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...
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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