

AGRICULTURE OUTLOOK

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



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EXECUTIVE SUMMARY

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

The growth and tillering of wheat crop is reported satisfactory both in rainfed and irrigated areas of Punjab. In flood affected areas of Sindh province late sowing of wheat is in progress. Farmers are advised to use only recommended varieties for wheat sowing. Cotton crop picking has been completed in the provinces of Punjab and Sindh. In Sindh province rains and flooding damaged the cotton crop. In Balochistan province cotton crop is completely vanished in Nasirabad, Bolan and Dera Bugti Districts because of flood. Sowing of maize (autumn) has been completed. Growth and Development of sugarcane crop was reported satisfactory in Punjab Province. Harvesting/crushing of cane for “Gurr” making has also been reported in progress in growing areas of Punjab Province. However, the condition of sugarcane crop is reported satisfactory and its harvesting is under process in non flood affected areas of Sindh province. In KP, the harvesting of sugarcane is continued. Growth and production of orchards including oranges is satisfactory. Moreover, sowing winter vegetables is in progress. In Bloachistan vegetables and orchards especially the northern and eastern parts of the province had largely been damaged due to torrential rains along with flash flooding during the recent monsoon. However, the fruits and vegetables in rest parts have been reported in good condition.

As reported by PMD, during the month of November 2022, rainfall received across Pakistan. Northern half of the country received good rainfall while most of the shouthern parts of the country remained dry.

As mentioned by Pakistan Bureau of Statistics (PBS), during the Month of November 2022 average prices of most of agri. commodities were increased in the country over the month of October 2022. The prices of flour, chicken, cooking oil, ghee, pulses and gur has been decreased over last month prices. On the other hand, prices of rice, meat, milk, curd, eggs, vegetables, spices etc. have shown increasing trend when compared to previous month prices.

As analyzed by Pakistan Bureau of Statistics (PBS), exports from Pakistan during October, 2022 amounted to Rs.525,831 million (provisional) as against Rs. 563,714 million in September, 2022 and Rs.423,063 million during October, 2021 showing a decrease of 6.72% over September, 2022 but an increase of 24.29% over October, 2021.

As published by National Fertilizer Development Centre (NFDC), total nutrient offtake during October 2022 was about 280 thousand nutrient tonnes which decreased by 50.3 per cent over same timeframe of 2021. Total imported supplies were 140 thousand tonnes comprising 103 thousand tonnes of urea, 27.5 thousand tonnes of DAP, 9 thousand tonnes of SOP and 0.96 thousand tonne of AS.



CURRENT CROP SITUATION

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

1. Wheat Crop

In Punjab and KP wheat crop sowing has been completed. The growth and tillering of wheat crop is reported satisfactory both in rainfed and irrigated. In flood affected areas of Sindh province late sowing of wheat is in progress. Farmers are advised to use only recommended varieties for wheat sowing as early as possible. Farmers may use cultivars such as Dilkush 21, Subhani 21, MH 21, Akbar 19, Ghazi 19, Bakkhar Star, Fakhar-e-Bakkhar, Anaj 2017, Zinkiol 2016, Gold 2016, Johar 2016, Borlog 2016 and Ujala 2016 for late sowing.

2. Cotton Crop

Cotton crop picking has been completed in the provinces of Punjab and Sindh. In Punjab province the growth and development of cotton crop has been observed/reported satisfactory. Except the flood affected districts of Punjab Province. In Sindh province rains and flooding damaged the cotton crop. In Balochistan province cotton crop is completely vanished in Nasirabad, Bolan and Dera Bugti Districts because of flood.

3. Rice Crop:

In Punjab Province Condition of rice crop is reported satisfactory and harvesting of early grown varieties has been completed. In Sindh and Balochistan the historical rains and flooding during July-August the standing crops had extensively been damaged in most of the plains. Farmers were advised not to burn crop residues as it causes smog and organic matter depletion in the soils.

4. Maize Crop:

Sowing of maize (autumn) has been completed. Germination and growth of the crop is reported satisfactory in Punjab province. In Sindh province sowing of Maize crop is in Process in areas partially hit by the floods.

5. Sugarcane:

Growth and Development of sugarcane crop was reported satisfactory in Punjab Province. Harvesting/crushing of cane for “Gurr” making has also been reported in progress in growing areas of Punjab Province. However, the condition of sugarcane crop is reported satisfactory and its harvesting is under process in non flood affected areas of Sindh province. In KP, the harvesting of sugarcane is continued.

6. Horticulture

- Growth and production of orchards including oranges is satisfactory. Moreover, sowing winter vegetables is in progress in Punjab Province.

- In Sindh the seasonal vegetables including Tomato, Chilies, Onions etc have also been affected by flood. However, the sowing of winter vegetables has been completed.
- In KP condition of orchards including oranges is reported satisfactory in most parts of the province and sowing of winter vegetables is in progress.
- In Bloachistan vegetables and orchards especially the northern and eastern parts of the province had largely been damaged due to torrential rains along with flash flooding during the recent monsoon. However, the fruits and vegetables in rest parts have been reported in good condition.

Source:

Pakistan Metrological Department (PMD)

Directorate of Agricultural information Punjab, Sindh, KP

Department of Agricultural Extensioin Balochistan

WEATHER SITUATION

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

Rainfall/Precipitation:

During the month of November 2022, rainfall received across Pakistan. Northern half of the country received good rainfall while most of the shouthern parts of the country remained dry. The Chief amounts of monthly rainfall recorded across Pakistan during November 2022 are shown in Table given below:

Table-1: Chief amount of rainfall recorded across Pakistan during the month of November, 2022					
S. No.	Stations	Rainfall (mm)	S. No.	Stations	Rainfall (mm)
1	Kalam	132.4	11	Tirah (KP)	88.4
2	Pattan	130.5	12	Chattar Kalas (AJK)	82.5
3	Rawalakot	101.5	13	Dhulli (Punjab)	81.1
4	Muzaffarabad Airport	100.8	14	Garhi Dupatta	77.8
5	Balakot	100.0	15	Kakul	73.0
6	Murree	95.0	16	Hajira	72.7
7	Dir	91.0	17	Chaklala Airbase	65.5
8	Malam Jabba	91.0	18	Kotli	60.0
9	Haraman	90.3	19	Cherat	57.0
10	Bandi Abbaspur	89.6	20	Chakwal	52.6

Relative Humidity

The mean daily Relative Humidity (R.H) remained below normal in most parts of Punjab and GB whereas it remained above normal in Quetta valley. However, mixed trend has been observed at the selected locations of Sindh, KP & Potohar region. Maximum value of mean Relative humidity observed as 67% at Peshawar, followed by 66% at Rawalpindi and 65% at Jhelum & Sargodha each.



Temperature Situation during November, 2022

Temperature plays a vital role in the growth and development of agricultural crops. Thermal regime particularly the night temperatures remained above normal over most of the agricultural plains of the country especially over Baluchistan, central Punjab and central Sindh. However, at particular locations of KP, upper Kashmir and western GB normal to slightly below normal night time temperatures were recorded.

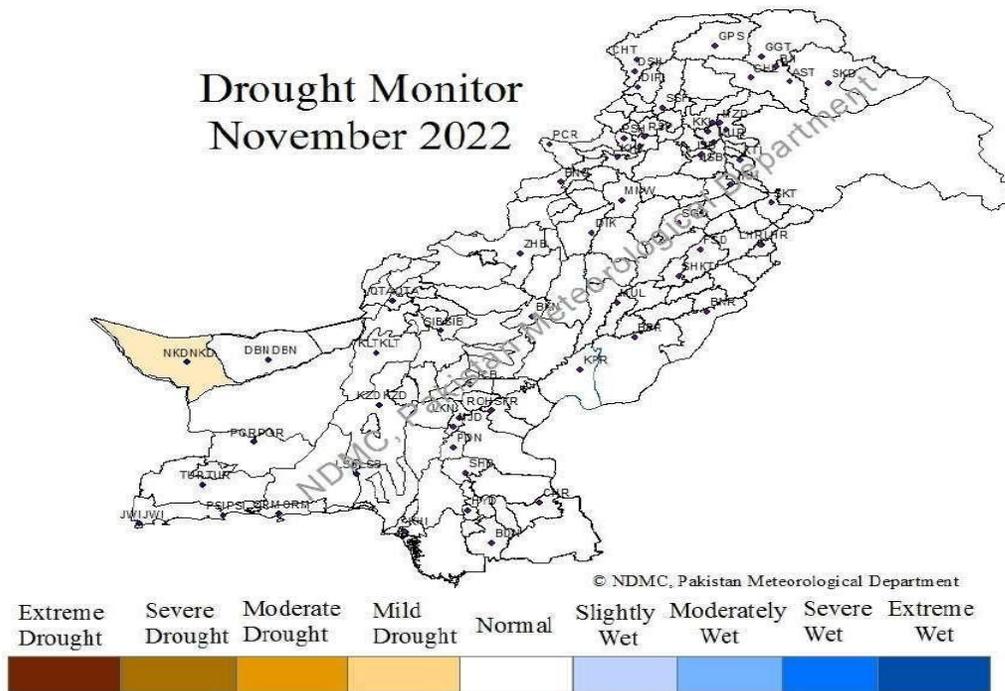
Weather Prediction during December, 2022

As per climatic normal, winter weather systems commonly known as “Western Disturbances” become active over the country during the month of December. Three to four troughs of westerly waves generally produce weather systems in Pakistan region especially over the upper half and western regions. Khyber Pakhtunkhwa along with the adjoining areas of Kashmir and the northwestern belt of Baluchistan covering Quetta & Kalat valleys and northern parts of Punjab receive considerable amount of precipitation due to westerly troughs passing across the area. However, fewer rains occur over the rest parts including the central-southern parts of Punjab, Sindh, most of Baluchistan and Gilgit Baltistan.

DROUGHT SITUATION

Spatial drought analysis results based on the outputs from different drought monitoring indices and Pakistan Meteorological Department ground station data across Pakistan are represented in Figure. given below:

In Southern Balochistan areas around Nokkundi observed dry conditions while in rest of the country conditions are normal.



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

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

In the month of November 2022, water inflow, outflow and levels of Rawal, Khanpur, Tarbela and Mangla dams are shown in Figs. 8 & 9. Except Rawal dam Level at other major reservoirs has dropped while inflow has also dropped due to less or no rains in the catchment areas.



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

AVERAGE PRICES OF AGRI. COMMODITIES

(Data compiled by Humma Nisar, BPU)

During the Month of November 2022 average prices of most of agri. commodities were increased in the country over the month of October 2022. A brief summary of increase/ decrease in average prices of commodities are given below:

- CPI inflation General, increased to 23.8% on year-on-year basis in Nov 2022 as compared to an increase of 26.6% in the previous month and 11.5% in Nov 2021. On month-on-month basis, it increased to 0.8% in Nov 2022 as compared to an increase of 4.7% in the previous month and an increase of 3.0% in Nov 2021.
- The prices of flour, chicken, cooking oil, ghee, pulses and gur has been decreased over last month prices. On the other hand, prices of rice, meat, milk, curd, eggs, vegetables, spices etc. have shown increasing trend when compared to previous month prices.

S.No.	Description	Unit	Average Prices			%change Nov 22 over	
			22-Nov	22-Oct	21-Nov	22-Oct	21-Nov
1	Wheat Flour Bag	20 Kg	1517.14	1541.43	1197.52	-1.601	21.067
2	Rice Basmati Broken (Average Qualit	1 Kg	127.69	125.89	98.45	1.410	22.899
3	Rice IRRI-6/9 (Sindh/Punjab)	1 Kg	99.31	97.64	73.20	1.682	26.291
4	Bread plain (Small Size)	Each	84.47	82.83	63.75	1.942	24.529
5	Beef with Bone (Average Quality)	1 Kg	691.86	690.84	570.42	0.147	17.553
6	Mutton (Average Quality)	1 Kg	1431.15	1427.14	1145.15	0.280	19.984
7	Chicken Farm Broiler (Live)	1 Kg	282.40	288.63	255.60	-2.206	9.490
8	Milk fresh (Un-boiled)	1 Ltr	145.60	144.18	112.90	0.975	22.459
9	Curd (Dahi) Loose	1 Kg	168.78	167.54	130.88	0.735	22.455
10	Powdered Milk NIDO 390 gm Polyba	Each	632.16	610.68	498.72	3.398	21.109
11	Eggs Hen (Farm)	1 Dozen	253.67	240.80	183.37	5.074	27.713
12	Mustard Oil (Average Quality)	1 Kg	523.44	522.63	363.90	0.155	30.479
13	Cooking Oil DALDA or Other Similar	Each	2768.31	2803.85	1918.02	-1.284	30.715
14	Vegetable Ghee DALDA/HABIB 2.5 k	Each	1370.08	1384.82	951.30	-1.076	30.566
15	Vegetable Ghee DALDA/HABIB or Ot	Each	527.91	536.23	381.66	-1.576	27.704
16	Bananas (Kela) Local	1 Dozen	102.36	92.63	67.98	9.506	33.587
17	Pulse Masoor (Washed)	1 Kg	262.44	286.39	182.11	-9.126	30.609
18	Pulse Moong (Washed)	1 Kg	246.27	249.84	161.04	-1.450	34.608
19	Pulse Mash (Washed)	1 Kg	366.33	375.03	247.28	-2.375	32.498
20	Pulse Gram	1 Kg	233.06	246.03	146.99	-5.565	36.930
21	Potatoes	1 Kg	73.02	67.98	59.13	6.902	19.022

22	Onions	1 Kg	176.20	134.23	44.82	23.820	74.563
23	Tomatoes	1 Kg	205.30	202.72	131.88	1.257	35.762
24	Sugar Refined	1 Kg	90.68	87.54	99.60	3.463	-9.837
25	Gur (Average Quality)	1 Kg	135.50	137.73	144.12	-1.646	-6.362
26	Salt Powdered (NATIONAL/SHAN) 80	Each	45.08	40.47	30.20	10.226	33.008
27	Chilies Powder NATIONAL 200 gm Pa	Each	218.67	216.83	374.65	0.841	-71.331
28	Garlic (Lehsun)	1 Kg	336.31	334.58	283.76	0.514	15.625

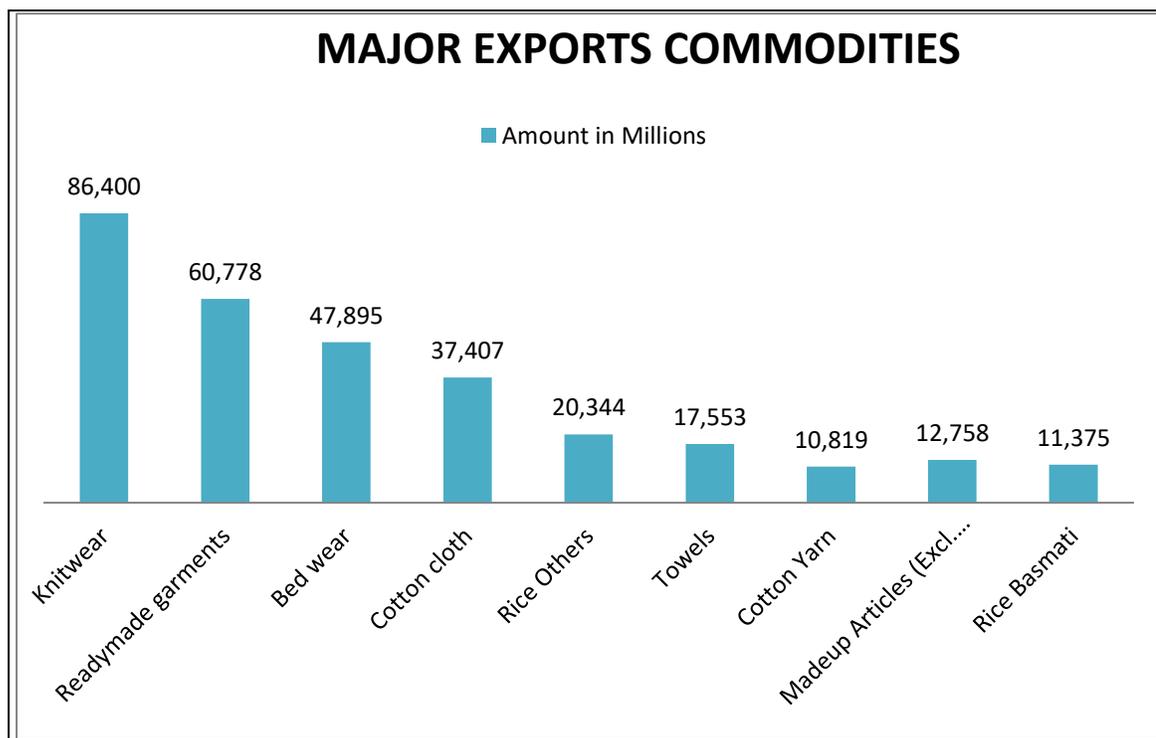
Increase Decrease

TRADE SITUATION

(Data compiled by Humma Nisar, BPU)

Exports:

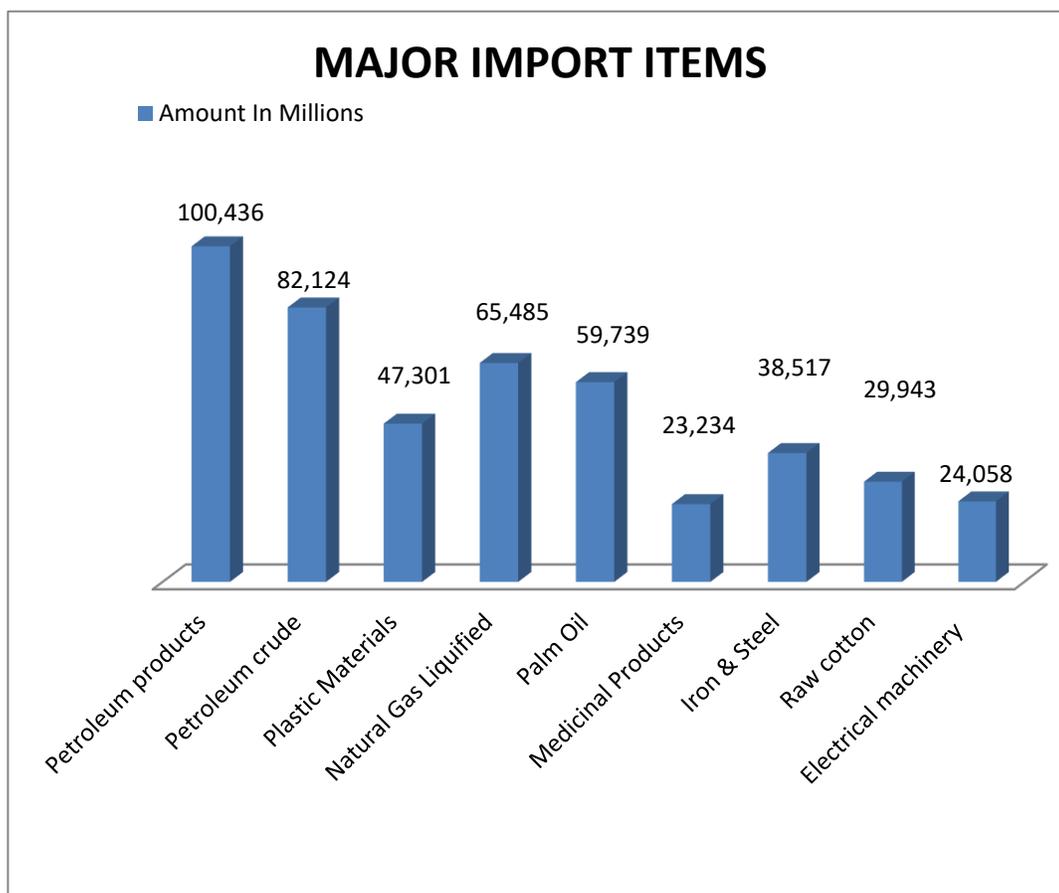
- According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during October, 2022 amounted to Rs.525,831 million (provisional) as against Rs. 563,714 million in September, 2022 and Rs.423,063 million during October, 2021 showing a decrease of 6.72% over September, 2022 but an increase of 24.29% over October, 2021.
- In terms of US dollars the exports in October, 2022 were \$ 2,384 million (provisional) as compared to \$ 2,446 million in September, 2022 showing a decrease of 2.53% and by 3.25% as compared to \$ 2,464 million in October, 2021.





Imports:

- Imports into Pakistan during October, 2022 amounted to Rs. 1,039,036 million (provisional) as against Rs. 1,232,299 million in September, 2022 and Rs. 1,093,545 million during October, 2021 showing a decrease of 15.68% over September, 2021 and of 4.98% over October, 2021.
- In terms of US dollars the imports in October, 2022 were \$ 4,711 million (provisional) as compared to \$ 5,347 million in September, 2022 showing a decrease of 11.89% and by 26.03% as compared to \$ 6,369 million in October, 2021.



Source: Pakistan Bureau of Statistics

FERTILIZER OFFTAKE SITUATION

(Data compiled by Humma Nisar, BPU)

- ❖ Total nutrient offtake during October 2022 was about 280 thousand nutrient tonnes which decreased by 50.3 per cent over same timeframe of 2021.
- ❖ Nitrogen offtake decreased by 34.1 per cent while phosphate offtake decreased by 77.8 per cent.
- ❖ Potash offtake decreased by 84.0 per cent over October 2021.
- ❖ Urea offtake during October, 2022 was 430 thousand tonnes which recorded a decrease of



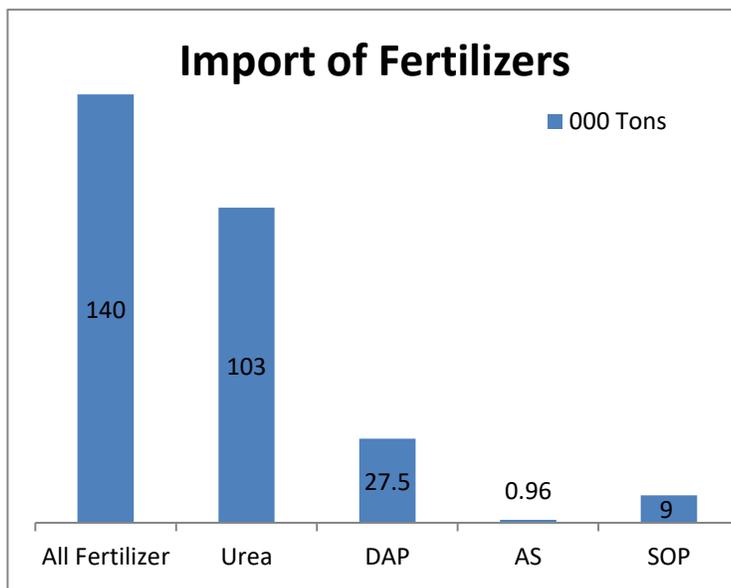
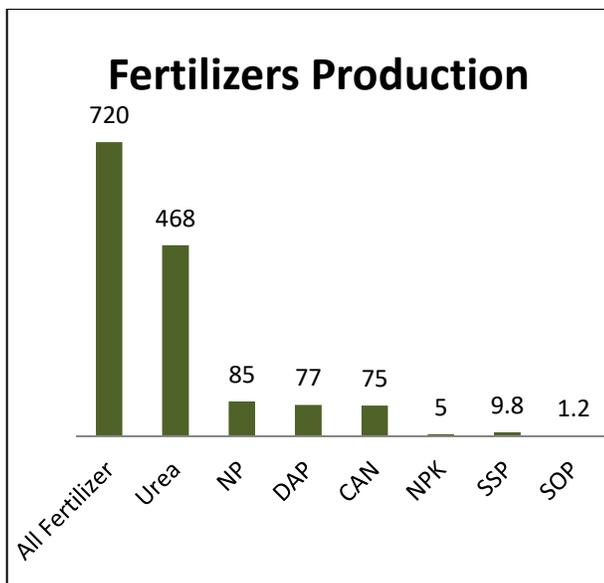
16.4 per cent over October, 2021.

- ❖ DAP offtake was 71 thousand tonnes which decreased by 79.1 per cent over October, 2021. This decrease in offtake is due to heavy rains / floods and high price of DAP fertilizer in domestic market.

FERTILIZER PRODUCTION AND IMPORTED SUPPLIES:

(Data compiled by Humma Nisar, BPU)

- Total production of all fertilizer products during October 2022 was 720 thousand tonnes comprising urea 468, DAP 77, CAN 75, NP 85, SSP 9.8, NPK 5 and SOP 1.2 thousand tonnes reported by the National Fertilizer Development Centre (NFDC). Total Imported supplies of fertilizers in January 2022 were 57.4 thousand tonnes.
- Total imported supplies were 140 thousand tonnes comprising 103 thousand tonnes of urea, 27.5 thousand tonnes of DAP, 9 thousand tonnes of SOP and 0.96 thousand tonne of AS as reported by the National Fertilizer Development Centre (NFDC).



NEWS TRENDS

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

The Punjab Agriculture Department (Pad) Is Initiating Legal Action Against Those Involved In Selling Unapproved 'Black Wheat Seed' In The Province

The Punjab Agriculture Department (PAD) issued warning for wheat growers that they must only use the wheat seed varieties approved by the agriculture department and should not pay attention to the misinformation being spread on social media regarding the qualities of black wheat seed. The process of wheat cultivation is going on in Punjab. Black-colored wheat is being advertised on social media by some vested interests.



Farmers are being informed by the Department that black wheat had been analyzed in ISO certified laboratory of Ayub Agricultural Research Institute, Faisalabad and properties and additional nutritional as being claimed and advertised on social media are found completely false and baseless.

New Estimates Place Flood Losses at \$46bn

According to Federal Minister for Planning, Development and Special Initiatives, the total estimated cost of damages, loss and needs caused by the devastating floods is about \$46.4 billion, besides the floods have raised the poverty rate by four percent pushing between 8.4 and 9.1 million people in poverty.

Farmer2farmer Initiative: Two Dutch Farmers Brought To Pakistan for Training Locals

In line with its Dairy Development Program (DDP) to aid knowledge transfer and best practice sharing, FrieslandCampina Pakistan invited certified dairy farmers from the Netherlands to train and advice Pakistani farmers on best dairy farming practices. Under the Farmer2Farmer initiative, 2 Dutch farmers, Petrus Adrianus and Gerhard Herman, visited FCEPL factory and partner farms in Sahiwal to engage with local dairy farmers on dairy farming practices like animal health and welfare, feeding and watering, calf-rearing, milking hygiene, cow fertility, housing and barn design. One of the objectives of the Dairy Development Program and Farmer2Farmer initiative is to build capabilities of the local farmers as per global benchmarks and transform the dairy industry of Pakistan.

Sources:

- <https://www.brecorder.com/>



زرعی سفارشات برائے کسان

مکند

- ☆ مکھیتی کاشت ہر صورت وسط دسمبر سے پہلے جہاں ضروری ہو وہاں خشک بوائی کر کے مکمل کر لیں۔ مزید شرح بیج (منظور شدہ 50 تا 60 کلوگرام) فی ایکڑ اضافہ کے ساتھ استعمال کیا جائے۔
- ☆ آبپاش علاقوں میں کم از کم زمین میں 2 بوری ڈی اے پی ایک بوری 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 سو بوری ڈی اے پی؛ ایک بوری یوریا اور ایک بوری ایس او پی فی ایکڑ بوتھ کاشت استعمال کریں۔
- ☆ کپاس مٹی اور کساد کے بعد کاشت کی گئی مکند 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۔

کساد

- ☆ 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 پرمٹ/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؛ موٹھی فصل اور اگیتی پکنے والی اقسام پہلے برداشت کریں۔ اس کے بعد درمیانی پکنے والی اقسام برداشت کریں۔
- ☆ موٹھی فصل رکھنے کے لیے کساد کو یکم جنوری کے بعد برداشت کریں۔

روغن دار اجناس

- ☆ سورج مکھی کی کاشت کے لیے بھاری میرا زمین کا انتخاب کریں۔ گلر اٹھی اور بہت ریتیلی زمین کاشت کے لیے موزوں نہیں ہے۔
- ☆ کیٹولا اقسام کی بوائی جلد از جلد مکمل کریں۔ کاشت تروت میں کریں۔ بیج ایک تا ڈیڑھ انچ گہرائی پر کاشت کریں۔ شرح بیج ڈیڑھ تا دو کلوگرام فی ایکڑ رکھیں۔
- ☆ سرسوں تو ریا ریا اور کیٹولا کی اقسام پر آگریٹیلہ یا لٹکری سنڈی وغیرہ کا حملہ نظر آئے تو جھکے زراعت کے زرعی ماہرین سے مشورہ کر کے کیٹیائی ادویات کا سپرے کریں۔

دالیں

- ☆ چنے کی فصل کا باقاعدگی سے معائنہ کرتے رہیں اگر فصل میں ٹو کے 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 مرجمہا و جھلساؤکنگی اور؛ مسور کی پھپھوندی زیادہ اہم ہیں۔ اس کے علاوہ ان پر دیبک؛ ٹوکا چور کیٹرا؛ رس چوسنے والے کیٹرے مثلاً است تیل؛ سفید مکھی؛ تھرپس؛ لٹکری سنڈی کا بھی حملہ ہو سکتا ہے۔ لہذا ان سے بچاؤ کے لیے سفارش کردہ زہروں کا سپرے کریں۔

سبزیات و باغات

- ☆ چھوٹی اور تازک 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؛ مٹھی وغیرہ جبکہ 3 سے 5 مرلہ کے پلاٹ میں ان سبزیوں کے علاوہ کو بھی ٹماٹر؛ گاجر؛ شامبھ؛ مولی وغیرہ لگائیں۔
- ☆ درمیانی موسم میں پکنے والے ترشاوہ 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, Directorate of Agricultural Information

پلاننگ اینڈ ریسرچ ڈیپارٹمنٹ

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