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AGRICULTURE OUTLOOK



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



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EXECUTIVE SUMMARY

Wheat crop is currently at flowering stage in most parts of the country. Adequate irrigation water supplies and overall favorable weather conditions supported a slight expansion in plantings and are benefiting crop development in the main wheat-growing areas of Punjab and Sindh provinces. Pakistan has missed the cotton production target by around 25 per cent. The production has been recorded at 10.5 million bales against the set target of 14.1 million bales for 2016-17. The number may reach 10.6 million bales by end-March (closing time); however, the number has surpassed the cotton production of 9.7 million bales recorded during the same period of the last year (2015-16). Sugarcane crushing season is expected to continue till end March in Central and North Punjab and till April 10 in South Punjab. Picking stage of cotton has completed in the country.

During the month of March, no significant rainfall is expected in drought prone areas of Sindh. Three to four weather systems are likely to pass across the country, resulting in slightly above normal rainfall over upper KP, GB, AJK, Northern parts of Punjab and normal rainfall in rest of the country. According to Indus River System Authority (IRSA), water level in the country's major reservoirs is alarmingly low and could reach the dead level. The expected urea off-take for the Rabi season would be around 3.3 MMT.

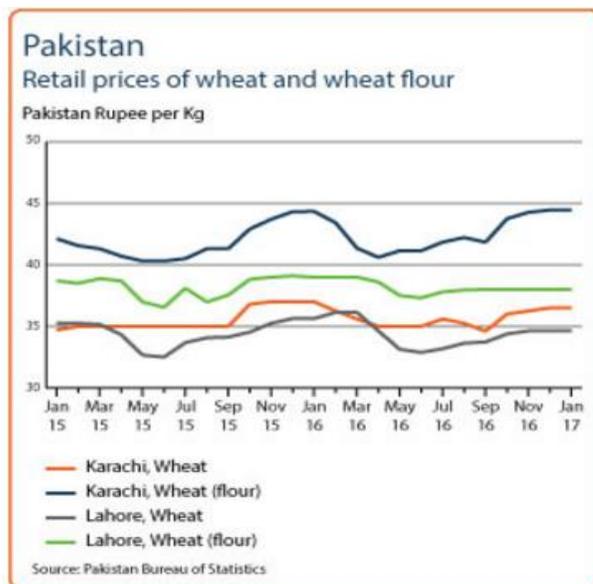
According to a publication by FAO-GIEWS (Food & Agriculture Organization-Global Information and Early Warning System), overall food security conditions in the country are stable following two consecutive years of good harvests and large carryover stocks of the main staples. However, food insecurity remains a matter of concern in some southeastern and northern areas of the country. In Tharparkar District and surrounding areas of Sindh Province, a below-average drought-affected cereal production for the third consecutive year, coupled with losses of small animals (in particular sheep and goats) which has aggravated food insecurity and caused acute malnutrition.

CURRENT CROP SITUATION

a. Wheat

Mostly irrigated “*rabi*” (winter) wheat crop, is currently in vegetative/flowering stage which will be harvested in April. Adequate irrigation water supplies and overall favourable weather conditions supported a slight expansion in plantings and are benefiting crop development in the main wheat-growing areas of Punjab and Sindh provinces, which together account for over 90 percent of the total wheat output. On the contrary, in the minor rainfed-producing areas in the provinces of Khyber Pakhtunkhwa (located in the northwest) and Balochistan (located in the southwest), below-normal rains hindered planting operations and negatively affected growing crops. However, current official forecasts put the wheat output in year 2017 at a record level of 26 million tonnes, 2 percent up from the 2016 bumper output. The increase reflects the slight increase in plantings and expectations that good water availability, fertilizers and herbicides will increase average yields in main growing areas.

The farmers of irrigated and rain-crop areas should remove weeds from their fields with a



view to helping the crops consume existing moisture in the soil fully. Farmers in the lower half of the country, especially those in central regions should ensure maintaining room temperature at the poultry rearing houses keeping in view the rapid weather changes and humidity in the air.

According to FAO, Wheat exports in the 2016/17 marketing year (May/April) are forecasted to increase by 13 percent from the previous year’s low level to 850 000 tonnes, in line with the 2016 overall good output and large carryover stocks.

Prices of wheat grain and wheat flour, the country’s main staples, were stable in recent months, reflecting ample supplies from the



bumper harvest in 2016 and favourable prospects for the 2017 crops. Overall, prices were below their year-earlier levels.

b. Cotton

Early sowing of cotton has started in some areas of Sindh however tillage practices of cotton are also being carried in some areas of Sindh. Pakistan Cotton Ginners Association (PCGA) has issued the figures of cotton arrival up to February 15, 2017. Seed cotton (Phutti) equivalent to over 10,685,254 bales of cotton have reached ginneries across Pakistan, showing an increase of 10.30 percent compared to corresponding period last year when ginneries received 9,687,118 bales.

Seed cotton prices remained between Rs. 3500 to Rs. 3800 per 40 kg in Punjab. Lint prices are also at par with international prices and remained between Rs. 6800 to Rs. 7050 per 40 kg in Punjab.

The country had missed the crop production target by around 30 per cent in 2015-16 and it remained around 10.8 million bales which had caused 0.5 percent to GDP negative growth. The officials said the crop prospects are not very good in the current season as well and may negatively affect the growth rate again. The government downward revised the cotton production target as well as cotton cultivation area and fixed it at 14.1 million bales from 7.4 million acres of land for 2016-17 against 15.49 million bales from 7.7 million acres of land estimated for 2015-16 earlier.

ASSESSMENT OF COTTON CROP 2016-17

(Bales = 170 Kg)

Province	Expected Production (Million Bales)		
	First Cotton Crop Assessment (06-9-2016)	Second Cotton Crop Assessment (06-10-2016)	Third Cotton Crop Assessment (05-12-2016)
Punjab	7.500	7.300	6.903
Sindh	3.733	3.700	3.600
KPK	0.001	0.001	0.001
Balochistan	0.038	0.038	0.038
Pakistan	11.272	11.039	10.542

Source: Cotton Crop Assessment Committee Meeting (held on 06-9-2016, 06-10-2016 & 05-12-2016)

International Cotton Situation

The world cotton area in 2016-17 declined by 3.6 percent to 29.2 million hectare, as compared to 30.3 million hectare in 2015-16, which is lowest area under crop since 2009-10. While average yield is projected to decline by 12 percent to 764 kg/ha as compared to 781 kg/ha recorded in 2015-16. India is still the world's largest cotton producing country followed by China, U.S.A and Pakistan.



World cotton consumption is expected to remain stable at 24.1 million tons in 2016-17 as high price discouraged growth in demand. The world imports in 2016-17 are projected to increase by 1.01 percent showed a slight increase of 2.6 percent at 7.7 million metric tons as compared to 7.5 million tons recorded in 2015-16. The world cotton ending stocks are projected to decline by 6.4 percent to 18.02 million tons in 2016-17 as compared to 19.2 million tons registered in 2015-16.

c. Sugarcane

The active crushing and subsequent harvesting of sugarcane crop started across the country by early December. Sugarcane season is near to end in some areas of Punjab and KP. However, Sugarcane crushing season is expected to continue till end March in Central and North Punjab and April 10 in South Punjab. Sindh Government has fixed sugarcane prices @ Rs. 182 per 40 Kg. The sugar availability is surplus for a number of years in a row. Government has allowed subsidized export of the commodity. Last year, Government allowed exports of 0.5 million tons of sugar. Despite a subsidy of Rs. 13 per kg, the millers were able to export only one half of the commodity as a raise in import duty to 40% thwarted the export regime. This year, a quantity of 0.225 million tons has been allowed for exports. The incentive of subsidy has been withdrawn by the Government.

The Punjab Agriculture Department has advised the sugarcane growers to keep the ratio of seed from 100 to 120 maund per acre to get better yield and select seed from such fields which are healthy and disease free. The department also advised the growers not to get seed from ratoon crop and ensure that seed is healthy before its cutting from stems. A spokesman of the department also urged the growers to use seeds approved by the department and suitable to their local climate.

d. Horticulture

- Mango is at its flowering stage in Sindh and some other parts of the country.
- Marketing of early lady finger is ongoing in Sindh however sowing of lady finger has started in KP.
- Date palm is at pollination stage in few areas of Sindh.
- Tomato harvesting is towards end in most parts of the country.
- Brinjal is at harvesting stage in Sindh.

IMPORT & EXPORT SITUATION

- FAO forecasts rice exports in calendar year 2017 at 4.2 million tonnes, close to last year's level. The forecast reflects expectations of adequate exportable availabilities, notwithstanding the 2016 production contraction.
- In January 2017, pulses import surged to \$117.861 million from \$81.012 million in January 2016, up by 48 percent or \$36.849 million. In term of quantity, pulses import shot up by 43.34 % to 173,464 metric tons in January 2017 from 121,013 metric tons in January 2016, showing an increase of 52,451 metric tons.



- According to Pakistan Bureau of Statistics, seafood export grew by 11 percent or \$20.184 million in July-January 2017 from \$190.480 million in July-January 2016. The country fetched \$210.664 million of seafood export during July-January 2017. In term of quantity, seafood export went up to 77,768 metric tons in July-January 2017 from 71,882 metric tons in July-January 2016, up by 8.28 percent or 5,886 metric tons. In January 2017, seafood export surged by 12.48 percent or \$3.02 million to \$27.214 million from \$24.194 million in January 2016. Seafood export quantity mounted to 10,254 metric tons in January 2017 from 8,707 metric tons in January 2016, up by 18 percent or 1547 metric tons. Ongoing problems of a slight crew shortage and winter winds reduced the fishing to some extent.
- The country's import textile machinery grew to \$306.609 million in July-January 2017, up by 16.13 percent, official figures say. Increase in textile machinery import now stands at \$ 42.576 million in July-January 2017 from \$264.033 million in July-January 2016, Pakistan Bureau of Statistics says. In January 2017, textile machinery was imported of \$47.770 million, 51.08 percent or \$16.151 million higher from \$31.619 million in January 2016.

WATER SITUATION

The Indus River System Authority (IRSA) has warned that the water level in the country's major reservoirs is alarmingly low and could reach the dead level by March 10, 2017. IRSA spokesperson said that the current water situation has arisen after three to four years in Pakistan mainly because of last year's drought which continued for four months.

The current water level in Tarbela Dam was recorded at 1,400 feet and in Mangla Dam at 1,079 feet. However, the dead level for Tarbela Dam is 1,380 feet and for Mangla Dam 1,040



feet. The Pakistan Meteorological Department (PMD) has predicted light to moderate showers next week but it will not help increase the water level in the major water reservoirs.

Considering the current water levels in the reservoirs, Sindh has reduced its water demand from 45,000 cusecs to 40,000 cusecs, Punjab from 57,000 cusecs to 50,000 cusecs for the next 10 days, meanwhile Khyber-Pakhtunkhwa (KP) has asked for 3,000 cusecs and Balochistan for 4,000 cusecs of water.

DROUGHT SITUATION

- The month of February was good for drought prone areas of Sindh and Balochistan. Moisture conditions in most part of Balochistan are normal. However dry conditions prevail across southeast Sindh which is causing emerging drought condition.
- During the month of March, no significant rainfall is expected in drought prone areas of Sindh. Dry conditions would be helpful for farmers as harvesting of rabi crops starts in Sindh.

WEATHER OUTLOOK

During the month of March, increased solar angle and brighter sunshine would trigger energetic weather systems, which may result in increasing wind storms and convective precipitation. Global climate indicators such as North Atlantic Oscillations (NAO), El Nino & Southern Oscillations (ENSO) and Indian Ocean Dipole (IOD) are expected to remain neutral in March 2017. Based on prevailing atmospheric conditions, climate outlook of different models suggest that;

- Three to four weather systems are likely to pass across the country, resulting in slightly above normal rainfall over upper KP, GB, AJK, Northern parts of Punjab and normal rainfall in rest of the country.
- Snowfall is also expected over high mountains in March 2017.
- Thunder/hailstorms accompanied with gusty winds are also likely to occur at isolated places in the country.
- Air temperature is expected to remain slightly above normal in March 2017.
- Initial estimates indicate that precipitation is likely to remain normal in the month of April.

FERTILIZER OFF TAKE SITUATION

The expected off-take of urea for the Rabi season, after factoring in 11% excess demand owing to a reduction in urea prices, would be around 3.3 MMT. The total surplus Urea fertilizer would be around 1.0 MMT (4.324 MMT available - 3.3 MMT off take); after maintaining a strategic reserve of 0.2 MMT, around 0.8 MMT surplus would be available for export up to June 30, 2017.



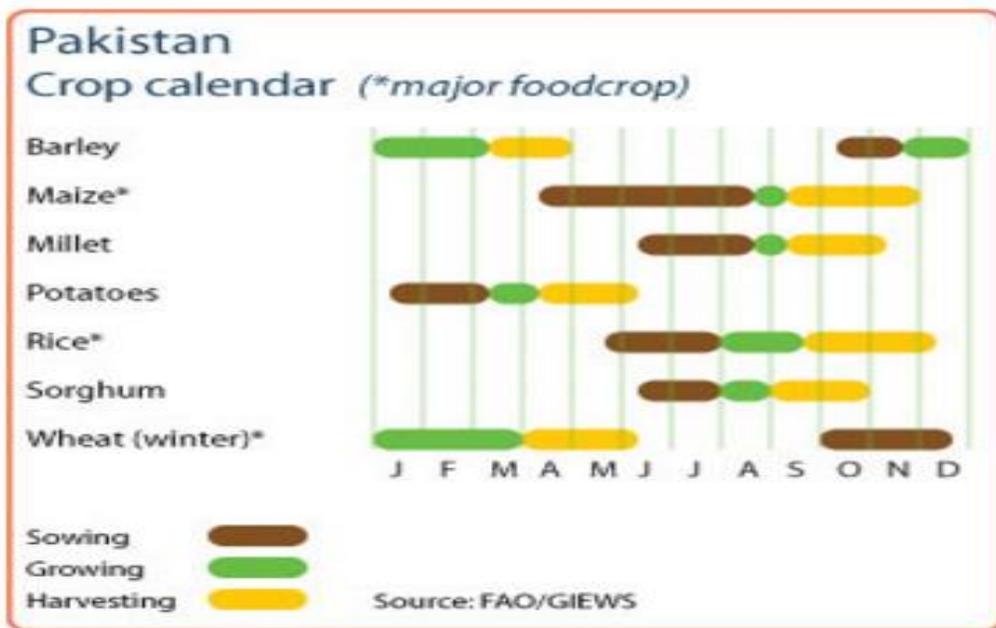
RECENT NEWS & TRENDS

- Punjab government has devised the methodology of extending a subsidy of Rs 500 million on potassium-based fertilizers and introducing direct cash subsidy mechanism first time in the province. Under this scheme farmers will have a cash subsidy of Rs 800 on bag of sulphate of potassium fertilizer and Rs 500 per bag on Muriate of Potassium. Farmers registered under Kissan Package of the provincial government will buy potassium-based fertilizer from the dealer and will find a voucher with the bag. After scratching that coupon the farmer will find a unique number and text it along with his CNIC number to 3070. The farmer will receive an SMS that he has bought a genuine product of any company and eligible for subsidy. He will also receive a code which he will show to any Jazz agent and will receive the amount of subsidy. If the farmer is not registered, he will receive an SMS that he is not a registered farmer and get another SMS in which, registration process will be explained. That specific farmer will also be eligible for the subsidy once his registration is completed. The growers can contact 0800-15000 and 0800-29000 (toll free number of the department) for further clarification and information.
- The federal governments' initiative to improve the forest cover of Pakistan through Green Pakistan Programme was formally launched on February 09, 2017, all across the country. The Punjab Forest Department also launched the programme by planting 100,000 saplings over an area of 138 acres across 19 districts of the province. For Green Pakistan Programme, the federal government is bearing 50 percent cost of the project, whereas each province will contribute 50 per cent as a matching grant. Through the programme, 100 million trees will be planted across the country. The programme aims to plant indigenous tree species to conserve and promote the local flora of Punjab. The species to be planted in different ecological areas include Chir, Kail, Deodar, Fit, Partal, Spruce, Phulai, Kiker, Rubinia, Kahu, Jand, Ber, Fig, Akhrot, Toot, Neem, Frash and other species etc.
- Khyber Pakhtunkhwa government, Higher Education Commission and NRPU have inaugurated and initiated a project titled "Commercialization of High Quality Rapeseed Variety Hasnain-2013" for enhancing oilseed Productivity in KP. Project was designed to provide high quality certified Rapeseed to the farmers, which is the limiting factor in the present agriculture system of the country. The main objectives of the project are to procure process and market 150 tons of certified Rapeseed during the project's three years time ie 2015-18.
- A report published by Pakistan Bureau of Statistics (PBS) revealed that Pakistanis have consumed tea worth Rs 5.028 billion in January-2017. During same period of previous fiscal year, figure for tea imports stood at Rs 4.833 billion. Report states that tea imports have swelled by 4.03pc in January 2017.
- Nestle' Pakistan has disbursed Rs 114 million among almost 100 dairy farmers through National Bank under the PM's Youth Loan Scheme. Nestle Pakistan and the National Bank of Pakistan had entered a partnership in 2015 to facilitate young farmers under the PM's Youth Loan Scheme. Around 400 farmers had applied for loan assistance.



- Pakistan Agriculture Research Council (PARC) would launch a livestock development project worth Rs 635 million to promote this particular sector in backward areas of Sindh province. This amount would be spent on promotion of livestock in various areas of Sindh province, including Mithi, Umerkot, Nagar Park and Chachroo. The project also aims to promote upbringing of quality camel breed in the areas, adding that through this project new and healthy varieties of grass would be introduced for consumption of livestock. This project would help improve the life-standard of the people of these areas and help their economic development.

CALENDAR FOR MAJOR CROPS IN PAKISTAN



زرعی سفارشات برائے کسان

بہاریہ مونگ

﴿ مونگ کی کاشت مارچ کے پہلے ہفتہ سے آخر مارچ تک کی جاسکتی ہے۔ البتہ مارچ کے پہلے دو ہفتے کاشت کے لیے موزوں ترین ہیں۔
 ﴿ اچھی پیداوار کے حصول کے لیے آبپاش علاقوں میں منظور شدہ اقسام نیاب مونگ-2006، ازری مونگ-2006، نیاب مونگ
 2011 اور نیاب مونگ 2016 جبکہ بارانی علاقوں میں چکوال M-6 کاشت کے لیے موزوں ترین ہیں۔
 ﴿ فصل کی کاشت کے لیے شرح بیج 10 تا 12 کلوگرام فی ایکڑ استعمال کریں۔
 ﴿ بیج کو جراثیمی ٹیکہ لگا کر کاشت کریں اس سے فصل کی نائٹروجن حاصل کرنے کی صلاحیت اور پیداوار بڑھ جاتی ہے۔
 ﴿ بجائی ہمیشہ تروتہ حالت میں کریں تاکہ اگاؤ بہتر ہو۔ قطاروں کا فاصلہ ایک فٹ رکھیں۔ اور پودوں کا آپس میں درمیانی فاصلہ 8 تا
 10 سینٹی میٹر ہونا چاہیے۔
 ﴿ مونگ کی فصل کے لیے ایک بوری ڈی اے پی اور آدھی بوری پوٹاشیم سلفیٹ بجائی سے پہلے اور آخری بل کے بعد چھٹہ کر کے سہاگہ
 دیں۔

مونگ پھلی

﴿ بارانی علاقوں میں مونگ پھلی کی کاشت آخر مارچ تا آخر اپریل میں کرنی چاہیے۔
 ﴿ مونگ پھلی کی کاشت کے لیے زمین کی تیاری کریں۔ اچھے نکاس والی ریتیلی میرا زمین کاشت کے لیے موزوں ہے۔
 ﴿ زمین کی تیاری کے وقت گہراہل چلائیں۔ تاکہ اوپر والی مٹی مکمل طور پر نیچے چلی جائے اور جڑی بوٹیاں بھی تلف ہو جائیں۔

کماڈ

﴿ جو کسان کماڈ کی کاشت ابھی تک نہیں کر سکے وہ جلد از جلد مکمل کر لیں کیونکہ گنے کی کاشت کا وقت مارچ کے وسط تک ہے۔
 ﴿ ہمیشہ صحت مند، بیماریوں اور کیڑوں سے پاک فصل سے بیج کا انتخاب کریں۔ بیج بناتے وقت بیمار اور کمزور گنے چھانٹ کر نکال دیں۔
 ﴿ ایس پی ایف 234 صرف راجن پور، بہاولپور اور رحیم یار خاں اضلاع کے لیے موزوں ترین قسم ہے۔ نیز ایچ ایس ایف 240، ایچ
 ایس ایف 242، سی پی 400-77 سیلابہ علاقوں کے لیے موزوں اقسام ہیں۔ جبکہ سی پی ایف 246، 247، 248 اور غیر سیلابہ
 علاقوں کے لیے موزوں اقسام ہیں۔

﴿ زرخیز زمین کے لیے 2.5 بوری یوریا+1 بوری ڈی اے پی اور 1 بوری پوٹاشیم سلفیٹ، درمیانی زمین کے لیے 3.25 بوری یوریا
 +2 بوری ڈی اے پی اور 2 بوری پوٹاشیم سلفیٹ اور کمزور زمینوں کے لیے 4 بوری یوریا+3 بوری ڈی اے پی اور 2 بوری پوٹاشیم سلفیٹ

فی ایکڑ ڈالیں۔

﴿سونا پوریا کا استعمال اگاوے بعد تین فسطوں میں کرنا چاہیے۔ بہاریہ کاشت کے لیے پہلی فسط اپریل میں، دوسری فسط مئی کے آخر میں اور تیسری فسط جون کے آخر میں پوناش کے ساتھ مکس کر کے ڈالیں۔﴾

﴿ستمبر کے مہینے میں کاشت کی گئی فصل کو سونا پوریا کی دوسری فسط 1.25 بوری فی ایکڑ مارچ کے آخر میں اور تیسری فسط 1.25 سونا پوریا فی ایکڑ اپریل میں مٹی چڑھاتے وقت ڈالیں۔﴾

گندم

﴿گندم کے لیے پانی کی ضرورت کا انحصار پودوں کی بڑھوتری اور موسمی صورتحال پر ہوتا ہے۔ تیسرا پانی دانوں کی دودھیہ حالت پر دیں یہ دانے بننے کا وقت ہوتا ہے۔ اس وقت پانی کی کمی سے دانوں کا سائز چھوٹا رہتا ہے اور پیداوار بھی کم آتی ہے۔﴾

﴿اگر فصل کارنگ پیلا ہو تو دو کلوگرام پوریا 100 لٹر پانی میں ملا کر فی ایکڑ سپرے کریں۔ لیکن بارانی علاقوں 2 کلوگرام پوریا کے ساتھ 2 کلوگرام امیں۔ او۔ پی یا ایم۔ او۔ پی ضرور شامل کریں۔﴾

﴿جڑی بوٹیوں سے پیداوار میں 10 سے 15 فیصد تک نقصان ہو سکتا ہے۔ گندم میں دو اقسام کی جڑی بوٹیاں یعنی نوکیلے پتوں والی اور چوڑے پتوں والی پائی جاتی ہیں۔ لہذا ان کی بروقت تدراک بہت ضروری ہے۔﴾

﴿گندم کی فصل میں زہرکش ادویات کی سفارش نہیں کی جاتی کیونکہ اس سے ماحول آلودہ ہونا، صحت کے مسائل اور مفید کیڑوں کا ختم ہونا شامل ہیں۔﴾

آم

﴿مارچ کے مہینے میں پھل اور پھول بننے کا وقت شروع ہو جاتا ہے۔ اور نئی اور کمزور شاخوں میں کیڑوں اور بیماریوں کے حملے کا خدشہ بھی بڑھ جاتا ہے لہذا زرعی ماہرین کے مشورہ کے مطابق جراثیم کش ادویات کا استعمال کریں۔﴾

﴿مارچ کے مہینے کے دوران سونا زنگ (100 تا 150 گرام) اور سونا بوران (50 تا 70 گرام) فی پودا گوبر کی کھاد ملا کر پودوں کے پھیلاؤ کے نیچے پھیلا دیں۔﴾

﴿پھول آنے پر مکمل حد تک آبپاشی نہ کریں۔ تاہم پھل آنے پر موسم کی کیفیات کے مطابق آبپاشی کریں۔﴾

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

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

پلاننگ اینڈ ریسرچ ڈیپارٹمنٹ

ہیڈ آفس، زرعی ترقیاتی بینک لمیٹڈ

اسلام آباد



**PLANNING & RESEARCH DEPARTMENT
HEAD OFFICE, ISLAMABAD**