



GIEWS Country Brief Pakistan

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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

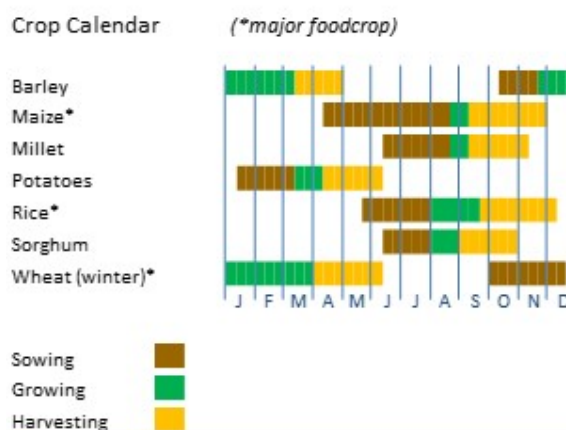
Heavy monsoon rains caused severe floods between mid-June and end-August 2022 with widespread devastation to the agricultural sector, especially in the southern parts of the country.

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

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Source: FAO/GIEWS.

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Cereal Production

	2017-2021	2021	2022	change
	average			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.

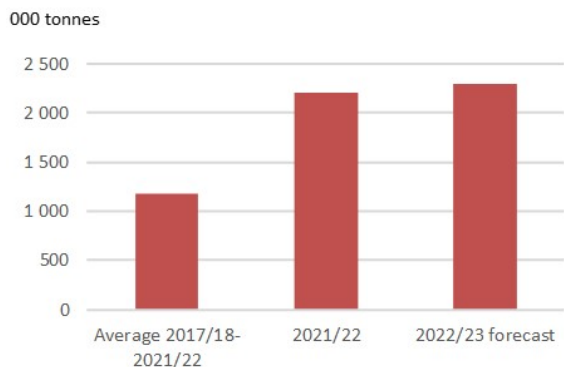
Overall, the year-on-year inflation rate increased to 27.3 percent in August 2022, compared to 8.4 percent in August 2021. The year-on-year food price inflation stood at 30.2 percent in rural areas and at 28.8 percent in urban areas.

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

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Wheat Imports

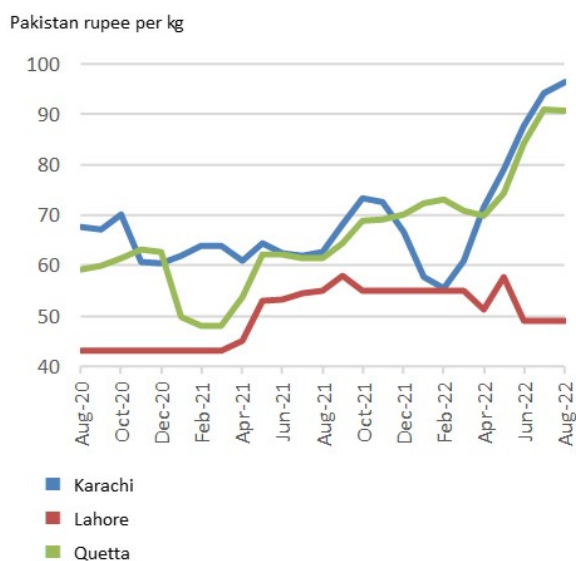


Note: Split year refers to crop marketing year.

Source: FAO/GIEWS Country Cereal Balance Sheets.

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Retail wheat flour prices in selected markets



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

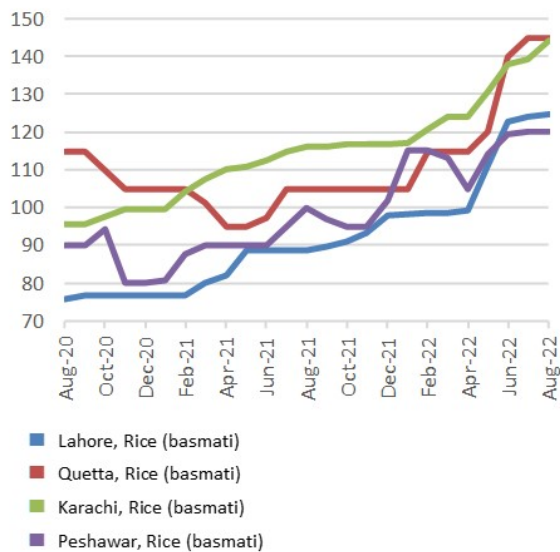
Phase 3 [Crisis] and above), between July and November 2022. Acute food insecurity levels are expected to increase considerably in 2022 as livelihoods of a large number of people have been disrupted and vulnerable households have often depleted their productive assets in order to secure their basic needs. 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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Retail rice prices in selected markets

Pakistan rupee per kg



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