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AGRICULTURE OUTLOOK



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EXECUTIVE SUMMARY

The Federal Government has set agriculture credit target of Rs. 1,001 billion for FY 2017-18. Punjab government has formulated a well-knitted plan for enhancing per acre yield of wheat crop at village level in the province. Under the plan government will provide quality wheat seeds to the progressive growers at village level for enhancing per acre productivity in irrigated and Barani areas of the Punjab. Wheat seed availability in Punjab is 326529.57 mt. (40.02%), Sindh 44759.15 mt. (32.43%), Khyaber Pakhtunkhwa 14406.09 mt. (15.80%) and Balochistan 2286 mt. (4.76%). Growers are getting seed cotton prices of around 2000/40 kg. According to Provincial Agriculture Department estimates, during 2016-17, rice production at country level increased 0.7% with total production of 6.849 million tons against target of 6.838 million tons

Following the directives of the federal government, State Bank of Pakistan (SBP) has announced to extend the subsidy on export of wheat and its products up to October 30, 2017.

During Rabi 2017-18, urea consumption is estimated around 3,200 thousand tonnes against 2,892 thousand tones in previous season showing an increase of about 10.7 percent over last Rabi 2016-17. DAP offtake is expected to increase by 0.1 percent over Rabi 2016-17. Total offtake of fertilizers in the previous year was 4,532 thousand tonnes against 4,836 thousand tones estimation for forthcoming Rabi 2017-18 with 6.7 percent forecasted increment.

During October, no significant rainfall is expected in drought affected areas of Sindh and Balochistan. Therefore moderate drought conditions are likely to prevail in these areas.



The Federal Government has set agriculture credit target of Rs. 1,001 billion for FY 2017-18. Agriculture Credit advisory Committee (ACAC) has adopted and assigned targets to agri lending institutions. During July-August 2017, the agri lending institutions have disbursed agri loans of Rs. 97.6 billion which is 9.7 percent of the annual target of Rs 1,001 billion. The outstanding portfolio of agri loans has increased by Rs. 61.6 billion i.e. from Rs 345.2 billion to 406.8 billion as at the end of August 2017 compared with corresponding date last year.

CURRENT CROP SITUATION

1. Wheat

Punjab government has formulated a well-knitted plan for enhancing per acre yield of wheat crop at village level in the province. Under the plan government will provide quality wheat seeds to the progressive growers at village level for enhancing per acre productivity in irrigated and Barani areas of the Punjab. Punjab Agriculture Department has already completed necessary arrangements at tehsil, village and district level for the purpose. Under the programme 100 KG seed would be provided for two acres land in irrigated and 50 KG for one acres land in Barani areas among the progressive wheat growers during 2017-18.

Wheat seed testing is in progress. For sowing season Rabi 2016-16, the total seed availability was 389808.41 mt. (35.91%). The wheat seed availability for sowing Rabi 2017-18 is 387980.87 mt which will fulfill 35.49% of the total seed requirement. Wheat seed availability in Punjab is 326529.57 mt. (40.02%), Sindh 44759.15 mt. (32.43%), Khyaber Pakhtunkhwa 14406.09 mt. (15.80%) and Balochistan is 2286 mt. (4.76%).

The current wheat availability was 30.911 million tons including production of 26.38 million tons, leftover stock of previous year was 4.531 million tons during the start of wheat year as on 01-05-2017. The national requirement of wheat is 25.8 million tons (including 1 million tons strategic reserves and 0.5 million seed and feed purpose)

Current Wheat Stock Position:

(Million tons)					
Province/Agency	Estimated carry forward 01/05/2017	Procurement target (2017)	Proc. 2017	Current Wheat Stocks	Last Year Wheat Stocks
Punjab	2.579	4.50	3.949	6.528	6.179
Sindh	0.361	1.20	1.399	1.760	1.471
KP	0.004	0.35	0.269	0.273	0.0725
Balochistan	0.001	0.10	-	0.001	0.125
PASSCO	1.586	0.90	0.899	2.485	2.076
Total	4.531	7.05	6.516	11.047	9.923



*food year ends on 1st May.

Proposed Wheat Targets (2017-18):

Wheat production target for the year 2017-18 has been set as 26 million tons. Province wise break up is given as below;

Country/Province	Area (000 ha)	Production (000 tons)
Punjab	6800	19500
Sindh	1150	4200
KP	760	1400
Balochistan	400	900
Pakistan	9110	26000

2. Cotton

. Growers are getting seed cotton prices at around 2000/40 kg. In upper part of Sindh flower shedding has been reported due to wind storms. Besides this pink boll worm incidence has also been reported in lower Sindh. In Punjab, attack of various insect pests and diseases such as white fly, thrips, mealy bug, arm worm, pink boll worm and clcuv has been reported. Incidence of white fly and pink boll worm has been reported at above economic threshold level.

First Cotton Crop Assessment:

(Bale=170 kg)

Province	Expected Production (million bales)
Punjab	8.80
Sindh	3.70
KP & Balochistan	0.10
Pakistan	12.60

International Cotton Situation 2017-18:

The world cotton area in 2017-18 is projected to expand by 8.5% to 31.8 million hectares as compared to 29.3 million hectares in 2016-17. World cotton production is forecasted to grow by 8.6% to 25.1 million tons in 2017-18 as against 23.1 million tons in 2016-17 due to expansion in area. Global cotton consumption may recover by 2% to 25.1 million tons in 2017-18 as compared to 24.5 million tons in 2016-17. The world imports and exports are projected to decrease by 1 percent to 7.9 million tons in 2017-18. The world ending stocks in 2016-17 are expected to decline by 8.4 percent to 18.5 million tons.



Cotton Production & Consumption in Major Cotton Growing Countries

Countries	2016-17 Proj. (Million tons)
Production	
Pakistan	1.66
India	5.78
China	4.90
USA	3.74
Brazil	1.52
Uzbekistan	0.79
Others	4.68
World Total	23.07
Consumption	
Pakistan	2.15
China	8.00
India	5.15
Europe & Turkey	1.61
Vietnam	1.17
Bangladesh	1.41
USA	0.73
Brazil	0.72
Others	3.60
World Total	24.55

3. Rice

New hybrid rice developed by the Guard Agricultural Research & Services Limited and Yuan Longping High Tech Agriculture (China) was sown on area of around 450,000 acres of land in Golarchi and other areas of Badin district. This hybrid rice has increased the per acre yield to double.

According to Provincial Agriculture Department estimates, in 2016-17, rice production at country level increased 0.7% with total production of 6.849 million tons against target of 6.838 million tons.

Percent change in area, production and yield of rice:

Country/ Province	Area			Production			Yield		
	2015-16 (000 ha)	2016-17 (000 ha)	Change (%)	2015-16 (000 ha)	2016-17 (000 ha)	Change (%)	2015-16 (000 ha)	2016-17 (000 ha)	Change (%)
Pakistan	2739.5	2724.0	-0.56	6801.6	6849.3	0.70	248.0	2514.42	1.30



Punjab	1780.2	1736.5	-2.45	3502.3	3475.0	0.77	1967.0	2001.15	1.73
Sindh	719.8	750.5	4.26	2572.8	2661.6	3.45	3574.0	3546.43	-0.77
KPK	64.7	67.0	3.55	153.8	158.2	2.86	2377.0	2361.19	-0.66
Balochistan	174.8	170.0	-2.74	572.7	554.5	-3.17	3276.0	3261.76	-0.43

Area shows decrease of 0.56% over the last years which is due to less economic return of last year crop which restricted the acreage of rice crop, shifting of rice crop area to other competitive crops.

4. Sugarcane

Total sugarcane cultivated area during the year 2016-17 was 1.21 million hectares showing an increase of 7.6% over last year. Sugarcane production for the year 2016-17 increased to 75.482 million tonnes from 65.5 million tones of the last year's production showing an increase of 15.27%. The average cane yield was 61.99 t/ha.

Increase in area, yield and production was due to favorable weather conditions, better management, well timed availability of inputs, better disposal and rate at sugar mills that encouraged sugarcane production over other competitive crops.

Percent change in area, production and yield of Sugarcane:

Country/ Province	Area			Production			Yield		
	2015-16 (000 ha)	2016-17 (000 ha)	Change (%)	2015-16 (000 ha)	2016-17 (000 ha)	Change (%)	2015-16 (000 ha)	2016-17 (000 ha)	Change (%)
Pakistan	1131.6	1217.6	7.60	65482.2	75482.2	15.27	58000	61990	6.88
Punjab	705.4	777.8	10.26	41968.2	49613.0	18.22	59500	63709	7.20
Sindh	312.8	320.5	2.46	17984.3	20208.9	12.37	57500	63050	9.66
KPK	112.7	118.6	5.24	5498.3	5628.7	2.37	48700	47460	-2.55
Balochistan	0.7	0.7	0.00	31.7	31.6	-0.32	45200	45140	-0.13

5. Horticulture

- The tomato crop of KP and Sindh is almost ready and it may start arriving in wholesale market in few days, thus expected to bring down the prices. The Agriculture Department spokesman said that tomato was coming throughout the year from one province or the other into the local wholesale markets. During these days, tomato is coming from Balochistan. Due to unfavorable weather conditions, its production was affected to some extent. On the other hand, the tomato crop of KP also delayed due to same weather conditions. Under the scenario, the supply of tomato was affected and prices surged in the local market. Last year, the Agriculture Department decided that during current year Pakistan will not import tomato from India due to sanitary and phytosanitary (SPS) issues and huge import bill. This year, Pakistan imposed ban on imports of tomato from India and saved foreign exchange of more than Rs 100 billion. This ban on import of



tomato also helped avoiding dangerous pests and diseases imported along this infected tomato, especially from India - Tomato Leaf Curl New Delhi Virus, Tomato Yellow Leaf Curl Virus and Tomato as Permy Virus (Cucumovirus), the spokesman alleged. Some newly-identified viruses in India on tomato could spread through whitefly and may affect our cotton crop as well. The annual production of tomato in our country is 543,160 tons, out of which Punjab produces 106,229 tons. Punjab is the third biggest producer with 19 percent share in tomato production, Sindh with 35 percent share is the biggest contributor, while Balochistan contributes 27 percent and KP contributes 16 percent in tomato production.

- Harvesting of kharif crops like soybean, sunflower, mungbean and peanut is in progress.
- Citrus is at flowering stage in Punjab
- Harvesting of date palm is near to end in Punjab

IMPORT & EXPORT SITUATION

- Total import comprising of insecticide/pesticides/fungicides is 2606730 MT, out of which 60629 MT cotton specific pesticides and 162 MT wheat specific herbicides have been imported from 1st January 2017-31st August, 2017.
- Rice Exporters Association of Pakistan (REAP) asked the Kenyan government for preferential duty structure for Pakistani rice to create a balance of trade between the two countries. Presently Kenya is getting around \$200 per metric ton or 75 percent (whichever is higher) on the import of rice from Pakistan, despite the fact that Pakistan is a major importer of Kenyan tea. The higher tea import and lower rice exports due to higher duty structure is directly hurting the trade balance, which is largely in favor of Kenya. Trade between Pakistan and Kenya is enjoying a very good trend, however higher duties are major hurdles in improved rice exports to Kenya. Pakistan is the largest buyer of Kenyan tea, therefore, Kenya government has been requested to grant preferential tariff/duty structure for Pakistani rice to create balance of trade. Rice exports to Kenya are witnessing a declining trend as Pakistan exported 465,425 metric tons of rice amounting to \$ 169 million during last fiscal year 2016-17 (FY17), whereas previously Pakistan had exported approx 0.5 million metric tons of rice amounting to \$ 188 million in FY16. However with the collective efforts of stakeholders, the declining rice exports to Kenya could be halted.
- Following the directives of the federal government, State Bank of Pakistan (SBP) has announced to extend the subsidy on export of wheat and its products up to October 30, 2017.
- The quality Pakistani mangoes exports of 129,423 Metric Tons (MT) to different countries in the world, has contributed \$94.059 million precious foreign exchange to national kitty during two years. During year 2014-15, Pakistan exported 65,311 MT mangoes worth \$45.672 million while year 2015-16 witnessed export of 64,112 MT and amount was \$48.387 million.



- As a result of prolonged discussions at highest level and in an effort to increase Pakistan's exports, Indonesia has agreed to allow export of Pakistani Kinnow starting from December till April. Previously it was allowed for only January - April. Permission to export Kinnow during the month of December would play well for Pakistani exporters as competitor countries like China are not allowed to export their citrus during December.

WEATHER OUTLOOK

Rainfall is expected to remain near normal during the month in South Asia including Pakistan. Following are the main features of weather outlook in October, 2017;

1. Slightly below normal rainfall is predicted in most parts of Pakistan during the month.
2. Two to three spells of rainfall with light to moderate intensity are expected in different parts of the country.
3. Temperatures are likely to remain above normal due to relatively clear skies.
4. Water resource management authorities are advised for the judicious use of water stocks to meet the requirements of the Rabi sowing.

DROUGHT SITUATION

The month of September was very good for drought prone areas of Sindh. Moisture conditions over most parts of Sindh are normal including drought affected areas of Tharparkar, Sanghar, Dadu, Mirpurkhas and Thatha. However deficit rainfall is received across western parts of Balochistan aggravating drought conditions.

During October, no significant rainfall is expected in drought affected areas of Sindh and Balochistan. Therefore moderate drought conditions are likely to prevail in these areas.

WATER SITUATION

Punjab Irrigation department and Agriculture department have jointly prepared a plan to prudently use the available water for sowing, growing and maturing the strategic Rabi crops over 22 million acres of land from October 01, 2017 to March 31, 2018. Climate change played a major role in water shortage in rivers, as the country has received less rainfall than normal this year. Punjab Irrigation engineers said that according to national water regulatory body's estimates, there will be only 29.5 million acre feet of water available to all provinces for agriculture purpose during winter, of which Punjab will get 15.72 MAF water besides there will be a loss of 2.24 MAF running water in the system during the course of distribution.

IRSA started drawing additional water from the Tarbela and Mangla dams during last week of August to meet water demands of the provinces as the water inflow in the rivers was not sufficient



to irrigate Kharif crops that were at a critical stage of their maturity. Out of the 68 MAF only 7.5 MAF water has now been left in the two reservoirs to meet requirements of hydel power generation and watering the Rabi crops till March 31, 2018.

Water availability of dams during Rabi 2017-18:

Reservoir	Year		
	2015	2016	2017
Tarbela	8.9	9-10	7-8
Mangla	5.6	5-6	4-5

FERTILIZER OFFTAKE SITUATION

During Kharif 2017, total urea offtake is estimated 3,520 thousand tonnes which is 30.2 percent more than kharif 2016. The DAP offtake is expected to increase by 13.3 percent upto level of 790,000 tonnes against 697,000 tonnes. There is significant increase in offtake of potash (SOP/MOP) fertilizers. The overall estimated offtake is estimated to increase by 27.0 percent.

The supply of urea will remain satisfactory during Rabi season due to enhanced local production and sufficient stock position. However, availability of DAP may witness slight deficiency for the reason of low local production and import by the private sector. However the concerned department has been directed by MoNFR&S in advance to make preemptive measures for ensuring sufficient availability of all fertilizers at reasonable prices.

During Rabi 2017-18, urea consumption is estimated around 3,200 thousand tonnes against 2,892 thousand tonnes in previous season showing an increase of about 10.7 percent over last Rabi 2016-17. DAP offtake is expected to increase by 0.1 percent over Rabi 2016-17. Total offtake of fertilizers in the previous year was 4,532 thousand tonnes against 4,836 thousand tonnes estimation for forthcoming Rabi 2017-18 with 6.7 percent forecasted increment.

Fertilizer Offtake (000 tonnes) during Rabi 2017-18 (Estimated):

Province	UREA	DAP	SOP/MOP	Total
Punjab	2,100	1,200	20	3,340
Sindh	800	300	5	1,105
NWFP	200	60	0.7	261
Balochistan	100	30	0.6	131
Pakistan	3,200	1,610	26	4,836
Rabi 2016-17	2,892	1,608	32	4,532
%age change over Rabi 2016-17	10.7	0.1	-18.0	6.7



NEWS & TRENDS

- The Punjab Agriculture Department has disbursed interest-free loans to 173,000 small growers during the last 10 months under Khadim-e-Punjab Kissan Package. The department is offering Rs 40,000 per acre for Kharif and Rs 25,000 per acre for Rabi crops and these loans are being given to growers having up to 12 acres of land. Under the package, 600,000 growers will be disbursed interest-free loans with preference to those having up to 5 acres of land. A grower who succeeds to repay the loan taken at the last crop will again be given loan for the new crop. The growers will be registered under the scheme free of cost and will be issued a token soon after registration and bank or financial institution concerned will itself contact the growers for further proceeding. The growers should get themselves registered at tehsil land record center by visiting it along with their original CNIC, mobile number and details of the land. Tenants and those having land on lease can also apply for loan under this scheme. Last date of registration is November 30, 2017, and loans will be given by Akhuwat, National Rural Support Programme (NRSP), Zarai Taraqati Bank, National Bank of Pakistan or Telenor Bank.
- Nestlé Pakistan with Lahore University of Management Sciences (LUMS) unveiled a 'Water Plan' at LUMS with the aim to bring together multiple partners to preserve and protect water resources by leveraging research and technology to reduce and recycle water, introduce sustainable agricultural techniques to reduce water use vis-à-vis increase yield and provide access to clean and safe water within communities. The water plan has been launched by the Nestle in collaboration with the Sustainable Development Policy Institute (SDPI), WWF Pakistan, Department of Agriculture, Government of Punjab and Pakistan Agriculture Research Centre (PARC).
- Small and Medium Enterprises Development Authority (SMEDA) in collaboration with the Livestock and Dairy Development Department, Khyber Pakhtunkhwa and the Dairy Farmer Associations organized Help Desks at Peshawar and Mardan. The objective of these help desks is to support the dairy farmers through providing them access to relevant service providers, market information, networking, linkages, and business plan development.

ROLE OF ZTBL

- ZTBL recently inaugurated three new branches one at Adda Chak Humand under Faisalabad zone, Jalalpur Jatan under Gujranwala zone and Garam Mor under Vehari Zone. The main objective of establishing new branches is to alleviate financial suffering of local masses by ensuring greater outreach for cost effective and timely availability of credit to the farming community of the area which will help them in improving their living standard.

زرعی سفارشات برائے کسان

گندم

☆ بارانی علاقوں میں اگر بارش ہو جائے تو پانی محفوظ کرنے کے لیے گہرا صل چلائیں تاکہ بوقت کاشت وتر مہیا ہو سکے۔
 ☆ زمین کی تیاری شروع کر دیں۔ اگر گلی سڑی کھادا بھی تک نہ ڈالی ہو تو فوراً ڈال دیں اور اچھی طرح ملا دیں۔ بیج کھادا کا انتظام بھی کریں۔
 ☆ پنجاب کے تمام بارانی علاقوں کے لیے محکمہ زراعت کی منظور شدہ گندم کی اقسام این اے ارسی 2009، دھرابی 2011، پاکستان 2013، احسان 2016، اور فتح جنگ 2016 کو 20 اکتوبر سے 15 نومبر تک جبکہ چکوال 50 کو 15 اکتوبر تا 15 نومبر تک کاشت کریں۔

☆ پنجاب کے آپاش علاقوں کے لیے سحر 2006، لاٹانی 2008، فیصل آباد 2008، آری 2011، آس 2011، ملت 2011، پنجاب 2011، این اے ارسی 2011، گلکسی 2013، اجالا 2016، جوہر 2016، بور لاگ 2016، گولڈ 2016 اور این این گندم 1 کے بیج کا انتظام کریں۔

☆ بروقت کاشت کے لیے 20 نومبر تک کے لیے شرح بیج 40 تا 50 کلوگرام اور 21 نومبر تا 15 دسمبر کے لیے شرح بیج 50 تا 60 کلوگرام فی ایکڑ رکھیں جو بیماریوں اور کیڑے مکوڑوں سے پاک ہو۔

کینولا

☆ کاشتکار زیادہ سے زیادہ رقبہ پر کینولا یعنی میٹھی سرسوں کاشت کریں۔ اگر علیحدہ رقبہ میسر نہ ہو تو ستمبر کاشتہ کما د، چنے، گندم اور برسم وغیرہ کے ساتھ کامیابی کے ساتھ اس کی مخلوط کاشت کی جاسکتی ہے۔

☆ پنجاب اور خیبر پختونخواہ میں کینولا کی کاشت کا بہترین وقت 15 ستمبر تا 15 نومبر جبکہ سندھ اور بلوچستان میں 15 ستمبر سے 15 اکتوبر ہے۔ منظور شدہ اقسام میں پنجاب کینولا، فیصل کینولا، پی اے ارسی کینولا ہا سبر ڈ کاشت کریں۔

☆ شرح بیج آپاش علاقوں کے لیے ڈیڑھ تا دو کلوگرام جبکہ بارانی علاقوں میں دو تا اڑھائی کلوگرام فی ایکڑ رکھیں۔

☆ سیلڈار اجناس کا بیج (NARC) اسلام آباد، پنجاب سیڈ کارپوریشن، مختلف زرعی تحقیقاتی اداروں مثلاً شعبہ روغندار اجناس (AARI) فیصل آباد، روغندار اجناس ریسرچ اسٹیشن خانپور، زرعی تحقیقاتی ادارہ RARI بہاول پور، BARI چکوال اور پرائیویٹ کمپنیوں سے حاصل کیا جاسکتا ہے۔

کپاس

☆ پٹریوں پر کاشت کی گئی کپاس کے لیے آخری پانی اکتوبر کے وسط تک لگائیں۔ اس میں تاخیر فصل کے لیے نقصان دہ ہے۔
 ☆ کپاس کی دو چنائیوں کا درمیانی فاصلہ کم از کم 15 سے 20 دن کا ہونا چاہیے۔ جلدی چنائی کرنے سے غیر معیاری اور کچرا ریشہ حاصل

ہوتا ہے۔

☆ ذخیرہ کی جانے والی کپاس میں 8 تا 10 فیصد سے زیادہ نہیں ہونی چاہیے۔ نئی ذیادہ ہونے کی صورت میں کپاس کو باہر دھوپ میں خشک کریں۔

☆ کپاس کو صرف سوت سے بنے کپڑے کے بوروں میں ہی رکھیں۔ سلائی کے لیے صرف سوتی ڈوری استعمال کی جائے۔ یاد رکھیں پٹ سن کے بورے، پٹ سن کے سیسے اور پولی پرولین کے بوروں کا استعمال قانوناً جرم اور قابل دست اندازی پولیس ہے۔

مسور

☆ مسور کی کاشت کے سلسلے میں زمین کی تیاری شروع کر دیں۔

☆ منظور شدہ اقسام نیاب مسور 2002، نیاب مسور 2006، پنجاب مسور 2009، مسور 93، چکوال مسور اور مرکز 2009 کے بیج کا بندوبست کریں۔

☆ مسور کی کاشت کے لیے ریپتھی میر اور اوسط زرخیز زمین کا انتخاب کریں۔

☆ بارانی علاقوں میں مسور کی کاشت کا وقت 15 اکتوبر سے آخر اکتوبر جبکہ آبپاش علاقوں میں یکم نومبر سے وسط نومبر تک ہوتا ہے۔

ترشاوہ پھل

☆ اکتوبر کے مہینے میں آگیتی اقسام کے پھل پکنا شروع ہو جاتے ہیں۔ لہذا ان کی فروخت کا انتظام کریں۔

☆ دسمبر میں 1 تا 1.5 کلوگرام سونا ڈی اے پی، 0.5 تا 1 کلوگرام ایف سی ایف سی ایس او پی یا ایف ایف سی ایم او پی کو گو بر کی گلی سڑی کھاد 80 تا 100 کلوگرام فی پودا ڈال کر گوڈی کے ذریعے ملا دیں۔

☆ نقصان دہ کیڑوں اور بیماریوں کے انسداد کے لیے زرعی ماہرین کے مشوروں کے مطابق کریں۔ گڈھیری کے انسداد کے لیے زہروں کا

☆ استعمال کے علاوہ پودوں کے تنوں پر چپکنے والے بند لگائیں تاکہ گڈھیری پودوں پر نہ چڑھ سکے۔

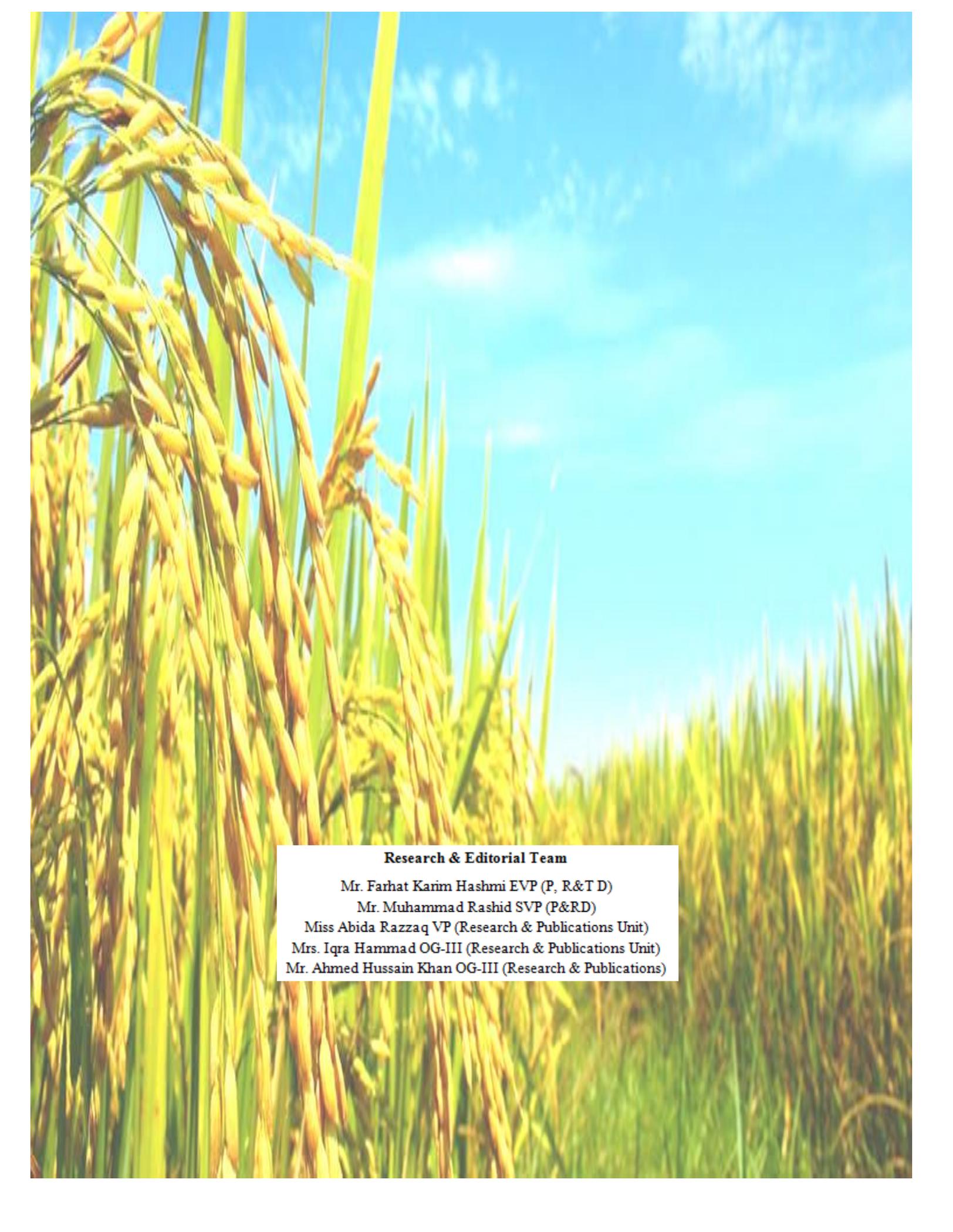
Source: 1) Ziratnama Government Of Punjab (Farmers' Advisory)

2) Fauji Fertilizer Company Limite (Farmers' Advisory Services)

پلاننگ اینڈ ریسرچ ڈیپارٹمنٹ

ہیڈ آفس، زرعی ترقیاتی بینک لمیٹڈ

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