



GIEWS Country Brief

The Islamic Republic of Pakistan

Reference Date: 05-March-2024

FOOD SECURITY SNAPSHOT

- Area sown to 2024 wheat crop estimated at above-average level
- Above-average cereal production obtained in 2023
- Above-average wheat imports forecast in 2023/24
- Near-record wheat flour prices last January 2024
- Acute food insecurity deteriorating

Area sown to 2024 wheat crop estimated at above-average level

Planting of 2024 wheat crops, almost entirely irrigated, finalized in mid-December 2023 and harvesting is expected to start in March 2024, with the bulk harvested between April and early June. The area sown is estimated at an above-average level of 9.5 million hectares, supported by adequate soil moisture levels at planting time and near-record domestic prices of wheat flour. Despite well below-average precipitation amounts and warmer-than-average temperatures in December 2023 and January 2024, vegetation conditions were average to above average in the main wheat cropping areas due to sufficient supply of irrigation water (green on ASI map). In the minor rainfed areas, known locally as “barani”, low rainfall quantities negatively affected crop emergence and early development, especially in parts of northern Punjab, southwest Balochistan and southeast Sindh, which together account for about 10 percent of total wheat sowings.

The 2024 final output depends on the performance of the rainy season until April 2024. Abundant rains are needed to support proper crop development as well as to replenish main reservoirs that will be used for irrigating main season crops from May 2024.

Above-average cereal production in 2023

The 2023 cropping season finalized in December 2023, and aggregate cereal production is estimated at an above-average level of 52 million tonnes. Production of wheat is officially estimated at an above-average level of 28.1 million tonnes. Paddy output is estimated at 13 million tonnes, 9 percent above the five-year average and 18 percent higher than the flood-affected harvest of 2022. The result is attributed to a recovery in sowings due to high prices and an upturn in yields.

Pakistan

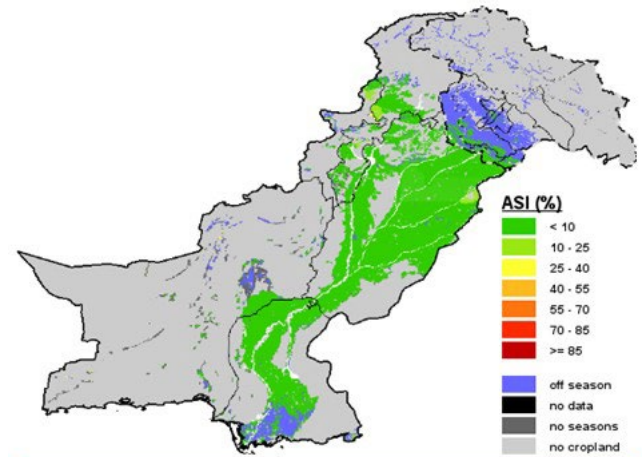
Crop Calendar

(*major foodcrop)



Pakistan - Agricultural Stress Index (ASI)

from start of season 1 to dekad 2, February 2024



Maize production is estimated at 11 million tonnes, well above the average, also reflecting large sowings and high yields.

Above-average wheat imports forecast in 2023/24

Although the country is traditionally a wheat exporter, a large quantity of wheat has been imported over the last three marketing years with the aim to improve market supply and temper price increases. However, the current market situation remains tight mostly due to significant wheat stock losses due to widespread floods in 2022. In the 2023/24 marketing year (April/March), wheat imports are forecast at 1.8 million tonnes, still above the five-year average, but significantly less than the quantity imported between 2020/21 and 2022/23.

Exports of rice, the country's major cereal export, are forecast at 4.9 million tonnes in 2024, 8 percent above the 2023 level due to ample exportable surplus and increased buyer interest following India's imposition of export restrictions on non-basmati white and broken rice. Exports of maize are also forecast to be well-above average at 1.4 million tonnes in 2023/24, attributed to the above-average 2023 harvest and lower domestic poultry feed demand resulting in high exportable surpluses.

Near-record wheat flour prices in January 2023

Domestic prices of wheat flour, the country's main food staple, rose sharply in 2022 and early 2023, reaching record highs in June 2023. The price surge was due to the tight market supply, high costs of production and transport, and a sharp increase in the minimum support price (MSP) in early 2023. The significant depreciation of the national currency in 2022 and 2023 made imports more expensive, amplifying domestic price increases. After a short-lived seasonal decrease in July and August 2023, prices remained generally stable until January 2024, when they were on average 65 percent higher than the elevated levels a year earlier.

According to the Pakistan Bureau of Statistics, food inflation has been declining since July 2023, but it remained at high levels, estimated at 26 percent in January 2024.

The Pakistan rupee depreciated significantly by more than 70 percent between January 2022 and September 2023. Subsequently, between October 2023 and January 2024, it appreciated by 9 percent to PKR 280/USD 1. The appreciation of Pakistan rupee is expected to have a positive impact on imported food items, particularly pulses and edible oil.

Acute food insecurity deteriorating

According to the latest Integrated Food Security Phase Classification (IPC) [analysis](#), the number of people facing high levels of acute food insecurity (IPC Phase 3 [Crisis] and above) between November 2023 and January 2024 was estimated at 11.8 million people, compared to the 10.5 million between April and October 2023. The deterioration of the food insecurity situation is mainly caused by high food prices that have eroded the purchasing power of vulnerable households, limiting their access to food. The lingering effects of widespread floods in 2022, which caused severe losses of livestock and food stocks, and damaged housing and infrastructures, have also contributed to the current high level of food insecurity.

Pakistan

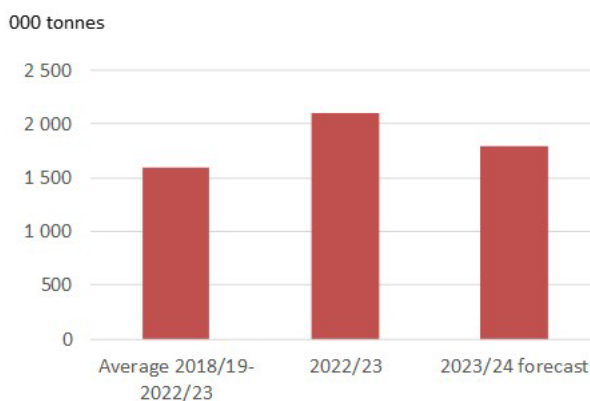
Cereal Production

	2018-2022 average	2022	2023 estimate	change 2023/2022
	000 tonnes			percent
Wheat	25 669	26 208	28 180	7.5
Rice (paddy)	11 898	10 978	12 954	18.0
Maize	8 832	10 984	11 000	0.1
Others	501	468	485	3.6
Total	46 900	48 638	52 619	8.2

Note: Percentage change calculated from unrounded data.

Pakistan

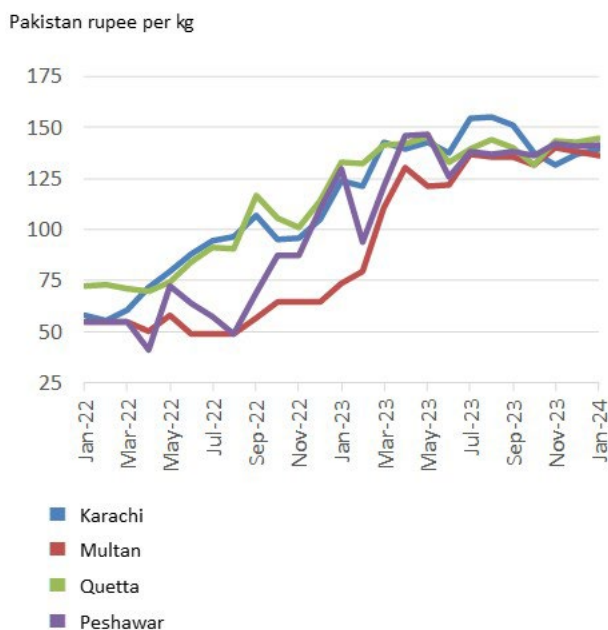
Wheat Imports



Note: Split years refer to crop marketing year.

Pakistan

Retail prices of wheat flour



According to the World Bank, the poverty rate rose to 39 percent in 2023 from 34 percent in 2022.

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This brief was prepared using the following data/tools:

FAO/GIEWS Country Cereal Balance Sheet (CCBS)

<https://www.fao.org/giews/data-tools/en/>.

FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool

<https://fpma.fao.org/>.

FAO/GIEWS Earth Observation for Crop Monitoring

<https://www.fao.org/giews/earthobservation/>.

Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.



GIEWS Country Brief

The Islamic Republic of Pakistan

Reference Date: 14-November-2023

FOOD SECURITY SNAPSHOT

- **Planting operations of 2024 wheat crop ongoing**
- **Above-average cereal production forecast in 2023**
- **Above-average wheat imports forecast in 2023/24**
- **Prices of wheat flour softening, but still at near-record levels in October**
- **Acute food insecurity deteriorating**

Planting operations of 2024 wheat crop ongoing

Adequate soil moisture benefits ongoing for planting operations of the 2024 wheat crop, almost entirely irrigated, especially in the main producing Punjab and Sindh provinces. The area sown is forecast at an above-average level of 9 million hectares, driven by near-record domestic prices of wheat flour and by strong local demand of wheat-based products. According to the Indus River System Authority, as of early October, irrigation water availability in the main reservoirs was estimated to be above average, which is expected to support planting operations and to boost yields.

Above-average cereal production forecast in 2023

Harvesting of the 2023 rice and maize crops is underway and will finalize by mid-December. Paddy production is forecast at 13 million tonnes, 10 percent above the five-year average and 18 percent higher than the flood-affected harvest of 2022. The result is attributed to a recovery in sowings due to high prices and an expected upturn in yields. Maize production is forecast at 10.3 million tonnes, 17 percent above the average, reflecting large sowings and high yields. The 2023 wheat crop, harvested last June, is officially estimated at an above average level of 28.1 million tonnes.

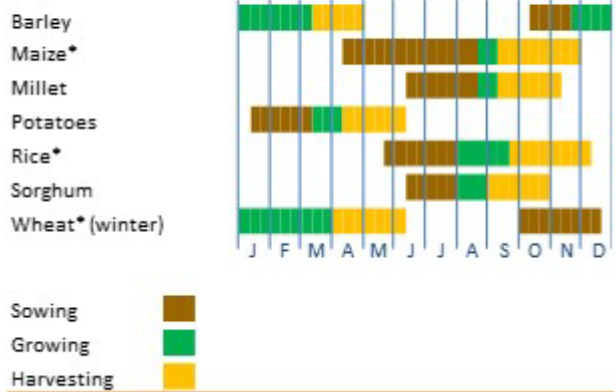
Above-average wheat imports forecast in 2023/24

Traditionally a wheat exporter, the country is expected to import a substantial quantity of wheat for the third consecutive marketing year reflecting the need to improve market supply amid surges in domestic prices. The current tight market situation stems from below-average outputs and high export flows between 2018 and 2020, significant wheat stock losses caused due to widespread floods in 2022, coupled with domestic demand in line with demographic growth. In the 2023/24 marketing year

Pakistan

Crop Calendar

(*major foodcrop)



Pakistan

Cereal Production

	2018-2022	2022	2023 estimate	change
	average			2023/2022
	000 tonnes			percent
Wheat	25 669	26 208	28 180	7.5
Rice (paddy)	11 898	10 978	12 954	18.0
Maize	8 832	10 984	10 317	-6.1
Others	501	468	485	3.6
Total	46 900	48 638	51 936	6.8

Note: Percentage change calculated from unrounded data.

(April/March), wheat import requirements are forecast at above-average level of 1.8 million tonnes but would decline significantly from the high imported quantity between 2020/21 and 2022/23.

Rice exports in 2024 are forecast to increase year on year, driven by ample exportable surpluses.

Prices of wheat flour softening, but still at near-record levels in October

Prices of wheat flour, the country's main food staple, increased sharply between April 2022 and June 2023, reaching record highs. The price surge was due to the tight market supply and high costs of production and transport, mostly driven by hikes in prices of petroleum and energy. The significant depreciation of the national currency since the beginning of 2022 made imports more expensive and contributed to price increases. Since July 2023, prices decreased marginally, owing to improved market availability from the 2023 harvest, but they remained at near-record levels in October, averaging about 85 percent higher year on year.

According to the Pakistan Bureau of Statistics, food inflation has slightly declined since June 2023, but it remains at high levels, estimated at 28.7 percent as of October 2023.

Since January 2022, the Pakistani rupee depreciated steadily and it reached a record low level at PKR 298/USD 1, losing 30 percent of its value last September compared with a year earlier.

Acute food insecurity deteriorating

According to the latest Integrated Food Security Phase Classification (IPC) [analysis](#), the number of people facing high levels of acute food insecurity (IPC Phase 3 [Crisis] and above) between November 2023 and January 2024 is projected at 11.8 million, compared to 10.5 million people between April and October 2023. The deterioration of the food insecurity situation is mainly caused by high food prices, eroded by the purchasing power of vulnerable households and limited access to food. The lingering effects of the widespread floods in 2022, which caused severe losses of livestock and food stocks, and damaged housing and infrastructures, also contribute to the food insecurity.

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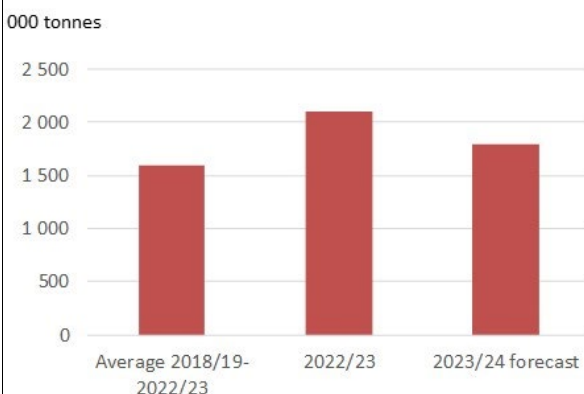
FAO/GIEWS Earth Observation for Crop Monitoring

<https://www.fao.org/giews/earthobservation/>.

Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.

Pakistan

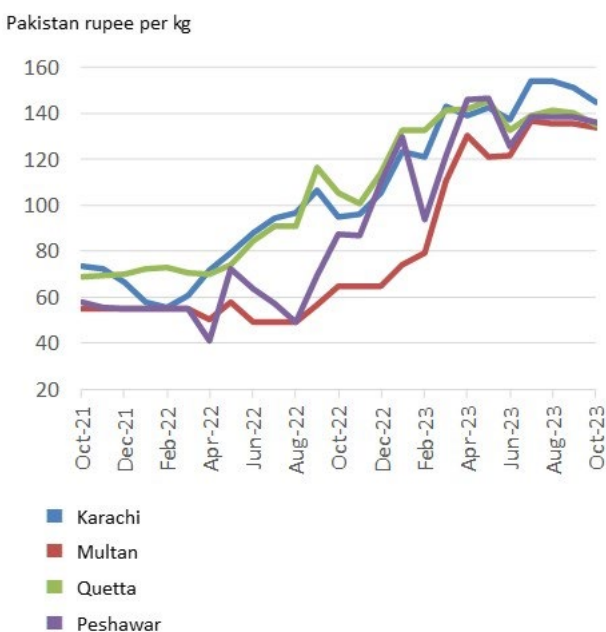
Wheat Imports



Note: Split years refer to crop marketing year.

Pakistan

Retail prices of wheat flour





GIEWS Country Brief Pakistan

Reference Date: 04-October-2022

FOOD SECURITY SNAPSHOT

- Severe flooding caused widespread devastation to agricultural sector
- Wheat imports in 2022/23 marketing year forecast well above five-year average
- Prices of most basic food products at record or near-record levels in August
- Acute food insecurity expected to worsen due to negative impact of floods and high prices of basic food items, energy and fuel

Severe flooding caused substantial damage to 2022 “Kharif” cereal and cash crops

Heavy monsoon rains caused severe floods between mid-June and end-August 2022 with widespread devastation to the agricultural sector, especially in the southern parts of the country.

Preliminary official estimates, as of 27 September 2022, indicate that about 2.6 million hectares of standing “Kharif” crops have been adversely affected, mainly in the province of Sindh (1.9 million hectares), Balochistan (365 000 hectares), Punjab (285 000 hectares) and Khyber Pakhtunkhwa (60 700 hectares). The area affected by floods represents about 35 percent of the total area planted to cereals, sugarcane and cotton during the 2022 “Kharif” season. Severe losses are reported for cotton and rice crops as well as vegetables and orchards. The production forecasts of 13.2 million tonnes for rice and 9.4 million tonnes for maize, sorghum and millet will need to be downward revised to take into consideration the extensive losses due to floods. Standing flood waters are expected to hamper harvesting operations of the “Kharif” crops, which are set to start in October, and to increase harvest and post-harvest losses.

Floods did not affect the 2021/22 main “Rabi” wheat crop, which accounts for about 55 percent of the total annual cereal output, as its harvest was already concluded by mid-June. Despite record plantings, the 2022 wheat output is officially estimated at a near-average level of 26.1 million tonnes as yields were affected by heatwaves between March and April, and shortages of urea fertilizers and irrigation water supplies.

Planting of the “Rabi” wheat crop, almost entirely irrigated, normally takes place between October and December. As many areas are still flooded, planting operations for the 2022/23 wheat crop are expected to be severely hampered. In addition, floods

Pakistan

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Pakistan

Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Wheat	25 730	27 293	26 129	-4.3
Rice (paddy)	11 937	13 978	13 180	-5.7
Maize	7 810	9 500	8 900	-6.3
Others	518	523	525	0.4
Total	45 994	51 294	48 734	-5.0

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

resulted in the loss or damage of agricultural inputs, including seed stocks, fertilizers, machinery at household level and irrigation infrastructure, which may result in a contraction in the area planted and have a negative impact on crop development.

Regarding the livestock sector, preliminary official estimates show that 1.1 million animals, including cattle, goats, donkeys and sheep, died due to drowning or starvation as grazing land was covered by water and feed stocks were lost. Most of the animal deaths are reported in Balochistan Province (estimated around 500 000) followed by Sindh (393 000), Punjab (205 000) and Khyber Pakhtunkhwa (21 000). Widespread damage to livestock shelters has also been reported.

Wheat imports in 2022/23 forecast well above five-year average

In the 2022/23 marketing year (April/March), wheat import requirements are estimated at 2.3 million tonnes, close to previous year's well above-average level. The high level of imports reflects the government's announcement, in July 2022, to import large quantities of wheat aiming to boost availabilities, amid elevated domestic prices.

Prices of most basic food products at record or near-record levels in August

Prices of wheat flour, the country's main food staple, have been generally increasing since the end of 2021, low levels of domestic stocks, following below-average outputs in 2018 and 2020, and high export flows (wheat grain and wheat flour). High agricultural input costs and inflationary pressure also supported prices. In August 2022, prices of wheat flour were at record or near-record levels, averaging about 30 percent higher year on year. Similarly, domestic prices of rice were at record levels in August 2022 after increasing since late 2021, amid general inflationary pressure and strong demand for exports. Prices of vegetables and livestock products registered substantial increases, particularly in the markets near the flood-affected areas. The depreciation of the national currency caused a strong rise in domestic prices of imported items, such as petroleum and energy products. Given the extensive damage by floods to road infrastructure, physical access to food in some areas is very difficult.

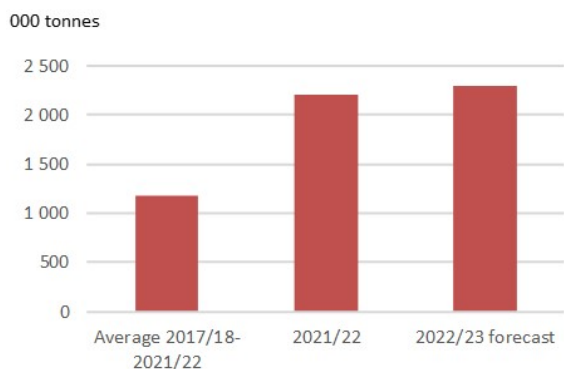
Overall, the year-on-year inflation rate increased to 27.3 percent in August 2022, compared to 8.4 percent in August 2021. The year-on-year food price inflation stood at 30.2 percent in rural areas and at 28.8 percent in urban areas.

Acute food insecurity expected to worsen due to negative impact of floods and high prices of basic food items, energy and fuel

According to latest official estimates, floods affected about 33 million people (nearly 15 percent of the total population) in 116 out of the country's 160 districts, particularly in southern provinces of Sindh and Balochistan. On 24 August 2022, the government announced a state of emergency and 81 districts were declared as calamity hit. Floods caused severe damage to housing and infrastructure, including roads, bridges and shops. According to the latest Integrated Food Security Phase Classification (IPC) analysis, carried out in 28 districts in Balochistan, Sindh and Khyber Pakhtunkhwa provinces prior to the floods in the first week of July, about 5.96 million people are projected to be facing high levels of acute food insecurity (IPC

Pakistan

Wheat Imports

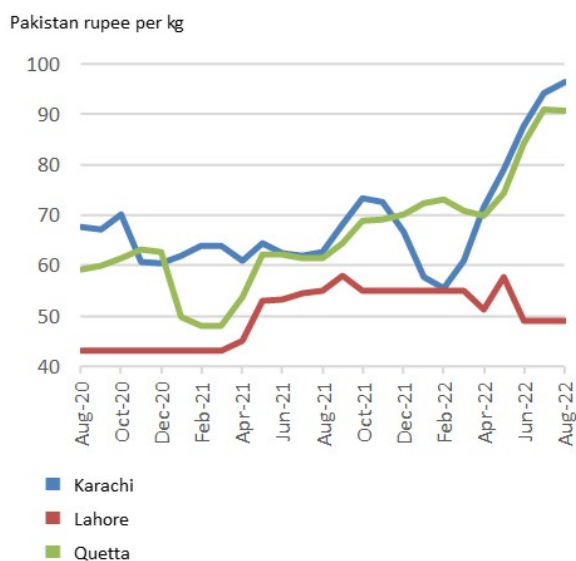


Note: Split year refers to crop marketing year.

Source: FAO/GIEWS Country Cereal Balance Sheets.

Pakistan

Retail wheat flour prices in selected markets



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

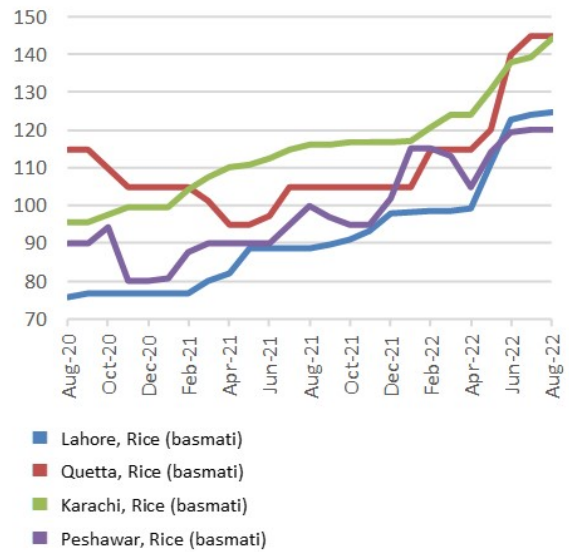
Phase 3 [Crisis] and above), between July and November 2022. Acute food insecurity levels are expected to increase considerably in 2022 as livelihoods of a large number of people have been disrupted and vulnerable households have often depleted their productive assets in order to secure their basic needs. In addition, prices of basic food items, energy and fuel, are at high levels worsening access to these items for large numbers of people.

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Pakistan

Retail rice prices in selected markets

Pakistan rupee per kg



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



GIEWS Country Brief Pakistan

Reference Date: 04-August-2021

FOOD SECURITY SNAPSHOT

- Above-average wheat output obtained in 2021
- Wheat imports in 2021/22 marketing year forecast well above five-year average
- Prices of wheat flour above year-earlier levels in July 2021
- Pockets of food insecurity persist

Above-average wheat output in 2021

Harvesting of the 2021 (mostly irrigated) wheat crop was completed in June and production is officially estimated at a near-record level of 27 million tonnes. The area planted reached an above-average level of 9.2 million hectares, prompted by record high domestic crop prices and government programmes that promoted wheat production. Wheat yields were also estimated at above-average levels, reflecting generally favourable weather conditions and adequate supplies of irrigation water and fertilizers.

Planting of the 2021 main maize crop is ongoing with a slight delay reported in the rainfed areas of Punjab and Khyber Pakhtunkhwa provinces due to below-average rains since April. The total area planted is forecast at an above-average level, driven by strong demand by the poultry and livestock sectors. Adequate supplies of high yielding seed varieties, which are estimated to cover nearly 70 percent of the planted area, are expected to support an increase in productivity in 2021.

Land preparation and planting of the 2021 (mostly irrigated) paddy crop are underway. The area planted is forecast to be close to the previous year's high level.

Wheat imports forecast well above five-year average in 2021/22

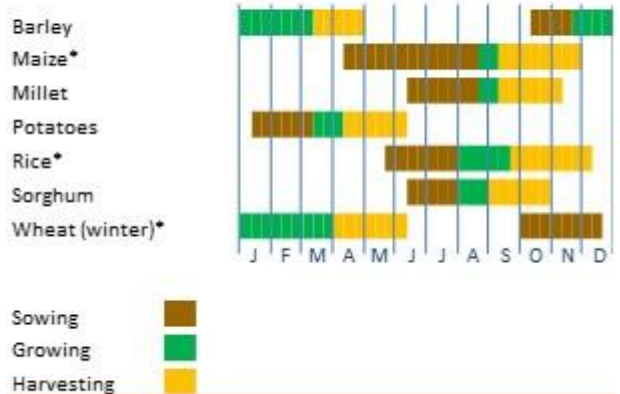
Although traditionally a wheat exporter, the country is expected to import a substantial quantity of wheat for a second consecutive marketing year, as the government and traders seek to boost domestic availabilities following three below-average outputs between 2018 and 2020. In the 2021/22 marketing year (April/March), wheat import requirements are estimated at 1.8 million tonnes, well above the five-year average but half the unusual high level of 2020/21.

Cereal exports consist mostly of rice and smaller quantities of wheat. In calendar year 2021, rice exports are forecast at

Pakistan

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Pakistan

Cereal Production

	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Wheat	25 398	25 249	27 000	6.9
Rice (paddy)	11 194	12 622	12 650	0.2
Maize	6 740	7 600	7 600	0.0
Others	519	523	523	0.0
Total	43 851	45 994	47 773	3.9

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

4.6 million tonnes, up 17 percent from 2020, reflecting adequate availabilities from the 2020 bumper output.

Prices of wheat flour above year-earlier levels

Prices of wheat flour, the country's main food staple, have been generally stable or decreased in some markets since May 2021, weighed by improved market availabilities from the above-average 2021 harvest and imports. However, prices in July 2021 were above their year-earlier levels on account of steady increases in 2020, owing to tight market availabilities after the below-average outputs between 2018 and 2020. In an effort to ease supply pressure and keep prices under control, the government removed the import duties and taxes for private traders since November 2020 and has also imported large quantities of wheat grain.

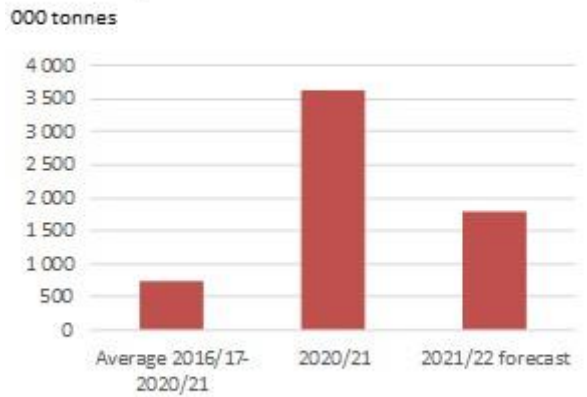
Pockets of food insecurity persist

Overall, food security conditions in the country are generally stable. However, food insecurity persists in some areas, in particular in Balochistan and Sindh, provinces with the highest prevalence of food insecurity, malnutrition and poverty. According to the latest Integrated Food Security Phase Classification (IPC) analysis, about 3.8 million people were estimated to face high levels of acute food insecurity (IPC Phase 3: [Crisis] or above) between March and June 2021 in 19 districts analyzed in Balochistan and Sindh provinces. These include around 2.8 million people (19 percent of the rural population analyzed) in IPC Phase 3: (Crisis) and almost 1 million people (7 percent of the rural population analyzed) in IPC Phase 4 (Emergency). In northwestern parts of the country, along the border with Afghanistan, about 1.43 million Afghan refugees were sheltering in the country (United Nations High Commissioner for Refugees [UNHCR] data from June 2021). Most of these people are in need of humanitarian assistance and put a significant strain on the already limited resources of the host communities. The negative effects of the COVID-19 pandemic have had a severe impact on livelihoods and food security of large numbers of people due to the loss of income-generating opportunities. According to a survey conducted by Pakistan Bureau of Statistics (PBS) in October 2020 to evaluate the socio-economic impact of the COVID-19 pandemic, about 40 percent of the households in Pakistan were moderately or severely food insecure during the April-July 2020 period, compared to the 16 percent estimated in the 2018/19 Household Integrated Economic Survey (HIES).

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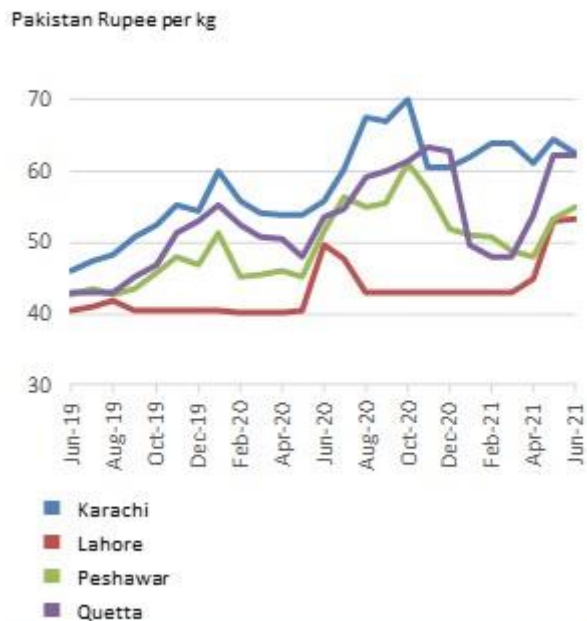
Wheat Imports



Note: Split year refers to crop marketing year.
Source: FAO/GIEWS Country Cereal Balance Sheets.

Pakistan

Retail wheat flour prices in selected markets



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



GIEWS Country Brief Pakistan

Reference Date: 09-December-2020

FOOD SECURITY SNAPSHOT

- Area planted with 2021 “Rabi” wheat crop forecast at above-average level
- Cereal production in 2020 forecast at above-average level
- Wheat import requirements in 2020/21 at highest level in 12 years
- Prices of wheat flour well above year-earlier levels in November 2020
- Monsoon floods and COVID-19 pandemic heighten food insecurity

Area planted with 2021 “Rabi” wheat crop forecast at above-average level

Planting of the 2021 “Rabi” (mostly irrigated) wheat crop, for harvest next April, started in October in the southern parts of the country and will continue until the end of the year in the north. Favourable weather conditions since the beginning of October and ample supplies of irrigation water have supported land preparation and planting activities. The area planted with “Rabi” wheat is officially forecast at an above-average level of 9.2 million hectares, prompted by record domestic prices and official programmes promoting wheat production. At the end of October, the Government increased the minimum support price for the 2021 wheat crop by 15 percent compared to the previous year and announced plans to support wheat producers with subsidies for fertilizers and pesticides.

The production of the current season will, however, depend on the precipitation performance until next May which is likely to be influenced by the La Niña meteorological phenomenon. In general, the La Niña weather pattern is characterized by below-average precipitation, which may affect wheat crops in the rainfed areas. In addition, in the northern parts of the country, reduced snowfall during the winter months may reduce the availability of irrigation supplies and soil moisture in the spring that normally comes from snow melting.

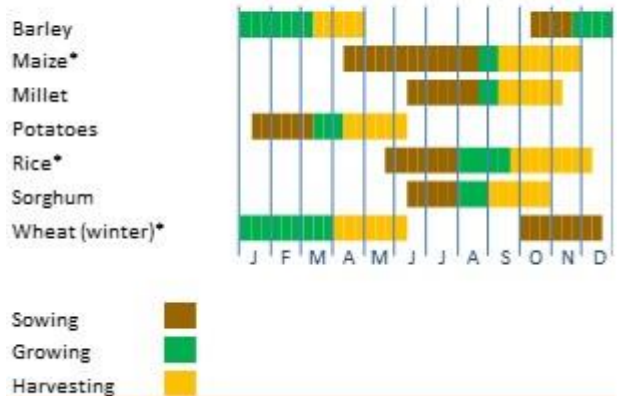
Cereal production in 2020 forecast at above-average level

Harvesting of the 2020 main season crop, mostly rice and maize, is expected to be completed by mid-December. The 2020 paddy output is estimated at a record 12.3 million tonnes, reflecting the high level of plantings in response to remunerative prices. Damages to standing paddy crops were reported in Sindh

Pakistan

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Pakistan

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Wheat	25 365	24 358	25 250	3.7
Rice (paddy)	10 709	11 114	12 264	10.3
Maize	6 063	6 700	7 000	4.5
Others	519	522	523	0.2
Total	42 657	42 694	45 037	5.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Province due to floods in August and locust infestation. The 2020 maize output is forecast at a record level of 7 million tonnes reflecting the high level of plantings due to the strong demand by the feed industry. Adequate supplies of high-yielding seed varieties, which covered nearly 70 percent of the planted area, increased productivity. The 2020 wheat output, harvested in June, is officially estimated at a below-average level of 25.25 million tonnes, mostly reflecting reduced yields due to heavy rains and hail in March and April in Punjab Province and by locust infestation.

Wheat import requirements in 2020/21 at highest level in 12 years

Rice accounts for the bulk of the cereal exports. In the 2020 calendar year, rice exports are forecast at 4.0 million tonnes, 13 percent less than the 2019 record.

The country also exports wheat, with quantities averaging to almost 1 million tonnes in the previous five years. Wheat, being a key strategic commodity, the Government regulates its marketing system. In September 2019, the Government banned wheat exports over concerns about tight domestic availabilities following the below-average outputs gathered in 2018 and 2019. In March 2020, after heavy rains and locust infestation dampened expectations of a bumper harvest in 2020, the Government allowed private imports, exempt of duties and taxes, and started importing wheat through official channels. In the first seven months of the 2020/21 marketing year (April/March) about 900 000 tonnes of wheat grain were imported compared to the 1 000 tonnes imported during the corresponding period in 2019/20. Overall, wheat imports in the 2020/21 marketing year (April/March) are forecast at about 1.7 million tonnes, the largest volume since 2008/09.

Prices of wheat flour decreased in November, but remain at high levels

Prices of wheat flour, the country's main staple, showed a steady upward trend throughout the year and reached record levels in October 2020, reflecting a tight market supply situation. In November 2020, prices decreased in most markets as recent imports improved availabilities and the Government's decision to decrease domestic prices of petroleum products reduced transport costs from early November. However, prices of wheat remained well above their year-earlier levels in November 2020 and were still at near-record highs in some markets.

Monsoon floods and COVID-19 pandemic heighten food insecurity

The key drivers of food insecurity in the country are limited livelihood opportunities, high food prices and recurrent natural disaster, amplified by the COVID-19 pandemic.

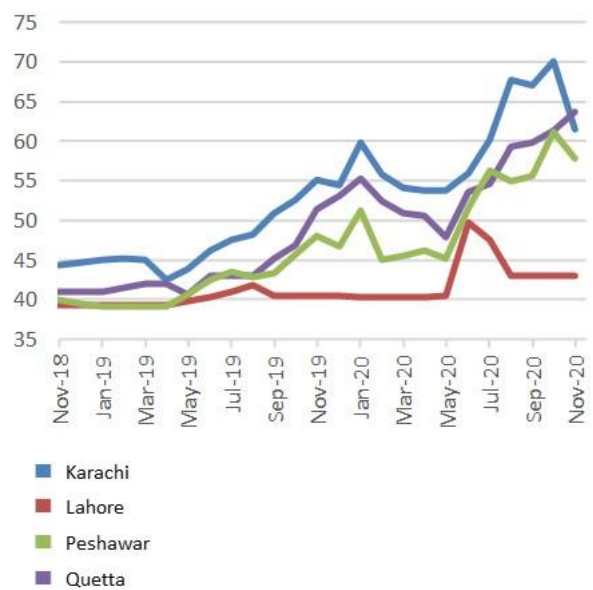
Severe floods in August in Sindh Province affected the livelihoods of about 2 million people and caused severe damage to housing and infrastructure. In addition, the prices of wheat flour and other important food items, such as milk, onion and chicken meat, have been at high levels since the beginning of 2020, constraining access to food of the most vulnerable households.

According to the latest Integrated Food Security Phase Classification (IPC) analysis, about 1.8 million people were projected to face severe food insecurity (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") between June and August 2020

Pakistan

Retail wheat flour prices in selected markets

Pakistan Rupee per kg



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

in the administratively merged areas of Khyber Pakhtunkhwa. As the analysis was conducted prior the start of the COVID-19 pandemic, the current food insecurity situation is likely to be more severe due to declining remittances and income losses associated with the COVID-19 movement restrictions.

Prolonged conflict in the northwestern parts of the country, along the border with Afghanistan, triggered large-scale internal displacement. According to the United Nations High Commissioner for Refugees (UNHCR), as of September 2020, about 1.4 million Afghan refugees were sheltering in the country. Most of these people are in need of humanitarian assistance and put a significant strain on the already limited resources of the host communities.

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GIEWS Country Brief Pakistan

Reference Date: 17-April-2020

FOOD SECURITY SNAPSHOT

- Near-average 2020 wheat crop expected
- Cereal production in 2019 reached record level
- Cereal exports in 2019/20 forecast close to average levels
- Prices of wheat and wheat flour near-record levels in March
- Food insecurity persists in some localized areas

Near-average 2020 wheat crop expected

Harvesting of the 2020 “Rabi” (mostly irrigated) wheat crop started in March in the southern province of Sindh, with the bulk to be gathered between April and mid-June. The 2020 wheat season started on time last October and progressed well until February. During this period, favourable weather conditions, ample irrigation water supplies and adequate availability of agricultural inputs, such as fertilizers, chemicals and labour, allowed farmers to plant an above-average area and fostered expectations for bumper yields. In March/April, unseasonal heavy rains and localized hail over areas of the main wheat-producing province of Punjab, delayed harvesting operations and caused localized damage to standing crops. Above-average rains raise concerns over the worsening of the desert locust outbreak, which has been present in the county since the beginning of 2019, and control measures managed to contain it so far. In fact, the abundant rains in March/April improved vegetation conditions that, together with warm temperatures in April, could support locust breeding, with an increase in locust numbers that may damage late-planted wheat crops still to be harvested. Overall, 2020 wheat production is expected to remain close to the five-year average, but below previous expectations of a bumper output.

Cereal production in 2019 estimated at record level

The 2019 cropping season finalized in November 2019 and the aggregate cereal output, including wheat, paddy rice and maize, is estimated at a record level of 43.6 million tonnes.

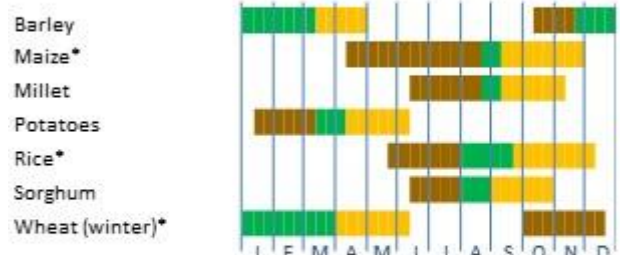
Cereal exports in 2019/20 forecast close to average levels

Cereal exports consist mostly of rice and wheat. In calendar year 2020, rice exports are forecast at 4.8 million tonnes, almost 20 percent above the five-year average, reflecting adequate

Pakistan

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Pakistan

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Wheat	25 690	25 076	25 195	0.5
Rice (paddy)	10 586	10 798	11 544	6.9
Maize	5 711	6 309	6 300	-0.1
Others	509	515	522	1.4
Total	42 496	42 698	43 561	2.0

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

availabilities from the 2019 record output. By contrast, exports of wheat in the 2019/20 marketing year (May/April) are forecast at 200 000 tonnes, almost 75 percent less than the average, after the Government banned wheat exports in September 2019 over concerns about tight domestic availabilities following the below-average outputs gathered in 2018 and 2019. In addition, reports from the country indicate that the Government is planning to import a total of 500 000 tonnes of wheat throughout 2020 in order to ensure adequate market supplies.

Prices of wheat grain and flour at near-record levels in March

Prices of wheat grain and flour, the country's main staples, increased sharply between November 2019 and January 2020, reaching record or near-record highs in most markets. The significant price increases was the result of tight market availabilities, following the below-average outputs in 2018 and 2019 as well as higher transport costs, after the strong increases in domestic prices of petroleum products. Successively, prices of wheat grain and flour decreased slightly in February and the first two weeks of March, mostly in response to measures undertaken by the Government to contain the price increases. Measures include the distribution of wheat flour at subsidized prices throughout the State-owned Utility Stores Corporation (USC) outlets and a major cut in prices of petroleum products effective from 1 March 2020. However, prices resumed their increasing trend from the second part of March, mostly supported by an upsurge on demand and transport disruptions related to the COVID-19 pandemic. Harvest delays due to above-average rains, provided further upward pressure on prices. Overall, prices in March remained well above their year-earlier levels and at near-record highs in some markets.

Food insecurity persists in some localized areas

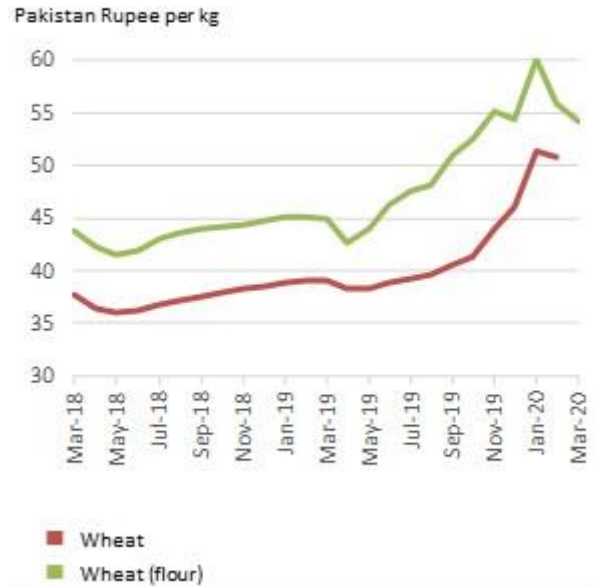
Overall, food security conditions in the country are generally stable reflecting adequate cereal supplies from the record 2019 production. However, concerns about food insecurity persist in some parts of the country, particularly in western and southwestern areas of Balochistan Province, in the arid southeastern and western areas of Sindh Province and newly merged areas of Khyber Pakhtunkhwa. Recurrent drought conditions in Sindh and Balochistan since 2014 have resulted in successive crop failures and significant livestock losses, with severe consequences for the livelihoods of the local population. In addition, localized crop losses were reported due to a winterized emergency (heavy snow and rainfall) in several districts of Balochistan as well as in a few areas of Khyber Pakhtunkhwa, Pakistan Administered Kashmir and Gilgit-Baltistan, worsening the food security situation of the affected households. Localized crop losses may also occur due to locust outbreaks in 35 districts of Pakistan.

Prolonged conflict in the northwestern parts of the country along the border with Afghanistan, triggered large-scale internal displacement. According to UNHCR, as of February 2020, 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.

The risk posed by the COVID-19 pandemic, both through the negative impacts associated with a reduction in economic activities and the potential adverse effects on the food supply chain is an additional concern for food security in the country.

Pakistan

Selected retail cereal prices in Karachi



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

Recent price increases of wheat grain and flour as well as other important food items, such as chicken meat, milk and onions, are affecting households' access to food.

COVID-19 and measures adopted by the Government

In response to the COVID-19 pandemic, the Government has imposed a partial lockdown starting from 22 March 2020 until further notice in all provinces of the country, with the exception of Sindh Province, where the lockdown is total due to the high number of infected people. However, the restrictive measures were partially applied to people working in the agriculture sector and the food supply chain in order to guarantee adequate availability of food in the local markets.

To mitigate the negative effects of the virus, on 31 March 2020, the Government approved a relief package of PKR 1 200 billion (USD 7.2 billion). Out of this amount, PKR 280 billion (USD 1.7 billion) were allocated for stocking of the wheat crop for future needs and PKR 50 billion (USD 298 million) were assigned for the distribution of food items at subsidized prices throughout the outlets of the USC across the country. In addition, about 20.2 million people, particularly low income households whose livelihood has been severely affected by the virus outbreak, are expected to receive cash support of PKR 12 000 (USD 72) on a monthly basis for a period of four months through the Ehsaas Kifalat Programme, one of country's main social protection systems.

In response to the high prices of wheat grain and flour, the Government has increased wheat supplies from official stocks to flour mills in an effort to supplement market availabilities.

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GIEWS Country Brief Pakistan

Reference Date: 09-January-2019

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.

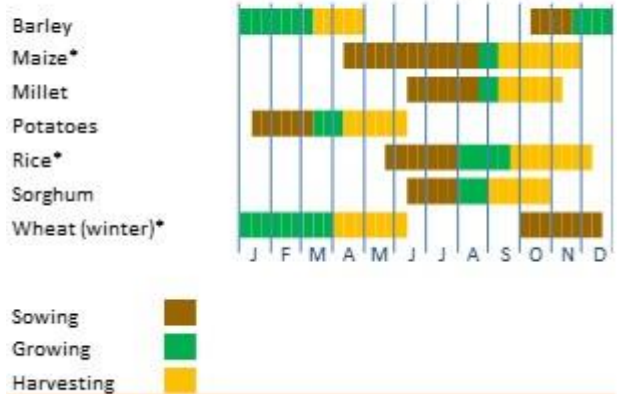
Cereal production in 2018 estimated at near-average level

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.

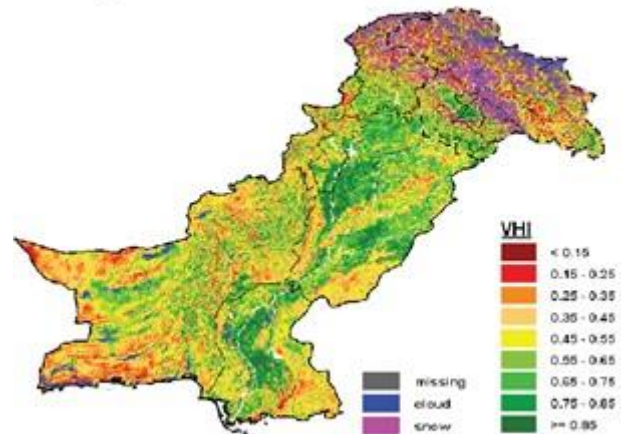
Food insecurity persists in some localized areas

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



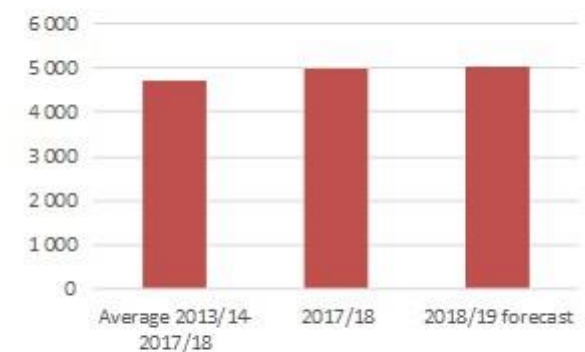
Disclaimer*

Source: FAO/GIEWS Earth Observation System.

Pakistan

Cereals Exports

000 tonnes



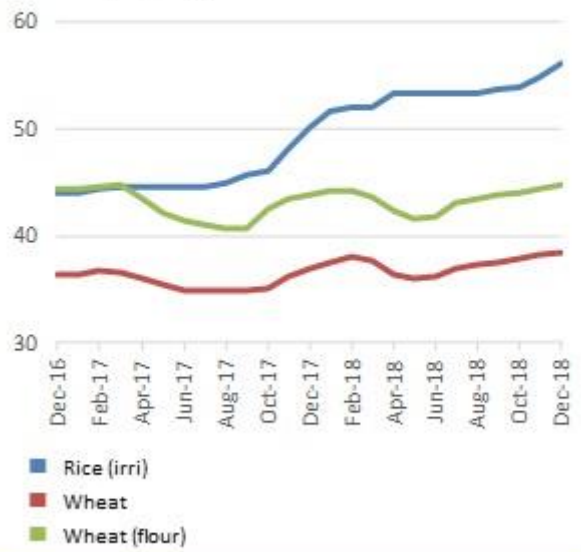
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

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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GIEWS Country Brief Pakistan

Reference Date: 20-June-2018

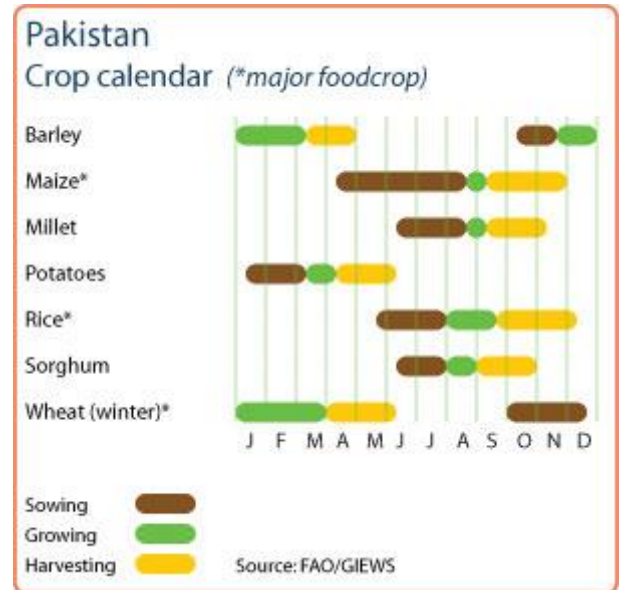
FOOD SECURITY SNAPSHOT

- Wheat production in 2018 estimated at average level
- Cereal exports in 2018/19 forecast to increase from 2017/18 level
- Prices of wheat and wheat flour weakened seasonally in recent months
- Food insecurity persists in some localized areas

Wheat output in 2018 estimated at average level

Harvesting of the 2018 “rabi” (winter) wheat crop is complete. Cumulative rainfall levels between October 2017 and May 2018 were around 40 percent below the long-term average throughout most of the country. Although water availability for irrigated fields, which accounts for about 90 percent of the total wheat area, was well below average, farmers were able to reduce the impact of the rainfall deficits by accessing ground water supplies. In the minor rainfed farming systems, known locally as “barani”, reduced rains resulted in lower plantings and a decrease in yields, notably in the provinces of Punjab, southwest Balochistan and southeast Sindh. Official estimates released last April puts the 2018 wheat output at 25.4 million tonnes, about 4 percent below the previous year’s bumper level, but still close to the five-year average.

The 2018 main “kharif” paddy (mostly irrigated) and maize crops are currently being planted. As of 6 June, the Pakistan Meteorological Department released a “Drought Alert” indicating that most parts of the country are experiencing severe soil moisture deficits due to persistent below-average rainfall since October 2017. By early June, water availability in the main reservoirs was estimated to be about 60 percent below average, which is constraining planting operations and may affect yields of early-planted crops. The water situation in the major irrigation reservoirs is expected to improve in the coming weeks, with the start of the rainy season as well as the increased melting of snow and glacier due to higher summer temperatures. Overall, sustained strong demand from the domestic feed industry is expected to keep maize plantings close to the previous year’s high level. As rice is expected to remain a remunerative crop due to attractive producer prices and Government support measures, current projections indicate that planted area will be close to last year’s high level, while increased utilization of improved seed varieties is likely to benefit yields.



Pakistan
Cereal production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Wheat	25 428	26 380	25 410	-4
Rice (paddy)	10 463	11 157	11 360	2
Maize	5 456	6 000	6 000	0
Others	504	505	515	2
Total	41 851	44 042	43 285	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Cereal exports in 2018/19 forecast to increase from 2017/18 level

Cereal exports consist mostly of rice and wheat. In calendar year 2018, rice exports are forecast at 4.1 million tonnes, with a 12 percent increase from the previous year's reduced level, reflecting ample availabilities from the 2017 record output. Similarly, wheat exports in the 2018/19 marketing year (May/April) are forecast to increase from last year's average level. The increase mostly reflects the Government's incentive programme to boost exports aiming at reducing large carryover stocks that have been built up from successive years of bumper harvests between 2014 and 2017.

Prices of wheat and wheat flour weakened seasonally

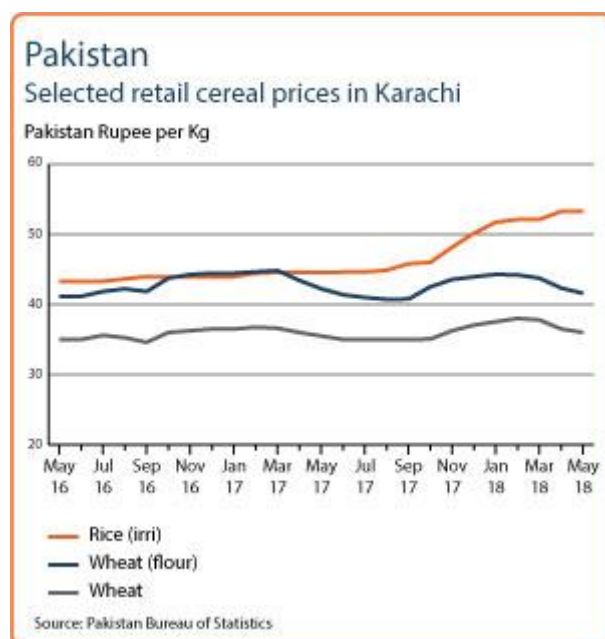
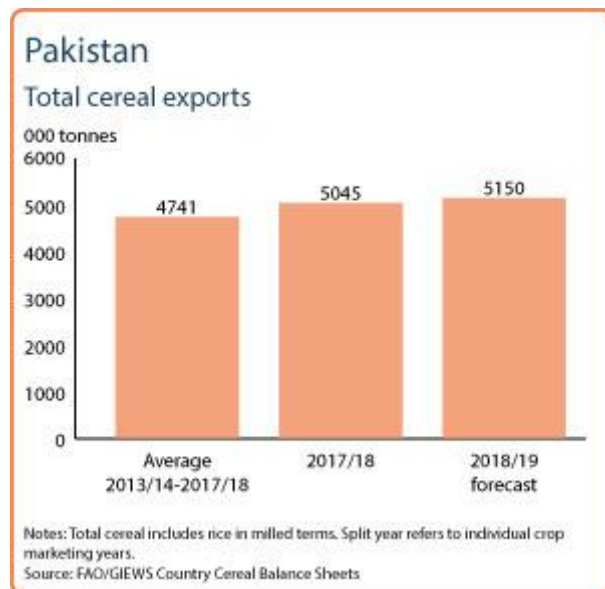
Prices of wheat grain and wheat flour, the country's main staples, weakened seasonally for the third consecutive month in May 2018, reflecting improved market supplies following the "rabi" harvest. Overall, prices in May were close to their year-earlier levels.

Overall food security conditions stable, but concerns remain in southern parts of Sindh Province and in some northern areas

Overall, food security conditions in the country are stable, following five consecutive years of bumper harvests and large carryover stocks of the main food staples. However, there are concerns about food insecurity in some parts of the country, particularly the drought-prone arid southeastern and southwestern areas of Sindh Province, western and southwestern areas of Balochistan Province and in some northern areas, due to the impact of rainfall deficits on local production. Moreover, in southeastern parts of Sindh Province, recurrent drought conditions since 2014 have resulted in successive crop failures and livestock losses, with severe consequences for the livelihoods of the local population.

Recurrent insecurity in the northwestern parts of the country, along the border with Afghanistan, triggered large-scale internal displacement. According to UNOCHA, as of April 2018, about 30 000 households are currently displaced in the Federally-Administered Tribal Areas (FATA) and Khyber Pakhtunkhwa Province due to the complex emergency situation. In addition, the country hosts close to 1.4 million registered and unregistered Afghan refugees. These populations rely mainly on humanitarian assistance to cover their basic needs.

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GIEWS Country Brief Pakistan

Reference Date: 02-February-2018

FOOD SECURITY SNAPSHOT

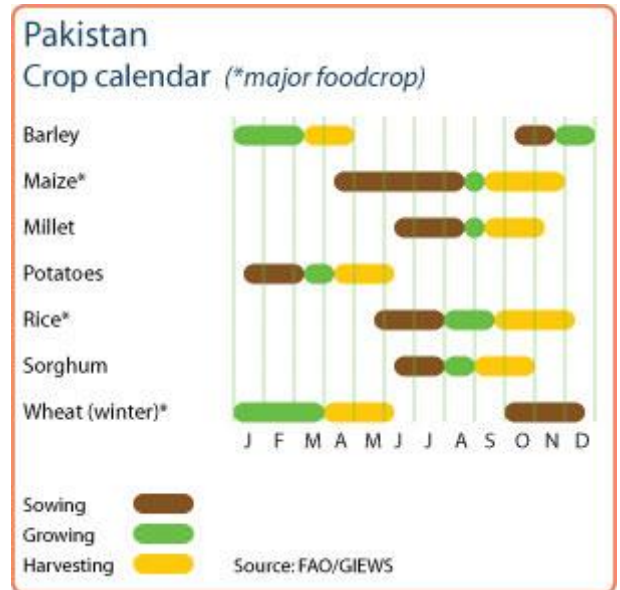
- With near-normal rains at start of season, current prospects for 2018 wheat output are positive
- Aggregate cereal output in 2017 estimated at record level
- Rice exports in 2018 forecast to increase from last year's near-average level
- Prices of wheat and wheat flour strengthened seasonally in recent months
- Food insecurity persists in localized areas

With near-normal rains at start of season, current prospects for 2018 wheat output are positive

Planting of the 2018, mostly irrigated “rabi” (winter) wheat crop, was completed in December 2017, with harvesting expected to start in April 2018. Dry weather conditions between August and October last year have reportedly reduced soil moisture content and limited water supplies for irrigation, affecting planting operations for the wheat crop, particularly in the minor rainfed-producing “barani” areas. Near-normal rains in late November and December 2017 over most of the country provided some relief to crops in the main wheat-producing areas. A concern remains in the rainfed areas, which account for only 10 percent of the national wheat output, as these rains were not enough to offset the soil moisture deficit. Considering that growing conditions in the main wheat-producing areas improved and assuming normal weather for the remainder of the season, current prospects for the 2018 wheat production remain positive.

Aggregate cereal output in 2017 estimated at record level

The 2017 aggregate cereal production is estimated at a record of 43.3 million tonnes. Disaggregated by crops, wheat production in 2017 is officially estimated at 25.8 million tonnes, marginally above the 2016 bumper level, mostly reflecting higher yields, which offset a small contraction in plantings. The 2017 output of rice is estimated at a record of 11.1 million tonnes, 8 percent above last year's good level, sustained by area expansions linked to remunerative prices and continued subsidies on basic inputs. Similarly, the 2017 maize output is forecast at 5.8 million tonnes, above the previous year's high level, supported by an increase in plantings due to sustained demand from the feed industry.



Pakistan
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Wheat	24 846	25 482	25 750	1
Rice (paddy)	9 891	10 268	11 120	8
Maize	4 920	5 500	5 800	5
Others	604	615	615	0
Total	40 262	41 865	43 285	3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Rice exports in 2018 forecast to increase from previous year's near-average level

FAO forecasts Pakistan's rice exports in calendar year 2018 at 4.1 million tonnes, a 14 percent increase from the previous year's level, reflecting the record crop obtained in 2017.

Wheat exports in the 2017/18 marketing year (May/April) are forecast to remain close to last year's above-average level at 750 000 tonnes.

Prices of wheat and wheat flour strengthened seasonally in recent months

Prices of wheat grain and wheat flour, the country's main staples, strengthened for the third consecutive month in December 2017, following seasonal patterns. Overall, prices in December were close to their year-earlier levels.

Overall food security conditions stable, but concerns remain in southern parts of Sindh Province and some northern areas

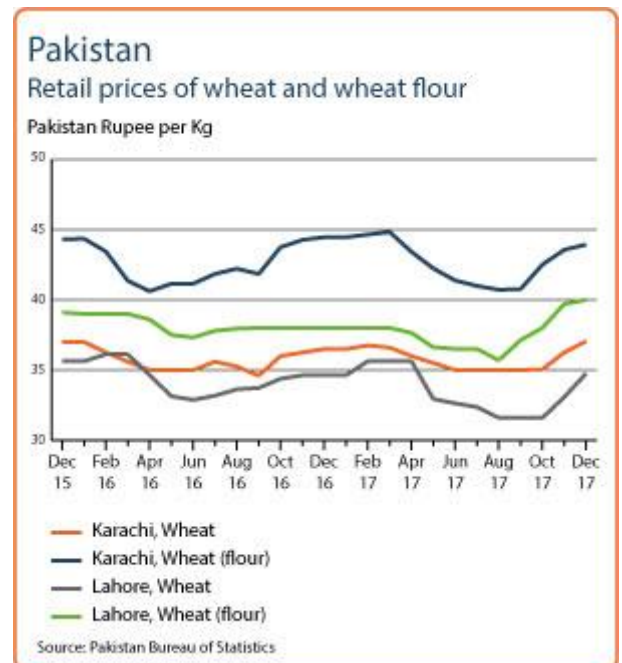
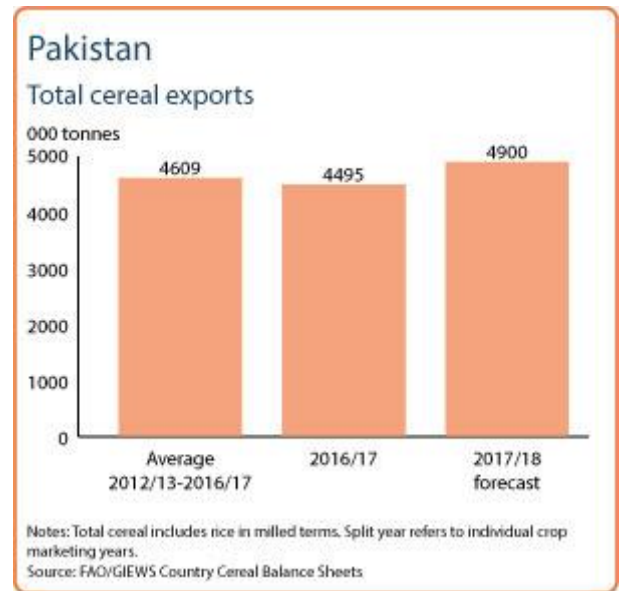
Overall, food security conditions in the country are stable, following three consecutive years of good harvests and large carryover stocks of the main staples. However, food security concerns remain critical in the drought-prone arid southeastern and southwestern areas of Sindh Province and some northern areas of the country.

In southern parts of Sindh Province, recurrent drought conditions during the monsoon season since 2014 resulted in successive crop failures and losses of livestock, with severe consequences for the livelihoods of the local population. Based on the latest IPC analysis, valid for the period February to August 2017, some 2.7 million people (50 percent of the surveyed population) were estimated to be food insecure (in IPC Phases 3: "Crisis" and 4: "Emergency") in Jamshoro, Sanghar, Tharparkar and Umerkot districts of Sindh Province.

Food security conditions might have improved slightly with the 2017 main season crops harvested in September-November and improved rains during the 2017 monsoon season, particularly in Tharparkar. However, these improvements are likely to be limited and short-lived as the harvest in 2017 is estimated at below-average levels in these areas, due to erratic rainfall during the cropping season and reduced agricultural inputs, including seeds and fertilizers.

Recurrent insecurity in the northwestern parts of the country along the border with Afghanistan triggered large-scale internal displacement. According to OCHA, as of January 2018, over 42 000 families are currently displaced in the Federally-Administered Tribal Areas (FATA) and Khyber Pakhtunkhwa Province due to the complex emergency. In addition, the country hosts close to 1.4 million registered and unregistered Afghan refugees. These populations rely mainly on humanitarian assistance to cover their basic needs.

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GlEWS Country Brief Pakistan

Reference Date: 19-January-2018

FOOD SECURITY SNAPSHOT

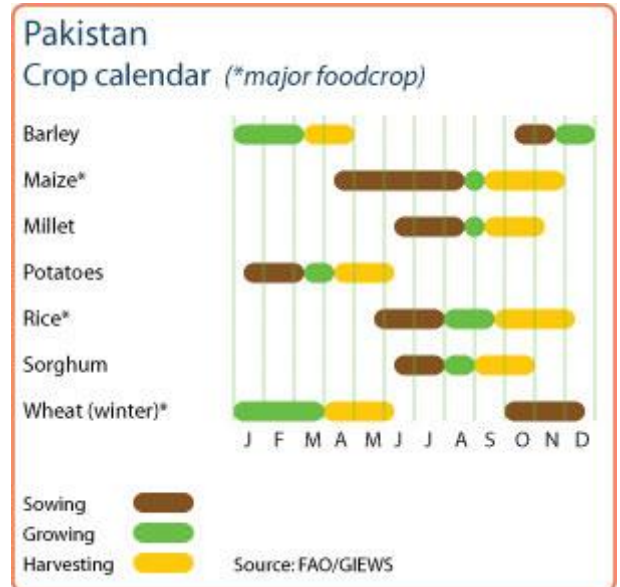
- Despite erratic rains at start of season, current prospects for 2018 wheat output are positive
- Aggregate cereal output in 2017 estimated at record level
- Rice exports in 2018 forecast to increase from last year's near-average level
- Prices of wheat and wheat flour strengthened seasonally in recent months
- Food insecurity persists in localized areas

Despite erratic rains at start of season, current prospects for 2018 wheat output are positive

Planting of the 2018, mostly irrigated “rabi” (winter) wheat crop, was completed in December 2017, with harvesting expected to start in April 2018. Dry weather conditions between August and October last year have reportedly reduced soil moisture content and limited water supplies for irrigation, affecting planting operations for the wheat crop, particularly in the minor rainfed-producing “barani” areas. Near normal rains in late November and December 2017 over most of the country provided some relief to crops in the main wheat-producing areas. A concern remains in the rainfed areas, which account for only 10 percent of the national wheat output, as these rains were not enough to offset the soil moisture deficit. Considering that growing conditions in the main wheat-producing areas improved and assuming normal weather for the remainder of the season, current prospects for the 2017 wheat production remain positive.

Aggregate cereal output in 2017 estimated at record level

The 2017 aggregate cereal production is estimated at record of 43.3 million tonnes. Disaggregated by crops, wheat production in 2017 is officially estimated at 25.8 million tonnes, marginally above the 2016 bumper level, mostly reflecting higher yields, which offset a small contraction in plantings. The 2017 output of rice is estimated at a record of 11.1 million tonnes, 8 percent above last year's good level, sustained by area expansions linked to remunerative prices and continued subsidies on basic inputs. Similarly, the 2017 maize output is forecast at 5.8 million tonnes, above the previous year's high level, supported by an increase in plantings due to sustained demand from the feed industry.



Pakistan
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Wheat	24 846	25 482	25 750	1
Rice (paddy)	9 891	10 268	11 120	8
Maize	4 920	5 500	5 800	5
Others	604	615	615	0
Total	40 262	41 865	43 285	3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Rice exports in 2018 forecast to increase from previous year's near-average level

FAO forecasts Pakistan's rice exports in calendar year 2018 at 4.1 million tonnes, a 14 percent increase from the previous year's level, reflecting the record crop obtained in 2017.

Wheat exports in the 2017/18 marketing year (May/April) are forecast to remain close to last year's above-average level at 750 000 tonnes.

Prices of wheat and wheat flour strengthened seasonally in recent months

Prices of wheat grain and wheat flour, the country's main staples, strengthened for the third consecutive month in December 2017, following seasonal patterns. Overall, prices in December were close to their year-earlier levels.

Overall food security conditions stable, but concerns remain in southern parts of Sindh Province and some northern areas

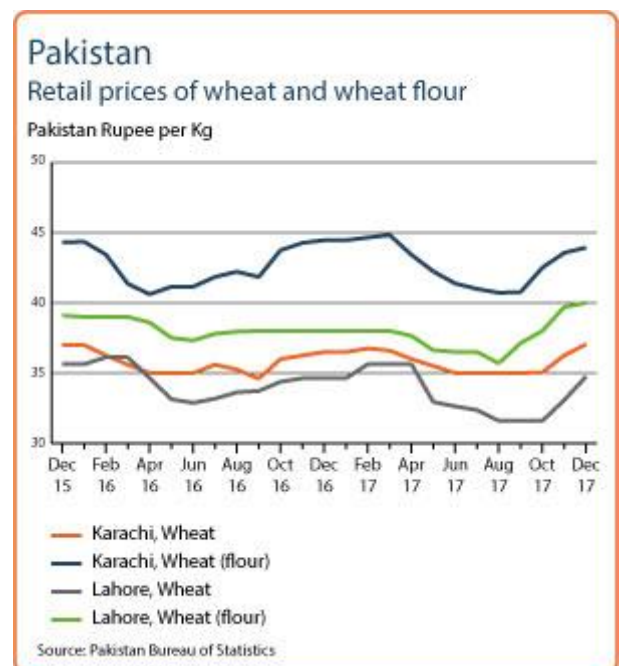
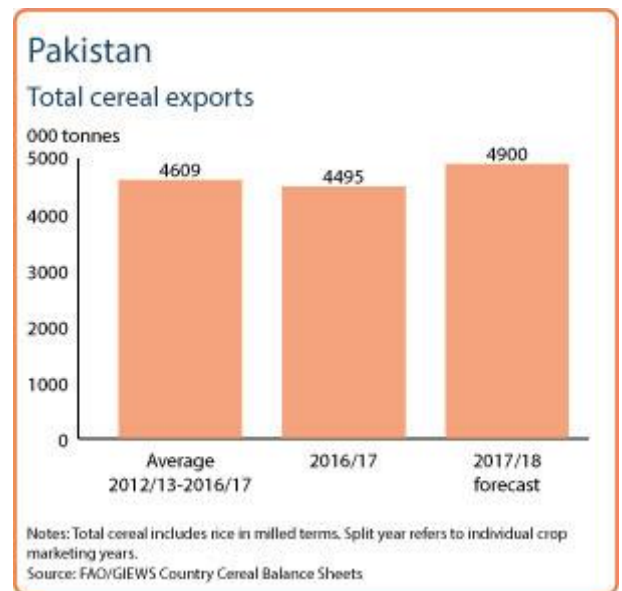
Overall, food security conditions in the country are stable, following three consecutive years of good harvests and large carryover stocks of the main staples. However, food security concerns remain critical in the drought-prone arid southeastern and southwestern areas of Sindh Province and some northern areas of the country.

In southern parts of Sindh Province, recurrent drought conditions during the monsoon season since 2014 resulted in successive crop failures and losses of livestock, with severe consequences for the livelihoods of the local population. Based on the latest IPC analysis, valid for the period February and August 2017, some 2.7 million people (50 percent of the surveyed population) were estimated to be severely food insecure (IPC Phases 3: "Crisis" and 4: "Emergency") predominantly concentrated in the districts of Jamshoro, Sanghar, Tharparkar and Umerkot.

Food security conditions have improved slightly with the 2017 main season crops harvested in September-November. However, these improvements are likely to be limited and short-lived as the harvest in 2017 is estimated at below average levels in these areas, due to erratic rainfall during the cropping season and reduced agricultural inputs, including seeds and fertilizers.

Recurrent insecurity in the northwestern parts of the country along the border with Afghanistan triggered large-scale internal displacement. According to OCHA, as of September 2017, around over 250 000 people have been displaced within the Federally Administered Tribal Areas (FATA) and Khyber Pakhtunkhwa Province. In addition, the country hosts close to 1.4 million registered and unregistered Afghan refugees. These populations rely mainly on humanitarian assistance to cover their basic needs.

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GIEWS Country Brief Pakistan

Reference Date: 09-May-2017

FOOD SECURITY SNAPSHOT

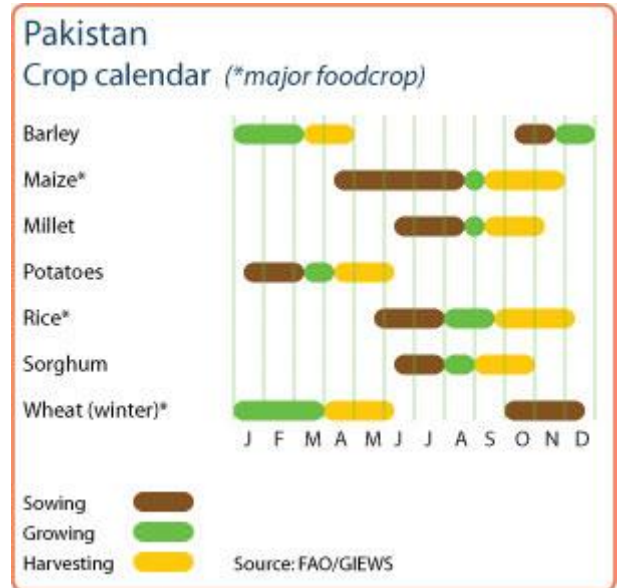
- Wheat production in 2017 to decrease marginally from last year's bumper level
- Rice exports in 2017 forecast to decrease from last year's high level but remain above-average
- Prices of wheat and wheat flour declined in April with new harvest
- Localized food insecurity persists

Wheat production in 2017 to decrease marginally from last year's bumper level

Harvesting of the 2017, mostly irrigated, “*rabi*” (winter) wheat crop began in late March in Sindh Province in the south and will continue until mid-June in the main producing northern Punjab area. Overall, prospects for the 2017 wheat production are positive, with FAO’s current forecast pointing to an output of 25.1 million tonnes, slightly below last year’s bumper level but above the five-year average. The small decrease is the result of a contraction in plantings in the rainfed-producing area, which account for only 10 percent of the national output, following dry conditions during the planting period from September to December 2016. The rainfed areas in the Province of Khyber Pakhtunkhwa (located in the northwest) and Balochistan (located in the southwest) were the most affected by dry weather. However, adequate water supplies in the irrigated areas, coupled with the increased use of fertilizers and herbicides, boosted overall yield prospects and partly offset the decrease in plantings.

Planting of the 2017 main “*khariif*” maize crop is currently underway in the main growing provinces of Punjab and Sindh. The total area planted to maize this year is officially forecast at 1.2 million hectares, an increase of 5 percent compared to the 2016 high level, in response to sustained demand from the feed industry. Assuming good weather conditions, FAO tentatively forecasts the 2017 maize production at 5.5 million tonnes.

Planting of the 2017 main “*khariif*” rice crop is expected to start from late May. FAO’s preliminary forecast for this year’s rice output is 10.3 million tonnes, a 3 percent recovery from last year’s above-average level, assuming that plantings return closer to average after 2016’s reduced levels, supported by recoveries in local quotations.



Pakistan
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	24,846	25,482	25,100	-1
Rice (paddy)	9,831	9,955	10,250	3
Maize	4,880	5,300	5,500	4
Others	604	615	615	0
Total	40,162	41,352	41,465	0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Rice exports in 2017 to decrease from last year's high level but remain above average

FAO forecasts Pakistan's rice exports in calendar year 2017 at 3.9 million tonnes, 4 percent below last year's high level but remaining above the five-year average. The year-on-year decline reflects reduced exportable availabilities, following the smaller crop obtained in 2016.

Wheat exports in the 2016/17 marketing year (May/April) are estimated to have increased 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 and wheat flour fell with new harvest

Prices of wheat grain and wheat flour, the country's main staples, declined in most markets in April, when the new supplies from the 2017 harvest started to reach the markets. Overall, prices were above their year-earlier levels.

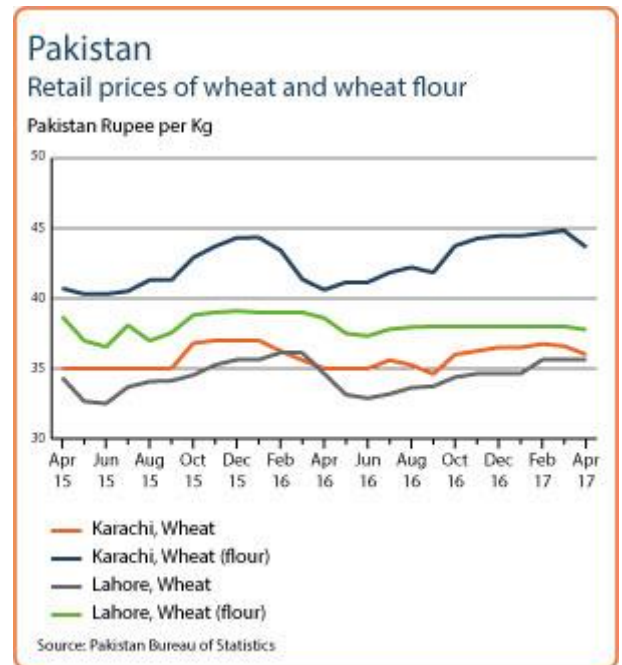
Overall food security conditions stable, but concerns remain in Tharparkar District and some northern areas

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 security concerns remain in some southeastern and northern areas of the country.

In the districts of Tharparkar, Umerkot and Sanghar, located in the southeastern parts of Sindh Province, below-average rains throughout 2016 sharply reduced the 2016/17 cereal production. This, coupled with losses of small animals (in particular sheep and goats) due to diseases and severe shortage of fodder and water availability, has aggravated food insecurity and caused acute malnutrition. At this point, it is critical that the most affected households receive appropriate and timely agricultural assistance, including rice and maize seeds, irrigation tools and fertilizers for the 2017 main season crops. In the livestock sector, there is an urgent need for feed and vaccines.

According to OCHA estimates, as of January 2017, about 3.2 million people were in need of humanitarian aid. Furthermore, OCHA data indicates that around 504 000 people (approximately 74 003 families) remain displaced within the Federally Administered Tribal Areas (FATA) and Khyber Pakhtunkhwa, due to recurrent insecurity. These populations rely mainly on humanitarian assistance, including food aid, healthcare and other necessities.

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GIEWS Country Brief Pakistan

Reference Date: 22-February-2017

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2017 wheat crop production
- Paddy production in 2016 decreased slightly
- Rice exports in 2017 forecast to remain close to last year's level
- Prices of wheat and wheat flour strengthened in recent months
- Localized food insecurity persists

Favourable production prospects for 2017 wheat crop

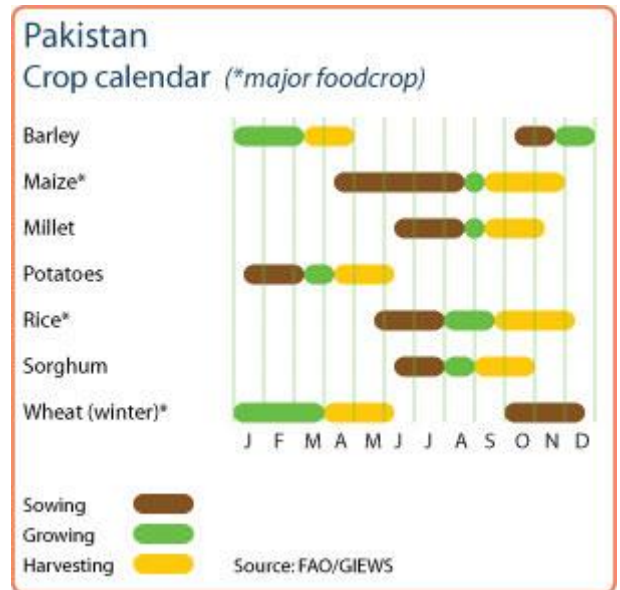
The 2017 mostly irrigated “*rabi*” (winter) wheat crop, to be harvested from April, is currently in vegetative stage. Adequate irrigation water supplies and overall favourable weather conditions supported a slight expansion in plantings and are benefiting crop development in the main wheat-growing areas of Punjab and Sindh provinces, which together account for over 90 percent of the total wheat output. By contrast, 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. Overall, however, current official forecasts put the 2017 wheat output 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.

Paddy production in 2016 decreased slightly

Harvesting of the 2016 summer (monsoon) season maize and rice crops was completed in December 2016. The latest official estimates put the 2016 paddy output at some 10 million tonnes, 3 percent below the 2015 bumper output. This reduction was a result of a contraction in plantings, mainly in response to low domestic prices at sowing time. By contrast, the 2016 maize production increased by 4 percent to 5.2 million tonnes as a result of the slight increase in both area and yields.

Rice exports in 2017 forecast to remain close to last year's level

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.



Pakistan
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Wheat	24,793	25,086	25,482	2
Rice (paddy)	9,687	10,211	9,955	-3
Maize	4,688	5,000	5,200	4
Others	582	615	615	0
Total	39,750	40,912	41,252	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

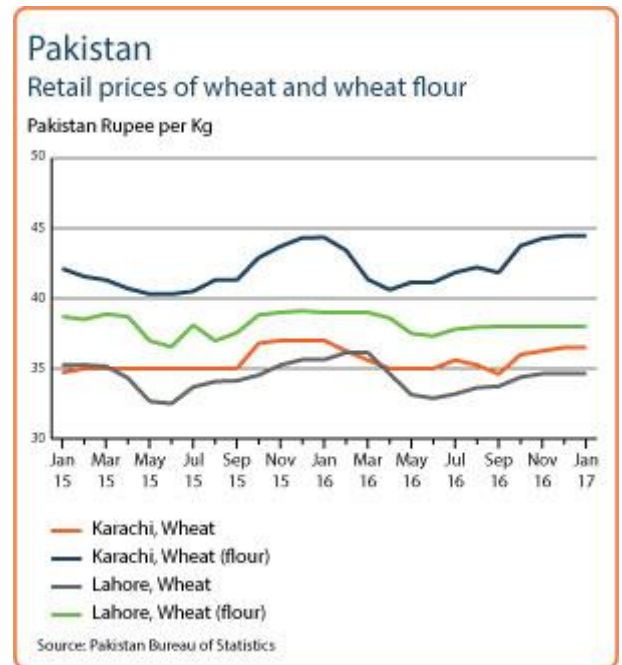
Wheat exports in the 2016/17 marketing year (May/April) are forecast to increase by 13 percent from the previous year's low level to 850 000 tonnes, in line with the 2016 overall good output and large carryover stocks.

Prices of wheat and wheat flour were stable in recent months

Prices of wheat grain and wheat flour, the country's main staples, were stable in recent months, reflecting ample supplies from the 2016 bumper harvest and favourable prospects for the 2017 crops. Overall, prices were below their year-earlier levels.

Overall food security conditions stable, but concerns remain in Tharparkar District and northern Pakistan

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 security concerns remain 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), has aggravated food insecurity and caused acute malnutrition. According to OCHA estimates, as of January 2017, about 3.2 million people were in need of humanitarian aid. Furthermore, OCHA data indicates that around 504 000 people (approximately 74 003 families) remain displaced within the Federally Administered Tribal Areas (FATA) and Khyber Pakhtunkhwa, due to recurrent insecurity. These populations rely mainly on humanitarian assistance, including food aid, healthcare and other necessities.





GIEWS Country Brief Pakistan

Reference Date: 30-November-2016

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2017 wheat crop production
- Above-average production for 2016 summer cereal crops estimated
- Rice exports expected to increase in 2016
- Prices of wheat and wheat flour strengthened in recent months
- Localized food insecurity persists

Favourable prospects for 2017 wheat crop production

Planting of the 2017, mostly irrigated, “rabi” (winter) wheat crop is currently underway and will continue until mid-December. Near-average irrigation water supplies in the main wheat-growing areas of Punjab and Sindh provinces are benefitting plantings and early crop development in these areas. However, below-normal rains hindered planting operations in the minor rainfed-producing “barani areas”, located in the northern parts of Punjab Province.

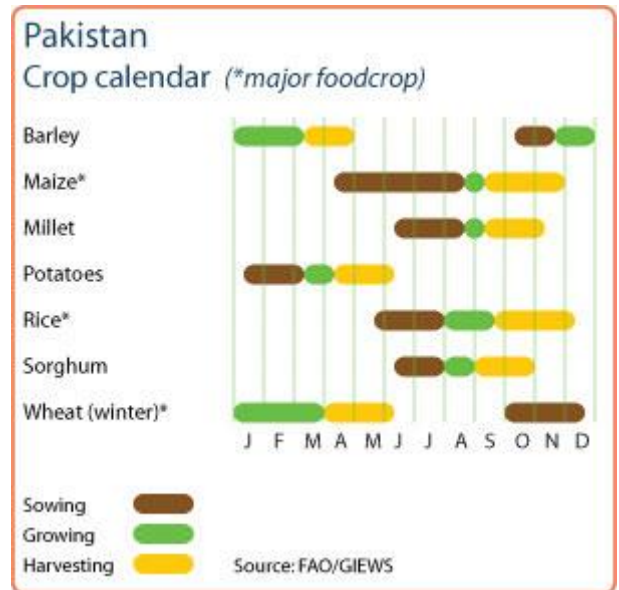
Current official forecasts put the 2017 wheat output at a record level of 26 million tonnes, 2 percent up from the 2016 bumper output. This forecast rests on expectations that adequate water availability in the main reservoirs will boost plantings, while the good supply of quality seeds, fertilizers and herbicides will increase average yields.

Above-average 2016 summer cereal crops estimated

Harvesting of the 2016 summer (monsoon) season maize and rice crops is almost complete. FAO estimates the 2016 paddy and maize outputs at 10.3 million tonnes and 5.2 million tonnes, respectively, slightly above the previous year’s production. This result follows generally favourable weather conditions during the cropping season, coupled with an adequate water supply for irrigation and good access to fertilizers and other basic inputs.

Rice exports to increase in 2016

FAO forecasts rice exports in 2016 at 4.4 million tonnes, representing a 7 percent increase from the 2015 level, thanks to competitively priced non-basmati supplies.



Pakistan
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Wheat	24 793	25 086	25 482	2
Rice (paddy)	9 687	10 211	10 300	1
Maize	4 688	5 000	5 200	4
Others	582	615	615	0
Total	39 750	40 912	41 597	2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Wheat exports in the 2016/17 marketing year (May/April) are forecast to increase from the previous year's low level to 800 000 tonnes, in line with the 2016 overall good output and large carryover stocks.

Prices of wheat and wheat flour strengthened in recent months

Prices of wheat and wheat flour, the country's main staples, have strengthened in recent months, following seasonal patterns, but remained below their year-earlier levels owing to good availabilities following a bumper 2016 crop.

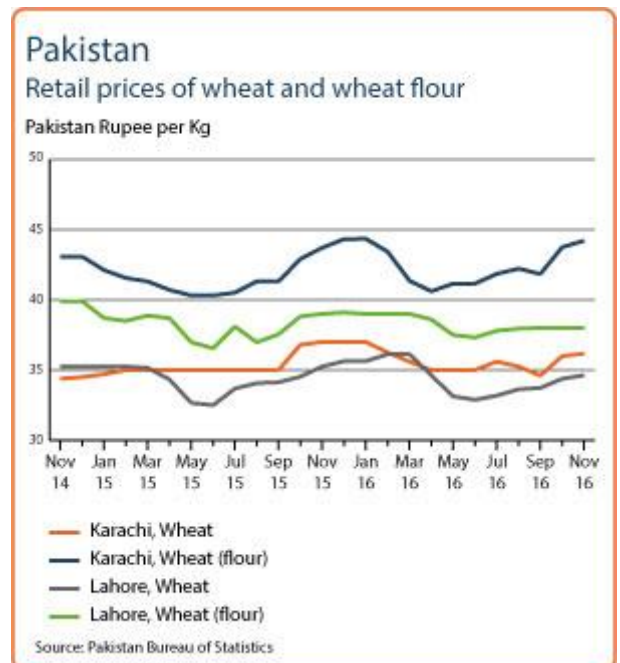
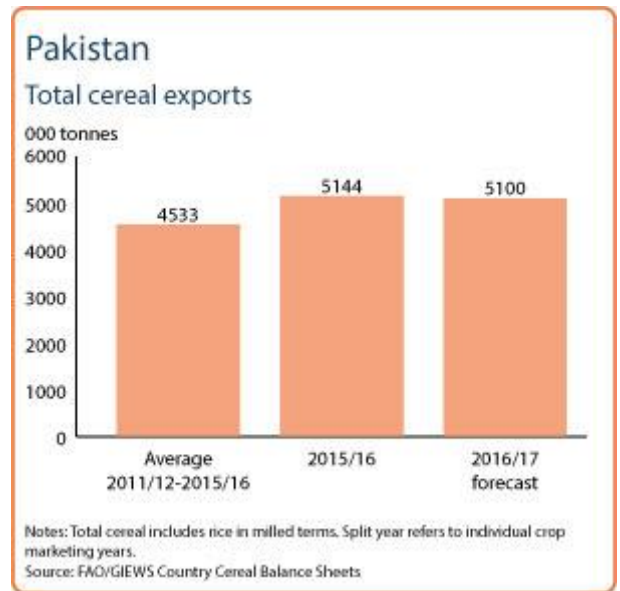
Food security conditions overall stable but concerns remain in Tharparkar District and northern Pakistan

Overall, the food supply situation is stable following two consecutive years of good harvests and large carryover stocks of the main staples. However, food security concerns remain in some areas, particularly in Tharparkar District and northern Pakistan.

In Tharparkar District (southeastern Sindh Province) and the surrounding areas of Sindh Province, a below-average drought-affected cereal production for the third consecutive year, coupled with losses of small animals, especially sheep and goats, has aggravated food insecurity and caused acute malnutrition.

Food insecurity has been exacerbated by the lingering negative impact of the 2015 floods; the provinces of Sindh, Punjab and Khyber Pakhtunkhwa were most affected. Official assessments reported the loss of lives and severe damage to housing, infrastructure and agriculture. Households in northern parts of the country have also not fully recovered from the impact of the earthquake in October 2015.

The Federally Administered Tribal Areas (FATA) and Khyber Pakhtunkhwa, located in northern Pakistan, are still affected by the return process after the large scale displacement (312 000 families or around 1.9 million people) due to insurgency in FATA. According to OCHA estimates, as of October 2016, over 1.3 million refugees remained displaced in northern Pakistan. These populations rely mainly on humanitarian assistance, including food aid, healthcare and other necessities.





GIEWS Country Brief Pakistan

Reference Date: 22-September-2016

FOOD SECURITY SNAPSHOT

- Bumper 2016 summer cereal crops expected
- Rice exports forecast to increase in 2016
- Prices of wheat and wheat flour relatively stable
- Localized food insecurity persists

Bumper 2016 summer cereal crops expected

Harvesting of the 2016 summer (monsoon) season crops, including rice and maize, is currently underway and will continue until early December. FAO forecasts the 2016 paddy and maize outputs close to their 2015 levels at 10.3 million tonnes and 4.9 million tonnes, respectively. The good outputs are the result of generally favourable weather conditions during the cropping season, coupled with adequate water supply for irrigation and adequate availability of fertilizers.

The 2016, mostly irrigated, “rabi” (winter) wheat crop, harvested by mid-June, is officially estimated at 25.5 million tonnes, 2 percent above last year’s good level. A slight contraction in plantings was more than offset by higher yields achieved, as a result of good water availability in the main reservoirs and adequate supply of quality seeds, fertilizers and herbicides.

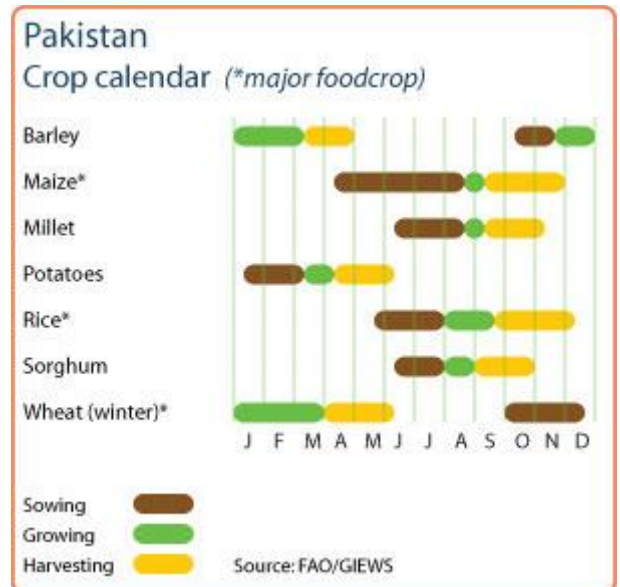
Rice exports forecast to increase in 2016

FAO anticipates that rice exports by Pakistan in 2016 will exceed the 2015 level by 7 percent and reach 4.4 million tonnes. Cumulative rice deliveries in the first seven months of 2016 are officially put at 2.5 million tonnes, up 13 percent from the same period in 2015.

Wheat exports for the 2016/17 marketing year (May/April) are forecast to increase from last year’s low level to 850 000 tonnes, in line with the 2016 overall good output and large carryover stocks.

Prices of wheat and wheat flour relatively stable

Prices of wheat and wheat flour, country’s main staple, were relatively stable in recent months, owing to adequate availabilities from the 2016 bumper output and high level of stocks.



Pakistan
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Wheat	24 793	25 086	25 482	2
Rice (paddy)	9 687	10 211	10 300	1
Maize	4 672	4 920	4 900	0
Others	582	615	615	0
Total	39 734	40 832	41 297	1

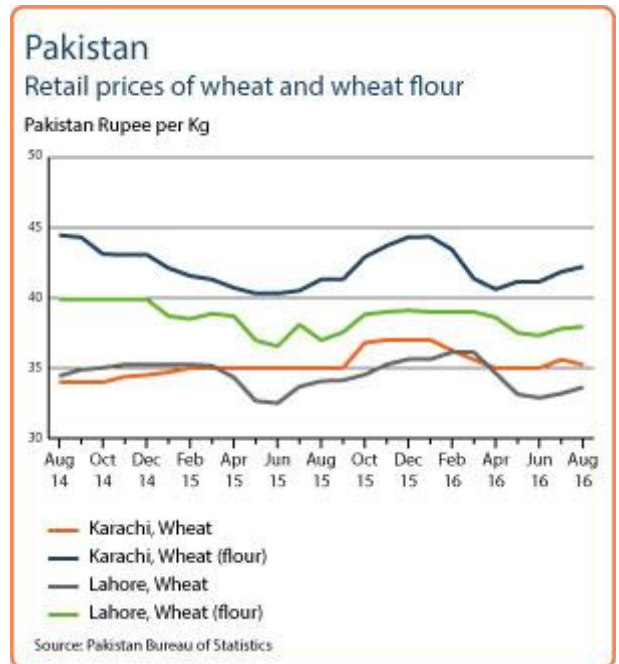
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Overall, food security conditions stable but concerns remain in Tharparkar District and northern Pakistan

Overall, the food supply situation is stable following consecutive years of good harvests and large carryover stocks of the main staples. However, food security concerns remain in some areas, particularly in Tharparkar District and northern Pakistan.

In Tharparkar District (southeastern Sindh province) and the surrounding areas of Sindh Province, where cereal production shortfalls due to drought for the third consecutive year, coupled with losses of small animals, especially sheep and goats, have aggravated food insecurity and caused acute malnutrition. Furthermore, recurrent floods since March 2016, which particularly hit Khyber Pakhtunkhwa province located in the northwestern part of the country, have exacerbated the food security situation of the affected population. The latest official assessments report losses of hundreds of lives, displacement of large numbers of people and severe damage to housing, infrastructure and agriculture in the most affected areas.

Federally Administered Tribal Areas (FATA) and Khyber Pakhtunkhwa, located in northern Pakistan, are affected by large scale displacement due to recurrent insecurity. Authorities report that, as of early 2016, over 1 million people remained displaced in Khyber Pakhtunkhwa.





GIEWS Country Brief Pakistan

Reference Date: 03-August-2016

FOOD SECURITY SNAPSHOT

- **Wheat production in 2016 estimated at near-record level**
- **Rice exports forecast to increase in 2016**
- **Prices of wheat and wheat flour on increase**
- **Overall, food security conditions stable but localized food insecurity persists**

Wheat production in 2016 estimated at near-record level

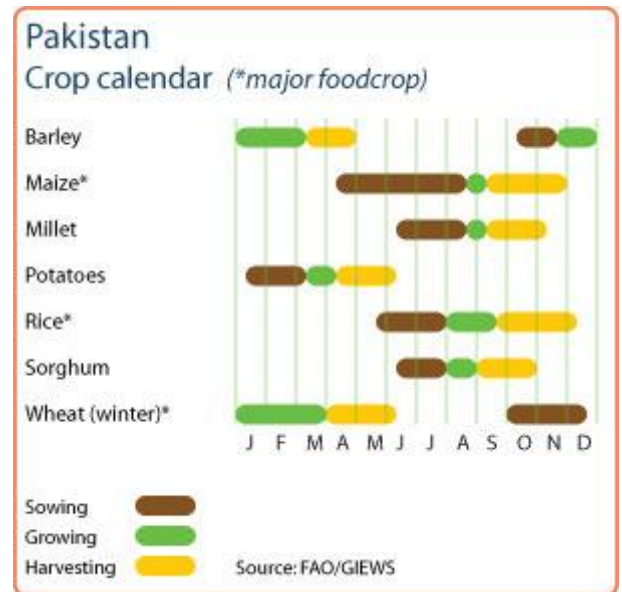
The 2016, mostly irrigated, “rabi” (winter) wheat crop, harvested by mid-June, is officially estimated at 25.9 million tonnes, 2 percent above last year’s bumper level. A slight contraction in plantings for the 2016 crop was more than offset by higher yields achieved, as a result of favourable weather conditions, good water availability in the main reservoirs and adequate supply of quality seeds, fertilizers and herbicides.

Planting of the 2016 summer (monsoon) crops, mainly rice and maize, is currently ongoing. Overall, rainfall since April has been near normal over the main cereal producing areas benefiting planting activities and early crop development. However, with domestic prices for rice and maize remaining weak, there is little incentive for producers to increase sowings, and FAO forecasts the 2016 paddy and maize outputs close to their 2015 levels at 10.3 million tonnes and 4.5 million tonnes respectively. To support agricultural productivity and lower production costs, in early June, the Government extended into 2016/17 the tax and duty concessions approved under the last year’s budget. The Government has also announced cuts in prices of basic agricultural inputs, such as fertilisers and pesticides, as well as reduction of electricity tariffs for agricultural tube-wells.

Rice exports forecast to increase in 2016

FAO anticipates 2016 rice exports by Pakistan to exceed the 2015 level by 7 percent and reach 4.4 million tonnes. Cumulative rice deliveries in the first six months of 2016 are officially put at 2.4 million tonnes, up 14 percent from the same period in 2015.

Wheat exports for the 2016/17 marketing year (May/April) are forecast to increase from last year’s low level to 700 000 tonnes, in line with the 2016 overall good output and large carryover stocks.



Pakistan
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Wheat	24,871	25,480	25,878	2
Rice (paddy)	9,687	10,211	10,300	1
Maize	4,541	4,592	4,650	1
Others	582	615	615	0
Total	39,682	40,898	41,443	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Prices of wheat and wheat flour on increase

Prices of wheat and wheat flour increased slightly in July, mainly reflecting relatively large quantities procured by the Government at high Minimum Support Prices and high production costs. Prices of rice were stable in most markets in recent months, owing to adequate availabilities following successive bumper harvests.

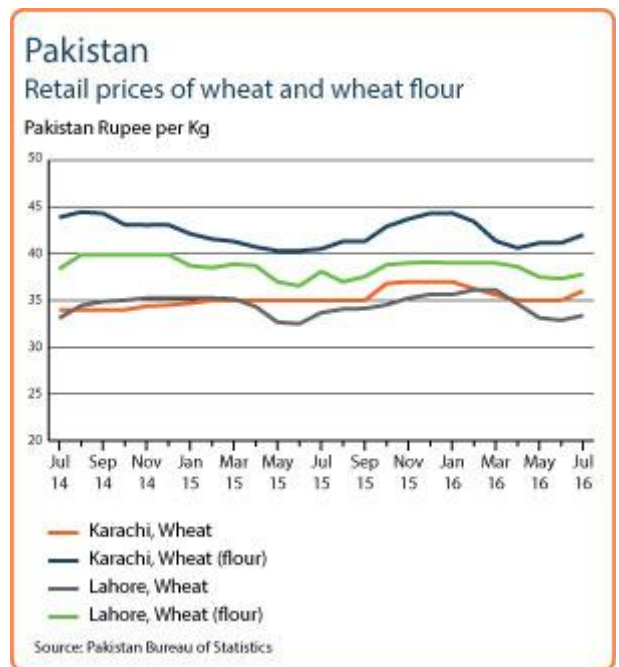
Overall, food security conditions stable but concerns remain in Tharparkar District and northern Pakistan

Overall, the food supply situation is stable following consecutive years of good harvests and large carryover stocks of the main staples. However, food security concerns remain in some areas, particularly in Tharparkar District and northern Pakistan.

In Tharparkar District (southeastern Sindh province) and the surrounding areas of Sindh Province, where cereal production shortfalls due to drought for the third consecutive year, coupled with losses of small animals, especially sheep and goats, have aggravated food insecurity and caused acute malnutrition.

Furthermore, recurrent floods since March 2016, which particularly hit Khyber Pakhtunkhwa province located in the north-western part of the country, have exacerbated the food security situation of the affected population. The latest official assessments report losses of hundreds of lives, displacement of large numbers of people and severe damage to housing, infrastructure and agriculture in the most affected areas.

Federally Administered Tribal Areas (FATA) and Khyber Pakhtunkhwa, located in northern Pakistan, are affected by large scale displacement due to recurrent insecurity. Authorities report that, as of early 2016, over 1 million people remained displaced in Khyber Pakhtunkhwa.



Reference Date: 20-November-2015

FOOD SECURITY SNAPSHOT

- Planting of 2016 wheat crop in progress under mostly favourable conditions
- Rice production in 2015 forecast to decrease
- Reduced wheat imports forecast in 2015/16 marketing year (May/April)
- Prices of wheat and wheat flour declined in February and well below year-earlier levels
- Overall food security conditions stable but localized food insecurity persists

Planting of 2016 wheat crop in progress under mostly favourable conditions

Planting of the 2016, mostly irrigated, “rabi” (winter) wheat crop is currently underway. The official planting intentions survey points to a 2 percent year-on-year contraction to 8.98 million hectares. The reduction reflects high production costs, ample stocks and the Government decision to leave minimum support prices unchanged this year.

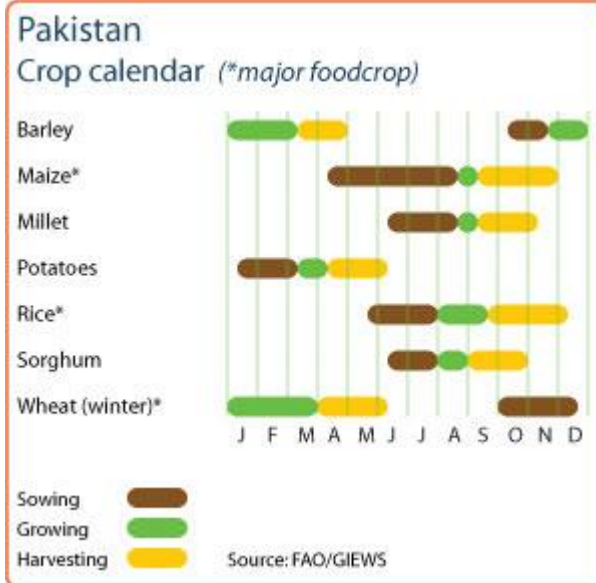
However, despite this, the early official forecast of production in 2016 points to a record output of 26 million tonnes, 3 percent up from the 2015 bumper level, under expectations that good water availability in the main reservoirs and adequate supply of quality seeds, fertilizers and herbicides will increase average yields.

Rice production in 2015 forecast to decrease

Harvesting of the 2015 rainfed “kharif” season crops, mostly rice and maize, is currently underway and is expected to be concluded in early December. Latest official estimates put the 2015 rice production at 9.9 million tonnes, 6 percent below the 2014 record level. The forecast decrease is largely due to a 5 percent contraction in area planted in response to large stocks and high production costs. Localized floods across northern and northeastern parts of the country, following heavy rains in July and August, caused only minor damage to crops. FAO’s latest forecast puts the 2015 aggregate maize production similar to last year’s good level of 4.6 million tonnes. Final official estimates of the 2015 wheat crop, harvested by mid-June, put output at 25.5 million tonnes, 2 percent below last year’s record and 4 percent above the five-year average. The year-on-year decrease is attributed to slightly lower yields, following heavy rains in March, which affected standing crops in the final stages of development.

Reduced wheat imports forecast in 2015/16 marketing year (April/May)

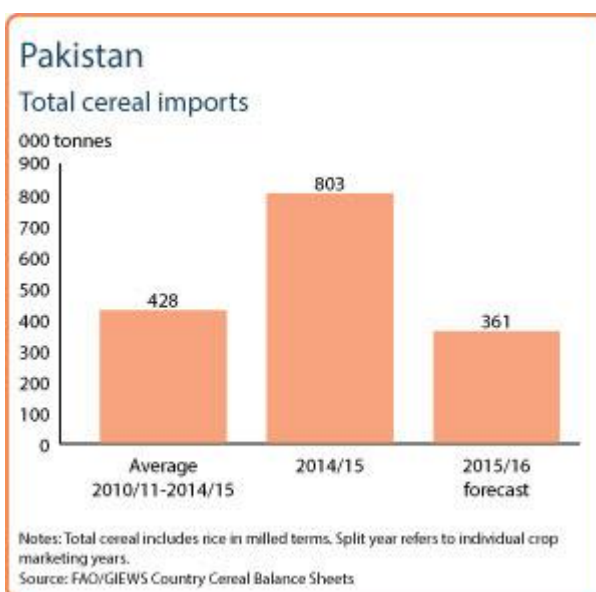
Wheat imports for the 2015/16 marketing year (May/April) are forecast to decline to 250 000 tonnes from 741 000 tonnes in the previous year, in line with the 2015 good output and large carryover stocks. Rice exports for the 2015/16 marketing year (September/August) are forecast at 3.9 million tonnes, close to last year’s high level.



Pakistan Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Wheat	24,438	25,979	25,480	-2
Rice (paddy)	9,092	10,502	9,904	-6
Maize	4,364	4,609	4,600	0
Others	571	612	615	0
Total	38,464	41,702	40,599	-3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



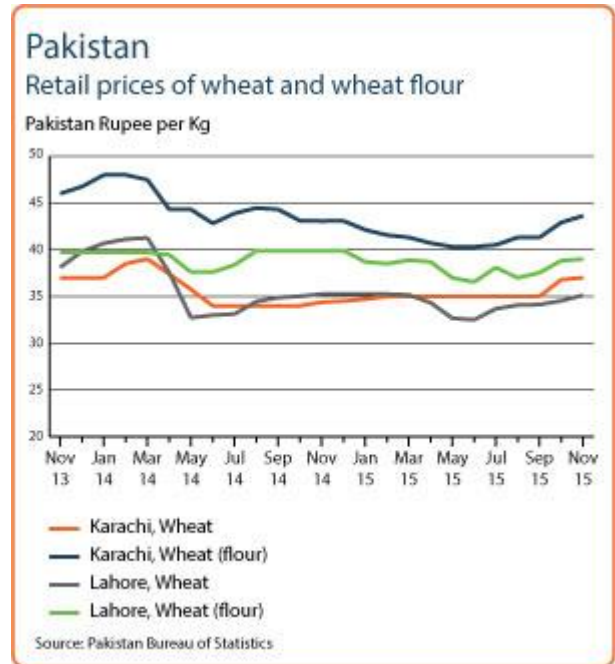
Prices of wheat and wheat flour increased slightly in first two weeks of November

Prices of wheat and wheat flour increased slightly during the first two weeks of November, mainly due to the growing costs of locally-produced wheat. However, prices remained below their year earlier levels. Prices of rice decreased in most markets, reflecting new supplies from the ongoing 2015 harvest.

Overall food security conditions stable but concerns remain in Tharparkar District and northern Pakistan

Overall, the food supply situation is stable following consecutive years of good harvests and large carryover stocks of the main staples.

According to the Integrated Food Security Phase Classification (IPC) analysis conducted in March-June 2015, out of 148 districts, 29 districts in Pakistan were classified under Phase 3: "Crisis" (highly food insecure and require immediate attention) and four districts were found under Phase 4: "Humanitarian Emergency" (severely food insecure and need immediate response). In Tharparkar District (southeastern Sindh Province) and the surrounding areas of Sindh Province, cereal production shortfalls due to drought-like situation for the third consecutive year, coupled with losses of small animals, especially sheep and goats, have aggravated food insecurity and caused acute malnutrition. Furthermore, the floods in July and August had affected approximately 1.5 million people, mainly in Sindh Province. Severe damage to housing and infrastructure, including roads and bridges has also been reported. In addition, losses of stored food and livestock are likely to be high in the most affected areas, resulting in a deterioration of the food security situation of the affected population. Recurrent insecurity has negatively impacted on food security in the Federally Administered Tribal Areas (FATA), located in northern Pakistan. According to the FATA Disaster Management Authority, as of mid-November 2015, some 638 144 people remained temporarily displaced.



Reference Date: 20-March-2015

FOOD SECURITY SNAPSHOT

- Wheat production in 2015 forecast at record level of 26.4 million tonnes
- Despite improved production, wheat imports anticipated higher in 2014/15 marketing year (May/April)
- Prices of wheat and wheat flour declined in February and were well below year-earlier levels
- Overall food security conditions stable but localized food insecurity persists

Wheat production in 2015 forecast at record level of 26.4 million tonnes

Harvesting of the 2015, mostly irrigated, “*rabi*” (winter) wheat crop will start in April and continue until June. Below-average rains at the very start of the 2014/15 agricultural season (October-June) resulted in water deficits, particularly in the rainfed areas of northern Punjab and Khyber Pakhtunkhwa provinces. Rains, however, returned to normal patterns since early January, benefitting crop development at critical growing stages, after the crop came out of dormancy in early February. The vegetation response captured by the Normalized Difference Vegetation Index (NDVI), as of the third dekad of February, shows good establishment of winter wheat over most of the country. The official forecast for 2015 wheat production has been recently revised upwards by 402 000 tonnes to a record level of 26.4 million tonnes, 4 percent up from the bumper level of the previous year. The larger production is attributed to a near 4 percent increase in the area planted and slightly higher forecasted yields, on account of adequate irrigation water supply, high fertilizer use and improved rains.

Bumper 2014 paddy and maize production estimated

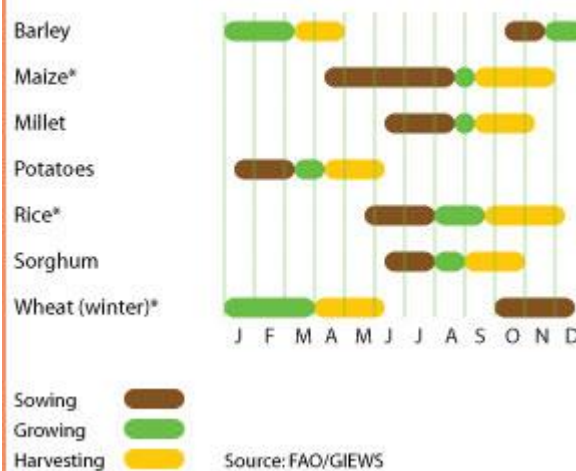
Latest official estimates put the 2014 paddy production at 10.1 million tonnes, 11 percent above the previous five-year average, but 1 percent lower than 2013’s bumper output. The slight decrease is the result of localized crop damages in some eastern parts of Punjab, Gilgit Baltistan and Azad Jammu and Kashmir (AJK), following floods in September and drought in southeastern parts of Sindh province. FAO puts the 2014 maize crop (including the spring and “*kharif*” seasons) at 4.7 million tonnes, 4 percent up from last year’s bumper production. The large maize output in Punjab province, as a result of increased plantings following a shift of cotton areas into maize, and increased use of hybrid maize seeds, is estimated to have more than compensated for a production decline in Sindh province, following the poor rains.

Considerably higher wheat imports forecast in 2014/15

Despite the record 2014 wheat production, wheat imports for the 2014/15 marketing year (May/April) are forecast to almost double the 2013/14 level and reach 800 000 tonnes. Between May 2014 and January 2015, about 740 000 tonnes of wheat were imported, approximately 88 percent more than the corresponding period in

Pakistan

Crop calendar (*major foodcrop)



Pakistan

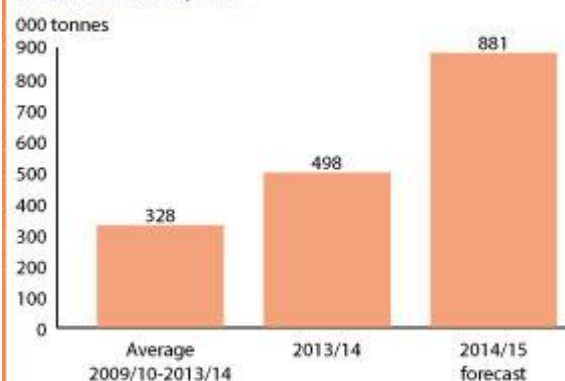
Cereal production

	2009-2013	2013	2014	change
	average		estimate	2014/2013
		000 tonnes		percent
Wheat	24 048	24 211	25 286	4
Rice (paddy)	9 055	10 192	10 075	-1
Maize	4 011	4 527	4 700	4
Others	554	611	611	0
Total	37 669	39 541	40 672	3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Pakistan

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

2013/14. Following the Government's policy that eased conditions to import, millers and importers preferred imported wheat to the domestically produced crop, due to attractive international prices, particularly in the Russian Federation, the main supplier in the current marketing season. Rice exports for 2015 are forecast at 3.8 million tonnes, slightly above the level of the previous year, mainly reflecting the 2014 good rice production.

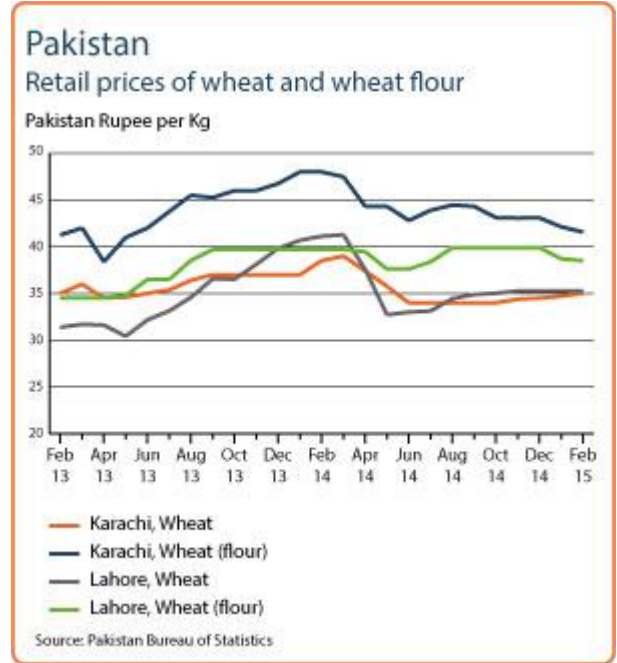
Prices of wheat and wheat flour declined in February and were well below their year-earlier levels

Prices of wheat and wheat flour declined in February 2015 and were well below their levels for the same month last year in most markets, reflecting ample availabilities from the 2014 bumper harvest and high levels of imports in the previous months. The favourable outlook for the 2015 crop also put downward pressure on prices.

In February 2015, the national Consumer Price Index (CPI) was up 3.2 percent relative to the same period last year. Compared to last year, the food component of the CPI increased by 2.1 percent, while the non-food component rose by 4 percent.

Overall food security conditions are stable but concerns remain in Tharparkar district and northern Pakistan

Overall, the food supply situation is stable following consecutive years of good harvests and adequate levels of imports. However, in Tharparkar district (southeastern Sindh Province) and the surrounding areas of Sindh province cereal production shortfalls, due to poor rains, for the second consecutive year, coupled with losses of small animals, mostly sheep and goats following a viral disease outbreak, have aggravated food insecurity and malnutrition of around 1.7 million people (ACAPS Report January 2014). Furthermore, recurrent insecurity has negatively impacted on food security in the Federally Administered Tribal Areas (FATA), located in northern Pakistan. According to the FATA Disaster Management Authority, as of December 2014, nearly half a million people were temporarily displaced, including at least 365 000 children.



Reference Date: 29-October-2014

FOOD SECURITY SNAPSHOT

- Bumper 2014 paddy and maize production expected
- Lower wheat imports in 2014/15 marketing year (May/April)
- Prices of wheat and wheat flour generally stable or decreased slightly in late October
- Overall food security conditions stable but localized food insecurity persists

Bumper 2014 paddy and maize production expected

Harvesting of the 2014 “*kharif*” season crops, including rice and maize, is currently underway and will continue until early December. Overall, rainfall between June and August has been generally favourable over the main cereal producing areas benefiting crop development. However, heavy monsoon rains during the first dekad of September caused the main eastern rivers of Pakistan (Chenab, Jehlum, Sutlej and Ravi) to overflow, resulting in floods and landslides in eastern parts Punjab, Gilgit Baltistan and Azad Jammu and Kashmir (AJK) provinces. In spite of the severe localized crop losses, the overall damage to the 2014 paddy crop is expected to be minimal. As a result, the recently released official forecast puts this year’s paddy production at 10.1 million tonnes, just 1 percent lower than the 2013 bumper level and 11 percent above the previous five-year average.

Similarly, FAO’s latest forecast puts the 2014 maize crop (including the spring and “*kharif*” seasons) at 4.5 million tonnes, marginally below last year’s record output.

Planting of the 2015, mostly irrigated, “*rabi*” (winter) wheat crop is currently underway. The abundant rains in September improved water availability for irrigation and are expected to benefit this season’s crop. The official target for the 2015 wheat crop is set at 26 million tonnes, 3 percent up from the 2014 bumper level. The projected increase is due to anticipated higher yields, as a result of increased use of improved seed varieties.

Lower wheat imports in 2014/15 marketing year (May/April)

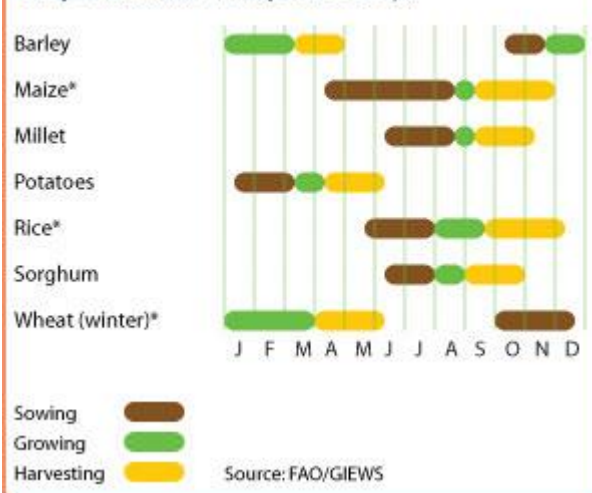
Reflecting the record 2014 wheat production, wheat imports for the 2014/15 marketing year (May/April) are forecast to decrease from the high level of the previous year to 500 000 tonnes, which is still considerably above the previous five-year average. Pakistan is the world’s fifth-largest rice exporter. The 2015 rice exports are forecast at 3.5 million tonnes, some 6 percent higher than the above-average level of the year before, based on the anticipated 2014 good rice production.

Prices of wheat and wheat flour generally stable or decreased slightly in late October

Prices of wheat and wheat flour remained unchanged or decreased slightly in late October and were below their levels at the same time last year in most markets, reflecting ample domestic availabilities from the 2014 record harvest, completed earlier in the year.

Pakistan

Crop calendar (*major foodcrop)



Pakistan

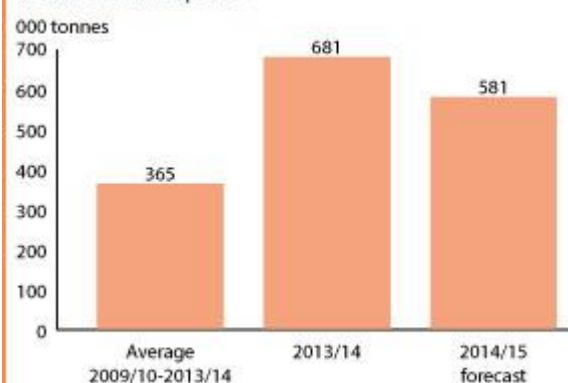
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	24 048	24 211	25 286	4
Rice (paddy)	9 055	10 192	10 075	-1
Maize	4 011	4 527	4 500	-1
Others	554	611	611	0
Total	37 669	39 541	40 472	2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Pakistan

Total cereal imports

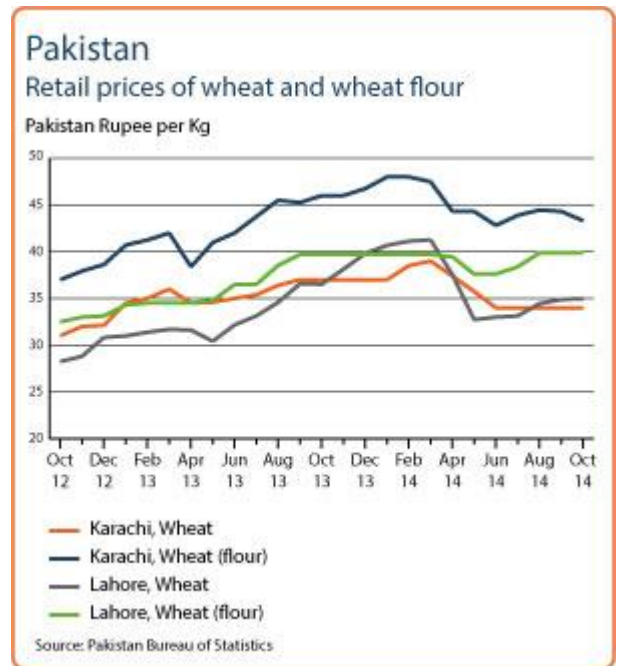


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

In September 2014 the national CPI was up 7.7 percent relative to the same period last year. Compared to last year, the food component of the CPI increased by 7.2 percent, while the non-food component rose by 8 percent.

Overall food security conditions stable but concerns remain for the flood-affected population

Overall, food supply conditions are stable following consecutive years of relatively good harvests and adequate levels of imports. However, recurrent floods over the last five years have exacerbated the food security situation of the affected population. The latest official assessments, as of 15 October 2014, indicate that the floods last September caused the loss of hundreds of lives, displaced at least 500 000 people and adversely affected approximately more than 2.5 million. Severe damage to housing, infrastructure and agriculture is also reported. In Tharparkar district (southeastern part of Sindh Province), food insecurity has aggravated since early 2014 due to cereal production shortfalls as a result of poor rains for the second successive season, coupled with loss of small animals, mostly sheep and goats, following a viral disease outbreak.



Reference Date: 19-June-2014

FOOD SECURITY SNAPSHOT

- Near-record 2014 wheat production estimated
- Lower wheat imports in 2013/14 (May/April)
- Prices of wheat and wheat flour fell with the new harvest but still at high levels
- Overall food security conditions stable but localized food insecurity persists

The 2014 wheat production estimated at a near-record level

Harvesting of the 2014, mostly irrigated, winter wheat crop began in late March in Sindh Province in the south and is currently nearing completion in the main producing northern Punjab area. Excessive rains in May particularly in the northern parts of the country, which reduced yields somewhat, led to a slight downward revision of the 2014 wheat from the previous official forecast. As a result, FAO latest estimates point to a 2014 wheat output of 25 million tonnes, slightly above last year's flood-affected crop and the second best on record.

Planting prospects for the 2014 maize crop, currently underway, are good, as a result of an anticipated increase in the area planted in response to sustained demand from the feed industry. FAO's early forecast points to an aggregate 2014 maize crop (including the spring and *Kharif* seasons) of about 4.8 million tonnes, slightly above the record output of 2013.

Planting of the 2014 main *Kharif* rice crop is currently in full swing in the main growing provinces of Punjab and Sindh. The total area planted to rice this year is officially forecast to increase to 2.8 million hectares, slightly higher than the average level of the previous year. Assuming good weather conditions, and adequate availability of irrigation water supplies, FAO tentatively forecasts the aggregate 2014 rice production at 9.8 million tonnes, slightly above last year's good level.

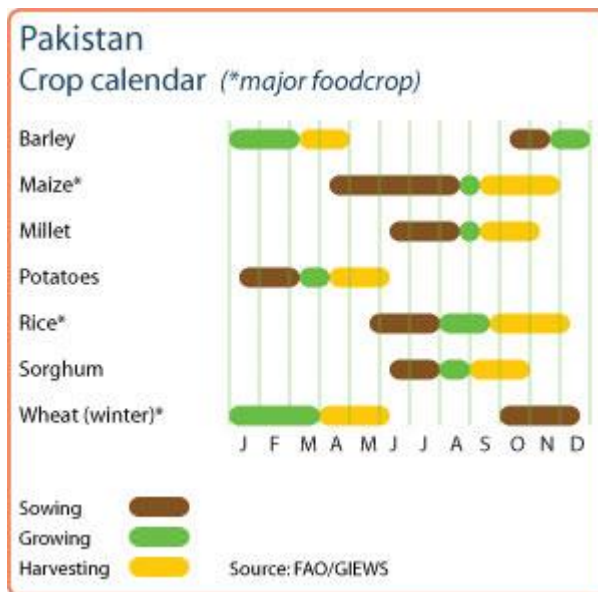
Lower wheat imports in 2014/15 (May/April)

Reflecting the near-record 2014 wheat production, wheat imports for the 2014/15 marketing year (May/April) are forecast to decrease from the high level of the previous year to 500 000 tonnes, which is still considerably above the previous five-year average. Pakistan is the world's fifth-largest rice exporter. With the good rice production in 2013, the 2014 rice exports are forecast at 3.3 million tonnes, some 5 percent higher than the above-average level of the year before.

Prices of wheat and wheat flour fell with the new harvest but still at high levels

Prices of wheat and wheat flour, declined in most markets in recent months, with the advance of the 2014 harvest. Early concerns about a reduction in the 2014 output and low level of stocks, underpinned prices in previous months. Overall, however, wheat and wheat flour prices were still above their year-earlier levels.

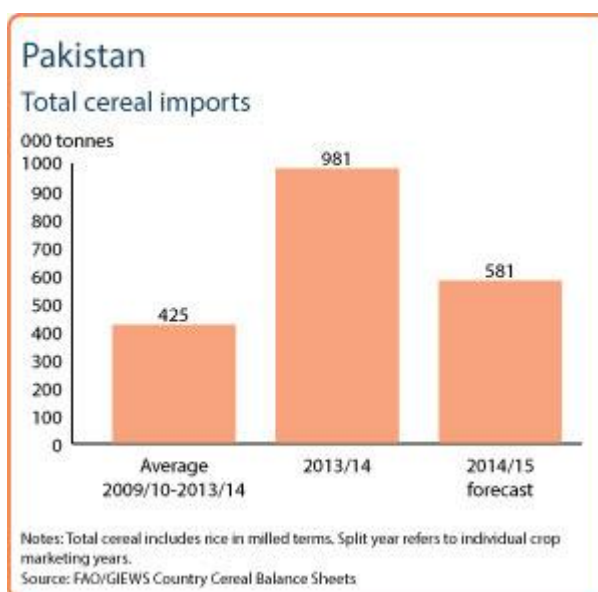
In May 2014 the national CPI was up 8.3 percent relative to the same



Pakistan Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	24,052	24,231	25,000	3
Rice (paddy)	8,942	9,627	9,800	2
Maize	4,127	4,700	4,800	2
Others	554	611	611	0
Total	37,676	39,169	40,211	3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

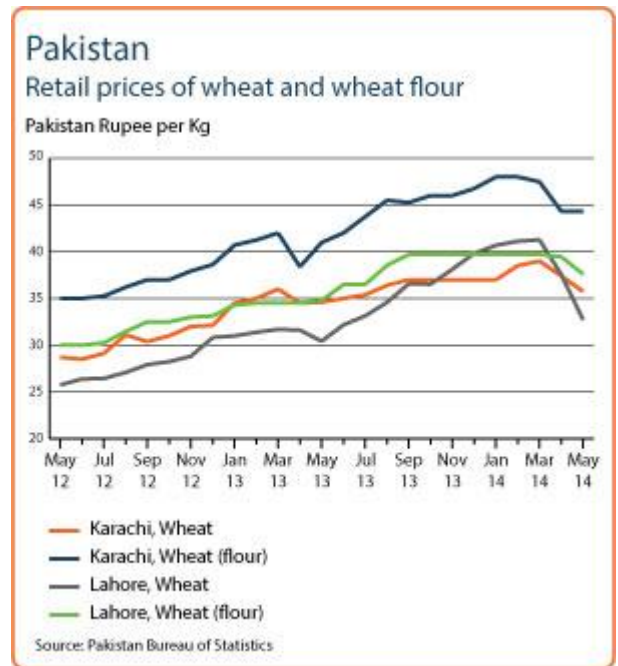


period last year. Compared to last year, the food component of the CPI increased by 7.4 percent, while the non-food component rose by 9 percent.

Overall food security conditions stable but localized food insecurity persists

Overall, food supply conditions are stable following consecutive years of relatively good harvests and adequate levels of imports. However, in 2013 the country was hit by severe floods for the fourth year in row. Last year's floods in August and September caused widespread damage, affecting at least 1.5 million people, particularly in Punjab and Sindh provinces. Furthermore, a powerful earthquake in Pakistan's remote western province of Balochistan on 24 September 2013 affected at least 300 000 people. In Tharparkar district (southeastern part of Sindh Province), food insecurity has further aggravated since early 2014, due to cereal production shortfalls as a result of poor rains for the second successive season, coupled with loss of small animals following a recent sheep pox outbreak.

In general, the high prices of main staple wheat are also a contributing factor for food insecurity, especially of the low-income households.



Reference Date: 23-April-2014

FOOD SECURITY SNAPSHOT

- Record 2014 wheat production forecast
- Increased wheat imports in 2013/14 (May/April)
- Prices of wheat and wheat flour stabilized in March but at record or near record highs
- Overall food security conditions stable but localized food insecurity persists

Upward revision of the 2014 wheat production to a record level of 25.4 million tonnes

Harvesting of the 2014, mostly irrigated, winter wheat crop began in late March in Sindh province in the south and is expected to continue until mid-June in the main producing northern Punjab area. Recently revised official forecasts put the 2014 winter wheat crop at a record level of 25.4 million tonnes, up 5 percent from last year's above-average output. The projected increase in production is mainly attributed to a slight expansion in area planted, generally favourable weather conditions during the growing season in the main producing provinces of Punjab and Sindh, and good supplies of fertilizers and irrigation water.

Early prospects for the 2014 maize crop, currently being planted, are good. FAO's preliminary forecast points to an aggregate 2014 maize crop (including the spring and *Kharif* seasons) of about 4.8 million tonnes, slightly above the record output of 2013, as a result of anticipated higher plantings in response to sustained demand from the feed industry.

Planting of the 2014 main *Kharif* rice crop will start in late June. The total area planted to rice this year is officially forecast to increase to 2.8 million hectares, slightly higher than the average level of the previous year. Assuming good weather conditions, with adequate availability of water supplies for irrigation, FAO tentatively forecasts the aggregate 2014 rice production at 9.8 million tonnes, slightly above last year's good level.

Increased wheat imports in 2013/14 (May/April)

Reflecting the insufficient 2013 wheat production for a second consecutive year, wheat imports for the almost completed 2013/14 (May/April) marketing year are estimated to have increased considerably to 900 000 tonnes. Pakistan is the world's fifth-largest rice exporter. With the good rice production in 2013, the 2014 rice exports are forecast at 3.3 million tonnes, some 6 percent higher than the above-average level of the year before.

Prices of wheat and wheat flour remain at record or near record levels

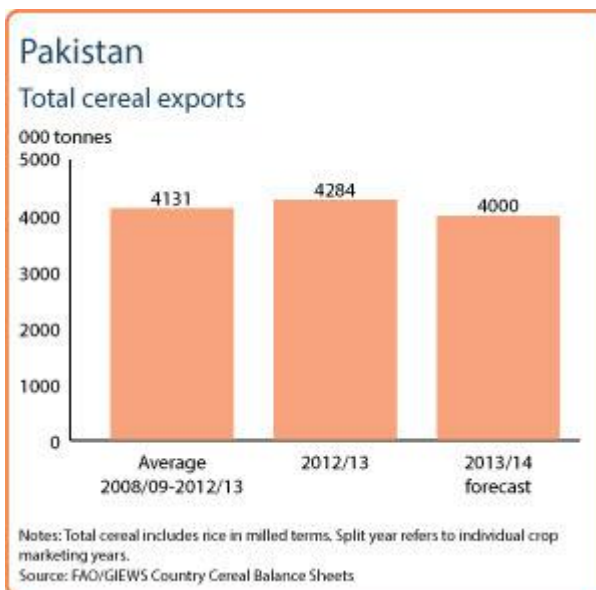
Prices of wheat and wheat flour stabilized in March in most markets with the onset of the 2014 harvest, anticipated at a record level. Early concerns about a reduction in the 2014 output and low level of stocks, underpinned prices in previous months. Overall, however, wheat and wheat flour prices remained at record levels substantially above those



Pakistan Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Wheat	24,052	24,231	25,420	5
Rice (paddy)	8,942	9,627	9,800	2
Maize	4,127	4,700	4,800	2
Others	554	611	611	0
Total	37,676	39,169	40,631	4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



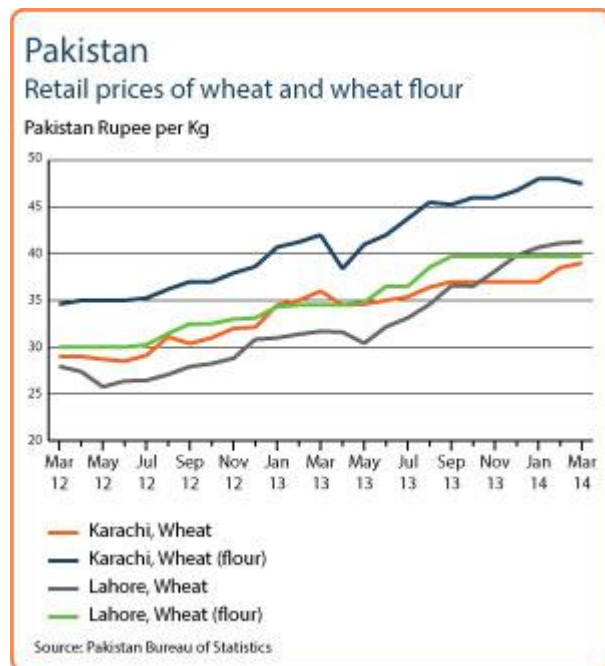
of a year earlier. In March 2014, retail prices of wheat and wheat flour in the largest Lahore market were 30 percent and 15 percent above their levels a year earlier.

In March 2014 the national CPI was up 8.5 percent relative to the same period last year. Compared to last year, the food component of the CPI increased by 9.3 percent, while the non-food component rose by 8 percent.

Overall food security conditions stable but localized food insecurity persists

Overall, food supply conditions are stable following consecutive years of relatively good harvests and adequate levels of imports. However, in 2013 the country was hit by severe floods for the fourth year in row. Last year's floods in August and September caused widespread damage, affecting at least 1.5 million people, particularly in Punjab and Sindh provinces. Furthermore, a powerful earthquake in Pakistan's remote western province of Balochistan on 24 September 2013 affected at least 300 000 people. In Tharparkar district (south eastern part of Sindh province), food insecurity has further aggravated since early 2014, due to cereal production shortfalls as a result of poor rains for the second successive season, coupled with loss of small animals following a recent sheep pox outbreak.

In general, the high prices of main staple wheat are also a contributing factor for food insecurity, especially of the low-income households.



Reference Date: 18-December-2013

FOOD SECURITY SNAPSHOT

- Higher winter wheat plantings for the 2013/14 cropping season
- Above-average cereal production in 2013
- Wheat imports forecast to increase in 2013/14 marketing year
- Prices rice remain stable, while those of wheat gain strength
- Food security remains a challenge for the flood-affected population

Higher winter wheat plantings estimated for the 2013/14 cropping season

Planting of the 2013/14 *Rabi* crops, including mostly irrigated winter wheat and barley, is currently ongoing. The above-average monsoon rains helped replenish water reserves and improved soil moisture conditions, benefiting planting activities and early crop development. As a result, the total area planted to wheat this year is expected to increase to almost 9 million hectares, some 4 percent above last year's below average level. Official target for the 2014 aggregate wheat production is set at 25 million tonnes, some 3 percent above last year's near-record level.

Above-average cereal production in 2013

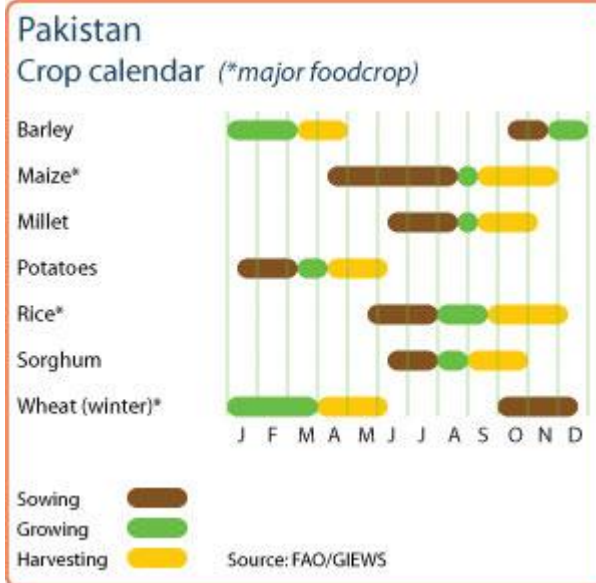
Harvesting of the 2013 summer season *Kharif* crops, mostly paddy, maize and sorghum, is completed. Following generally below average rains between April and July, a period of torrential rains ensued in August, causing localized flooding across the two main rice producing provinces, Punjab and Sindh. Although, the rains provided much relief to crops in some parts, they also negatively affected yields, particularly in the growing areas of Punjab. As a result, FAO has lowered its 2013 aggregate paddy production forecast by 600 000 tonnes to 8.7 million tonnes, which is still 5 percent up from last year's poor output but some 4 percent below the previous five-year average.

The 2013 winter wheat crop harvested by June is officially estimated at 24.2 million tonnes, some 3 percent above last year's flood affected output. Generally favourable weather conditions, with above-average rains during the growing season in Punjab, and good supplies of fertilizer and irrigation water, were the main reasons behind the estimated increase in production.

Overall, the 2013 total production estimate is put at 38.2 million tonnes, some 3 percent above last year's average harvest.

Wheat imports forecast to increase in 2013/14

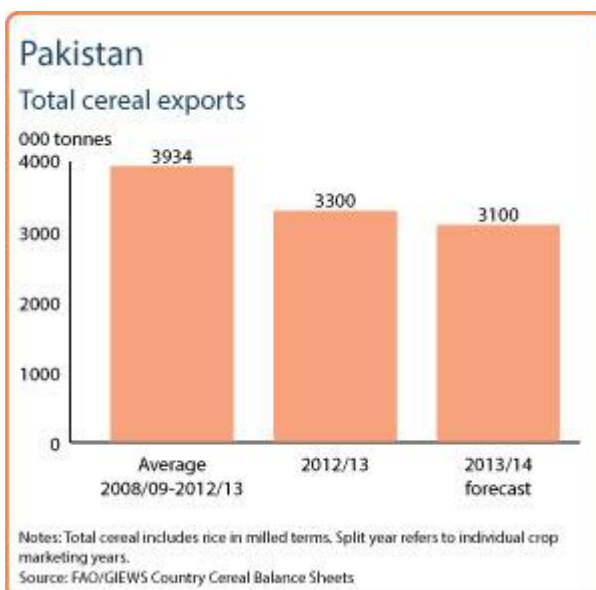
Reflecting the insufficient 2013 wheat production for a second consecutive year, wheat imports are forecast to increase considerably and reach some 950 000 tonnes during 2013/14 marketing year (May/April). Pakistan is a net cereal exporting country, mostly of rice, and with an estimated below-average production, rice exports for 2014 have been estimated at about 2.9 million tonnes, some 3 percent below the average level of year before.



Pakistan
Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Wheat	23 398	23 473	24 231	3
Rice (paddy)	9 103	8 307	8 695	5
Maize	3 906	4 630	4 700	2
Others	541	566	611	8
Total	36 949	36 976	38 237	3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Prices of wheat reach record or near record levels while those of rice remain stable

In November, retail prices of wheat and wheat flour in Karachi market, were 16 percent and 21 percent above their levels a year earlier.

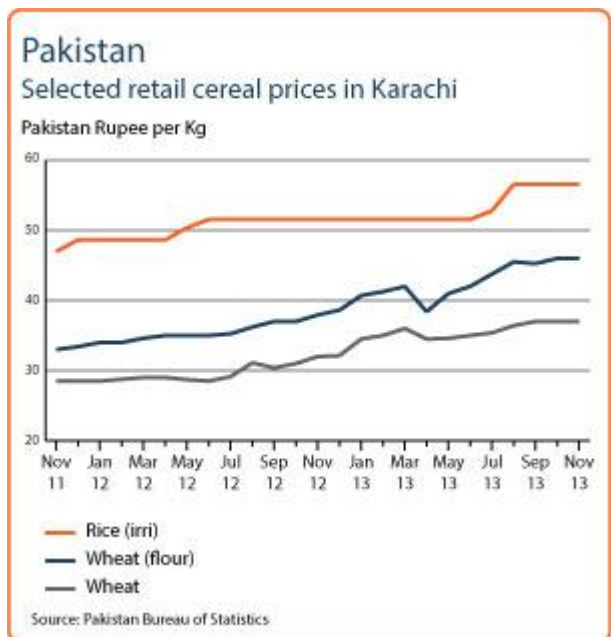
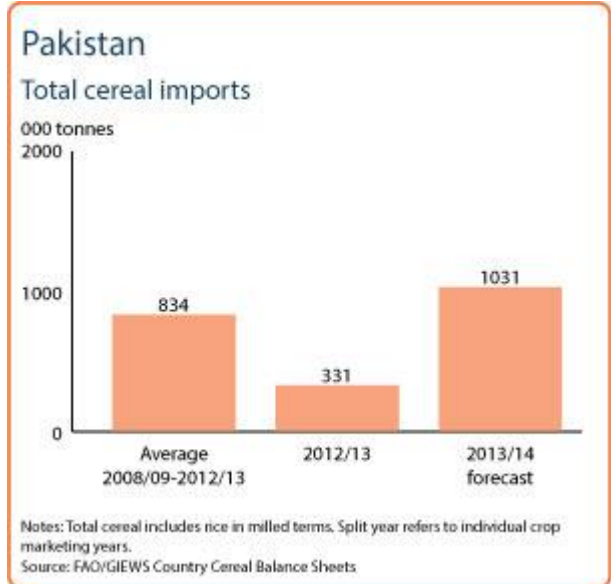
Prices of wheat and wheat flour, which increased steadily from late 2011, continue to gain strength, reaching record or near record levels in November 2013 in most markets of the country. The high level of prices reflects the shortfall in 2013 wheat production and low levels of stocks, coupled with sharp rises in fuel prices.

Prices of rice (IRRI varieties) have remained relatively stable since August 2013, after a sharp rise in June and July, mainly due to increased demand ahead of Ramadan, coupled with increases in petroleum prices and general sales tax. The price of basmati rice, intended mainly for export, has been stable at a record level since June 2013 and in November 2013 prices in Karachi market were 15 percent above the corresponding month last year.

In November 2013 the national CPI was up 10.9 percent relative to the same period last year. Compared to last year, the food component of the CPI increased by 13 percent while the non-food component rose by 9.4 percent.

Food security remains a challenge for the flood-affected population

The overall food supply situation in Pakistan has been satisfactory following consecutive years of relatively good harvests. However, the country was hit by severe floods for the fourth year in row. This year's floods in August and September caused widespread losses and damages, affecting Punjab and Sindh provinces the most. According to the National Disaster Management Authority about 230 lives were lost and at least 1.5 million people affected across the country. The affected population suffered significant crop, livestock and grain stock losses. Furthermore, a powerful earthquake in Pakistan's remote western province of Balochistan on 24 September affected at least 300 000 people. In general, the high food price inflation is also a contributing factor for food insecurity, especially of the low-income households.



Reference Date: 26-April-2013

FOOD SECURITY SNAPSHOT

- Favourable production prospects for the 2013 winter wheat crop
- Prices of wheat and rice remain stable at high levels
- Food security remains a major challenge for the flood-affected population

Favourable production prospects for the 2013 winter wheat crop

Harvesting of the 2013 winter wheat crop began in March in Sindh province in the south and is expected to continue until mid-June in Punjab in the north. Generally favourable weather conditions, with above-average rains between December and March 2013 in the main wheat growing province of Punjab, coupled with good supplies of fertilizers and irrigation water, led to an upward revision from the first forecast, to record levels. Latest official projections point to a crop of about 26.3 million tonnes, some 10 percent above last year's above-average output.

Harvesting of the 2012 summer season *Kharif* crops, mostly paddy, maize and sorghum was completed last December. Following below normal rains at the start of the 2012 *Kharif* season (May-July), a period of heavy rains ensued in late August and September, causing localised flooding across southern Punjab, northern Sindh and north-eastern Balochistan. Although, the rains provided much relief in some parts, they also reportedly damaged some 474 310 hectares of standing crops, mostly in Sindh and Balochistan. As a result of the localised floods the final estimate for the 2012 paddy output was reduced to 8 million tonnes (5.4 million tonnes in milled terms), some 13 percent below previous year's above-average harvest. The 2012 total production estimate for maize, sorghum and millet is put at 4.1 million tonnes.

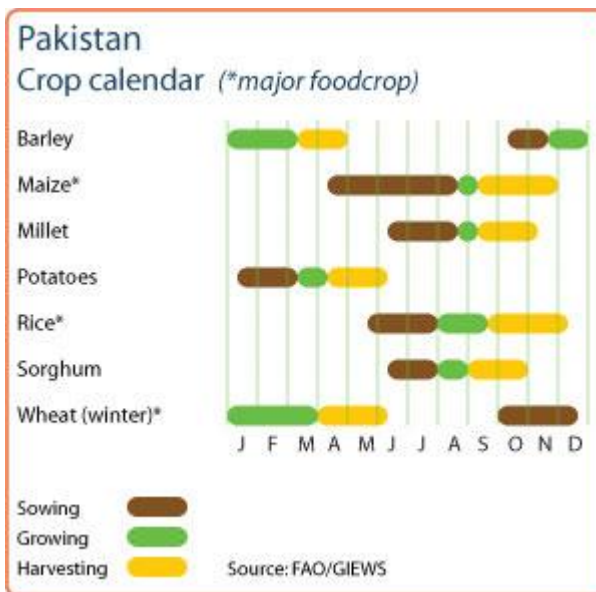
With the good production in 2012, cereal exports for the almost ended 2012/13 marketing year (May/April) have been estimated at about 2.9 million tonnes of rice and 300 000 tonnes of wheat.

Prices of wheat and rice remain stable at high levels

Prices of wheat and wheat flour, which increased steadily from late 2011, have stabilized in recent months but remained at record or near record levels in March in most markets of the country. The high level of prices reflects high producer prices and strong export demand. At the same time, the announcement of higher producer support price for wheat, from PKR 1 050 per 40 kg bag to PKR 1 200 per 40 kg, further underpinned prices in the past months.

In March, retail prices of wheat and wheat flour in Lahore market, were 13.4 percent and 15 percent above their levels a year earlier.

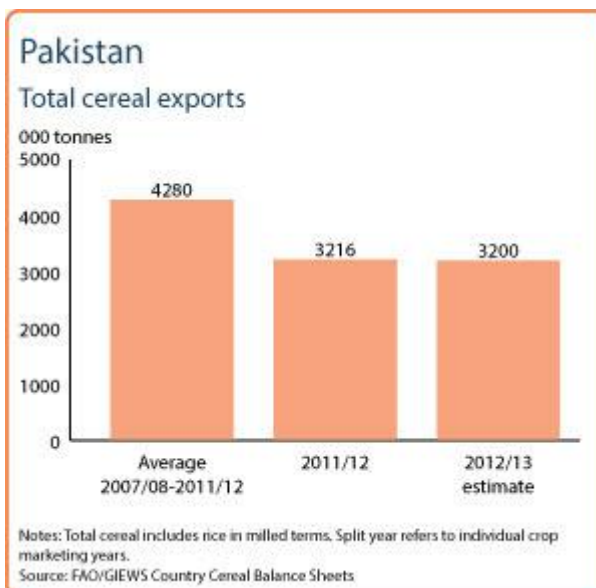
Prices of rice (*Irri* varieties) have remained relatively stable in recent months at high levels and in March 2013 they were some 6 percent higher than in March 2012. Similarly, the price of basmati rice, intended



Pakistan Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Wheat	23,509	24,030	26,346	10
Rice (paddy)	9,052	8,049	9,295	15
Maize	3,454	3,536	3,536	0
Others	568	606	606	0
Total	36,582	36,221	39,783	10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

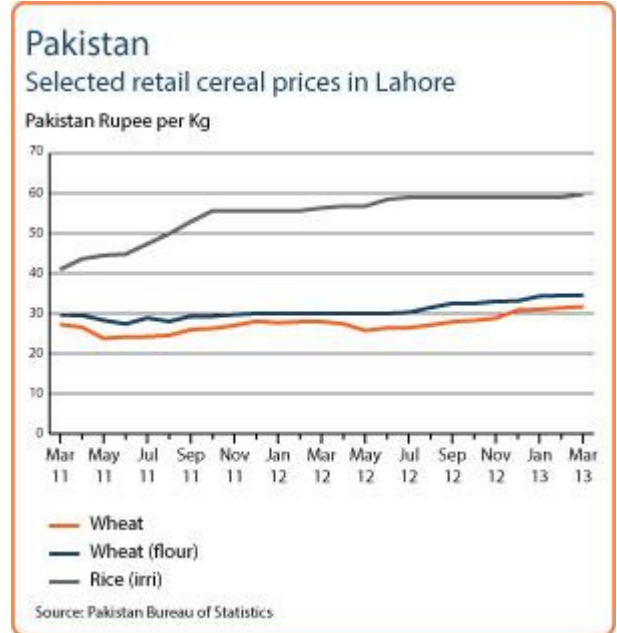


mainly for export, has been stable at a record level since June 2012 and in March 2013 prices increased by 15 percent over the corresponding month last year

In March 2013 the national CPI was up 6.6 percent relative to the same period last year. Compared to last year, the food component of the CPI increased by 6.3 percent while the non-food component rose by 6.7 percent.

Food security remains a major challenge for the flood-affected population

The overall food supply situation in Pakistan has been satisfactory following consecutive years of relatively good harvests. However, the country was hit by severe floods for the second year in row. The floods affected over 9 million people. The number of houses damaged or destroyed has reached nearly 1.5 million. Furthermore, the affected population suffered significant crop, livestock and grain stock losses. The FAO initiative Pakistan Floods Rapid Response Plan 2011 is funded by donor contributions with nearly USD 10.6 million to provide approximately 91 000 flood-affected families with vital crop and livestock assistance.



Reference Date: 17-December-2012

FOOD SECURITY SNAPSHOT

- Record 2012 cereal production estimated despite localised flooding at the end of the *Kharif* season
- Prices of wheat and wheat flour continue to rise following international trend, while those of rice remain stable at high levels
- Food security remains a concern for the flood-affected population

Record 2012 cereal production estimated despite localised flooding at the end of the *Kharif* season

Harvesting of the 2012 summer season *Kharif* crops, mostly paddy, maize and sorghum is completed. Following below normal rains at the start of the 2012 *Kharif* season (May-July), a period of heavy rains ensued in late August and September, causing localised flooding across southern Punjab, northern Sindh and northeastern Balochistan. Although, the rains provided much relief in some parts, they are also reportedly damaged some 474 310 hectares of standing crops, mostly in Sindh and Balochistan. Despite this localized floods the national paddy output is officially estimated to reach record level at about 10.8 million tonnes (7.2 million tonnes in milled terms), some 17 percent above last year's also flood affected crop, but comparable to the bumper harvests in 2008 and 2009.

Winter wheat crop harvested around May earlier this year is put at around 24 million tonnes, slightly below the record harvest in 2011 but some 3.7 percent above the previous five years average. A period of unfavorable weather, floods in Sindh province, reported reduced availability of fertilizers and irrigation water are the main causes behind the slight decline in 2012 wheat production. In aggregate, total cereal production in 2012 is estimated at 39 million tonnes, some 3.5 percent above the previous year's harvest.

Pakistan was the world's fourth largest rice exporter in 2012. With the good production in 2012, cereal exports for 2012/13 marketing year (May/April) have been forecast at about 3.4 million tonnes of rice and 1 million tonnes of wheat.

Heavy rains cause localised flooding at the start of the 2012/13 *Rabi* season

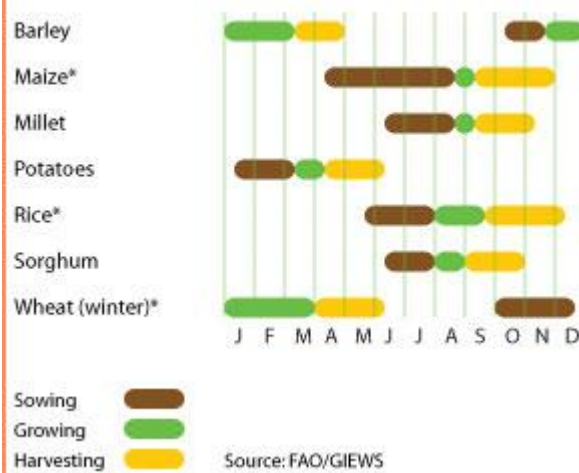
Planting of the 2012/13 *Rabi* crops, mostly winter wheat and barley, is almost completed. Reportedly, the floods in August and September hindered and delayed planting activities. Consequently, the area planted to wheat may be reduced since many areas were still under water by mid-November.

Prices of wheat and wheat flour continue to rise, while those of rice remain stable at high levels

Prices of wheat and wheat flour have been on steady increase since late 2011, reaching record levels in November in most markets of the country. The increase mainly reflects strong export demand and price trends in international markets. At the same time, the announcement of

Pakistan

Crop calendar (*major foodcrop)



Pakistan

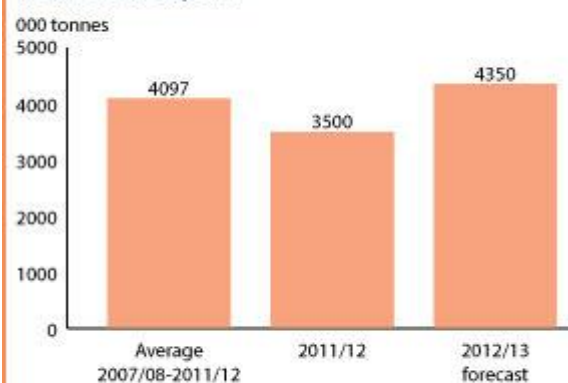
Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes			percent
Wheat	23,176	24,282	24,030	-1
Rice (paddy)	9,109	9,235	10,802	17
Maize	3,467	3,536	3,536	0
Others	560	600	586	-2
Total	36,312	37,653	38,954	3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Pakistan

Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

higher producer support price for wheat, from PKR 1050 per 40 kg bag to PKR 1200 per 40 kg, further underpinned prices in the past month.

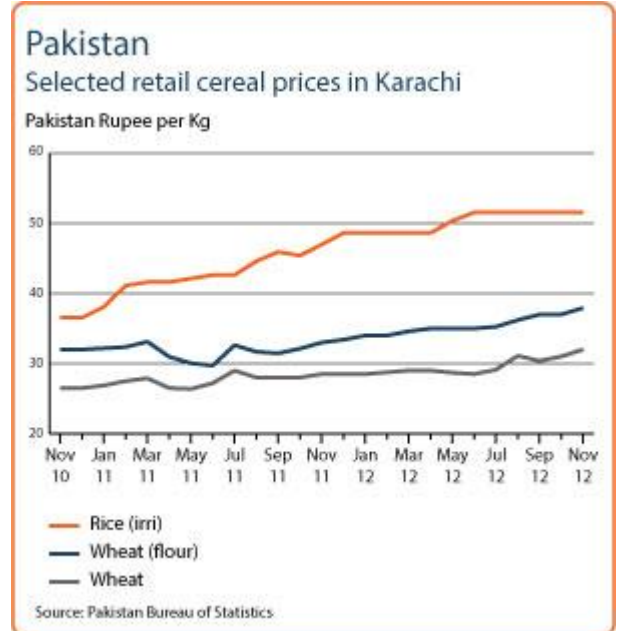
In November, retail prices of wheat and wheat flour in Karachi, were 12.3 percent and 14.9 percent above their levels a year earlier, averaging PKR 32 (about USD 0.33) and PKR 37.93 (about USD 0.39) per kg, respectively.

Prices of rice (*Irr*i varieties) have remained relatively stable in recent months at high levels, mainly reflecting adequate supplies from this year's rice production. In November 2012 they were some 9.7 percent higher than in November 2011. Similarly, price of basmati rice, intended mainly for export, has been stable at a record level since June 2012, averaging PKR 66.54 (about USD 0.68) per kg. In November 2012 prices increased by 16.5 percent over the corresponding month last year.

In November 2012 the national CPI was up 6.9 percent relative to the same period last year. Compared to last year, the food and non-alcoholic beverages increased by 4.7 percent.

Food security remains a concern for the flood-affected population

The overall food supply situation in Pakistan has been satisfactory following consecutive years of relatively good harvests. However, the country has been hit by floods for the third year in row. This year's floods affected over 4.8 million people. Reportedly some 626 956 houses were damaged or destroyed and significant crops, livestock and grain stock were lost. Additionally, high prices of primary commodities are a cause for concern especially for the low income population.



Reference Date: 19-April-2012

FOOD SECURITY SNAPSHOT

- Favourable outcome of the 2012 winter wheat crop production is forecast
- Prices of wheat and wheat flour continue to rise, while those of rice stabilized at high levels
- Food security remains a major challenge for the flood-affected population

Favourable outcome of the 2012 winter wheat crop production is forecast

Harvesting of the 2012 winter wheat crop began in March in Sindh province in the south and is expected to continue until the end of June in Punjab in the north. Scanty distribution of rains during the first three months of the 2011/12 agricultural winter season (October-December) resulted in water deficits to *Rabi* crops especially in Barani areas, which are rainfed. Although above normal rains were recorded at the end of December and early January, helping to reduce moisture deficits to some degree, dry weather resumed for 8 dekads from mid-January to end-March. However, most of the wheat crop cultivated in the main growing areas of Punjab and Sindh provinces is irrigated.

Following a period of cool weather which affected plant mitosis, a protracted period of below normal rains, floods in Sindh province, reported reduced availability of fertilizers and irrigation water led to a downward revision of the earlier forecast of the harvest. The latest official projection points to a crop of about 24.0 million tonnes, slightly below the record harvest in 2011 but above the previous five-year average.

Harvesting of the 2011 summer season *Kharif* crops, mainly paddy, maize and sorghum was completed by December. Heavy monsoon rains in August and September caused severe flooding in southern Pakistan, in most of Sindh and parts of Balochistan provinces. Over 9 million people were affected and at least 880 000 hectares of standing crops have been damaged. In spite of this localized floods the damage to the paddy crop was moderate and the national paddy output is estimated at 10.3 million tonnes (6.9 million tonnes in milled terms), which is 42 percent above 2010 drought-affected crop, but below the bumper harvests in 2008 and 2009. The 2011 total production estimate for maize, sorghum and millet is put at 4.1 million tonnes.

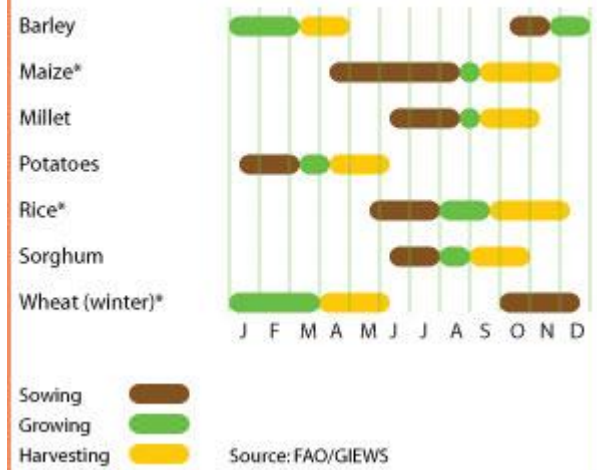
Pakistan is the world's fifth-largest rice exporter. With the good production in 2011, the exportable surplus for 2011/12 marketing year (May/April) has been estimated at about 3.5 million tonnes of rice and 600 000 tonnes of wheat.

Prices of wheat and wheat flour continue to rise, while those of rice stabilize at high levels

Prices of wheat and wheat flour have been on the increase since late 2011, reflecting strong export demand. In the first two weeks of April, prices of wheat and wheat flour were 9 and 13 percent respectively above their levels a year earlier. Prices of rice (*Irri* varieties) have

Pakistan

Crop calendar (*major foodcrop)



Pakistan

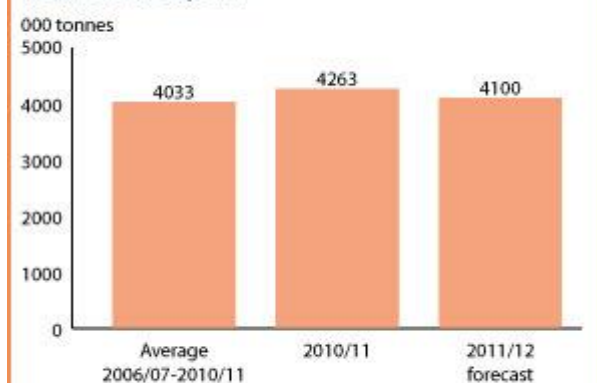
Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes			percent
Wheat	23 176	24 282	24 030	-1
Rice (paddy)	9 331	10 345	10 800	4
Maize	3 467	3 536	3 536	0
Others	560	600	579	-4
Total	36 534	38 763	38 945	0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Pakistan

Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

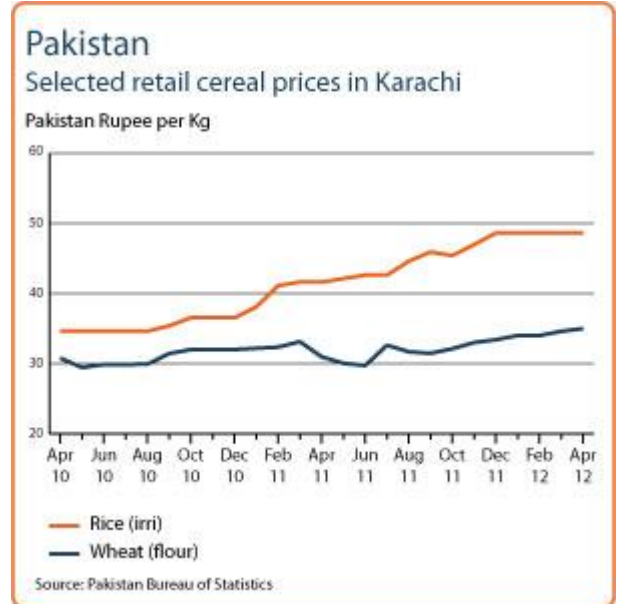
remained relatively stable in recent months at high levels, about 17 percent higher than in April 2011.

Price of basmati rice, intended mainly for export, is on the rise since September 2010. It has been stable at a record level since February 2012 averaging PKR 61.54 (about USD 0.68) per kg. In April 2012 prices increased by 26 percent over the corresponding month last year.

The latest available official data indicate that nationally the overall year-on-year consumer price inflation in March 2012 was fairly high estimated at 10.8 percent.

Food security remains a major challenge for the flood-affected population

The overall food supply situation in Pakistan has been satisfactory following consecutive years of relatively good harvests. However, the country was hit by severe floods for the second year in row. The floods affected over 9 million people. The number of houses damaged or destroyed has reached nearly 1.5 million. Furthermore, the affected population suffered significant crop, livestock and grain stock losses. Additionally, the impact of high inflation is a cause for concern especially for the low income population. The FAO initiative Pakistan Floods Rapid Response Plan 2011 is funded by donor contributions with nearly USD 10.6 million to provide approximately 91 000 flood-affected families with vital crop and livestock assistance.



Reference Date: 13-February-2012

FOOD SECURITY SNAPSHOT

- Low rains so far for *Rabi* crops
- Prices of wheat and wheat flour increased in the recent months and that of rice have been rising since the beginning of last year
- Food security remains a major challenge for the flood-affected population

Low rains so far for *Rabi* crops

The sowing of the mostly irrigated 2012 winter wheat crop was completed in December. Scanty distribution of rains during the first three months of the 2011/12 agricultural season (October - December) resulted in water deficits to *Rabi* crops especially in Barani areas, which are rainfed. Rains, however, resumed more normal patterns in late December and early January helping to reduce moisture deficits somewhat. However, most of the wheat crop cultivated in the main growing areas of Punjab and Sindh provinces is irrigated. The water levels in reservoirs are reportedly below than last year.

Harvesting of the 2011 summer season *Kharif* crops, mainly paddy, maize and sorghum was completed by December. Heavy monsoon rains in August and September caused severe flooding in southern Pakistan, in most of Sindh and parts of Balochistan provinces. Over 9 million people were affected and at least 880 000 hectares of standing crops have been damaged. In spite of this localized floods the damage to the paddy crop was moderate and the national paddy output is estimated at 9.7 million tonnes (6.5 million tonnes in milled terms), which is 35 percent above the last year's drought-affected crop, but below the bumper harvests in 2008 and 2009. The 2011 total production estimate for maize, sorghum and millet is put at 4.1 million tonnes.

Winter wheat crop harvested from April to June 2011 was officially estimated to reach a record level at 24.3 million tonnes, some 4.2 percent higher than the previous year's above-average output, reflecting favourable weather, subsidized fertilizers and a government implemented minimum support purchase price (PKR 950 per 40 kg).

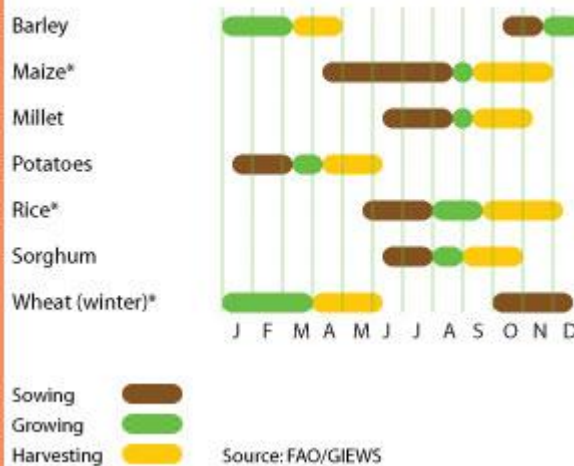
Pakistan is the world's fifth-largest rice exporter. With the expectation of a good production in 2011, the potential exportable surplus for 2012 is forecast at about 3 million tonnes of rice and 600 000 tonnes of wheat.

Prices of wheat and wheat flour increased in recent months while that of rice have been rising since the beginning of last year

With strong export demand the prices of wheat and wheat flour have increased over the last six months after a post-harvest dip in mid-2011. Wheat prices in January 2012 in Karachi were 6 percent above their levels a year earlier.

In January 2012, domestic price for rice, which has been rising since the beginning of last year following the trend in export prices, was 28 percent above its level in January 2011. Price of basmati rice, intended

Pakistan Crop calendar (*major foodcrop)

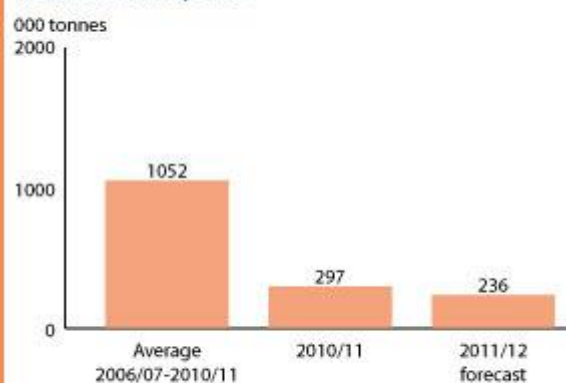


Pakistan Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes			percent
Wheat	22 575	23 311	24 282	4
Rice (paddy)	8 892	7 230	9 745	35
Maize	3 378	3 341	3 536	6
Others	541	556	600	8
Total	35 386	34 438	38 163	11

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Pakistan Total cereal imports

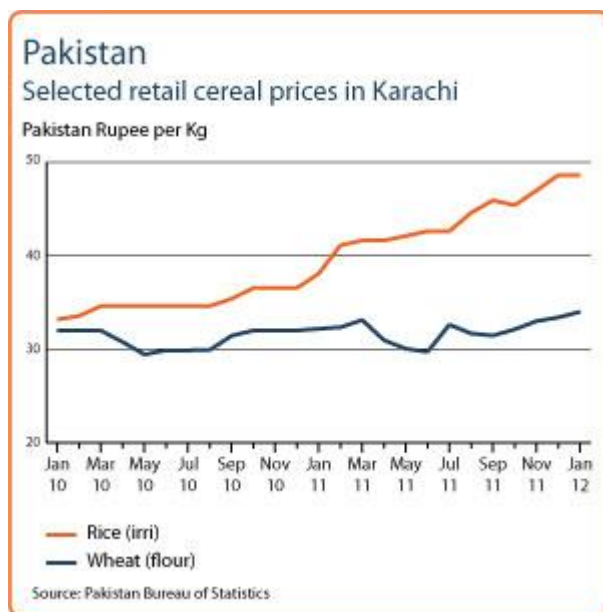
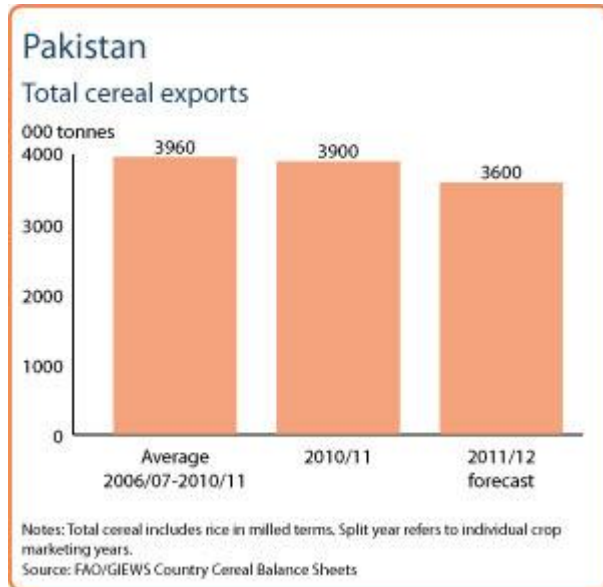


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

mainly for export, is on the rise since September 2010. The latest available official data indicate that nationally the overall year-on-year consumer price inflation in January 2012 was fairly high estimated at 10.1 percent.

Food security remains a major challenge for the flood-affected population

The overall food supply situation in Pakistan has been satisfactory following consecutive years of relatively good harvests. However, the country has been hit by severe floods for the second year in row. The floods of this year affected over 9 million people. The number of houses damaged or destroyed has reached nearly 1.5 million. Furthermore, the affected population suffered significant crop, livestock and grain stock losses. Additionally, the impact of high inflation is a cause for concern especially for the low income population. The FAO initiative Pakistan Floods Rapid Response Plan 2011 is funded by donor contributions with nearly USD 10.6 million to provide approximately 91 000 flood-affected families with vital crop and livestock assistance.



Reference Date: 21-December-2011

FOOD SECURITY SNAPSHOT

- Record wheat crop, good paddy and maize crops gathered in 2011
- Prices of wheat and wheat flour increased in the recent months and that of rice have been rising since the beginning of this year
- Food security remains a major challenge for the flood-affected population

Bumper cereal harvest estimated despite floods in parts of the country in 2011

Planting of winter wheat, the country's main staple crop, is currently ongoing under generally unfavourable weather conditions, although most of the winter wheat is mostly irrigated.

Harvesting of the 2011 summer season *Kharif* crops, mainly paddy, maize and sorghum is completed. Heavy monsoon rains in August and September caused severe flooding in southern Pakistan, in most of Sindh and parts of Balochistan provinces. Over 9 million people were affected and at least 880 000 hectares of standing crops have been damaged. In spite of this localized floods the damage to the paddy crop was moderate and the national paddy output is estimated at 9.7 million tonnes (6.5 million tonnes in milled terms), which is 35 percent above the last year's drought-affected crop, but below the bumper harvests in 2008 and 2009. The 2011 total production estimate for maize, sorghum and millet is put at 4.1 million tonnes.

Winter wheat crop harvested from April to June earlier this year was officially estimated to reach a record level at 24.3 million tonnes, some 4.2 percent higher than the previous year's above-average output, reflecting favourable weather, subsidized fertilizers and a government implemented minimum support purchase price (PKR 950 per 40 kg).

Pakistan is the world's fifth-largest rice exporter. With the expectation of a good production in 2011, the potential exportable surplus for 2012 is forecast at about 3 million tonnes of rice and xx tonnes of wheat in 2012.

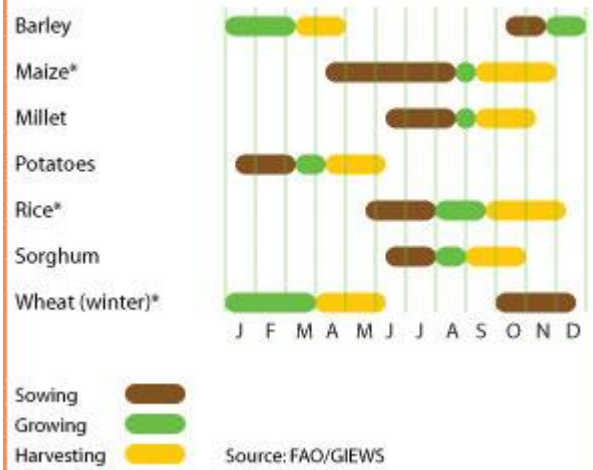
Prices of wheat and wheat flour increased in recent months while that of rice have been rising since the beginning of this year

With strong export demand the prices of wheat and wheat flour have increased over the last three months after a post-harvest dip in mid-2011. However, wheat prices in November in Karachi were generally around their levels a year earlier.

In November, domestic price for rice, which has been rising since the beginning of the year following the trend in export prices, was 28 percent above its level in November 2011. Price of basmati rice, intended mainly for export, is on the rise since August 2010. The latest available official data indicate that nationally the overall year-on-year consumer price inflation in August 2011 was fairly high estimated at 10.2 percent.

Pakistan

Crop calendar (*major foodcrop)



Pakistan

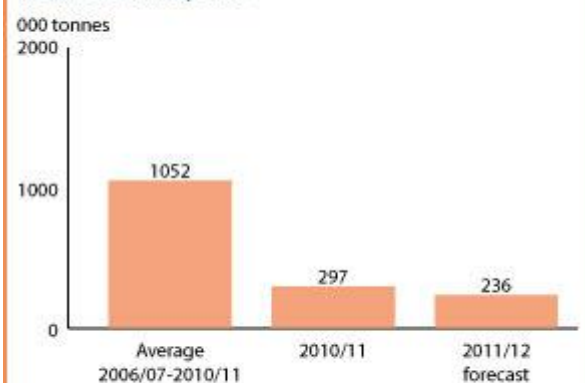
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Wheat	22 575	23 311	24 282	4
Rice (paddy)	8 892	7 230	9 745	35
Maize	3 378	3 341	3 536	6
Others	541	556	600	8
Total	35 386	34 438	38 163	11

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Pakistan

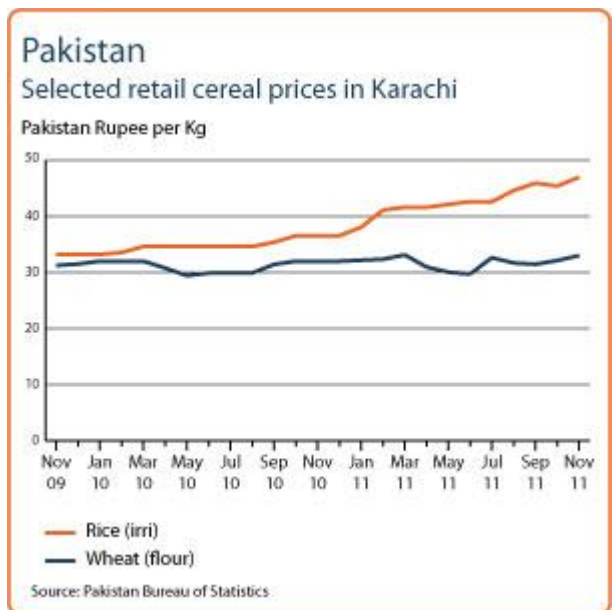
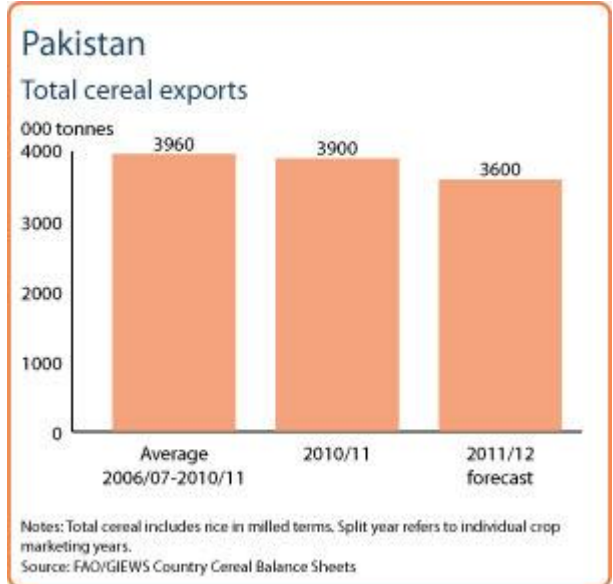
Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Food security remains a major challenge for the flood-affected population

The overall food supply situation in Pakistan has been satisfactory following consecutive years of relatively good harvests. However, the country has been hit by severe floods for the second year in row. The floods of this year affected over 9 million people. The number of houses damaged or destroyed has reached nearly 1.5 million. Furthermore, the affected population suffered significant crop, livestock and grain stock losses. Additionally, the impact of high inflation is a cause for concern especially for the low income population. The FAO initiative Pakistan Floods Rapid Response Plan 2011 is funded by donor contributions with nearly USD 10.6 million to provide approximately 91 000 flood-affected families with vital crop and livestock assistance.



Reference Date: 04-October-2011

FOOD SECURITY SNAPSHOT

- 2011 summer crops are affected by severe floods in southern Pakistan
- Prices of wheat and wheat flour have remained stable, while rice prices have been rising since the beginning of this year reaching a new record in August
- Food insecurity remains a major challenge for the flood-affected population

2011 summer crops are affected by severe floods in southern Pakistan

Heavy monsoon rains in August and September led to severe flooding in southern Pakistan, mostly in Sindh province. Official estimates indicate that, as of 27 September, over 8.9 million people have been affected and at least 880 000 hectares of standing crops have been damaged. The affected crop land represents 3.7 percent of the total national cropped area. However, damage to the current paddy crop is moderate and is estimated by FAO and Pakistan's space agency (SUPARCO), as of 20 September, at about 252 700 tonnes, or 2.5 percent of the normal national production. Reportedly a total of 20 000 irrigation structures have also been destroyed. Furthermore, nearly 92 thousand livestock have perished and 5 million surviving animals are at risk.

In Pakistan the summer *Kharif* season crops account for approximately 35 percent of total annual production. The official forecast for the 2011 rice crop, prior to the floods was just over 9.7 million tonnes, while the total production forecast for maize, sorghum and millet was 3.9 million tonnes. Wheat is the main staple crop in Pakistan and is cultivated during the winter (*Rabi*) season – harvested in April/June – and consequently it was gathered before the onset of the floods.

Reportedly the wheat stock would face some damages due to lack of proper storage facilities. The 2011 official harvest estimates at 24.21 million tonnes show a slight improvement of 3.9 percent over the previous year, which was also affected by severe floods in several provinces.

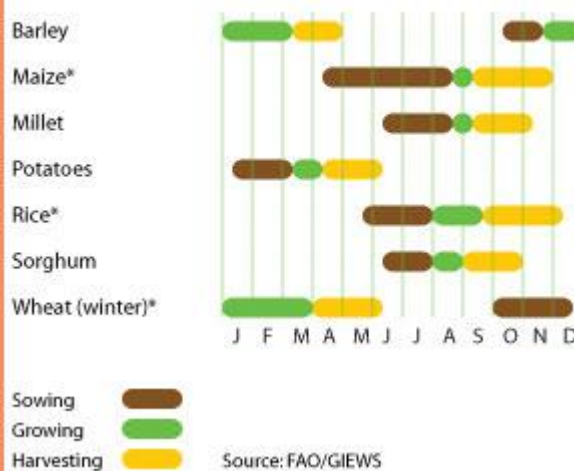
The government exported only 1.75 million tonnes of wheat by early August, out of a total target of 3 million tonnes, due to stiff competition from Russia. Prior to this year's floods in southern parts, FAO estimated the 2011 rice exports at about 2.5 million tonnes, slightly higher than the year before. The flood damages are not yet quantified.

Prices of wheat and wheat flour have remained stable, while that of rice have been rising since the beginning of this year reaching new record level in August

Prices of wheat and wheat flour have remained stable reflecting ample supplies of wheat at national level after a slowdown in exports. Unless exported, the ample stocks of wheat will put downward pressure on domestic prices of the commodity. Domestic price for rice which has been rising since the beginning of the year, following the trend in export

Pakistan

Crop calendar (*major foodcrop)



Pakistan

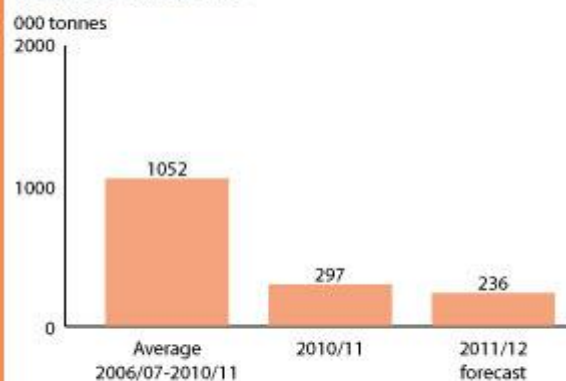
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Wheat	22 575	23 311	24 214	4
Rice (paddy)	8 893	7 231	9 745	35
Maize	3 378	3 341	3 536	6
Others	547	586	549	-6
Total	35 393	34 469	38 044	10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Pakistan

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

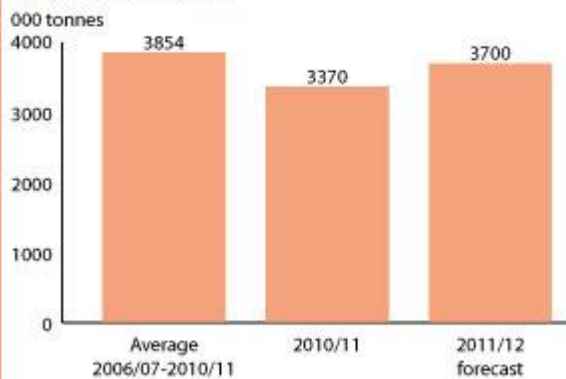
prices, reached new record levels in August 2011. Price of basmati rice, intended mainly for export, is on the rise since August 2010. The latest available official data indicate that nationally the overall year-on-year consumer price inflation in August 2011 was at 11.6 percent.

Food insecurity remains a major challenge for the flood-affected population

The overall food supply situation in Pakistan has been satisfactory following consecutive years of relatively good harvests. However, the recent onslaught of monsoon season affected some 8.9 million people. The number of houses damaged or destroyed has also been raised to nearly 1.5 million. Furthermore, the affected population has suffered severe crop, livestock and grain stock losses, as well as housing and infrastructure damage. According to the UN-Government joint assessment over 2.75 million people are in immediate need of food assistance in the monsoon affected areas, particularly in Sindh. FAO issued the Pakistan Floods Rapid Response Plan 2011 with an appeal for USD 18.9 million to provide immediate agricultural support. The impact of high inflation is a cause for concern especially for the low income population.

Pakistan

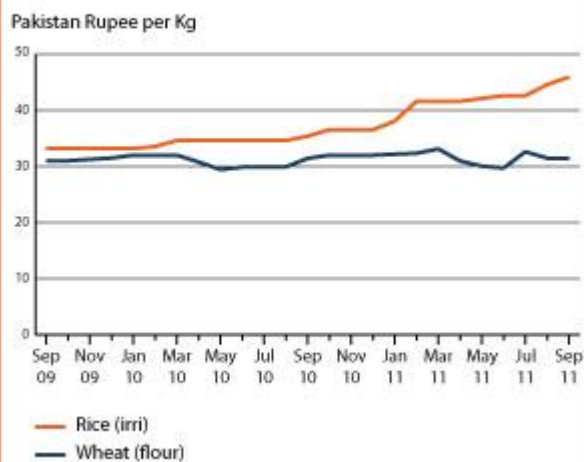
Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Pakistan

Selected retail cereal prices in Karachi



Source: Pakistan Bureau of Statistics

Reference Date: 23-May-2011

FOOD SECURITY SNAPSHOT

- In spite of the post-flood problems, the 2011 winter wheat harvest has been estimated at a near record level of 24 million tonnes
- Wheat prices have come down and rice prices are stabilized in recent months
- Food security has improved significantly but the lingering effects of 2010 floods and high inflation remain problems for the affected/low income population

The 2011 winter wheat harvest is estimated at a near record level of 24 million tonnes

In Pakistan, in spite of the severe flood related losses of farm infrastructure and seed stocks, plantings of winter wheat were up, the weather was generally good and supply of irrigation water and fertilizers were better than the year before. Although the official target is set at a record high level of 25 million tonnes, FAO forecasts it at 24 million tonne, an improvement by about 3 percent over the level of last year but just shy of the record level of 2009. Wheat plantings have been reportedly increased, mainly due to the cultivation along the Indus river banks covered with the fertile silt deposits following the huge flash floods during last summer.

In 2010 severe floods caused by heavy monsoon rains damaged some 2.4 million hectares of standing crops. For the rice crop, the area totally or partially damaged was estimated at 872 900 hectares or about one-third of last year's plantings. The final official estimate of the 2010 paddy production was at 8.3 million tonnes, much higher than the preliminary one, representing a drop of 20 percent from the previous year.

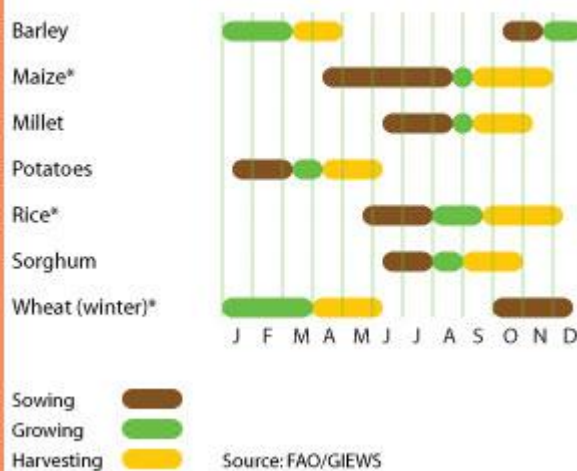
Reportedly Pakistan has accumulated significant levels of stocks of wheat and has authorized exports in marketing year 2010/11 (May/April) to clear silos and make room for the grain coming from the upcoming harvest in May-June. By early March, exports of 1 million tonnes of wheat have been recorded and the 2011/12 exports of rice and wheat are estimated at 4.1 million tonnes. The country would benefit from high international wheat prices.

Wheat prices have come down and rice prices stabilized in recent months

Prices of wheat and wheat flour started to decline at the beginning of April in view of the good prospects of 2011 wheat harvest. In the third week of May the year-on-year wheat price inflation was 0.9 percent, on the contrary the rice price inflation remained high at 22.2 percent. The general price inflation in Pakistan in April was 13 percent. Prices have generally remained strong due to the resumption of wheat exports after a three-year export ban. Retail rice prices in Karachi have stabilized after a steady increase over the past few months.

Food security has improved significantly but concerns remain for some of the flood-affected

Pakistan Crop calendar (*major foodcrop)

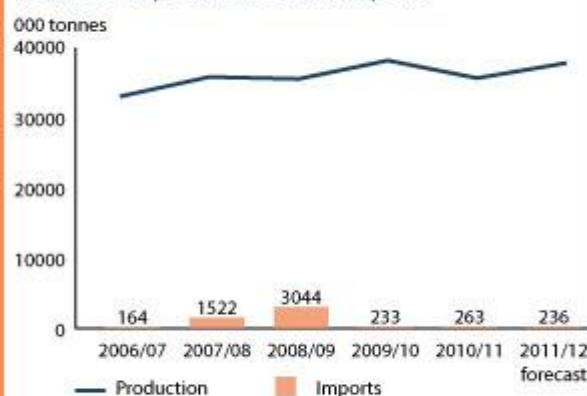


Pakistan Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Wheat	22 575	23 311	24 000	3
Rice (paddy)	9 106	8 300	10 000	20
Maize	3 428	3 590	3 341	-7
Others	433	365	365	0
Total	35 626	35 637	37 786	6

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

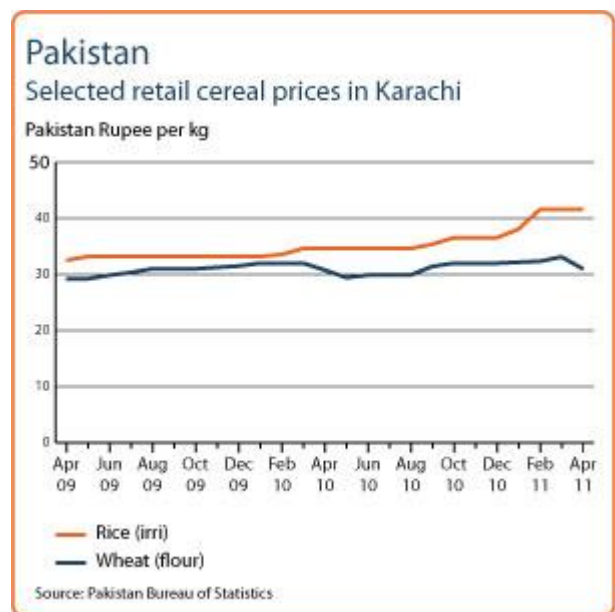
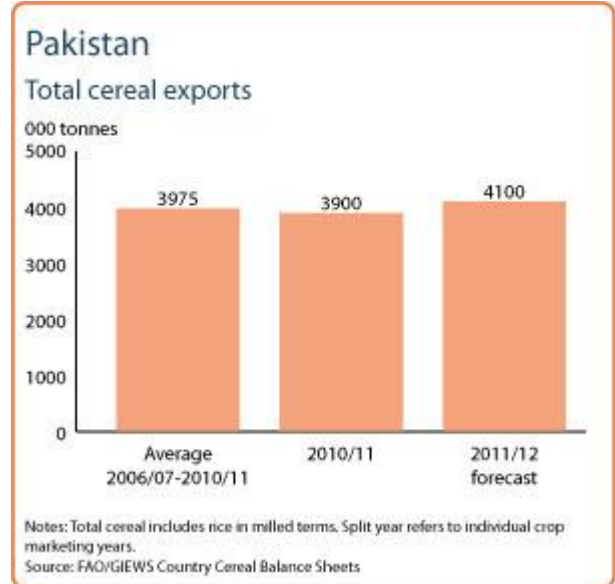
Pakistan Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

and low income population

The overall food supply situation in Pakistan has been satisfactory following consecutive years of good harvest. However, the flood emergency affected some 18 million people. The revised estimate of relief and early recovery interventions over a 12-month period (Aug.2010 to Jul.2011) for agriculture sector is USD 170.6 million of which only USD 97.40 million has been received/committed so far. The impact of high inflation is a cause for concern especially for the low income population.



Reference Date: 18-April-2011

FOOD SECURITY SNAPSHOT

- Good prospects for the 2011 harvest in spite of the post-flood problems and slight reduction in the area planted to winter wheat
- Food prices stabilizing after having increased in the past few months
- Food security has improved but problem continues for some of the flood-affected people

Early prospects for 2011 winter wheat harvest are good

In Punjab, where more than 75 percent of the country's wheat is produced, a slight reduction in the area planted is reported. However, in Sindh province wheat plantings have been reportedly increased, mainly due to the cultivation along the Indus river banks covered with the fertile silt deposits following the huge flash floods during last summer. Production losses due to the damaged irrigation infrastructure are expected to be compensated by the improved fertilizer and good quality seed supplies during this season. Although the official target is set at a record high level of 25 million tonnes, FAO's early forecast for 2011 wheat production is about 24 million tonnes, slightly above last year's good harvest and close to the record crop in 2009.

In 2010 severe floods caused by heavy monsoon rains damaged some 2.4 million hectares of standing crops. For the rice crop, the area totally or partially damaged was estimated at 872 900 hectares or about one-third of last year's plantings. The final official estimate of the 2010 paddy production was at 8.3 million tonnes, much higher than the preliminary one, representing a drop of 20 percent from the previous year.

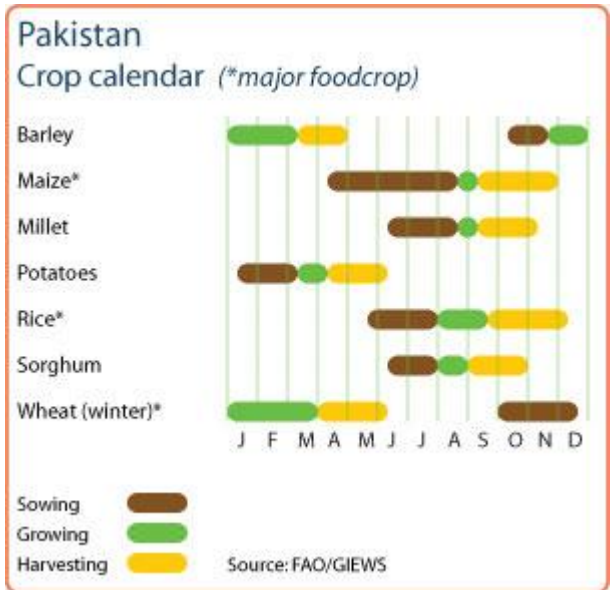
Reportedly Pakistan has accumulated significant levels of stocks of wheat and has authorized exports in marketing year 2010/11 (May/April) to clear silos and make room for the grain coming from the upcoming harvest in May-June. By early March, exports of 1 million tonnes have been recorded. The country would benefit from high international wheat prices.

Food prices stabilizing after increase in the past few months

Prices of wheat and wheat flour started to decline at the beginning of April in view of the good prospects of 2011 wheat harvest. In March they were already stable and close to their levels of a year earlier. Prices have generally remained strong due to the resumption of wheat exports after a three-year export ban. Retail rice prices in Karachi have stabilized after a steady increase over the past few months.

Food security has improved but remains a problem for some of the flood-affected population

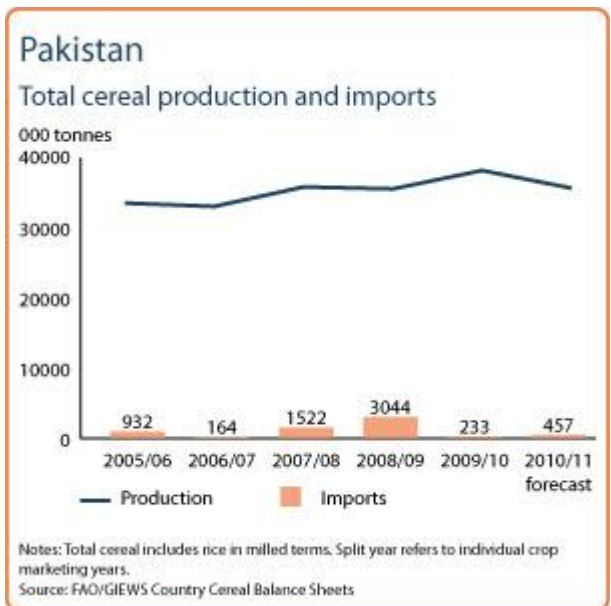
The overall food supply situation in Pakistan has been satisfactory following consecutive years of good harvest. However, the flood emergency affected some 18 million people. The revised estimate of



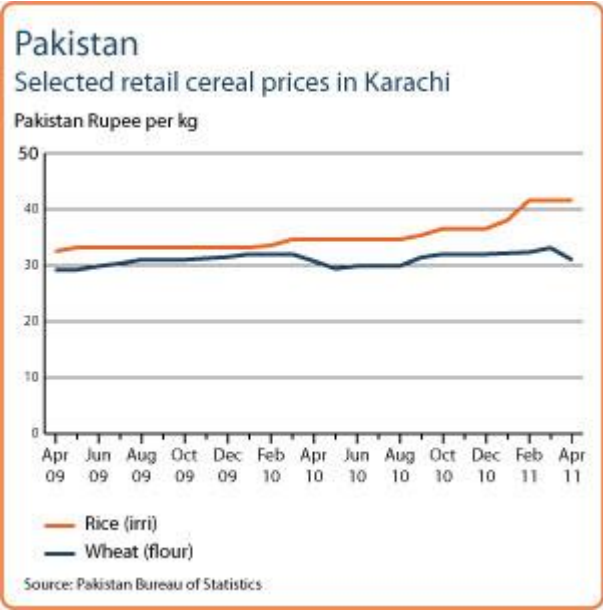
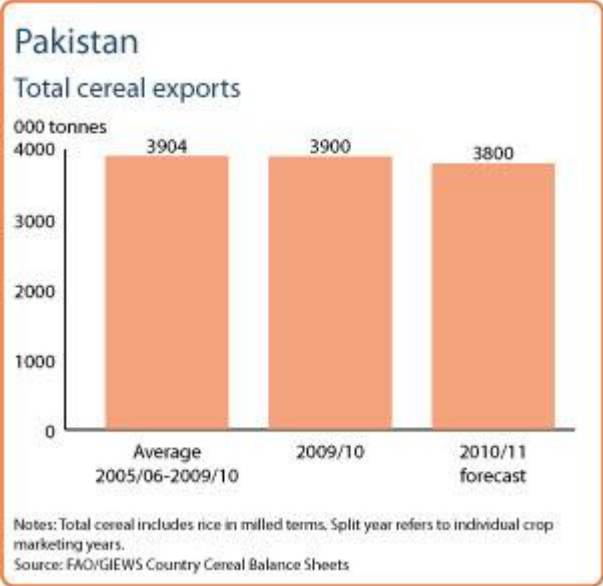
Pakistan Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Wheat	22 235	24 033	23 311	-3
Rice (paddy)	9 110	10 319	8 300	-20
Maize	3 332	3 262	3 590	10
Others	253	236	240	2
Total	35 200	38 143	35 637	-7

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



relief and early recovery interventions over a 12-month period (Aug.2010 to Jul.2011) for agriculture sector is USD 170.6 million of which only USD 97.40 million has been received/committed so far. The impact of higher rice prices on overall food consumption of the vulnerable population is still expected to be significant.



Reference Date: 10-February-2011

FOOD SECURITY SNAPSHOT

- In spite of the post-flood problems and slight reduction in the area planted to winter wheat, the early prospects for the 2010/11 harvest are good.
- Wheat prices are high but relatively stable and rice prices steadily rising in recent months.
- Food security has improved but problem continues for some of the flood-affected people

Early prospects for 2010/11 winter wheat harvest are good

In Punjab, where more than 75 percent of the country's wheat is produced, a slight reduction in the area planted is reported. However, in Sindh province wheat plantings have been reportedly increased, mainly due to the cultivation along the Indus river banks covered with the fertile silt deposits following the huge flash floods during last summer. Production losses due to the damaged irrigation infrastructure are expected to be compensated by the improved fertilizer and good quality seed supplies during this season. If the March temperatures would remain cool, necessary for wheat maturity, a good harvest is possible. Although the official target is set at a record high level of 25 million tonnes, FAO's early forecast for 2011 wheat production is 23.3 million tonnes, slightly below last year's record crop but above the average of the previous five years.

In 2010 severe floods caused by heavy monsoon rains damaged some 2.4 million hectares of standing crops. For the rice crop, the area totally or partially damaged was estimated at 872 900 ha or about third of last year's plantings. The 2010 paddy production is preliminary estimated at 6.3 million tonnes, representing a drop of 38 percent from the previous year.

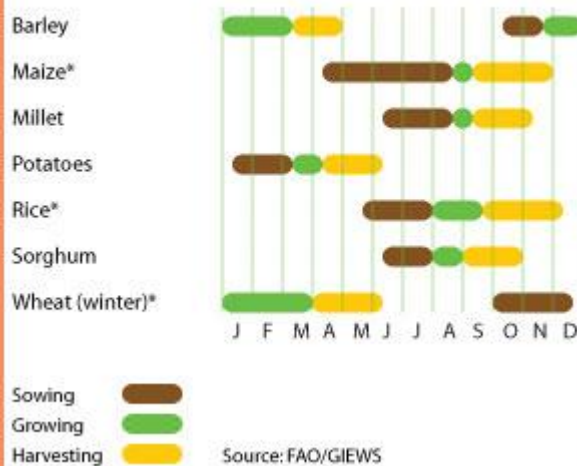
Food prices have increased in the past two months

In Pakistan, prices of wheat and wheat flour after the seasonal drop during May to August 2010 have increased and are currently high but stable over last few months. Despite the damages from the summer floods, wheat exports from Pakistan have resumed after lifting a three-year ban and as result the local market prices have been pushed up to some extent. However, reportedly Pakistan has accumulated significant level of stocks of wheat which would need to be cleared to make room for the grain coming from the upcoming harvest in May-June. The country would benefit from high international wheat prices. Retail rice prices have been rising in recent months after having been stable for some time.

Food security has improved but remains a problem for some of the flood-affected population

The overall food supply situation in Pakistan has been satisfactory following the two consecutive years of good harvest. However, the flood emergency affected some affected about 18 million people. The revised estimate of relief and early recovery interventions over a 12-month period (Aug.2010 to Jul.2011) for agriculture sector is USD

Pakistan Crop calendar (*major foodcrop)

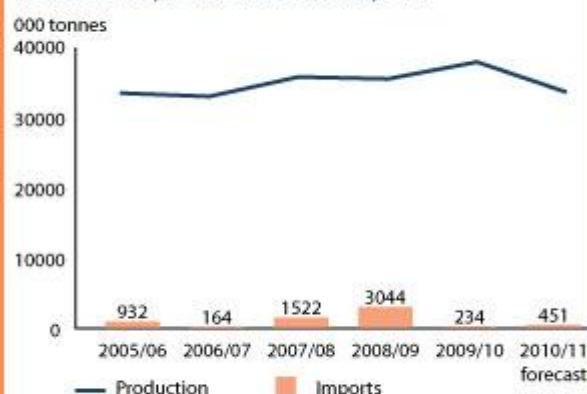


Pakistan Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Wheat	22235	24033	23311	-3
Rice (paddy)	9067	10106	6300	-38
Maize	3331	3262	3590	10
Others	528	529	436	-18
Total	35162	37929	33637	-11

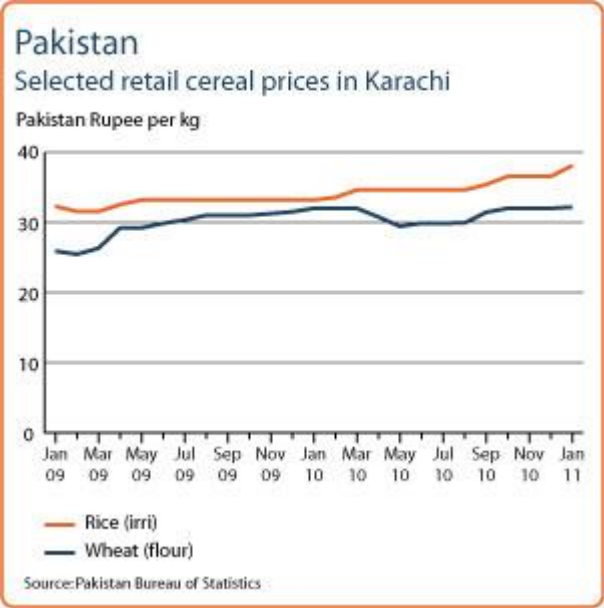
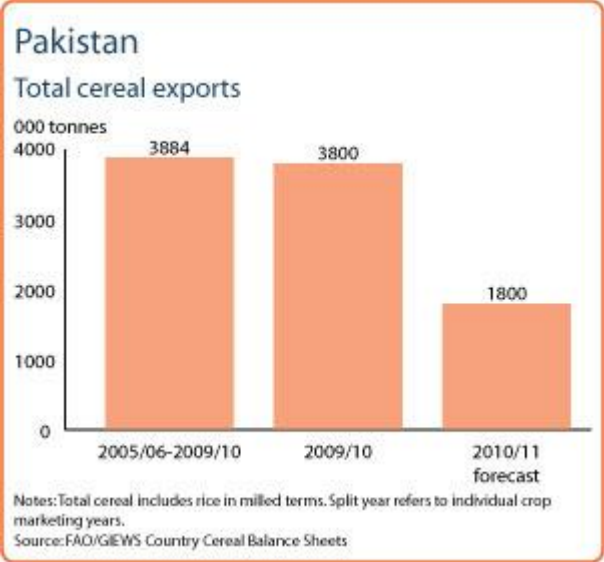
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Pakistan Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

170.6 million of which only USD 97.40 million has been received/committed so far. The impact of rising prices on overall food consumption of the vulnerable population is still expected to be significant.



Reference Date: 9-November-2010

FOOD SECURITY SNAPSHOT

- Planting of the 2010/11 winter wheat crop maybe affected due to flood damage
- Significant losses of the 2009/10 rice and other foodcrops are estimated due to the unprecedented floods in major crop producing areas in July and August
- Food prices are rising after a period of stability
- Food insecurity is a major problem for the flood-affected population

2010/11 winter wheat crop may be affected by flood damage

Planting of winter wheat, the country's main staple crop, is currently ongoing under difficult conditions. FAO estimated that farmers have lost some 500 000 to 600 000 tonnes of wheat seed. FAO is providing agricultural inputs and other support to over half a million flood-affected households during the current Rabi season. If the damaged irrigation and other infrastructure are not repaired/rehabilitated in time, reduction in next year's harvest is likely.

Significant crop losses due to the unprecedented floods in major producing areas are estimated

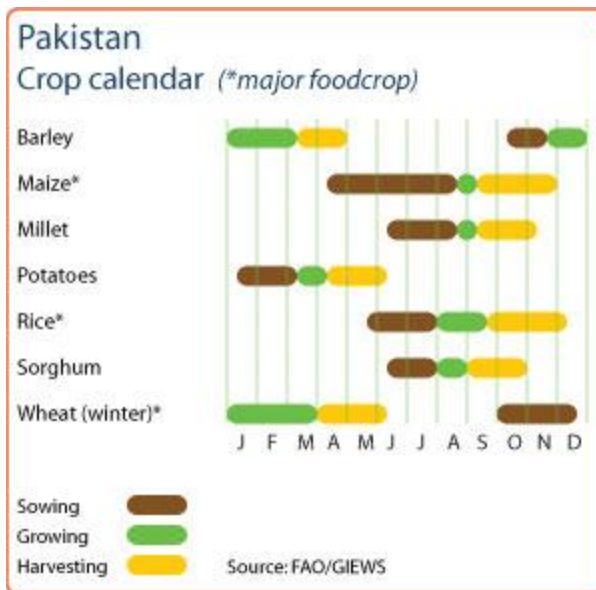
Severe floods caused by heavy monsoon rains from 22 July 2010 and further bursting of riverbanks have led to one of the most disastrous crises in Pakistan. According to the Government reports over 20 million people have been affected by the floods resulting in a death toll well over 1,500. In total some 2.4 million hectares of standing crops were reported damaged. For the rice crop, the area totally or partially damaged is estimated at 872 900 ha or about third of last year's plantings. The 2010 paddy production is estimated at 6.3 million tonnes, representing a drop of 38 percent from the previous year. Highest losses in terms of area cultivated were recorded in Sindh followed by Punjab, Baluchistan and KPK. Over a million animals have been lost and 22 million surviving ones are affected. FAO is assisting 261 730 families with animal feed/veterinary supplies.

Good paddy crop was gathered in 2009

The last paddy crop, harvested in December 2009 was estimated at 10.11 million tonnes, about 3 percent below the record level in the previous year, but still some 11 percent above the average of the previous five years. As the world's third-largest rice exporter, the country is estimated to have exported about 3 million tonnes of rice during 2010. Total net cereal exports in 2010 are expected to remain strong (above average) just below the record level of the previous year.

Food prices have increased in the past two months

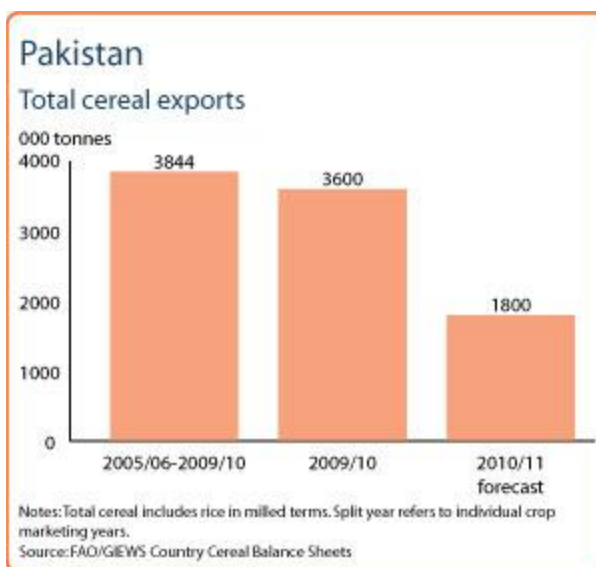
In Pakistan, prices of wheat that had remained stable after the floods, increased in September and October and are currently some 10 percent higher than in August. This rise is attributed to higher demand from Afghanistan and uncertainty about planting of the new crop due to damage caused by the severe floods in July/August. The increase in



Pakistan Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	22234	24030	23864	-1
Rice (paddy)	9067	10106	6300	-38
Maize	3311	3204	3590	12
Others	522	492	461	-6
Total	35135	37832	34215	-10

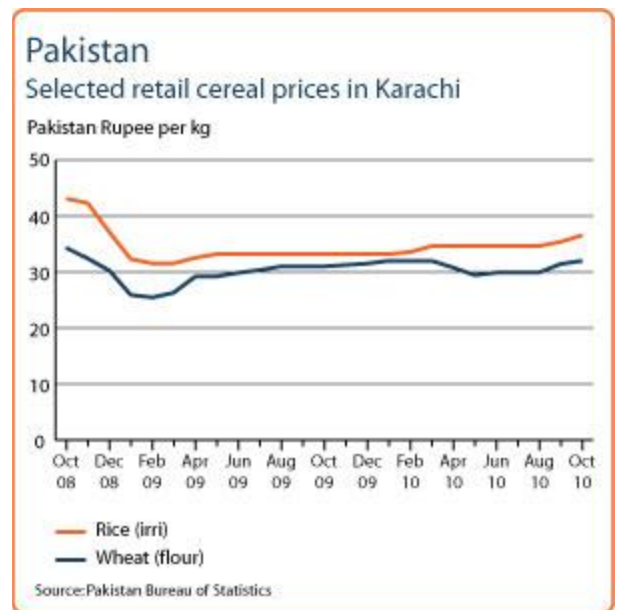
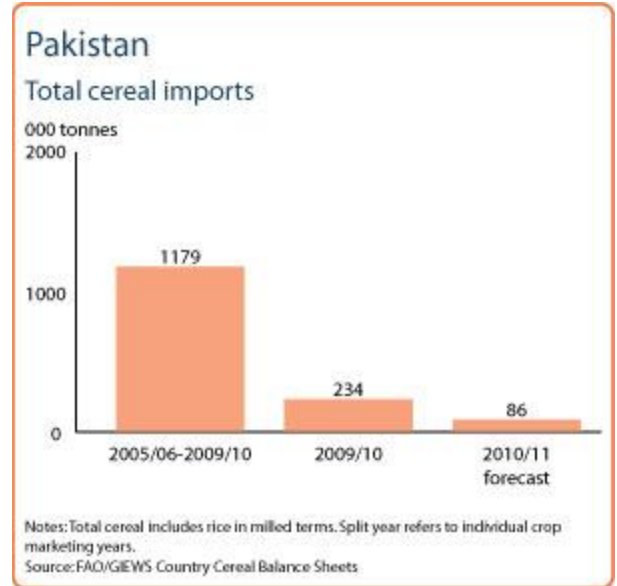
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



prices has been more pronounced in the main producing region of Punjab (Lahore market). With improved second consecutive bumper wheat harvests this year retail prices of wheat in major cities markets had come down from a peak of about PKR 29/kg two years ago to about 26 in October 2010. They remained, however, significantly higher in comparison to the pre-2008 food-crisis levels. Rice prices also have been rising in recent months after having been stable for some time. The price impact on overall food consumption of the vulnerable population is still expected to be substantial.

Food insecurity a major problem for flood-affected population

The overall food supply situation in Pakistan has been satisfactory following the two consecutive years of good harvest. However, the flood emergency has affected some 10 percent of the national population. According to the Food Cluster Report, plans to respond to up to 7 million are in need of assistance. So far, donor funding committed for the emergency response amounts to USD 83.9 million, the total requirement has been set at USD 107 million.



GIEWS Country Brief

Pakistan



Reference Date: 3-September-2010

FOOD SECURITY SNAPSHOT

- 2010 summer crops are affected by severe floods in major crop producing areas
- Food prices still high but stable
- Food insecurity a major problem for the flood-affected population

2010 summer crops are affected by severe floods in major producing areas

Severe floods caused by heavy monsoon rains from 22 July 2010 and further bursting of riverbanks have led to one of the most disastrous crises in Pakistan. According to the Government reports over 18 million people have been affected by the floods resulting in a death toll well over 1,500 (as of 1 September 2010). Floodwaters are receding in many areas although concerns about standing water remain. A rapid flood damages assessments carried out towards the end of August by the Agriculture Cluster in the country estimate that nationally 1.3 million hectares of field crops cultivated have been reported as affected in all the four provinces of Pakistan. For the rice crop, the area damaged represents some 13 percent of last year's plantings. Highest losses in terms of area cultivated were recorded in Punjab followed by Sindh, KPK and PAK. Over a million animals have been lost.

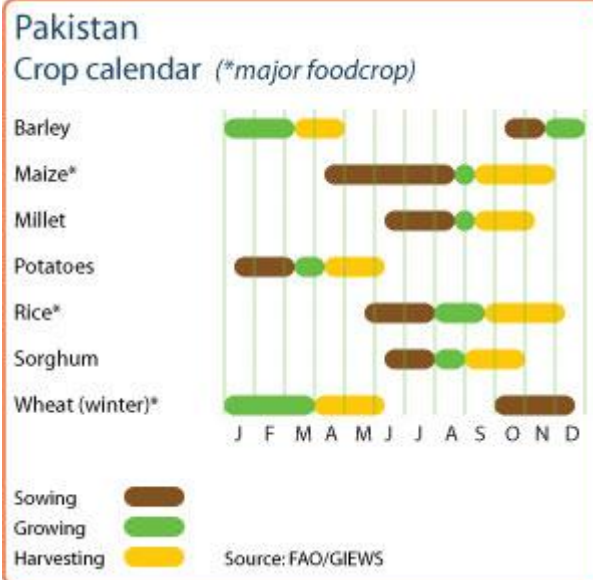
Winter wheat was harvested from April to June. The official final estimate of harvest at 23.86 million tonnes shows a slight reduction of 170 000 tonnes or 0.7 percent below the previous year's record output. During the season severe rainfall deficit existed throughout the country. However, since in the main growing areas of winter wheat is irrigated the national harvest turned out to be near record level. High wheat prices at planting, favourable government support programs (high procurement price currently set at PKR 950 per 40 kg bag, and subsidized fertilizer prices and credit) resulted in a good output this season.

Good paddy crop was gathered in 2009

The last paddy crop, harvested in December 2009 was estimated at 10.02 million tonnes, about 3 percent below the record level in the previous year, but still some 11 percent above the average of the previous five years. As the world's third-largest rice exporter, the country is estimated to have exported about 3million tonnes of rice during 2009. Total net cereal exports in 2010 (May/April) marketing year are expected to remain strong (above average) just below the record level of the previous year.

Food prices still high but stable

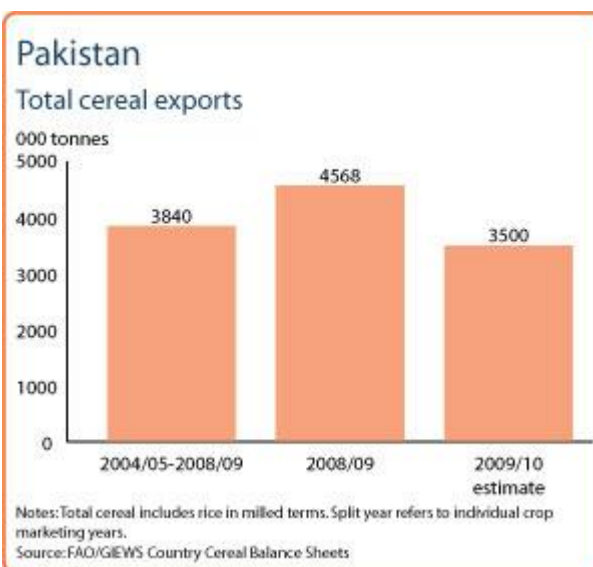
Food staple prices have declined from the 2008 peak, but remain significantly higher in comparison to the pre-2008 food-crisis levels. Rice prices in past several months have stabilized. With the much improved wheat harvest this year retail prices of wheat in major city markets in recent months have come down from a peak of about PKR



Pakistan Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	22234	24030	23860	-1
Rice (paddy)	9067	10106	7500	-26
Maize	3311	3204	3313	3
Others	522	492	461	-6
Total	35135	37832	35134	-7

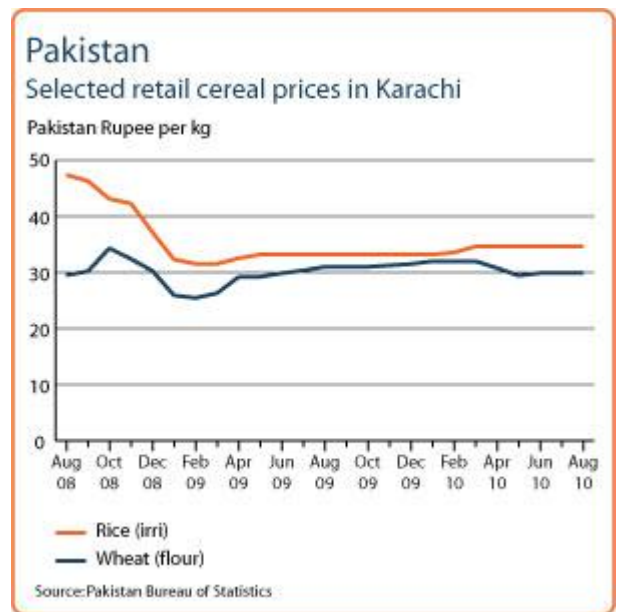
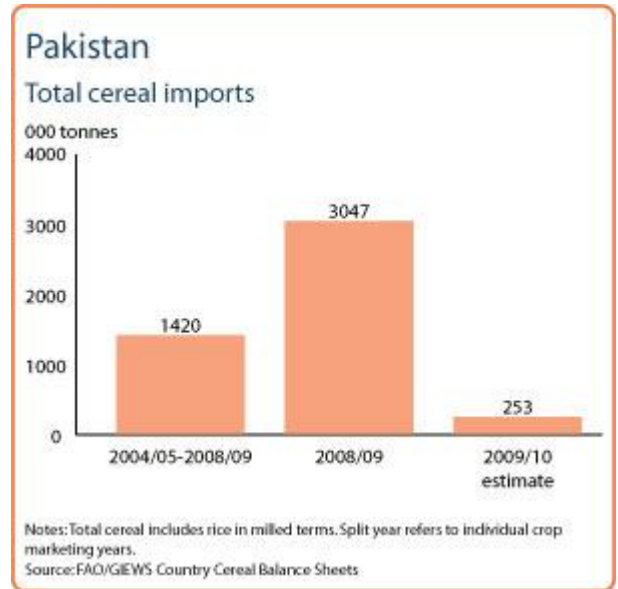
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



26/kg to about 23. The price impact on overall food consumption of the vulnerable population is still expected to be substantial.

Food insecurity a major problem for flood-affected population

The overall food supply situation in Pakistan is satisfactory following the two consecutive years of good harvest. However, the flood emergency has affected some 10 percent of the national population. According to the Food Cluster Report, plans to respond to up to 6 million beneficiaries in September are underway.



Reference Date: 13-July-2010

FOOD SECURITY SNAPSHOT

- 2010 winter *Rabi* wheat estimated at near record level despite fears of drought earlier
- Food prices still high
- Food insecurity persist in conflict-affected areas

2010 winter wheat crop better than predicted

Winter wheat was harvested from April to June. The official final estimate of harvest at 23.86 million tonnes shows a reduction of only 170 000 tonnes or 0.7 percent below the previous year's record output. During the season severe rainfall deficit existed throughout the country. However, since in the main growing areas of winter wheat is irrigated the national harvest turned out to be near record level. High wheat prices at planting, favourable government support programs (high procurement price currently set at PKR 950 per 40 kg bag, and subsidized fertilizer prices and credit) resulted in a good output this season.

Good paddy crop was gathered in 2009

The last paddy crop, harvested in December 2009 was estimated at 10.02 million tonnes, about 3 percent below the record level in the previous year, but still some 11 percent above the average of the previous five years. As the world's third-largest rice exporter, the country is estimated to have exported about 3.8 million tonnes of rice during 2009. Total net cereal exports in 2010 (May/April) marketing year are expected to remain strong (above average) just below the record level of the previous year.

Food prices still high

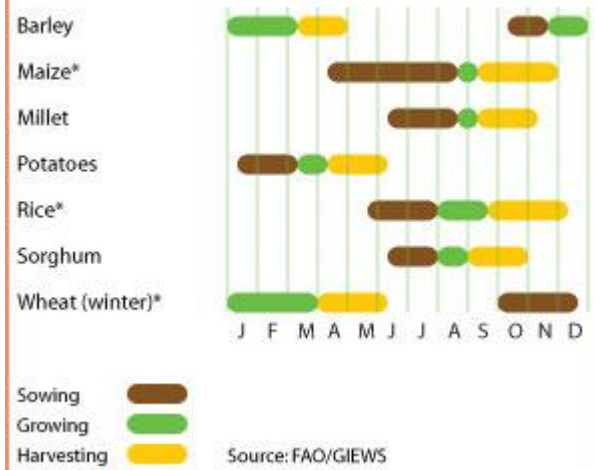
Food staple prices have declined from the 2008 peak, but remain significantly higher in comparison to the pre-2008 food-crisis levels. Rice prices in past several months have stabilized. With the much improved wheat harvest this year retail prices of wheat in major city markets in recent months have come down from a peak of about PKR 26/kg to about 23. The price impact on overall food consumption of the vulnerable population is still expected to be substantial.

Food insecurity persist in conflict-affected areas

The overall food supply situation in Pakistan is satisfactory following the two consecutive years of good harvest. However, lingering effects of conflict the Federally Administered Tribal Areas (FATA) and North West Frontier Province (NWFP) are responsible for food insecurity of the displaced population.

Pakistan

Crop calendar (*major foodcrop)



Pakistan

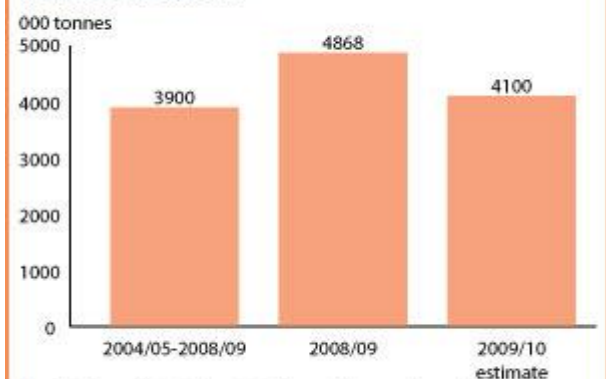
Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	22234	24030	23860	-1
Rice (paddy)	9049	10015	10100	1
Maize	3311	3204	3600	12
Others	522	492	492	0
Total	35117	37741	38052	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Pakistan

Total cereal exports

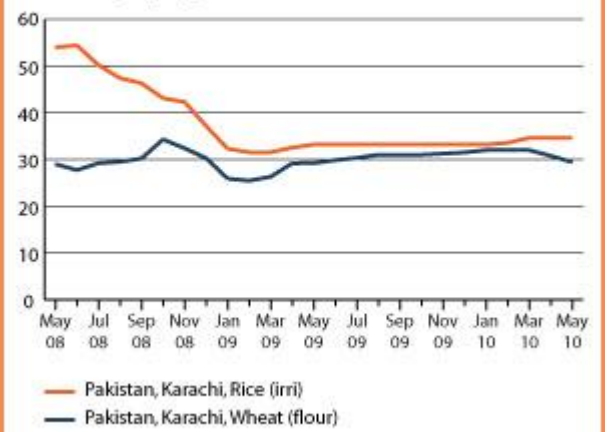


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Pakistan

Selected retail cereal prices

Pakistan Rupee per kg



Source: Pakistan Bureau of Statistics

Reference Date: 18-February-2010

FOOD SECURITY SNAPSHOT

- Unfavourable weather since December for *Rabi* crops
- Record wheat and rice outputs in 2009
- Food prices still high
- Food insecurity persist in conflict areas

Unfavourable weather for *Rabi* crops

The sowing of the mostly irrigated 2010 wheat crop was completed in December. In response to higher producer prices, a significant increase in area planted is reported. However, the winter rains this season have been well below normal. According to the Pakistan Meteorological Department, nationally, rains were 47 percent below normal in January and 14 percent below normal in February (as of 10 February). Rain deficit has been worse in the main growing provinces – Punjab and Sindh. An official statement on 25 January stated that the country is “likely to come under emerging agricultural drought”. Some significant rains were reported in parts of the country in past few days which may help to replenish the depleting reservoirs to some extent. The abnormal dry weather conditions are associated with El Niño phenomenon and are reportedly causing severe moisture stress to *rabi* crops especially in marginal agricultural in Barani area, in Sindh which are rainfed. Since in the main growing areas the winter wheat is irrigated and harvesting is due from late March through July, the final wheat outcome in 2010 will depend on the river water levels and irrigation water supplies in next two to three months.

Good paddy crop gathered in 2009 and wheat crop was record

Harvesting of the 2009 paddy crop was completed in December 2009. Total paddy output is estimated at 9.56 million tonnes (6.4 million tonnes in milled terms), which is 8.3 percent below the record in the previous year, but still some 12 percent above the average of the previous five years. As the world’s fifth-largest rice exporter, the country is expected to export about 2.6 million tonnes of rice in 2009/10.

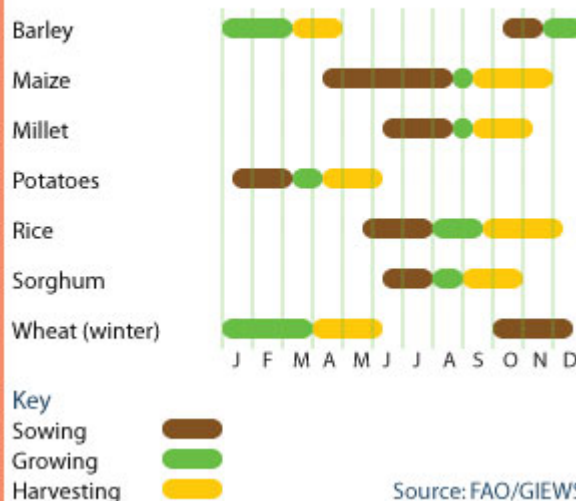
Wheat crop harvested in June was officially estimated at a record level output of 24 million tonnes, some 3 million tonnes more than the previous year’s level, reflecting a higher government support purchase price, favourable weather and subsidised fertilizers. As a result of the large wheat production, the country is expected to switch back to be a net wheat exporter in 2009/10, with net export of some 500 000 tonnes.

The overall food supply situation in Pakistan is satisfactory following the 2009 bumper crop and high level of cereal stocks. Total net cereal exports in 2009/10 are forecast at some 3.1 million tonnes, compared to 1.8 million tonnes in the previous year.

Food prices still high

Food staple prices have declined from the 2008 peak, but remain significantly higher in comparison to the pre-2008 food-crisis levels. The price impact on overall food consumption of the vulnerable population is still expected to be substantial. The retail price of wheat flour in Karachi

Crop calendar Pakistan

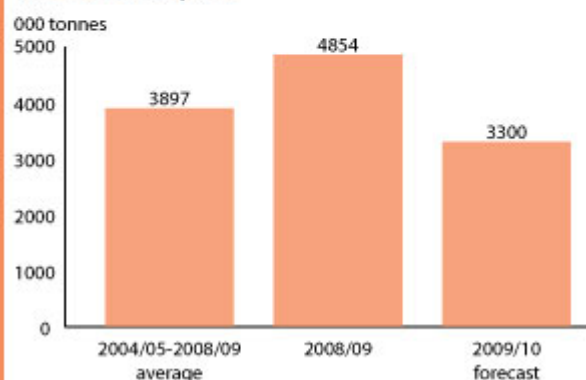


Pakistan Cereal production

	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes			percent
Wheat	21437	21500	24030	12
Rice (paddy)	8553	10426	9561	-8
Maize	3160	3200	3200	0
Others	505	485	492	1
Total	33654	35611	37283	5

Note: percentage change calculated from unrounded data.

Total cereal exports



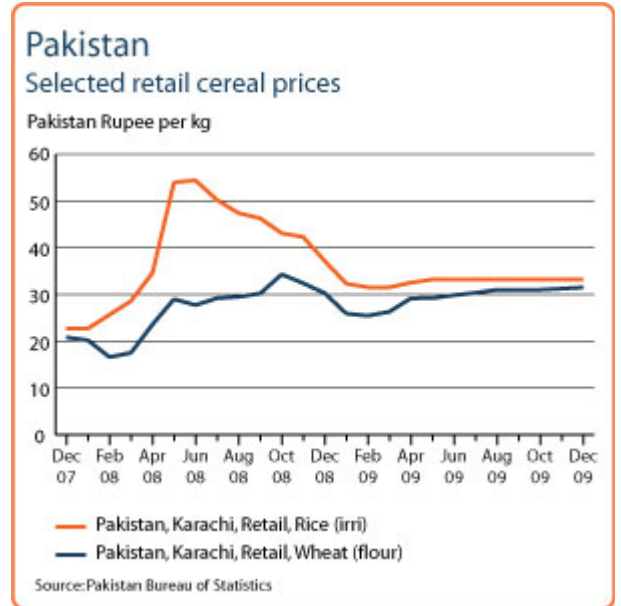
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

was 32 rupee/kg in January 2010, lower than the peak in October 2008, but still 58 percent higher compared to that in January 2008. The retail price of rice (IRRI variety) in Karachi was 33.2 rupee/kg in January 2010, 39 percent below the peak in June 2008, but 46 percent higher than the level 24 months before. Both wheat flour price and rice price have been almost unchanged in the last several months.

Food insecurity persist due to intensified conflict in parts

The overall food supply situation in Pakistan is satisfactory. However, intensified insecurity in Pakistan’s Federally Administered Tribal Areas (FATA) and North West Frontier Province (NWFP) has triggered significant displacement since August 2008. Over 2 million internally displaced persons (IDPs) have reportedly been registered and need food assistance.



Reference Date: 13-January-2010

FOOD SECURITY SNAPSHOT

- Record wheat and rice outputs in 2009
- Unfavourable weather in December for recently planted 2010 rabi crops
- Food prices still higher
- Food insecurity persist in conflict areas

Record wheat crop and good paddy crop gathered in 2009

Harvesting of the 2009 paddy crop was completed in December 2009. Total paddy output is estimated at 9.56 million tonnes (6.4 million tonnes in milled terms), which is 8.3 percent below the record in the previous year, but still some 12 percent above the average of the previous five years. As the world's fifth-largest rice exporter, the country is expected to export about 2.6 million tonnes of rice in 2009/10.

Wheat crop harvested in June was also officially estimated at a record level output of 24 million tonnes, some 3 million tonnes more than the previous year's level, reflecting a higher government support purchase price, favourable weather and subsidised fertilizers. As a result of the large wheat production, the country is expected to switch back to be a net wheat exporter in 2009/10, with net export of some 500 000 tonnes.

The overall food supply situation in Pakistan is satisfactory following the 2009 bumper crop and high level of cereal stocks. Total net cereal exports in 2009/10 are forecast at some 3.1 million tonnes, compared to 1.8 million tonnes in the previous year.

Sowing of 2010 wheat crop completed, but weather unfavourable for rabi crops

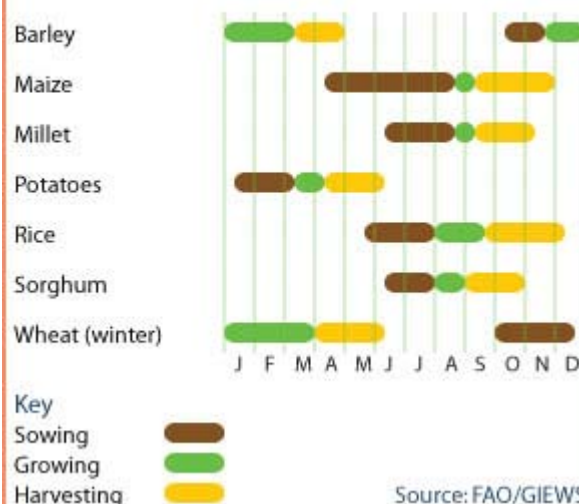
The sowing of the mostly irrigated 2010 wheat crop was satisfactory completed in December. In response to higher producer prices, a significant increase in area planted is reported. However, rains in December 2009 have been well below normal. In the main growing area of Punjab, rainfall in December was 96 percent below normal according to the National Meteorological Department of Pakistan. The abnormal dry weather conditions are associated with El Niño phenomenon and are reportedly causing severe moisture stress to rabi crops especially in marginal agricultural "Barani" areas which are rainfed.

As in the main growing areas the winter wheat is irrigated and harvesting is due from late March through July, the final wheat outcome in 2010 will depend on the river water levels and irrigation water supplies in next two to three months.

Food prices still high

Food staple prices have declined from the 2008 peak, but remain significantly higher in comparison to the pre-2008 food-crisis levels. The price impact on overall food consumption of the vulnerable population is still expected to be substantial. The retail price of wheat flour in Karachi was 31.5 rupee/kg in December 2009, 8.2 percent below the peak in

Crop calendar Pakistan



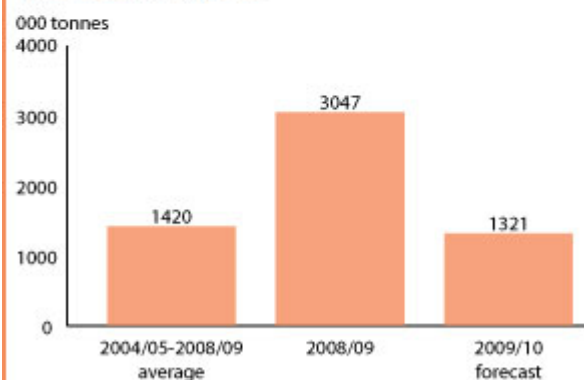
Pakistan

Cereal production

	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes			percent
Wheat	21437	21500	24030	12
Rice (in milled terms)	5705	6954	6377	-8
Maize	3160	3200	3200	0
Others	505	485	492	1
Total	30806	32139	34099	6

Note: percentage change calculated from unrounded data.

Total Cereals imports



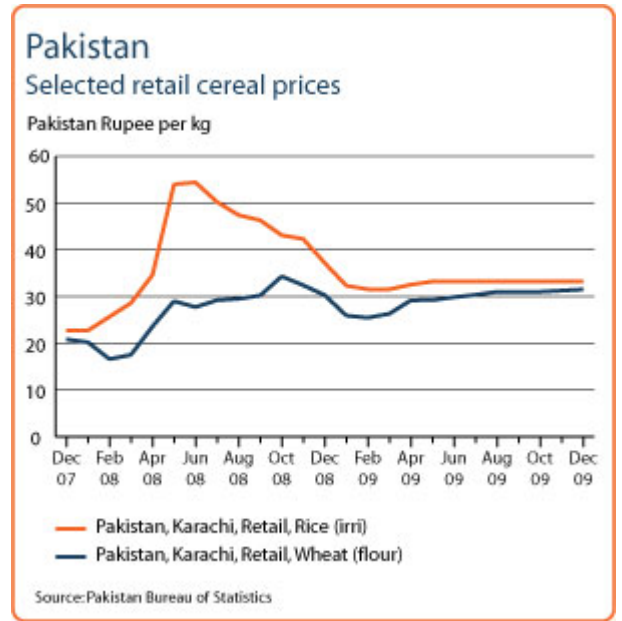
Notes: Total cereals includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

October 2008, but still 51.3 percent higher compared to that in December 2007. The retail price of rice (IRRI variety) in Karachi was 33.2 rupee/kg in December 2009, 39 percent below the peak in June 2008, but 46 percent higher than that in December 2007. Both wheat flour price and rice price have been almost unchanged in the last several months.

Food insecurity persist due to intensified conflict in parts

The overall food supply situation in Pakistan is satisfactory. However, intensified insecurity in Pakistan’s Federally Administered Tribal Areas (FATA) and North West Frontier Province (NWFP) has triggered significant displacement since August 2008. Over 2 million internally displaced persons (IDPs) have reportedly been registered and need food assistance.



Reference Date: 07-October-2009

FOOD SECURITY SNAPSHOT

- Record wheat and rice outputs in 2009
- Overall food supply situation satisfactory
- Food prices still higher
- Food insecurity persist in conflict areas

Record wheat crop gathered and good 2009 paddy crop expected

Harvesting of the 2009 wheat crop was completed in June and the output is officially estimated at a record of 24 million tonnes, some 3 million tonnes more than last year, reflecting a higher government supported purchase price (PKR 950/40 kg), favorable weather, and subsidized fertilizers. As a result of the large wheat production, the country is expected to switch back to be a wheat net exporter in 2009/10 and the government has removed a 35 per cent wheat export duty in September. The state procurement agency is expected to buy 6.5-7.5 million tonnes of wheat from the domestic market from 1 October 2009. Harvesting of the 2009 paddy crop has just started. The 2009 paddy output is forecast at a record of 8.9 million tonnes.

Overall food supply situation satisfactory

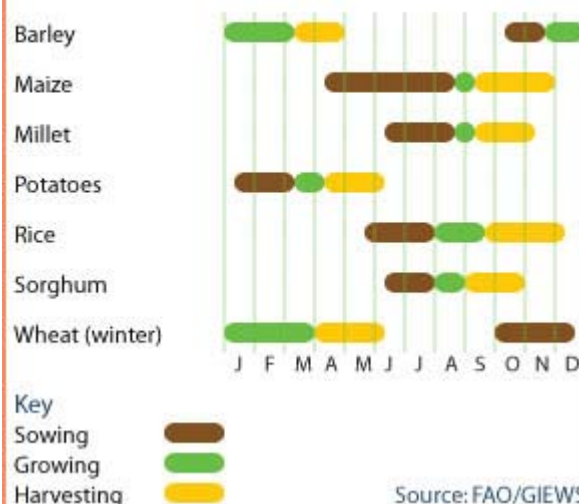
The overall food supply situation in Pakistan is satisfactory. The country is an exporter, mainly of rice. It imports and/or exports wheat depending on the domestic supply situation and demand from neighbouring countries. Total net cereal exports in 2009/10 are forecast at some 3.6 million tonnes, compared to 2.2 million tonnes in the previous year.

Food prices still high

Food staple prices have declined from the 2008 peak, but remain significantly higher in comparison to the pre-2008 food-crisis levels. The price impact on overall food consumption of the vulnerable population is still expected to be substantial. The retail price of wheat flour in Karachi was 31 rupee/kg in August 2009, 10 percent below the peak in October 2008, but still 59 percent higher compared to that in August 2007.

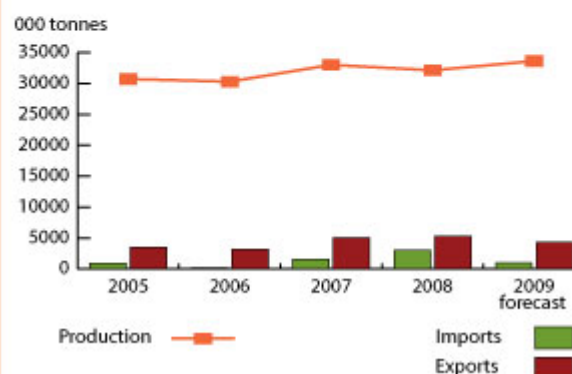
Affected by cross-border trade with Afghanistan, wheat retail price has overtaken the international prices since September 2008. The retail price of rice (IRRI variety) in Karachi was 33.2 rupee/kg in August 2009, 39 percent below the peak in June 2008, but 58 percent higher than that in August 2007.

Crop calendar Pakistan



Cereal production and trade Pakistan

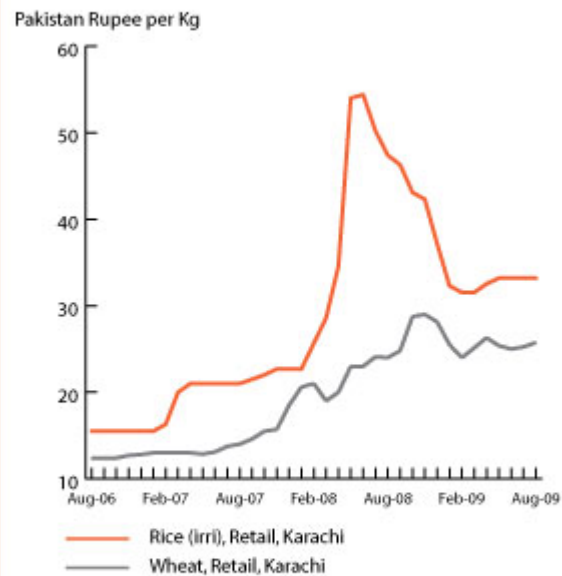
Cereal production	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes		percent	
Wheat	21437	21500	24000	11.6%
Rice (milled)	5705	6954	5949	-14.5%
Maize	3160	3200	3200	0%
Other	525	485	492	1.4%
Total Cereals	30801	32139	33641	4.7%



Food insecurity persist due to intensified insecurity

The overall food supply situation in Pakistan is satisfactory. However, intensified insecurity in Pakistan's Federally Administered Tribal Areas (FATA) and North West Frontier Province (NWFP) has triggered significant displacement since August 2008. Over 2.5 million internally displaced persons (IDPs) have reportedly been registered and need food assistance.

Pakistan Selected cereal prices



Source: Pakistan Bureau of Statistics