



GLEWS Country Brief Pakistan

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FOOD SECURITY SNAPSHOT

- Uncertain prospects for 2019 wheat output due to low availability of irrigation water
- Cereal production in 2018 estimated at near-average level
- Cereal exports in 2018/19 forecast close to last year's above-average level
- Prices of wheat and wheat flour increased in recent months reflecting seasonal patterns and strong exports
- Food insecurity persists in some localized areas

Uncertain prospects for 2019 wheat crop due to low availability of irrigation water

Planting of the 2019 “Rabi” (mostly irrigated) wheat crop was completed in December 2018. Below average rains in October and November 2018, coupled with low irrigation water availabilities for the predominantly irrigated wheat crop, have hampered planting operations. Official information from early December 2018, indicated that 8 million hectares were planted with wheat, 9 percent below last year's near-average level. As of 7 December 2018, the Pakistan Meteorological Department released a “Drought Alert” indicating that parts of Sindh and Balochistan provinces are experiencing moderate to severe drought conditions due to persistent below-average rainfall. According to Indus River System Authority (IRSA), as of October 2018, irrigation water supplies for the “Rabi” crops are estimated to be 40 percent below the previous ten-year average. As of the second dekad of December 2018, southern parts of Punjab and Sindh provinces, and eastern parts of Balochistan Province, exhibited below normal vegetation conditions (see Vegetation Health Index map) and the reduced water availability for irrigation raises concerns for yield prospects.

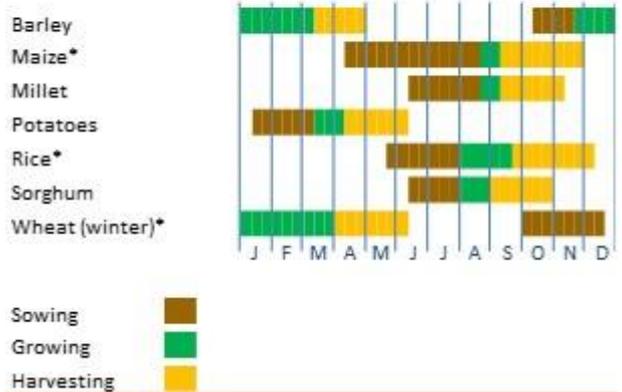
Cereal production in 2018 estimated at near-average level

The 2018 cropping season finalized in November 2018 and the aggregate cereal output, including wheat, paddy rice and maize, is estimated at a near-average level of 42 million tonnes. This is 6 percent below the record level in 2017, when bumper yields were achieved as a result of favourable weather conditions and adequate input supplies, including irrigation water supplies and good access to fertilizers and other basic inputs.

Pakistan

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Pakistan

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Wheat	25 517	26 674	25 490	-4.4
Rice (paddy)	10 463	11 157	10 320	-7.5
Maize	5 476	6 100	5 700	-6.6
Others	504	505	504	-0.2
Total	41 960	44 436	42 014	-5.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal exports in 2018/19 forecast close to 2017/18 above-average level

Cereal exports consist mostly of rice and wheat. In calendar year 2019, rice exports are forecast at 3.9 million tonnes, close to the previous five-year average, reflecting adequate availabilities from the 2018 average output. Wheat exports in the 2018/19 marketing year (May/April) are forecast to increase from last year's average level, reflecting strong sales in recent months. Between May (the start of the marketing year) and October 2018, cumulative wheat exports from Pakistan were estimated at 850 000 tonnes, considerably higher than the previous five-year average.

Prices of wheat and wheat flour increased seasonally

Prices of wheat grain and wheat flour, the country's main staples, increased for the fifth consecutive month in December 2018, reflecting seasonally tightening market availabilities and strong exports in recent months. Overall, prices in December 2018 were higher than their year-earlier levels.

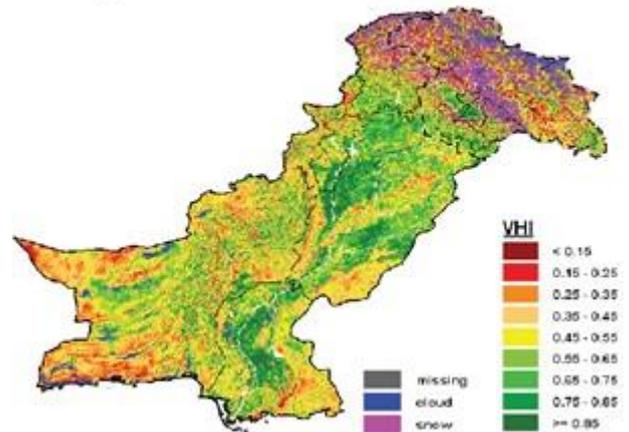
Food insecurity persists in some localized areas

Overall, food security conditions in the country are stable, following five consecutive years of bumper harvests. However, concerns about food insecurity persist in some parts of the country, particularly in western and southwestern areas of Balochistan Province and in the arid southeastern and western areas of Sindh Province. Recurrent drought conditions in these areas since 2014 have resulted in successive crop failures and significant livestock losses, with severe consequences for the livelihoods of the local population.

Recurrent conflicts in the northwestern parts of the country along the border with Afghanistan, triggered large-scale internal displacement. According to UNHCR, as of October 2018, about 15 800 families are currently displaced in Khyber Pakhtunkhwa Province due to the complex emergency situation. In addition, as of October 2018, close to 1.4 million Afghan refugees are sheltering in the country. Most of these people are in need of humanitarian assistance and put strain on the already limited resources of the host communities.

Pakistan - Vegetation Health Index (VHI)

Dekad 2, December 2018



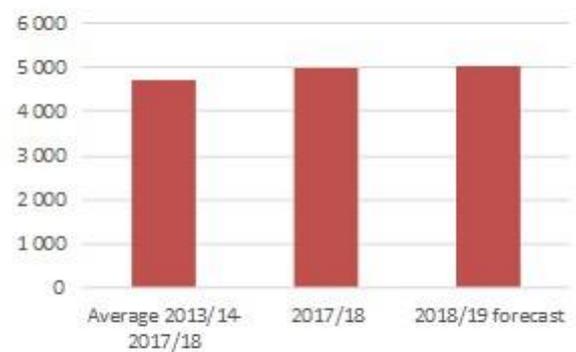
Disclaimer*

Source: FAO/GIEWS Earth Observation System.

Pakistan

Cereals Exports

000 tonnes



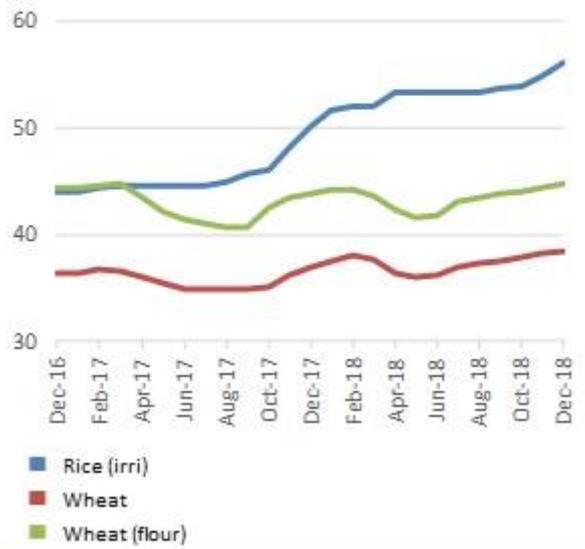
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Pakistan

Selected retail cereal prices in Karachi

Pakistan Rupee per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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