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AGRICULTURE OUTLOOK



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Contents

EXECUTIVE SUMMARY -----	01
CURRENT CROP SITUATION-----	02
• <i>Wheat</i> -----	02
• <i>Cotton</i> -----	03
• <i>Sugarcane</i> -----	04
• <i>Horticulture</i> -----	05
IMPORT & EXPORT SITUATION-----	05
WEATHER OUTLOOK-----	05
DROUGHT SITUATION -----	06
WATER SITUATION-----	06
FERTILIZER OFF TAKE SITUATION-----	07
LATEST NEWS & TRENDS-----	07
FARMER'S ADVISORY-----	08



EXECUTIVE SUMMARY

Wheat harvesting has started in Sindh however in Punjab harvesting of wheat is expected to begin by mid of April. The Met Office asked the wheat growers to evolve a plan to harvest the standing crop that is close to ripening stage. It said the growers should keep the prevailing weather in mind before reaping the standing wheat crop. As per report of PCGA on 1st March 2018, cotton arrivals were 11.5 million bales. It indicates an increase of 7.6% over the previous year. World cotton production is forecasted to grow by 11.0% to 25.5 million tons in 2017-18 as against 23.0 million tons in 2016-17 due to expansion in area. Sugarcane harvesting was at termination stage during the month of March.

Slightly below normal rainfall is expected throughout the country during April and May, however, the frequency and intensity of dust storms is likely to remain higher disturbing the harvesting and threshing activities.

The IRSA Advisory committee had projected 31 per cent water shortages in early Kharif during sowing season causing serious threat to Kharif crops due to higher losses and less inflow into rivers

As per market estimates, with 2.79 million metric tons domestic production and about 270,000 metric tons opening inventory, overall 3.060 million tons of urea stocks will be available in Kharif season against the expected offtake of 2.96 million tons.



The country is facing an extremely serious water crisis due to climate change posing serious threat to Kharif crops following more than 162 per cent reduction in inflows from Northern Areas despite higher temperature than last year. The current unexpected water crisis poses not only a threat to Kharif crops but also accounts for a reduction in hydel generation causing load shedding across the country. The shortages to Punjab and Sindh have increased to 60 per cent at rim station.

CURRENT CROP SITUATION

1. Wheat

Wheat crop is at different growth stages in various parts of the country depending upon sowing time and varietal characteristics. In Sindh and Balochistan, wheat crop was near to maturity / harvesting in start of March. In different parts of Punjab wheat crop was at spike formation to grain filling stage. In Khyber Pakhtunkhwa wheat crop was at vegetative growth stage.

Wheat harvesting has begun in Sindh therefore ongoing dry weather may not negatively affect the crop but in Punjab harvesting of wheat is expected to begin by mid of April therefore a high temperature would negatively affect the crop output in the province

The positive factors in wheat production include more rainfall during November and December 2017 compared to corresponding months of 2016. The month of January was generally dry, putting stress on underground water resources particularly in Punjab. There were wide spread rains during February.

The major negative factors include low surface water supplies particularly from reservoirs during the main growing season. The shortages peaked in Indus irrigated Southern Punjab followed by Sindh and Central Punjab. The major impact of water shortages is in Sindh which has limited sweet water aquifer. In Punjab, the shortages are supplemented by tube well water resulting in incremental cost of wheat production. However a shortage of 60 percent water supply in February (IRSA) at flowering/ grain formation stages is highly critical in Southern Punjab. Another negative factor is the shortage in fertilizer supplies during early crop growth. A 30 percent increase of nitrogen in January can almost compensate urea/ other nitrogen fertilizers shortages in the start of season (November/December). About 80 percent of phosphate uptake by plants is generally done during early 6 weeks of growth. The phosphate availability generally remained short during October-December and increased by 39 percent in January. Such an incremental supply at a belated stage is not useful for wheat crop. This incremental supply of phosphate may be useful for late Rabi crops/ Kharif crops.

Pakistan has generally been harvesting big crops of wheat during past few years. This has resulted in large buildup of carryover stocks of the commodity. Keeping in line with this trend, we are hoping a good crop.



The Met Office asked the wheat growers to evolve a plan to harvest the standing crop that is close to ripening stage. It said the growers should keep the prevailing weather in mind before reaping the standing wheat crop. It also said farmers should remove weeds from the standing crops at earliest to protect yield from a loss. The Met warned farmers against the disease, saying the growers should ensure field sanitation and spray prophylactic fungicidal to prevent spread of crops viruses that may attack vegetables.

2. Cotton

Cotton crop picking is generally completed by the end of December however market activities remain in progress till the end of May. This year, better seed cotton and lint prices have further increased growers confidence in the crop. It is therefore, expected that volume of cotton crop will increase in the next season. As per report of PCGA on 1st March 2018, cotton arrivals were 11.5 million bales. It indicates an increase of 7.6% over the previous year. Volume of crop increased up to 12.32% in Sindh by reaching at 4.3 million Bales. While it increased about 5% in Punjab as compared to Last year. It is expected that cotton crop in Punjab may touch 7.5 to 8.0 million bales this year. Better seed cotton & lint prices are prevailing in the market, but the waiving of custom and excise duty on import of cotton may impact the domestic cotton market. Moreover, it is expected that cotton crop will cover more area in the next crop season.

Province wise arrivals of cotton crop are given below:

Cotton Bales Arrival				
Province	2018	2017	Difference	
	000 bales			Percent
Punjab	7271.323	6920.370	350.953	5.07
Sindh	4253.258	3786.811	466.447	12.32
Total	11524.581	10707.181	817.4	7.63

The Punjab Agriculture Department has ensured availability of required quantity of certified cotton seed in the market for commercial cultivation during the coming season and has advised the growers to insist purchasing certified seed of approved varieties only.

International Cotton Situation 2017-18:

The world cotton area in 2017-18 is projected to increase by 12% to 33.0 million hectares as compared to 29.3 million hectares in 2016-17. World cotton production is forecasted to grow by 11.0% to 25.5 million tons in 2017-18 as against 23.0 million tons in 2016-17 due to expansion in area. World cotton consumption may recover by 3% to 25.4 million tons in 2017-18 as compared to 24.5 million tons in 2016-17. The world imports and exports are projected to increase by 16% to 8.2 million tons in 2017-18. The world ending stock in 2017-18 are estimated to increase by 1.1% to 18.9 million tons.



3. Sugarcane

Sugarcane harvesting was at termination stage during the month of March & its crushing started in Punjab. Farmer complains for lower sugarcane prices (Rs. 110 to 150) in the country. Sugar prices in local market were also lower as compared to last year. Last year during March sugar prices were in the range of Rs. 7100 to 5700 per 100 Kg whereas this year during March prices were in the range of Rs. 5400 to 4600 per 100 kg. This fall in prices may be due to high sugar stocks with the mills and bumper sugar production during this year. Comparison of Sugar prices from September to February for last two years is given below:



Source: Karachi Stocks Akbari Mandi

Ministry of National Food Security and Research (MoNFS&R) has estimated that sugarcane growers in Sindh, Punjab and KP are expected to suffer a financial loss of upto Rs 133 billion due to less payment by mill owners

For sugarcane crop 2017-18, indicative price was fixed at Rs 180/40 kg in Punjab and KP, Rs 182/40 kg in Sindh. Secretary MoNFS&R further explained that following issues have been observed during the current season: (i) delay in crushing season delayed the sowing of Rabi crops; (ii) non-payment of sugarcane price fixed by the Provincial Governments; (iii) receipts being obtained showing payments as per notified prices, though factually lower prices are being paid; in some cases CPRs are not being issued and being substituted by unprinted receipts; and (iv) non-payment of "premium" on the basis of sucrose content.

According to MoNFS&R, estimated total sugarcane production is 65.69 million tons of which 44.86 million tons in Punjab, 16.27 million tons in Sindh, 4.52 million tons in KP and 0.03 million tons in Balochistan.



4. Horticulture

- The growth of oilseed crop is reported satisfactory and the crop is at flowering stage. No serious pest attack is reported
- Sowing of maize silage started in some areas of Punjab
- Mango is at fruit setting stage in Punjab. In Sindh first and second spray against pest has completed and orchards are in good condition.
- Harvesting of tobacco ended in Punjab
- Picking of citrus fruits ended in Sindh and pruning has been completed.
- Picking of lady finger started in Punjab. Lady finger is at harvesting stage in Sindh.
- Onion harvesting is ongoing in some districts of Sindh. Crop condition is good with local market price is Rs. 20-25 per kg.

IMPORT & EXPORT SITUATION

- Pakistan's import of pulses slumped by 41.11 percent to \$353.431 million in July-February 2017-18, official figures say. Fall in pulses import now stands at \$246.569 million in July-February 2017-18 from \$600 million in July-February 2016-17, Pakistan Bureau of Statistics indicates. Pulses import volume also plunged by 41.43 percent or 309,159 metric tons to 437,067 metric tons in July-February 2017-18 from 746,226 metric tons in July-February 2016-17. In February 2018, the country's import of pulses dropped by 65.21 percent or \$71.191 million to \$37.986 million from \$109.177 million in February 2017. Import of pulses scaled down to 43,698 metric tons in February 2018 from 152,899 metric tons in February 2017, lower by 71.42 percent or 109,201 metric tons.
- The country's seafood export continues to grow to \$264.188 million in July-February 2017-18, up by 10.18 percent, official figures say. Increase in fisheries export now stands at \$24.4 million in July-February 2017-18 from \$239.788 million in July-February 2016-17, Pakistan Bureau of Statistics shows. In term of quantity, seafood export shot up by 22 percent to 108,262 metric tons in July-February 2017-18 from 89,032 metric tons in July-February 2016-17. In February 2018, seafood export mounted to \$34.555 million from \$29.134 million in February 2017, up by 19 percent or \$5.421 million. Fisheries export volume grew by 20 percent or 2203 metric tons to 13,437 metric tons in February 2018 from 11,234 metric tons in February 2017.

WEATHER OUTLOOK

- The global climate driver, El Nino is proceeding from negative to neutral phase, while Indian Ocean Dipole (IOD) and North Atlantic Oscillation (NAO) are swinging along its neutral values during the period, April to May 2018. Their impact on the weather pattern



also seems not pronounced. The main features of weather for the period April - May, 2018 would be as follows:

- Slightly below normal rainfall is expected throughout the country during April and May, however, the frequency and intensity of dust storms is likely to remain higher disturbing the harvesting and threshing activities
- 3-4 spells of western disturbances may occur across the upper parts of the country during April 2018
- The average temperature is likely to remain above normal throughout the country during the period. The expected rise in temperature during the months of April and May is 1-2°C. The rise in temperature will accelerate the snowmelt in the Northern Areas and subsequent increase in runoff in upper Indus region
- Heat wave conditions are most likely to affect the major cities occasionally, during the month of April to May 2018
- During winter 2018, snowfall remained 20-25% less than long term average in upper Indus Basin and most of that occurred in February or early March. Due to rise in temperature, water inflow will increase in the Indus and Jhelum Rivers. However, the water reservoir would remain under stress conditions and relevant agencies are advised for the better management of expected water resources during the period
- Deficient rainfall will intensify the drought conditions over south-west Balochistan and may transform into moderate, while the prevailing drought conditions over Thar-parker region of Sindh may exaggerate further, during the month of April –May 2018

DROUGHT SITUATION

The month of March was not good for drought prone areas of Balochistan. Deficient water is observed across western parts of Balochistan aggravating drought conditions.

During the month of April 2018, little rainfall may occur but not in drought prone areas of Balochistan. That may aggravate drought conditions further over there. Overall, mild to moderate drought conditions are likely to prevail over most parts of western Balochistan.

WATER SITUATION

The IRSA Advisory committee which met on March 29th2018 had projected 31 per cent water shortages in early Kharif during sowing season causing serious threat to Kharif crops due to higher losses and less inflow into rivers. Punjab and Sindh would face 31 per cent water shortage whereas Balochistan and KPK have been exempted from water shortage during Kharif crops.

Kharif season lasts from April 1 to November 30, and rice, sugarcane, cotton and maize are some of the key crops. However, against projection of 31 per cent water shortage for early kharif, the shortages reached an alarming level of 60 per cent which is a serious threat to sowing of Kharif



crops. The farmers would be depending on ground water due to less water releases from dams. During the meeting, Pakistan Metrological department and Wapda representatives had also revealed that snow was about 50 per cent less in catchments.

FERTILIZER OFFTAKE SITUATION

The closure of three urea plants due to non-availability of gas could lead to shortage of the commodity besides price escalation in Kharif season. Urea is expected to be in short supply starting May 2018 and may have a major negative impact on the agriculture sector

Presently, three urea plants operating on the SNGPL network are closed for the last 6 months due to lack of basic raw material - natural gas. There is no natural gas left to allocate to the urea producing plants on the SNGPL network, resulting in short production of some 85,000 tons urea every month or cumulatively over 0.6 million tons in the last few months

As per market estimates, with 2.79 million metric tons domestic production and about 270,000 metric tons opening inventory, overall 3.060 million tons of urea stocks will be available in Kharif season against the expected offtake of 2.96 million tons. The domestic urea production estimates are excluding production of three SNGPL-based urea plants, which are presently closed and despite requests unable to get gas for urea production

NEWS & TRENDS

- The Punjab government has decided to include farmers having land up to 50 acres in its E-Credit scheme. Provincial government is providing interest free loans to small farmers and till now had disbursed loans to 314,000 small farmers under this scheme. This scheme has infused a fresh blood into the dead veins of Agriculture sector since its inception. Small scale farmers and tenants have benefited from the scheme in a big way as they found sufficient resources for sowing their crops
- In-line with its commitment to promote dairy sector of Pakistan having its deep roots in the dairy farmers' community, Nestlé Pakistan partnered with University of Veterinary & Animal Sciences (UVAS) by signing a Memorandum of Understanding (MoU) which will focus on capacity building of farmers for enhanced development of the industry. Under this agreement, Nestlé Pakistan will link selected farmers and share its training expertise, whereas UVAS will provide the farmers with training facilities at their training farm. This initiative is in-line with Sustainable development goal number 17 of formulating partnerships for achieving desired goals as this will contribute towards capacity building of farmers as they will be given hands on training at UVAS covering the major areas and advanced practices of feeding, breeding, milk quality and general management of imported cows. Nestlé Pakistan will also install drip irrigation on selected sites at UVAS' Pattoki campus.
- The federal cabinet has decided that deep sea fishing in Zone-III will be regulated by the federal government and would be open to provinces for obtaining licences. The decision was



taken by the cabinet in its meeting held on March 31, 2018 under the chairmanship of Prime Minister Shahid Khaqan Abbasi. Prime Minister had constituted a committee to revise and formulate New Deep Sea Fishing Policy. Furthermore, it was directed that no deep sea fishing licenses should be issued until the introduction of a new policy framework and even then only if the criteria set out in the new framework allowed for the issuance of such licenses.

- The Punjab Agriculture Department is launching a special 'app' to help farmers interact with agriculture experts to seek advice on improvement of crops, knowing the real time weather conditions and future forecast and to have access to watch videos on latest production technologies of different crops. Under this scheme, at initial stage 110,000 smart phones will be distributed among registered farmers of Kissan Package and during the next stage all registered farmers will get such phones.
- Punjab Agriculture department has sold 50,000 summers vegetable seed kits on subsidized rate across the province. The step has been taken for promotion of "kitchen Gardening Culture" and to create awareness about the importance and utility of home grown fresh vegetables across the Province. Kitchen gardening has gained popularity among the people especially the women folk in different districts including Sialkot. The kitchen gardening is actively attaching highest importance in the wake of upsurge in prices, malnutrition, poverty alleviation and consumption of fresh and home grown vegetables

زرعی سفارشات برائے کسان

مونگ پھلی

- ﴿ مونگ پھلی کی کاشت کا موزوں ترین وقت مارچ کے آخر سے لے کر اپریل کے آخر تک ہے۔
- ﴿ کاشت بذریعہ پوریا ڈرل قطاروں میں کریں۔ بیج کی گہرائی 5 سے 7 سینٹی میٹر تک رکھیں۔ قطاروں کا درمیانی فاصلہ 45 سینٹی میٹر جبکہ پودوں کا آپس میں درمیانی فاصلہ 15 سے 20 سینٹی میٹر رکھیں۔
- ﴿ کاشت کے لیے خالص اور منظور شدہ اقسام باری 2011، پوٹھوہار اور باری 2016 اور بارڈ-479 کاشت کریں۔
- ﴿ کاشت کے لیے شرح بیج 70 کلوگرام پھلیاں یا 40 کلوگرام گریاں فی ایکڑ یا 5 کلوگرام گریاں فی کنال استعمال کریں۔
- ﴿ کھاد ڈالتے وقت محکمہ زراعت کی سفارش کردہ کھادوں کا مناسب استعمال کریں۔
- ﴿ 15 جولائی کے بعد 200 کلوگرام فی ایکڑ یا 25 کلوگرام فی کنال جیسم ڈالیں۔

کپاس

- ﴿ زمین کی بہتر تیاری کپاس کی اچھی پیداوار کی ضامن ہے۔ لہذا سب سے پہلے زمین میں موجود سخت تہہ کو توڑنے کے لیے چزل ہل چلائیں اور زمین کی ہمواری کے لیے لیزر لینڈ لیولنگ ٹیکنالوجی سے استفادہ کریں۔
- ﴿ کپاس کی کاشت مرکزی علاقوں میں 15 اپریل سے 31 مئی تک ہے کپاس کی بوائی یکم اپریل سے پہلے ہرگز نہ کریں تاکہ گلابی سنڈی کے حملے سے بچا جاسکے۔
- ﴿ بُرا تراہوا بیج 6 تا 8 کلوگرام فی ایکڑ کے حساب سے استعمال کریں۔ بوائی سے پہلے بیج کو مناسب کیڑے مارز ہر لگائیں۔ تاکہ شروع میں ایک ماہ تک رس چوسنے والے کیڑوں خاص طور پر سفید مکھی کے حملے سے بچا جاسکے۔
- ﴿ اپریل میں کاشتہ فصل کے لیے سفارش کردہ سونا پور یا 1/4 حصہ بوائی سے 30 تا 35 دن بعد جبکہ باقی ماندہ سونا پور یا موسم، زمین اور فصل کی حالت کو مد نظر رکھتے ہوئے استعمال کریں۔
- ﴿ کاشت کے چار سے پانچ دن کے بعد بیج اگنا شروع ہو جاتے ہیں اور خالی سوراخوں کا بخوبی پتہ چل جاتا ہے۔ لہذا ان کو پر کرنے کے لیے 5 سے 6 گھنٹے تک پانی میں بھگوئے ہوئے بیجوں میں سے 4 تا 5 بیج فی سوراخ ڈال کر مٹی سے ڈھانپ دیں۔

بہاریہ مکی

- ﴿ ڈرل سے کاشت کی گئی فصل کی اچھی پیداوار حاصل کرنے کے لیے چھدرائی نہایت ضروری ہے۔ کمزور اور بیمار پودے نکال دیں اور دوغلی اقسام کے لیے پودوں کا درمیانی فاصلہ 6 سے 8 انچ اور مکی کی عام اقسام کے لیے 7 سے 8 انچ پودوں کا درمیانی فاصلہ رکھیں۔

﴿ ڈرل یا پلانٹر سے کاشتہ فصل کو پہلی آبپاشی بوائی کے 10 سے 12 دن بعد کریں۔ اور وٹوں پر کاشت کی گئی فصل میں وتر برقرار رکھیں۔
﴿ ان دنوں فصل پر کونیل کی مکھی کا حملہ ہو سکتا ہے۔ فصل اگنے کے ایک ماہ بعد کیمیائی طریقہ انسداد کے دانہ دارز ہروں کا انتخاب کریں۔

بہاریہ کماد

﴿ فصل کی صحت مند پرورش کے لیے گوڈی اور تلاء کی بہت ضروری ہے۔ اس سے جڑی بوٹیاں بھی تلف ہو جاتی ہیں اور زمین بھی نرم ہونے کی وجہ سے فصل کی جڑیں خوب پھیلتی ہیں۔ پہلی گوڈی مکمل ہونے کے بعد دوسری مہینے بعد کریں۔
﴿ سیاڑوں کے درمیان بذریعہ کلٹیویٹر جبکہ پودوں کے درمیان میں جڑی بوٹیاں نکالنے کے لیے کسولہ یا کھر پیہ استعمال کریں۔

بعد از برداشت گندم کی دیکھ بھال

﴿ گندم ذخیرہ کرنے کے لیے ہوادار اور روشن گودام کا انتخاب کریں اور اس کی اچھی طرح صفائی کریں۔
﴿ گندم کو سٹور کرنے کے لیے نئی بوریوں کا استعمال کریں بصورت دیگر بوریوں پر زرعی ماہرین کے مشورہ سے سفارش کردہ زہروں کا سپرے کریں اور گندم کو خشک ہونے کے بعد دوبارہ سٹور کریں۔
﴿ گوداموں میں میلا تھیان کا 25 فیصد محلول سپرے کریں پھر گوداموں کو دو دن تک بند رکھیں تاکہ گذشتہ سال کے کیڑوں کے انڈے تلف ہو جائیں۔ اس کے علاوہ چوہوں اور باقی ماندہ کیڑے مکوڑوں کے لیے ایلومینیم فاسفائیڈ کی گولیاں بحساب 30 تا 35 فی ہزار مکعب فٹ استعمال کریں۔

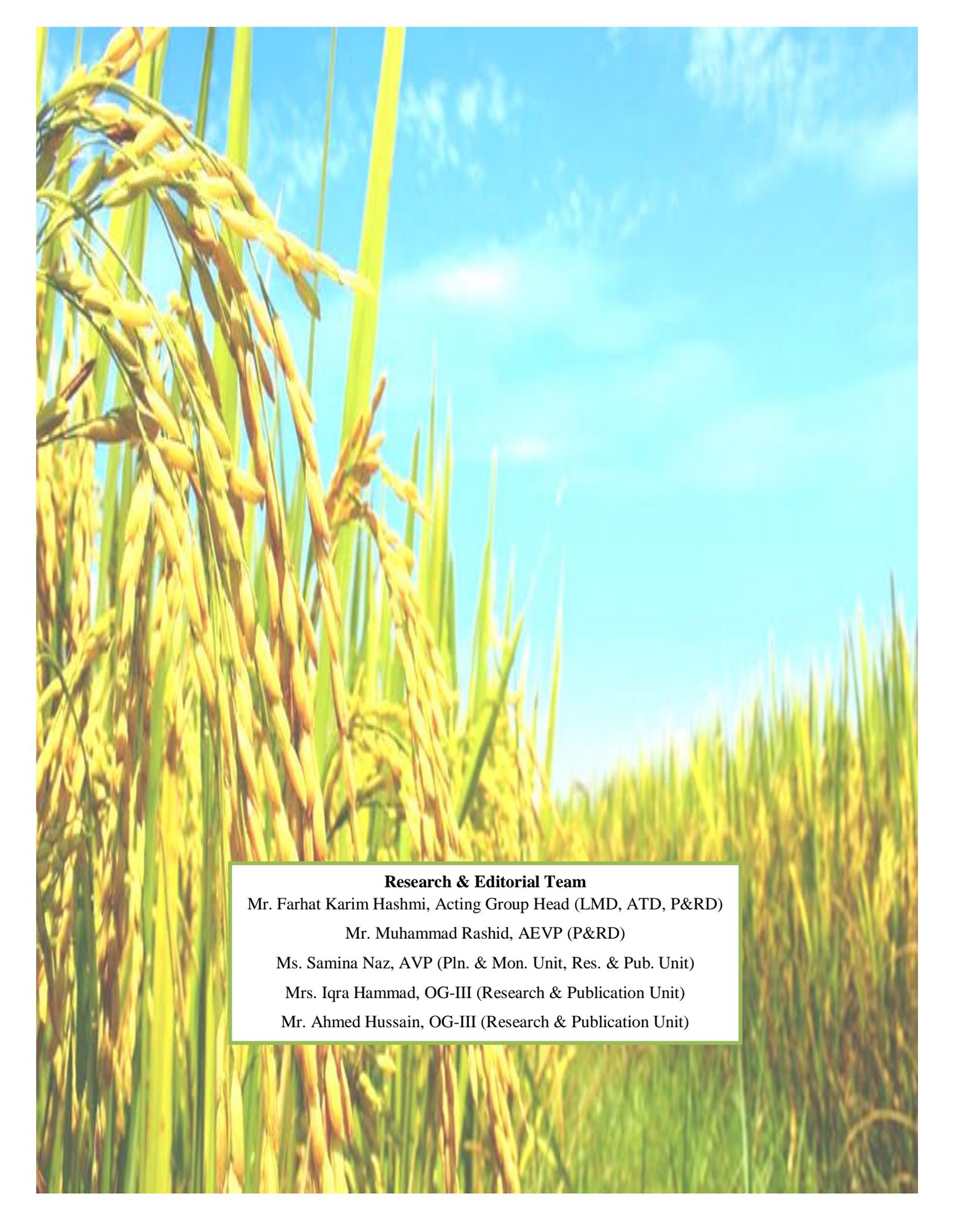
آم اور ترشاوہ باغات

﴿ اپریل کے مہینے میں فروٹ فلائی کے انسداد کے لیے جنسی پھندوں اور کیمیائی زہروں کا استعمال کریں۔
﴿ پھل آنے پر آبپاشی ضروری ہے۔ لہذا موسم کی کیفیت کو مد نظر رکھتے ہوئے آبپاشی 20 دن کے وقفے سے کریں۔
﴿ اپریل کے دوران پودوں میں پھل بن جانے پر سونا پوریا یا 3/4 کلوگرام فی پودا تنے سے 2 فٹ دور اور گھیر کے نیچے ڈال کر آبپاشی کریں۔
﴿ باغات میں سبز کھاد کے لیے جنتر یا گوارہ کاشت کریں تاکہ کھادوں کی افادیت کو بہتر بنایا جاسکے۔ سڑس سکیب، میلا نوز دیگر بیماریوں اور رس چوسنے والے کیڑوں کے خلاف سپرے کریں۔

Source: Zarat nama, Government of Punjab (Farmers' Advisory)

Fauji Fertilizer Company Limited (Farmers' Advisory Service)

پلاننگ اینڈ ریسرچ ڈیپارٹمنٹ
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