



**Foreign Agricultural Service**

Global Market Analysis

International Production Assessment Division

Web: <https://ipad.fas.usda.gov>

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# Commodity Intelligence Report

## PAKISTAN: COTTON PRODUCTION FORECAST TO RECOVER AFTER DEVASTATING FLOODS

Pakistan's cotton production for marketing year (MY) 2023/24 is estimated at 6.5 million 480-pound bales, up 2.6 million bales or 67 percent higher than the flood-damaged MY 2022/23 crop. The expected increase in production is due to a return to near average yield and rebound in area after losses incurred last season.

Harvested area is estimated at 2.5 million hectares, up 0.7 million hectares from last year. This will be the largest cotton planting achieved for several years. The area increase reflects prospects for higher cotton prices which encouraged some farmers to plant more cotton. Area has not yet reached the previous MY 2017/18 high of 2.7 mha, but increased demand for cotton has incentivized farmers following the flood reduced area of 1.8 mha that occurred in MY 2022/23 (Figure 1).

Yield is estimated at 566 kilograms per hectare, up 20 percent from last year. Growing conditions are favorable for the cotton crop this season with adequate irrigation and timely rain resulting in favorable soil moisture. Insect infestations have thus far been minimal and the crop, according to local observers, appears in excellent condition.

Cotton is grown under irrigation with the Tarbela Reservoir providing most of the irrigation water. As of late July, the water level in the Tarbela is favorable and above last season as observed by satellite (Figure 2).

Harvest begins in August with peak harvest typically in October. The two major cotton producing provinces are Punjab (66 percent) and Sindh (33 percent) based on a recent 3-year average (Figure 3).

The year-to-year production estimate is higher due to the expected area increase and return to a more average yield. 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.

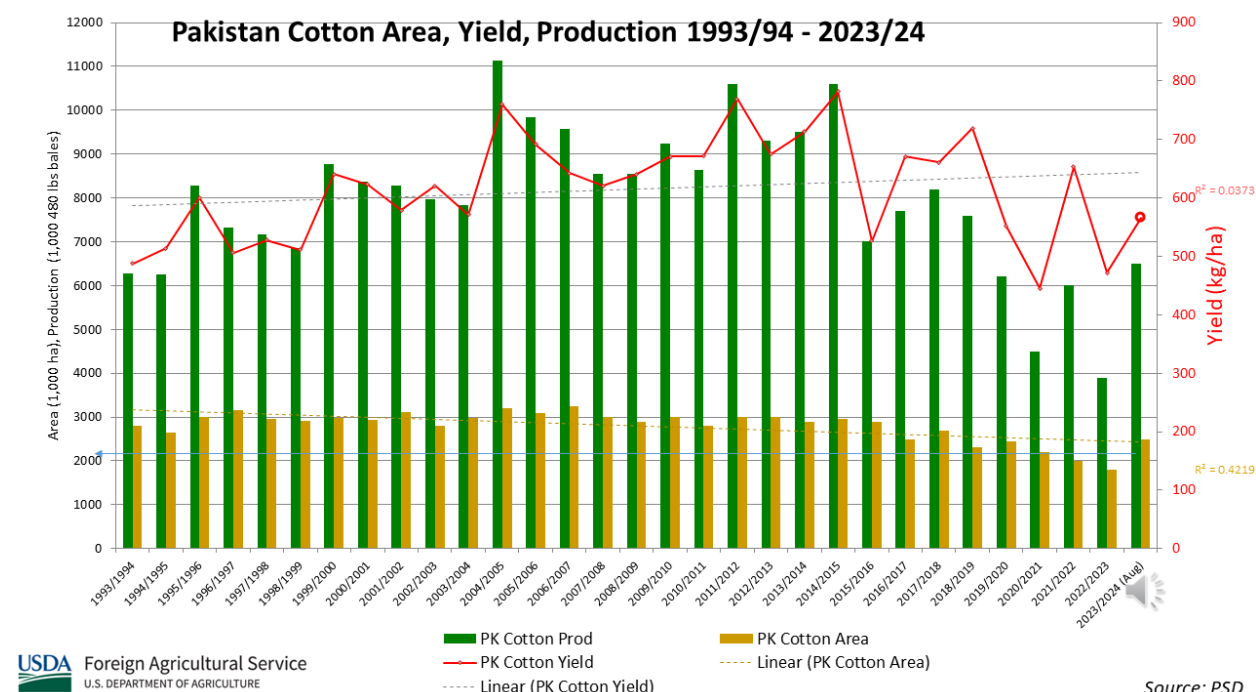
Cotton planting began in March and April and Sindh province typically plants first. Harvest has begun in Sindh province, with the peak harvest for Pakistan typically taking place in October as picking moves northward into the major cotton producing districts of

Punjab. This year, price conditions induced farmers to adopt good agronomic and plant protection measures in the field.

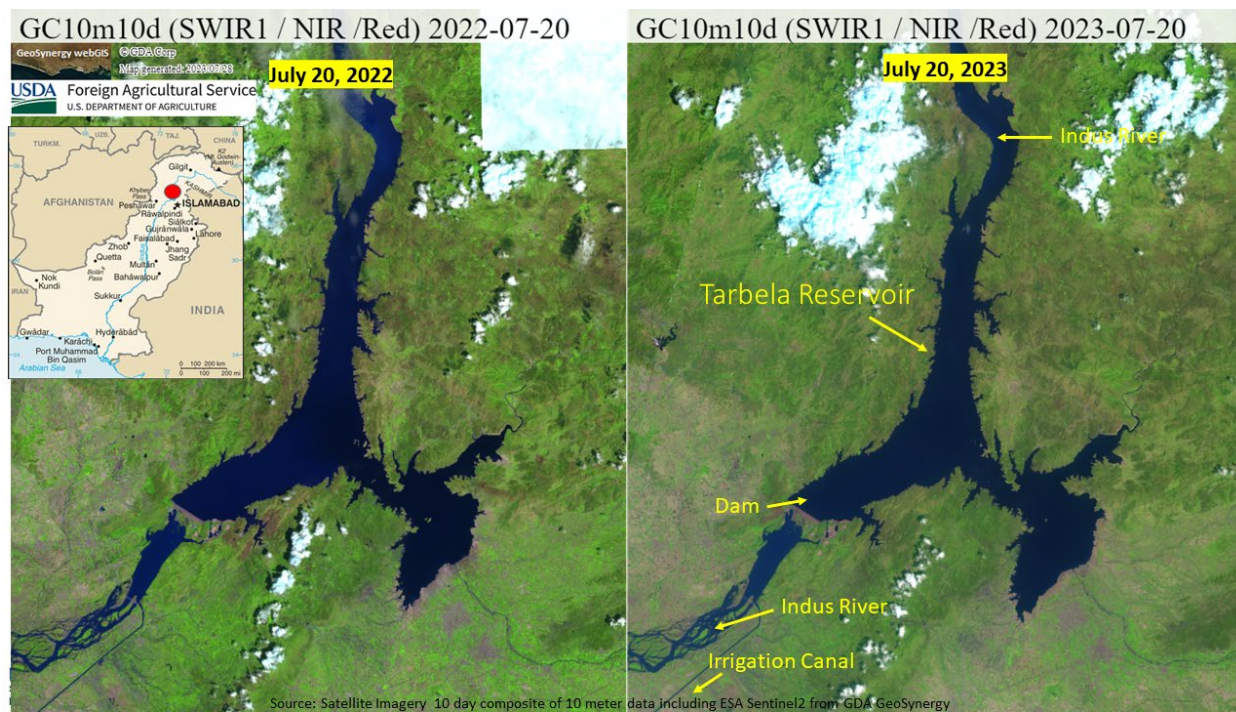
Pakistan mainly produces medium staple cotton. Lint quality is an issue within the industry due to the wide range of fiber quality and ginning results. Fiber quality can vary because farmers often plant multiple varieties as a hedge against poor germination rates.

Precipitation was above normal this year and some areas were reporting excessive moisture (Figure 4). 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. In Sindh, cotton is sown during March and April.

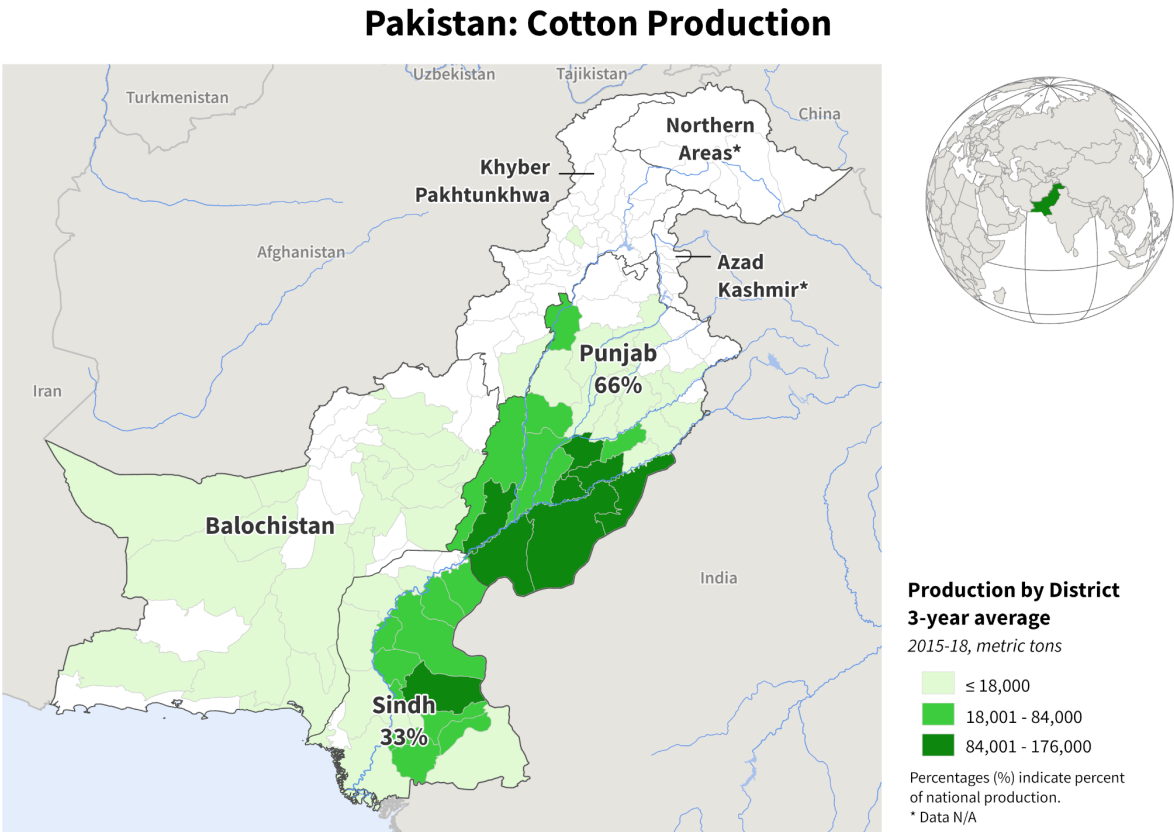
September is generally the most crucial month for the cotton crop. Below-average temperatures and high humidity during the recent years were conducive to insect development and resulted in pest-reduced yields. Farmers need to remain vigilant in monitoring for pest outbreaks. Overall, growers have reported 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 area, yield and production time series 1993 to 2023**



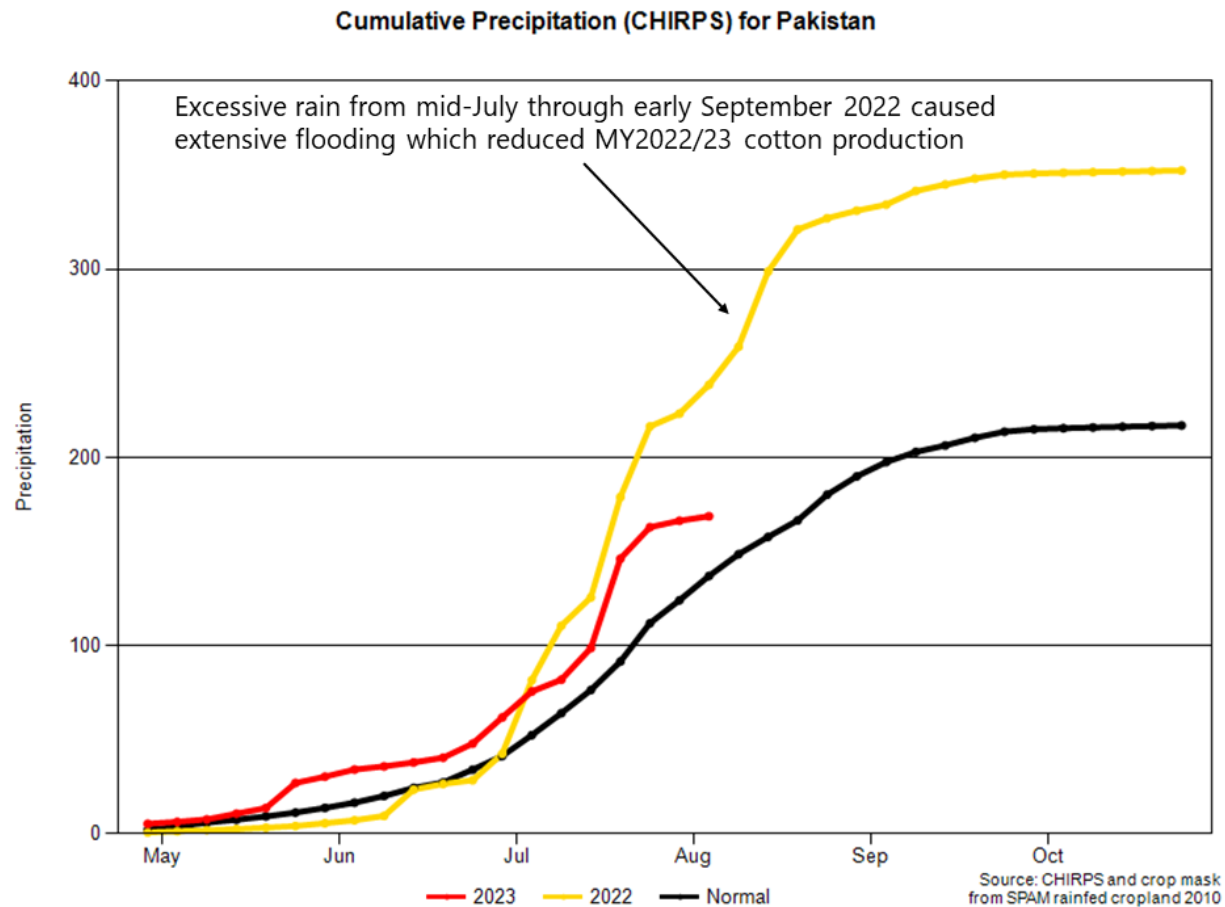
**Figure 2. Satellite image showing Pakistan Tarbela Reservoir. The 2023 water level is marginally higher than in 2022 as of late July.**



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Source: Agricultural Marketing Information Service, Pakistan;  
Khyber Pakhtunkhwa Bureau of Statistics

**Figure 3. Map of cotton production distribution in Pakistan. Punjab contributes 66 percent and Sindh 33 percent of total production based on a 3-year average.**



**Figure 4. Pakistan cotton cumulative precipitation for current 2023/24 and last season 2022/23.**

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