ایلور چارہ 40 سے 50 کلوگرام نیو نیو ایگزوسٹ استعمال کریں۔
- ☆ کئی کی بہترین پیداوار کے لیے 3 سے 4 ٹرائی گو بر کی گلی سٹری کھاد زمین کی تیاری کے وقت ضرور ڈالیں۔

کپاس

- ☆ حالیہ مون سون بارشوں کی وجہ سے جن کھیتوں میں زیادہ پانی کھلے ہوئے تو اس کے نکاس کا بروقت انتظام کریں۔ کھیت کے ایک طرف لمبائی کے رخ دو فٹ چوڑی چارٹ گہری کھائی کھود کر پانی جمع کر لیں۔
- ☆ زیادہ درجہ حرارت ہونے اور زیادہ ٹینڈے لگنے کی وجہ سے فصل کا پھل گرنا شروع ہو جاتا ہے۔ اس سے بچاؤ کے لیے نائٹروجنی کھاد کے استعمال کے علاوہ زمین میں بوران اور زنگ کی کمی پائی گئی ہو وہاں بوران اور زنگ کا استعمال بذریعہ پھرے کریں۔
- ☆ اگر کپاس کی فصل بارشوں کی وجہ سے سفید کھی سبز تپتا تھرپس اور ٹی بگ کا حملہ ہو اور یہ نقصان کی معاشی حد سے بڑھ رہا ہو تو جھنڈے میں دو پار پیسٹ سکاؤٹنگ کریں اور منگہ زراعت کے مقامی عملہ کے سفارش کردہ زہروں کا سپرے کریں۔

دھان

- ☆ زنگ کی زیادہ کمی کی صورت میں لاپ لگانے کے 10 دن بعد تک زنگ سلفیٹ 33% والا 6 کلوگرام یا زنگ سلفیٹ 21% والا 10 کلوگرام فی ایکڑ چھڑے دیں۔
- ☆ لاپ کی منتقلی کے 35 دن بعد نائٹروجنی کھاد کا اہلیہ حصہ ڈالنے سے پہلے 4 سے 5 دن کے لیے فصل کو ہلکا سا سوکادیں اس کے بعد کھاد کا چھڑے دیکر پانی لگا دیں۔
- ☆ تاقس پانی سے سیراب ہونے والی زمینوں میں اچھے نتائج حاصل کرنے کے لیے جیسم بحساب 5 پوری فی ایکڑ چھڑے دیں۔

سبزیات و باغات

- ☆ ٹماٹر اور گوبھی کی پیٹری کی کاشت جاری رکھیں۔
- ☆ ٹماٹر کی منظور شدہ اقسام برد ماگھیز، پاکت نقیب اور دو فلی اقسام نادر اور سالار وغیرہ کاشت کریں۔
- ☆ پھول گوبھی کی منظور شدہ اقسام فصل آباد نمبر 1, 2, 3, 4 وغیرہ کاشت کریں۔
- ☆ ترشادہ پھلوں کے پودوں کو نائٹروجن کی تیسری قسط ڈالیں۔

Source: Zarat Nama, Directorate of Agricultural Information

پلاننگ اینڈ ریسرچ ڈیپارٹمنٹ

زرعی ترقیاتی بینک لمیٹیڈ

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