Drought alert and heatwave conditions

The country overall received slightly below normal (-21.6%) rainfall from January to April 2022. Due to a good amount of rainfall during January, the previous drought conditions became normalized. The intermittent rainfall spell for the rest of the months helped to sustain the normal conditions in the country.

Due to an abrupt increase in daily maximum temperature, the heatwave situation was observed from mid of March till the date and land surface temperature remained very high which affected the low rainfall region i.e., Sindh, Balochistan, south Khyber Pakhtunkhwa and southern Punjab (Cholistan region). Keeping in view the impact of the heatwave, the drought-like situation has emerged over most of the high-temperature regions of the country.

The heatwave suppressed the moisture conditions and resulted in the severe drought-like condition in the Chagi district whereas moderate conditions have emerged over the Kharan, Nushki and Washuk districts of Balochistan. Similarly, mild drought conditions have arisen in Sindh, south Punjab and southern Khyber Pakhtunkhwa shown in map.

Keeping in view the climatology and current seasonal forecast of PMD for these areas, drought conditions may exacerbate and affect the agriculture, water resources and live stocks till mid of June 2022 (before the arrival of the summer monsoon). Dry conditions will cause water stress in the cultivated lands/areas of the country due to the limited supply of irrigation water for Kharif crops.

This year Heatwave impacted the crops (Wheat production reduced 9%), vegetation, water resources and most importantly the livestock in the Cholistan region. The severe heatwaves impacted the soil moisture, water table/resources and vegetation in the region. The high temperature caused heat stress which resulted livestock mortality and increased probability of the drought emergence in the Cholistan region.

**Impacts**

- **WATER STRESS**
  - For crops, vegetation and livestock

- **CROP PRODUCTION**
  - Reduced crop yield due to low rainfall/high temperatures

- **HIGH TEMPERATURES**
  - Increased flow of river is likely in upcoming days

- **WINDSTORMS/LAND SLIDING**
  - May cause damages to crops, fruit orchards in some parts of country
Weather Outlook - (May 2022)

Currently, La-Niña condition is prevailing and is likely to continue with weak intensity during May 2022, which gradually decreases, while the IOD condition is expected to remain in neutral state, but shifting to negative phase towards the end of the forecast month.

Overall, a tendency for below normal precipitation is predicted over most parts of the country. Khyber Pakhtunkhwa and the adjoining areas of Punjab, Kashmir and northern Balochistan are expected to receive below normal precipitation. Eastern parts of Gilgit-Baltistan and coastal areas of Sindh and Balochistan may get nearly normal rainfall during the forecast month.

Impacts:
- Day time temperature is likely to remain above normal all over the country.
- The dry period may increase the water demand of the standing crops and vegetables.
- The above normal temperatures in high altitudes are likely to increase the rate of snowmelt in the Northern Areas subsequently reducing the water stress due to deficient rainfall.

Source: PMD

Sectoral updates (5W)

In March 2022, from 5W matrix, it has been recorded that about 10 organization are actively working in this sector across Pakistan. About 458,113 most vulnerable people were targeted with diverse interventions of which 34% were in the context of drought only. Furthermore, 9% of the targeted people were reported in Punjab, 32% in KP, 24% in Balochistan and remaining 28% in Sindh. The major contexts against which the targeted population was benefitted were drought, floods/snow emergencies, RRP 2022 and COVID-19.

70,479 HHs reached by FSAWG partners in quarter -1 of 2022

Source: PMD
Seasonal Agro-Climate Outlook (May - Sept, 2022)

Central Balochistan may receive dry weather during the period. The continuous dry period is likely to increase water stress on the crops and orchids.

North-Eastern Balochistan may receive mainly dry weather during the period, however light rainfall is expected particularly during the first decade of September. Continuous dry period may increase the water demand of the crops.

Upper Khyber Pakhtunkhwa is expected to receive 7-8 spells of light to moderate rainfall during the period. These rains may provide good moisture to the Kharif crops and orchids grown in these areas.

Lower Khyber Pakhtunkhwa is expected to receive 3-4 spells of light to moderate rainfall from the 2nd decade of June till the end of season. The Kharif crop especially Peanuts and Maize crop will be in reproductive stages. These rains may benefit the crop in provision of satisfactory moisture during the stages and specifically Sugar cane may get favorable conditions for growth.

Upper Sindh is expected to have almost dry weather during the entire period.

Lower Sindh may receive 5-6 spells of light rainfall mainly during the 1st & 2nd decade of June, month of July, 1st & last decade of August and September. Kharif crops like Cotton, Sugarcane etc. in this area are well ahead in comparison to the rest of the country.

The Potohar Region in Punjab may receive continuous spells of light to moderate rainfall mainly from mid of June till end of period. Rains during the months of June and July would be beneficial for early growth and vegetation of the Kharif crops like Peanut while the continuous rains may extend the crop life cycle and may make favorable conditions for fungal diseases in Peanuts.

Central Punjab would receive almost continuous spells of light rainfall from mid of June till September end. These rains may benefit the Cotton crop during its life cycle with sufficient soil moisture availability.

Southern Punjab would receive almost continuously dry weather during the period.

Gilgit Baltistan is expected to receive several spells of light to moderate rainfall during the specified period (with few heavy downpours during August). Wheat in this region is not grown on wider scales, however, is normally at final stages during the first fortnight of June. The cloudiness/rains especially in the month of June may not be favorable for the crop in terms of dry matter production and final yield.

Kashmir is expected to receive several light to moderate rainfall spells (with few heavy downpours) during the specified period. Wheat in this region is not grown on wider scales, however, is normally at final stages during the first fortnight of June. The cloudiness/rains in the months of June would not be favorable for the crop in terms of dry matter production and final yield.

Central Balochistan may receive dry weather during the period. The continuous dry period is likely to increase water stress on the crops and orchids.

South-Western Balochistan may receive continuous dry weather during the period. The continuous dry period is likely to increase water stress on the crops and orchids.

“Light to moderate precipitation is predicted during May to September over most parts of the country except Balochistan”

Source: PMD
Overall 4.69 million people are estimated to be in IPC Phase 3 (Crisis) and 4 (Emergency) in 25 rural districts of Sindh, Balochistan and Khyber Pakhtunkhwa.

- As per the IPC AFI analysis conducted in October 2021, around 4.69 million people (26% of the rural population) are estimated to be in IPC Phase 3 (Crisis) and 4 (Emergency) in 25 rural districts of Sindh, Balochistan and Khyber Pakhtunkhwa.

- Out of 4.69 million people, 3.66 million people (20% of the rural population) are in Phase 3 (Crisis) and 1.03 million people, 6% of rural population) are in Phase 4 (Emergency) in the projection period (April-June 2022).

- 7.45 million people (40% rural population) in 25 districts are in IPC Phase 1 (Food Secure/Minimal Acute Food Insecurity)

- 6.45 million people (35% rural population) in Phase 2 (Stressed Acute Food Insecurity)

- 3.66 million people (20% rural population in Phase 3 (Crisis Acute Food Insecurity) and

- 1.03 million people (6% rural population) are estimated to be in Phase 4 (Emergency Acute Food Insecurity).

- Out of 25 analysed districts, only 3 districts (Badin, Dadu and Nushki) are classified in IPC Phase 2 (Stressed).

- Remaining 22 districts (Jamshoro, Mirpur Khas, Sanghar, Suajwal, Tharparkar, Thatta, Umerkot, Chagai, Kech, Kharan, Killa Abdullah, Loralai, Panjgur, Pishin, Washuk, Bajaur, Khyber, Kurram, Mohmand, North Waziristan, Orakzai, and South Waziristan) are in IPC Phase 3 (Crisis).

- The major factors contributing to acute food insecurity include high food prices, drought/inadequate rainfall, reduced income due to covid-19 impacts, livestock disease/deaths.
In the projection analysis period, corresponding to the harvest season of winter crops and sowing season of summer crops, the overall number of people in IPC Phase 3 or above in 25 districts of three provinces of Pakistan is expected to slightly increase. Compared to current period (October 2021-March 2022) analysis, a slight increase in numbers and severity in Balochistan and Khyber Pakhtunkhwa were expected particularly in IPC Phase 3 (Crisis) because of the expected rise in food prices and an influx of Afghan refugees in the bordering districts. In Sindh, a slight decrease was expected in the number of people in IPC Phases 3 and 4 due to improvement in food stocks, increased labour opportunities and normalization of drought conditions during the projection period.

Currently, slight to moderate drought conditions are prevailing in few parts of Sindh and Balochistan. The food security situation needs to be monitored regularly. Next IPC acute food insecurity analysis is planned in first week of July 2022 to provide updated situation of food insecurity for 28 vulnerable districts of 3 provinces (Balochistan, Khyber Pakhtunkhwa and Sindh).

**IPC Acute Food Insecurity Analysis for 9 districts of Balochistan**

**Projection period (April-June, 2022)**

In Balochistan, around **0.92 million people** (27% of the rural population analysed in 9 districts) are estimated to be in IPC Phase 3 (Crisis) and Phase 4 (Emergency) in the current period (April-June 2022). These include around **0.74 million people** (22% of the rural population) in IPC Phase 3 (Crisis) and **0.17 million people** (5% of the rural population) in IPC Phase 4 (Emergency) across the 9 districts analysed, namely, Chagai, Kech, Kharan, Killa Abdullah, Loralai, Nushki, Panjgur, Pishin, and Washuk.

- **1.29 million people** (38% rural population) in 9 analysed districts are in Phase 1 (Food Secure/ Minimal Acute Food Insecurity)
- **1.18 million people** (35% rural population) in Phase 2 (Stressed Acute Food Insecurity)
- **0.74 million people** (22% rural population) in Phase 3 (Crisis Acute Food Insecurity) and
- **0.17 million people** (5% rural population) is estimated to be in Phase 4 (Emergency Acute Food Insecurity)
- Only 1 district (Nushki) is classified in IPC Phase 2 (Stressed), while remaining 8 districts analysed are classified in IPC Phase 3 (Crisis).
- Chagai, Kharan, Killa Abdullah, Loralai, Panjgur, Pishin, and Washuk are the areas with 30 percent or more population in IPC Phases 3 (Crisis).
- The major factors contributing to acute food insecurity include high food prices, drought/inadequate rainfall, reduced income due to covid-19 impacts, and livestock diseases.
2.20 million people are in IPC phase 3 (Crisis) and 4 (Emergency)...

Overall, an estimated **2.20 million people (22% of the rural population)** in current period (October 2021-March 2022) are classified in IPC Phase 3 (Crisis) and 4 (Emergency. These include around **1.63 million people (16% of the rural population)** in IPC Phase 3 (Crisis) and **0.65 million people (6% of the rural population)** in IPC Phase 4 (Emergency) across the 9 districts analysed, namely, Badin, Dadu, Jamshoro, Mirpur Khas, Sanghar, Sujawal, Tharparkar, Thatta and Umerkot.

- **4.47 million people (44% rural population)** 9 analysed districts are in IPC Phase 1 (Food Secure/Minimal Acute Food Insecurity)

- **3.55 million people (35% rural population)** in Phase 2 (Stressed)

- **1.63 million people (16% rural population)** in Phase 3 (Crisis) and

- **0.65 million people (6% rural population)** is estimated to be in Phase 4 (Emergency)

- 2 districts (Badin and Dadu) were classified in IPC Phase 2 (Stressed), whereas remaining 7 districts (Jamshoro, Mirpur Khas, Sanghar, Sujawal, Tharparkar, Thatta, and Umerkot) were classified in IPC Phase 3 (Crisis).

- Jamshoro, Mirpur Khas, Sanghar, Sujawal, Tharparkar, Thatta and Umerkot have 20-35 percent population in IPC Phase 3 (Crisis) and above.

- The major factors contributing to acute food insecurity include high food prices, drought/inadequate rainfall, reduced income due to covid-19 impacts and livestock diseases/deaths.

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**CRISIS**

1.63 million people (16% rural population) in Phase 3 (Crisis)

**EMERGENCY**

0.65 million people (6% rural population) is estimated to be in Phase 4 (Emergency Acute Food Insecurity)
IPC Acute Food Insecurity Analysis for 7 districts of Khyber Pakhtunkhwa (Projection period (April-June, 2022))

In Khyber Pakhtunkhwa, around **1.57 million people** (32% of the rural population analysed in 7 newly merged districts) are estimated to be in IPC Phase 3 (Crisis) and Phase 4 (Emergency) in the projection period (May-June 2022). These include around **1.28 million people** (26% of the rural population) in IPC Phase 3 (Crisis) and **0.29 million people** (6% of the rural population) in IPC Phase 4 (Emergency) across the 7 districts analysed, namely, Bajaur, Khyber, Kurram, Mohmand, North Waziristan, Orakzai, and South Waziristan.

- **1.68 million people** (34% rural population) in 7 analysed districts are in IPC Phase 1 (Food Secure/Minimal Acute Food Insecurity)
- **1.72 million people** (35% rural population) in Phase 2 (Stressed Acute Food Insecurity)
- **1.28 million people** (26% rural population) in Phase 3 (Crisis Acute Food Insecurity) and
- **0.29 million people** (6% rural population) is estimated to be in Phase 4 (Emergency Acute Food Insecurity)
- All 7 districts analysed were classified in IPC Phase 3 (Crisis).
- Kurram, Mohmand, North Waziristan, Orakzai and South Waziristan have 30 percent or more population in IPC Phases 3 (Crisis) and above.
- The major factors contributing to acute food insecurity include high food prices, reduced income due to covid-19 impacts, inadequate rainfall and poor security situation.

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**CRISIS**

**1.28 million** people (26% of rural population) in Phase 3 (Crisis)

**EMERGENCY**

**0.29 million** people (6% rural population) is estimated to be in Phase 4 (Emergency Acute Food Insecurity)
Both the Russian Federation and Ukraine are major players in agricultural production and supply of two critical inputs to agricultural production, namely fertilizers and energy. In 2021, both countries stood among the top ten exporters of wheat, maize, oilseeds, and vegetable oils globally. Similarly, the Russian Federation has been the top exporter of nitrogen fertilizers and the second leading exporter of potassic and phosphorous fertilizers. Given a considerable concentration of exportable surplus of agricultural commodities and inputs to agricultural production in the Russian Federation and Ukraine, the conflict between the two countries has exposed global food and agricultural markets to increased volatility and vulnerability to shocks.

Pakistan imports significant amounts of wheat, pulses, and oilseeds from the Russian Federation and Ukraine. In 2021, imports from Russian Federation and Ukraine contributed 77.3% of total wheat imports, 19.3% of total pulses imports, and 10.4% of total oilseed imports into the country. Moreover, although Pakistan is not primarily dependent on these two countries for fertilizers and fossil fuels, it is likely to bear the brunt of rising international prices for fertilizers and energy. Due to high fertilizer prices and below average rainfall in some parts of the country, Pakistan may not meet its wheat production target of 28.90 million metric tons (MMT) for 2021-22 season. Therefore, Pakistan will most likely need to import around 3.0 MMT of wheat in the next few months. Wheat prices were already rising to historic levels, but with the ongoing conflict between the Russian Federation and Ukraine, international wheat prices are now at their highest level in the last few decades. The increased cost of production domestically due to increased fertilizer and energy costs are expected to raise the price of wheat in the Pakistani market.

Edible oil and ghee

Edible oil and ghee are also essential food commodities in Pakistan. The country’s annual requirement for edible oil is around 4.1 MMT. In 2021, Pakistan produced only 11% of edible oil required for domestic consumption, and the rest of 89% was imported. Since the beginning of the conflict, the price of edible oil in Pakistan has increased by 14.2% and that of vegetable ghee has risen by 15.8% in just six weeks. This increasing trend is likely to persist as the international edible oils market may experience a considerable shortfall due to the conflict and export restrictions.
Other Essentials

Pulses are classified as essential food commodities in Pakistan. However, the area under cultivation for pulses has significantly decreased during the last 20 years. Pakistan caters to a major portion of pulses demand through imports. In 2021, Pakistan imported $758 million worth of pulses, out of which 17% were from Russian Federation and 2.25% from Ukraine. Any shock to the global supply of pulses is likely to impact the availability and prices of pulses in Pakistan.

Over the period, Pakistan rupee has depreciated and total imports increased from $34.8 billion in 2019-20 to $39.5 billion in 2020-21 (13.6%). During the same period, food imports increased from $3.9 billion to $6.1 billion (54.5%). Rise in global food prices will cause larger import bill and ultimately affect local food prices and access to food especially for the low income groups.

Pakistan imports wheat, oilseeds, pulses, fossil fuel and fertilizers and rise in global prices of these commodities will contribute to larger import bill and ultimately affect local food prices and access to food especially for the low income groups. There would be severe implications for the poor population who spend a significant portion of their incomes on food. In Pakistan, 16.4% of people are food insecure based on Food Insecurity Experience Scale (FIES) and cannot access basic food needs, whereas 67% of people cannot access a healthy diet and are in need of greater affordability. As per latest IPC acute food insecurity analysis conducted in October 2021, around 4.69 million people are estimated to be food insecure (in IPC Phase 3 and 4) during April-June 2022. Though impact of rising food prices was considered in the IPC analysis - additional rise in food prices may push more people into food insecurity.

Source: FAO, PBS

Proposed actions

- Increase rigor of IPC vulnerability assessments in known food insecure / vulnerable areas.
- Strengthen integration of IPC data with national vulnerability assessment info (BISP) to improve targeting of national social protection schemes.
- Increase price monitoring and reporting; ensure transparency of data sharing on stock and holding to reduce the likelihood of hoarding by traders.
- Expand measures to reduce food losses and wastage at harvesting and post harvesting (bulk collection, storage and management).
- Support localized food production and management.
- Advocate for the continued commitment to open trade policies.
- Strengthen food trade with regional/neighboring countries.
- Encourage implementation of existing policy recommendations (FSS Action tracks; 3 year growth strategy)
Generally, prices were slightly unstable in the mentioned duration, slight fluctuations in many items whereas, significant fluctuations in few items.

Market Prices Situation update

During January-April 2022 period, the average retail market prices of essential food commodities generally experienced a decreasing prices trend among cereals for wheat and wheat flour along with a mostly increasing prices trend for rice Irri-6 and Basmati, while among non-cereals several items (veg. ghee, cooking oil, chicken, and pulse Masoor) experienced mostly increasing prices trend.

Among essential food items, ghee and chicken registered significant price increases during March. Both these food items were in higher demand during Ramzan and the increase in their prices might be attributed to profiteering by traders in anticipation of the month of Ramzan, which began in April. Prices trends of some of the key food items along with the current terms of trade are presented below.

**Wheat Flour**

During the last four months (Jan-April 2022), on a month-on-month comparison, the average retail price of wheat flour saw a downward trend with a slight decrease of 2% in January compared to its price in Dec 2021 and a further decrease by 0.4% in February compared to the previous month. However, in March there was a slight increase of 1% while in April its price decreased by 5% on a month-on-month comparison. In April, its average price was recorded at PKR 56.47 per kg.

**Rice Basmati**

The average retail price of rice Basmati experienced a mostly upward trend on a month-on-month comparison during Jan-April 2022. In January its price increased by 3% compared to the previous month (Dec 2021) while in February and March it further increased by 3% and 0.2%, respectively, on a month-on-month comparison. Whereas it decreased by 1% in April compared to the previous month. In April, its average price was recorded at PKR 109.52 per kg.

**Live Chicken**

The average retail price of live chicken experienced significant price fluctuation during the review period. Though its price decreased by 8% in January it experienced significant price hikes in February (17%) and March (31%) on a month-on-month comparison. However, in April there was a slight decrease in its price by 5% compared to its price from the previous month. In April, its average price was recorded at PKR 279.21 per kg.
Vegetable Ghee and Cooking Oil

During Jan-April 2022, the prices of vegetable ghee and cooking oil both experienced upward trends on a month-on-month comparison. For vegetable ghee, there were slight increases in its price in January (1%) and February (2%) along with a significant increase in March (12%) and a slight increase in April (5%) on a month-on-month comparison. Whereas, for cooking oil, there was a negligible increase in its price in January (0.2%) followed by slight increases in February (2%) and March (7%) and a more than slight increase in April (9%) on a month-on-month comparison. The average price of vegetable ghee was recorded at PKR 491.20 per kg while the price of cooking oil was recorded at PKR 493.00 per litre in April 2022.

Pulse Masoor

The average retail price of pulse Masoor experienced an upward trend on a month-on-month comparison during Jan-April period. Its price experienced slight increases in January (6%), February (1%), March (1%), and April (3%) on month-on-month comparison. In April, its average price was recorded at PKR 225.04 per kg.

Refined Sugar

The average retail price of refined sugar experienced a mostly downward trend on a month-on-month comparison during Jan-April period. After a negligible increase by 0.1% in January its price experienced slight decreases in February (3%), March (2%) and April (1%) on a month-on-month comparison. In April, its average price was recorded at PKR 87.41 per kg.
Terms of Trade (ToT)

The average Terms of Trade, which reflects the purchasing capacity of poor households, increased by 6.4% in April compared to the previous month. It was recorded in April at 17.59 kgs of wheat flour purchased with one day wage of unskilled labor. City-wise ToT for major cities are shown in figure.