Food and Agriculture Organization
of the United Nations

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**

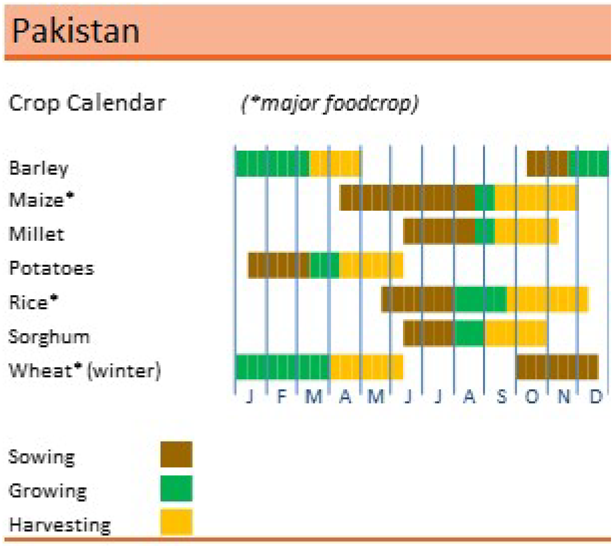
Area sown to 2024 wheat crop estimated at above-average level

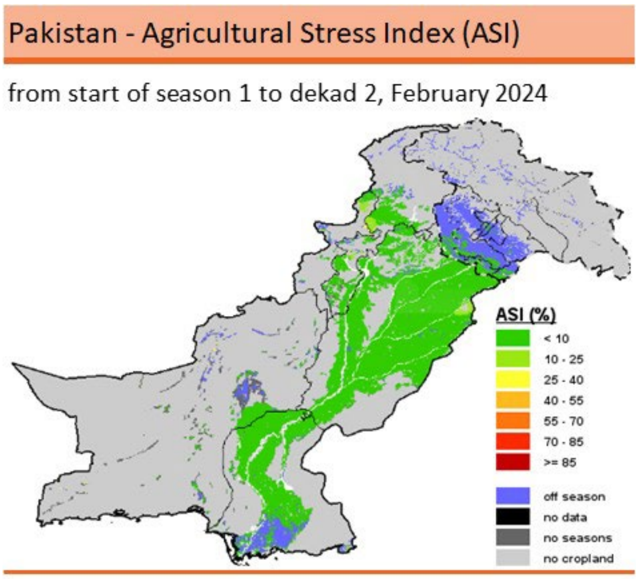
Planting of 2024 wheat crops, almost entirely irrigated, finalized in mid-December 2023 and harvesting is expected to start in March 2024, with the bulk harvested between April and early June. The area sown is estimated at an above-average level of 9.5 million hectares, supported by adequate soil moisture 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 Sidh, 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.





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

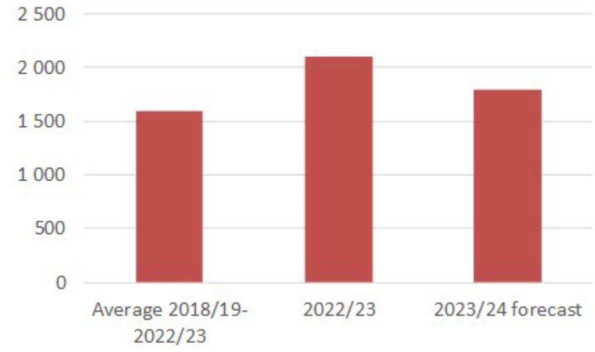
	2018-2022 average	2022	2023 estimate	change 2023/2022
		000 tonnes		percent
Wheat	25 669	26 208	28 180	7.5
Rice (paddy)	11 898	10 978	12 954	18.0
Maize	8 832	10 984	11 000	0.1
Others	501	468	485	3.6
Total	46 900	48 638	52 619	8.2

Note: Percentage change calculated from unrounded data.

Pakistan

Wheat Imports

000 tonnes

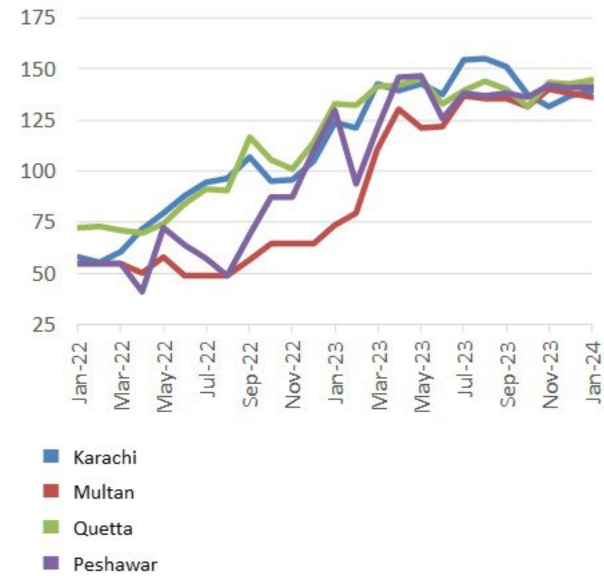


Note: Split years refer to crop marketing year.

Pakistan

Retail prices of wheat flour

Pakistan rupee per kg



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

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/.