United States
Department of
Agriculture
Foreign Agricultural Service

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Commodity Intelligence Report

Pakistan: Cotton Conditions Improve

Pakistan cotton production for 2018/19 is forecast at 8.5 million 480-pounds bales (mb), up 0.3 mb from last season (Figure 1). Area is estimated at 2.7 million hectares (mha), up 0.1 mha from last season. The area increase reflects prospects for higher cotton prices and delays in sugarcane payments, which encouraged some farmers to plant more cotton. Area has not yet reached the previous 2012/13 high of 3.0 mha, but it is gradually moving in that direction following the low-price-induced area of 2.4 mha that occurred in 2016/17 (Figure 2).

The year-to-year production estimate is higher due to the expected area increase. Final production, however, depends on multiple pickings during harvest. Farmers must decide on how much to invest in both inputs and labor, and recent cotton price increases encouraged these investments. In Pakistan, cotton is harvested by hand picking and farmers gauge the number of pickings while monitoring seed cotton prices. Harvest has begun in Sindh province, with the peak harvest for Pakistan typically taking place in October as picking moves northward into the major cotton producing districts of Punjab. This year price conditions induced farmers to adopt good agronomic and plant protection measures in the field, although cotton yields are forecast to be about the same as last year.

Pakistan mainly produces medium staple cotton. Lint quality is an issue within the industry due to the wide range of fiber quality and ginning results. Fiber quality can vary because farmers often plant multiple varieties as a hedge against poor germination rates.

On average, Punjab produces about 72 percent of Pakistan's cotton and Sindh 27 percent (Figure 3). In Punjab, most sowing activities take place during May and June. Provincial officials discourage early planting to counter the timing of peak bollworm activity. This season some late sowing continued up to the end of June. As an irrigated *kharif* (summer) crop, monsoon rainfall benefits cotton by recharging irrigation supplies. Precipitation was above normal this year and some areas were reporting excessive moisture (Figure 4).

In Sindh, cotton is sown during March and April. A temporary water shortage at one of Pakistan's key reservoirs delayed the start of planting by a few days, but water was diverted from another dam, enabling cotton planting to proceed near normal. Precipitation during the Sindh growing season has been below normal, but sufficient irrigation water remains available (see figure 5).

In areas of prolonged wetness there is a potential threat of insect pest multiplication. As expected, some hotspots of white fly and boll worm have been noted in parts of Punjab. Reports of pest infestation, however, have remained isolated, and growers have successfully managed to control any outbreaks.

September is generally the most crucial month for the cotton crop. Below-average temperatures and high humidity during the past several years were conducive to insect development, and farmers need to remain vigilant in monitoring for pest outbreaks. Overall, growers have reported good crop conditions showing a satisfactory number of bolls. Picking has begun in Sindh province and seed cotton prices remain attractive. The crop is approaching maturity in many areas. The next few weeks will remain crucial for crop development, and growers would not welcome any heavy rains during this period.

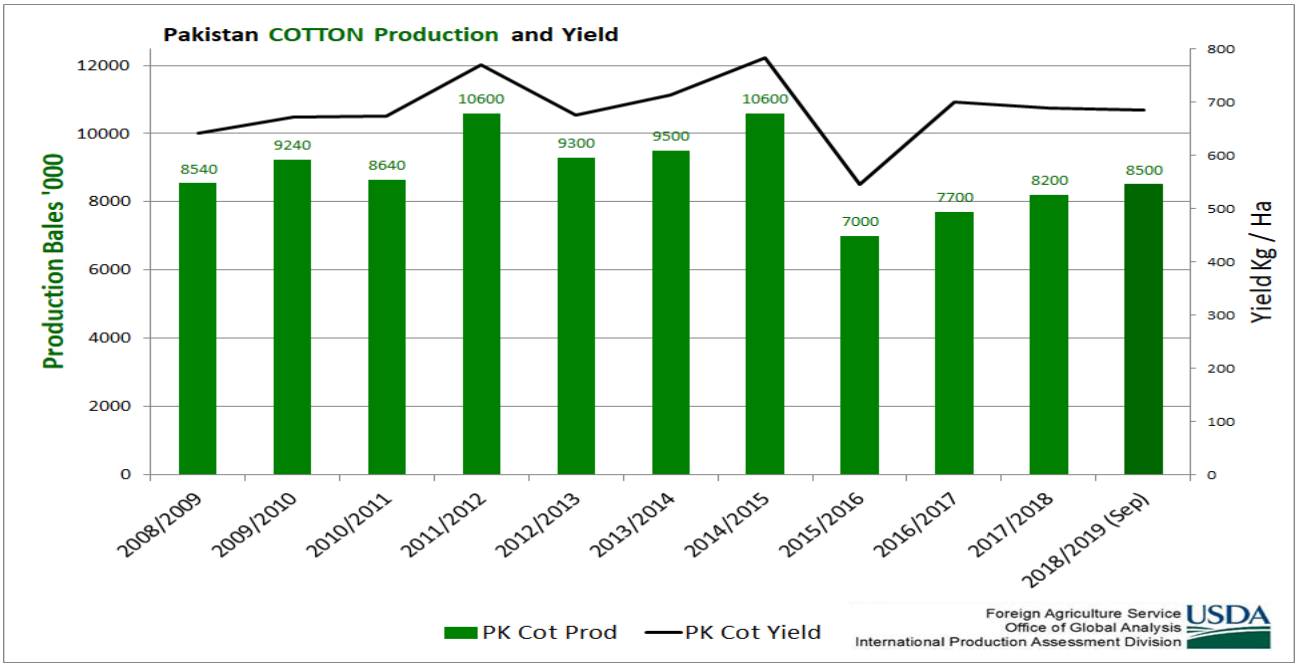

Figure 1 [Pakistan Cotton Production and Yield Time Series Chart]

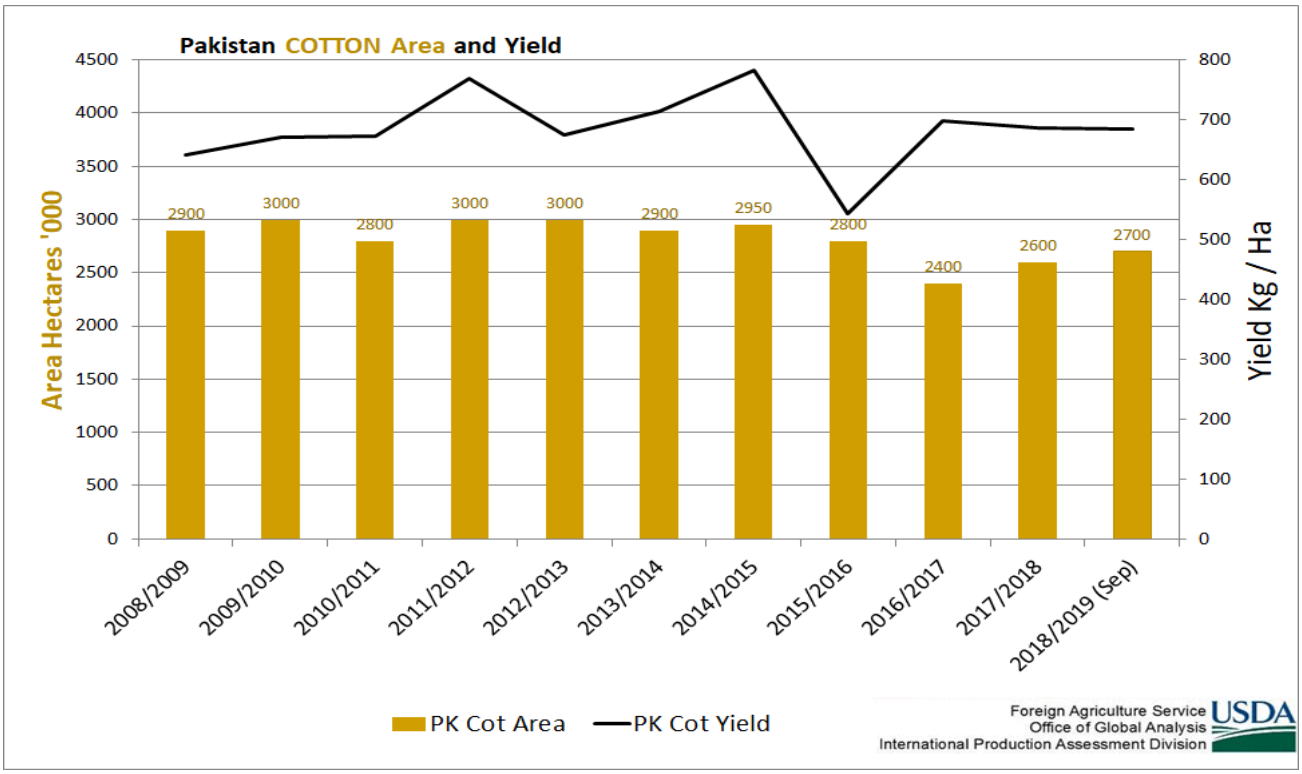

Figure 2 [Pakistan Cotton Area and Yield Time Series Chart]

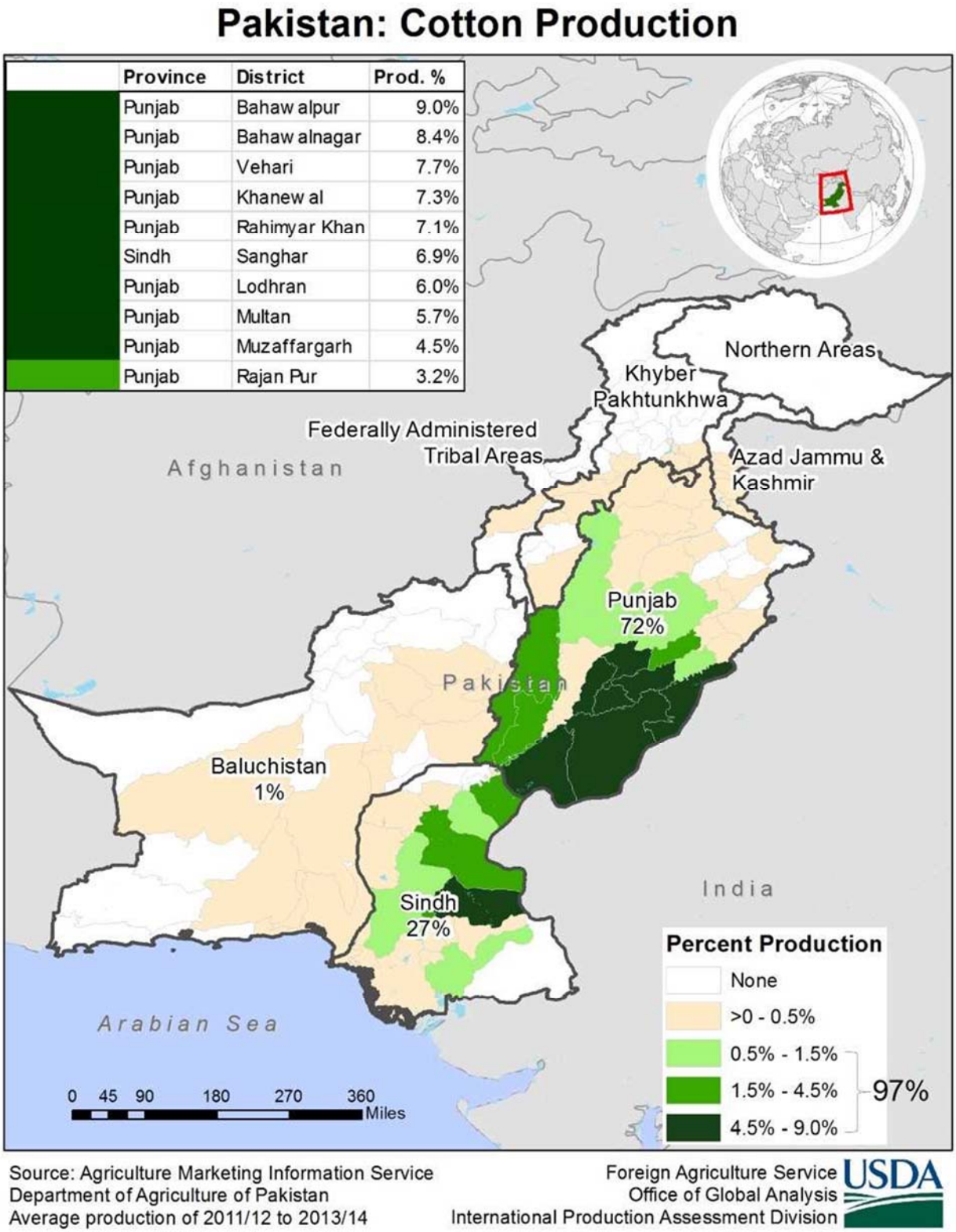

Figure 1 **[Map of Pakistan Cotton Production Distribution by District]**

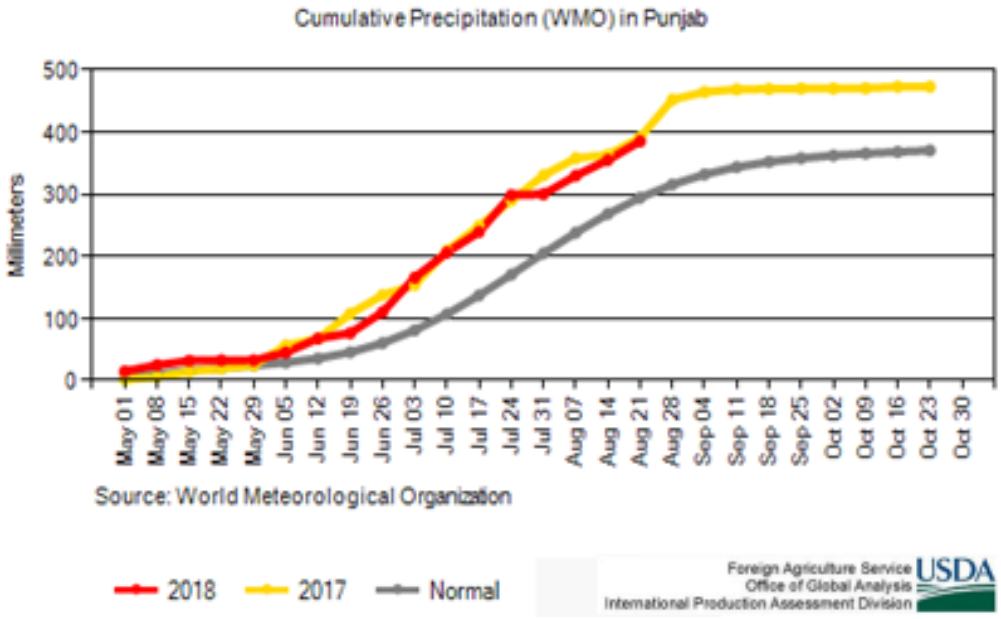

Figure 2 [Chart of Precipitation, Punjab Province]

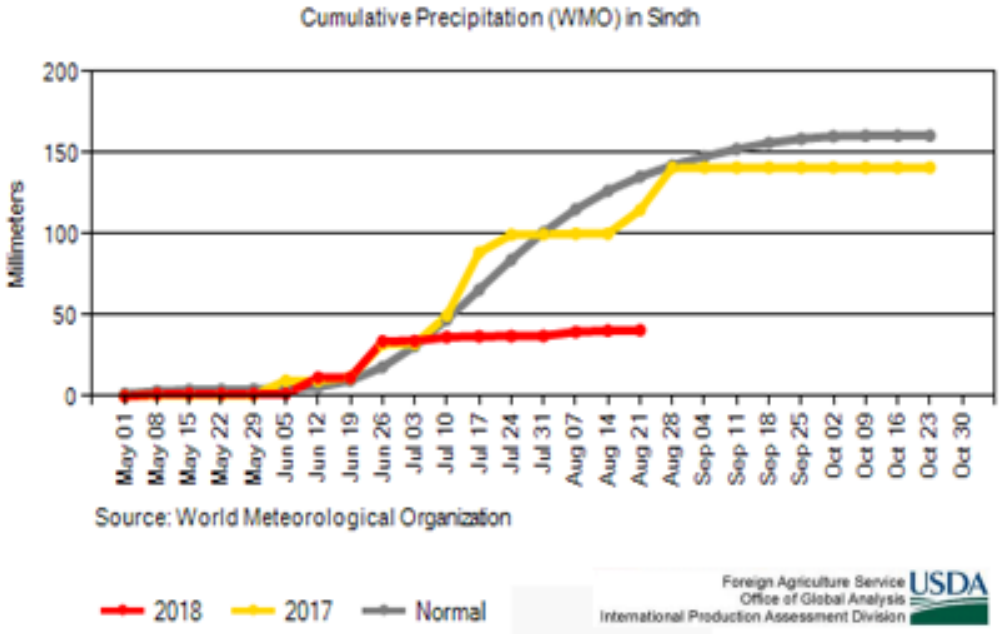

Figure 3 [Chart of Precipitation, Sindh Province]

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Current area and production estimates for grains and other agricultural commodities are available on IPAD's Agricultural Production page:
Crop Explorer https://ipad.fas.usda.gov/cropexplorer/or

Production, Supply and Distribution Database (PSD Online):
http://apps.fas.usda.gov/psdonline/psdHome.aspx

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