



Pakistan Food Security Bulletin

Issue 7 (Period: July–December 2017)

January, 2018

The Pakistan Food Security Bulletin is produced by the Vulnerability Analysis and Mapping (VAM) Unit of the World Food Programme as a contribution to periodic food security monitoring in the country.

Highlights

- Pakistan's overall Prevalence of Undernourishment (PoU) is estimated to be about 18 percent of the entire population.
- Integrated Context Analysis (ICA) on Vulnerability to Food Insecurity and Natural Hazards of Pakistan, categorized 123 districts of four provinces and seven Agencies of FATA into five levels of vulnerability.
- Total national wheat crop production for 2016-17 grew by 4.1 percent compared to 2015-16. While production of rice for 2017-18 has been estimated at 9.2 percent higher than 2016-17 production.
- Prices of staple crops (wheat, wheat flour, rice *Irri-6* and *Basmati*) remained stable with slight fluctuations, while prices of several non-cereal food commodities slightly decreased. However, the prices of live chicken, eggs, cooking oil and vegetable ghee increased. The fuel prices slightly increased for both Super Petrol and High Speed Diesel (HSD).
- Terms-of-Trade (ToT) increased by 7.9 percent from June 2017 mainly due to increased daily wages.
- Some 17,542 families returned to their areas of origin in FATA during the reporting period; 29,059 families are still in displacement.

Situation Overview

According to Strategic Review of Food Security and Nutrition in Pakistan, 18 percent¹ of Pakistan's population is undernourished. This PoU is ranked as "moderately high" according to the Global Hunger Map threshold.

ICA on Vulnerability to Food Insecurity and Natural Hazards of Pakistan, using existing data to identify the combined level of recurrence of vulnerability to food insecurity, flood and drought categorized 123 districts of four provinces and seven Agencies of FATA into five levels of vulnerability. ICA also ranked the recurrence level of other natural hazards and contextual factors which may aggravate the impact of floods and drought on food security. The analysis is intended to inform programmes of the government and other agencies in the areas of social safety nets, disaster risk reduction, early warning systems and disaster preparedness.

Production wise, there has been positive growth compared to production from previous year for the two main staples of Pakistan i.e., wheat and rice. For wheat, the main staple crop of Pakistan, the total national wheat production for 2016-17 is estimated at 26,673.6² thousand MT. It is 4.1 percent higher than the production for 2015-16, which was 25,633.1 thousand MT. Similarly, the national production of rice, the second main staple crop of Pakistan, estimated at 7,481.8³ thousand MT (milled basis) for 2017-18, and it is higher by 9.2 percent than the previous year's production of 6,849.3 thousand MT.

Considering access to food, over the past six months, prices of major food commodities in Pakistan either remained stable or decreased with a few exceptions. Notably, the ToT increased by 7.9 percent. Thus, the comparative stability in prices and improved ToT has been a welcome relief to the highly vulnerable segments of the population. However, one must remain cautious for the future outlook of prices and ToT in the coming months due to the impact of the U-turn observed in the previously declining fuel prices which are now continuously upward bound for both Super Petrol and High Speed Diesel since September and October 2017, respectively.

Owing to much improved FATA security situation, some 17,542 families returned to their areas of origin in FATA during the reporting period, reaching a total of 442,067 families (94 percent of total). However, 29,059 (6 percent of total) families are still in displacement and the Government has announced to complete the return by end of 2018⁴.

¹ Strategic Review of Food Security and Nutrition in Pakistan, August 2017, Government of Pakistan.

² Economic Wing of Ministry of National Food Security & Research, Government of Pakistan.

³ Economic Wing of Ministry of National Food Security & Research, Government of Pakistan.

⁴ UNHCR, FDMA, WFP's "KP and FATA IDP Population Fact sheet" and UNHCR's "IDP Returns Fact Sheet" as of 31 December 2017.

Strategic Review of Food Security and Nutrition in Pakistan

The Review was carried out jointly by the International Food Policy Research Institute (IFPRI) and Agha Khan University (AKU) under the direction of the Economic Affairs Division (EAD), Government of Pakistan and guided by an Advisory Group co-chaired by the EAD Secretary and the Resident Coordinator of the United Nations in Pakistan. The Review highlights that Food and Nutrition security are among the greatest challenges for Pakistan with more than half of its children under the age of 5 are either stunted, wasted or both; at least 18% of women of reproductive age in Pakistan are underweight; and overall prevalence of undernourishment (PoU) is estimated to be about 18 percent of the entire population.

Stunting and wasting among children increases a child's likelihood of death. The Report noted that in addition to this human toll, stunting exerts an enormous burden on the economy and government resources. Furthermore, malnutrition is an impediment to human development and affects Pakistan's economic growth and global competitiveness. The economic toll is estimated at nearly 3 percent of GDP per year, equivalent to PKR 704.3 billion annually, which is higher than the energy crisis. Additionally, findings of the Report suggest that giving food security and nutrition a higher priority over agriculture subsidies in government spending is feasible. Considering the annual costs of a recommended nutrition intervention package, scaled-up to 100 percent coverage by 2021 and carried through 2025 (PKR 193 billion), with added costs for needed institutional development, is equivalent to less than 10 percent of the annual costs of agricultural subsidies. The report provides detailed estimates of the costs and benefits of nutrition-specific interventions.

The Report recommends that significant progress on reducing stunting could be achieved quickly through nutrition-specific interventions that can be scaled-up by utilizing existing delivery platforms, which are cost-effective, and only require re-allocations of government funds. The interventions like encouraging breastfeeding, providing supplements and complementary feeding at the right time alone can reduce stunting by 20% when scaled-up to 90% coverage rates. Other recommendations include nutrition-sensitive interventions (interventions for dietary diversity, water, sanitation and hygiene (WASH), combined with interventions for food security that target underlying causes of under-nutrition (incomes, poverty, agricultural productivity).

The Report suggests to observe and track progress of some of the major policies including the **Multi-Sectoral Nutrition Strategy (MSNS) and associated institutional structures, Protection of Breastfeeding and Child Nutrition Act, Food**

Fortification Acts, Early Marriage Restraint Act, National Water Policy and Agriculture Policy. These policies require further supporting institutional and analytical programs to ensure successful and sustainable implementation. Important needs include a **nutrition surveillance system**, a culture of **monitoring and evaluation**, and the **engagement of women champions**. The programs recommended for immediate initiation require complementary measures such as **capacity strengthening** of frontline health workers in the area of nutrition, the development of a roadmap to encourage food **marketing, distribution and processing** industries, improving **storage**, and implementing **school-feeding programs (SFP)** as a nutrition focused form of social protection.

Integrated Context Analysis (ICA)

on Vulnerability to Food Insecurity and Natural Hazards

ICA is a WFP corporate programme design tool, used in over 20 countries around the globe. It provides empirical evidence to support strategic planning and positioning of four broad programmatic themes: Safety Net, Disaster Risk Reduction (DRR), Early Warning and Disaster Preparedness.

ICA aims at, categorising districts (basic administrative units) on the basis of recurrence of vulnerability to food insecurity, natural hazards and relevant contextual factors. It provides information for effective medium and long-term food security interventions related to resilience building and disaster risk reduction.

ICA for Pakistan implemented during January - October 2017 under the leadership of National Disaster Management Authority (NDMA) involving relevant line departments, ministries, various technical institutions and UN agencies including WFP, FAO. National launch of the Report was held on 17 October 2017 and six provincial dissemination & advocacy workshops were organized in November 2017.

Applying spatial techniques on long-term existing datasets, for establishing trends, ICA studies **two core dimensions** (*vulnerability to food insecurity and natural hazards*), **five core lenses** (*land slide, Glacial Lake Outburst Flood, earthquake, soil erosion, land degradation*) and **two contextual factors** (*dominant land cover, population density*).

ICA uses Multi-Dimensional Poverty Index (MPI) as a proxy for vulnerability to food security for four provinces (Balochistan, KP, Sindh, Punjab including Islamabad). It is derived from six rounds of Pakistan's Social and Living Standards Measurement Surveys (2004/05 – 2014/15) released by the Government in 2016. Due to lack of MPI data for FATA, food security prevalence rate of three in-depth assessments conducted by WFP and partners in 2014 - 2017 is used. For all kind of natural hazards (flood, drought, landslide, GLOF and earthquake) national data sets maintained by NDMA and

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Pakistan Metrological Department are used. For soil erosion, land degradation, dominant land cover and population density, Pakistan components of global datasets are used.

Technical findings and broad programmatic recommendations are initially based on combined level of recurrence of two core dimensions for 123 districts of four provinces and 7 Agencies of FATA. Relative standing of districts is presented by classifying them into nine different types of ICA Areas. These nine distinct classes are then condensed into five ICA Categories in order to formulate broad programmatic recommendations. Category 1 (ICA Areas: 1A, 1B) comprises 42 districts (19 in Balochistan, 13 in Sindh, 7 in KP and 3 in Punjab) having high recurrence of vulnerability to food insecurity coupled with high or medium levels of natural hazards. These districts would benefit from combinations of food security focused safety nets and comprehensive disaster risk reduction (DRR) interventions including infrastructure improvement, early warning and disaster preparedness. Category 2 (ICA Areas: 2A, 2B) comprises 20 districts (7 in Sindh, 5 in KP, 4 in Punjab, and 4 in Balochistan) have moderate recurrence of vulnerability to food insecurity coupled with high or medium natural hazards. In these districts, flexible food security safety nets, productive or protective are suggested. Alternatively, needs-based livelihood recovery efforts in unfavourable years could protect marginal households against negative coping strategies that undermine development gains. High natural hazards suggest broad DRR interventions including infrastructure improvement, early warning and disaster preparedness. Category 3 (ICA Areas: 3A, 3B) comprises 19 districts (8 in Balochistan, 6 in FATA and 5 in KP) showing high or moderate recurrence of vulnerability to food insecurity coupled with relatively low natural hazards. In Area 3A

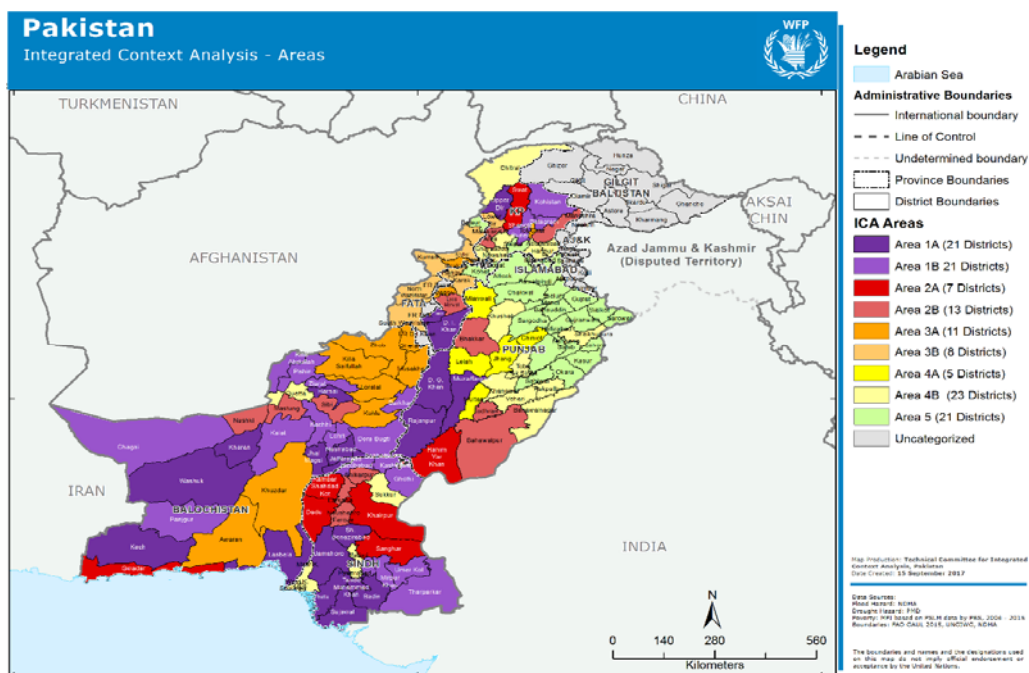
districts food security safety net approach similar to districts in Category 1 are appropriate, i.e. year round protective safety nets. In ICA Area 3B districts, either flexible safety nets, or livelihood recovery/protection programmes would be relevant. Category 4 (ICA Areas: 4A, 4B) comprises 28 districts (12 in Punjab, 9 in Sindh, 6 in KP, 1 in Balochistan) exhibiting low recurrence of vulnerability to food insecurity with high or medium level of natural hazards. Broad DRR (including infrastructure improvement as well as early warning and disaster preparedness) is a priority. Specific, targeted interventions to improve food security for the most vulnerable people would be needed. Category 5 (ICA Area: 5) comprises 21 districts (18 in Punjab, 2 in KP, 1 in FATA) showing low recurrence of vulnerability to food insecurity and also low natural hazards. It's recommended to ensure effective early warning that is set within systems to trigger disaster preparedness measures.

ICA final report is available at links below:

vam.wfp.org.pk/Publication/Integrated_Context_Analysis_Pakistan_2017.pdf

ndma.gov.pk/publications/Integrated_Context_Analysis_Pakistan_2017.pdf

N.B: Due to lack of food security or MPI data, ICA categorisation is not performed for 6 Frontier Regions (FR) of FATA, all districts of Gilgit Baltistan, and Azad Jammu and Kashmir (AJ&K) regions. On the other hand, availability of natural hazards, core lenses and contextual factors data enabled programming of disaster risk reduction and resilience building related strategies are recommended for these regions.



Crop and Livestock Production Situation

Crop situation

Pakistan is an agricultural country. During last financial year, agriculture sector contributed 19.5 percent in gross domestic product (GDP) and it remains by far the largest employer, employing 42.3 percent of the country's total labor force⁵.

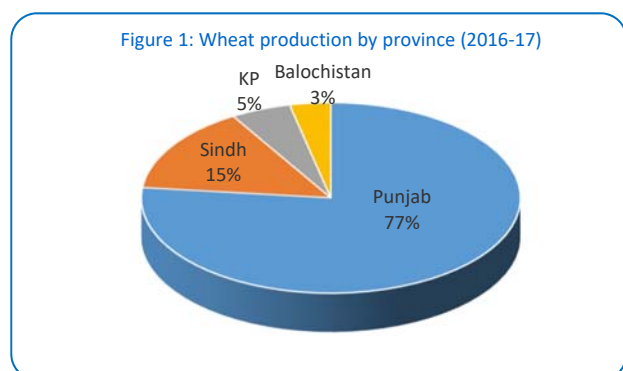
The agriculture sector recorded a positive growth of 3.46 percent in 2016-17 against a target of 3.5 percent. The growth in crops is positive of 3.02 percent compared to the negative growth of 4.97 percent during last year due to better harvest of major crops⁶.

Wheat production

For wheat – major *Rabi* crop – the final production for 2016-17 has been recorded at 26,673.6⁷ thousand MT and was grown on an estimated area of 8,973 thousand hectares, which is close to the target set by the Federal Committee on Agriculture (FCA) and recorded a positive growth of 4.1 percent.

The wheat support price has been maintained from the preceding year at PKR 1,300/40kg aiming at providing an incentive to farmers to grow more wheat and achieve production targets. However, significant geographic disparities in wheat production exist across the country. Slightly more than three quarters of the national cereal production comes from Punjab, followed by Sindh, Khyber Pakhtunkhwa and Balochistan (**Figure 1**).

The Federal Committee on Agriculture (FCA) has set the wheat crop production target for *Rabi* sowing season 2017-18 at 26.46⁸ million MT from an area of 8,950 thousand hectares. For 2017-18, wheat crop planting was completed by December 2017.



⁵ Pakistan Economic Survey 2016-17, Ministry of Finance, Government of Pakistan.

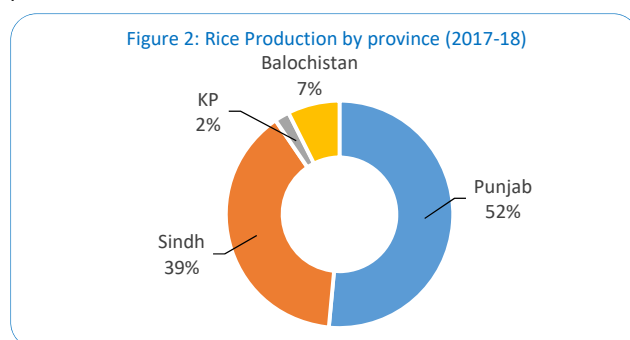
⁶ Pakistan Economic Survey 2016-17, Ministry of Finance, Government of Pakistan.

⁷ Economic Wing of Ministry of National Food Security & Research, Government of Pakistan.

Rice production

Rice is Pakistan's second most important staple and third largest crop in terms of area sown, after wheat and cotton. It accounts for 3.1 percent in the value added in agriculture and 0.6 percent of GDP. **Figure 2** presents the share of the national rice production by province in 2017-18.

The latest rice production projection (second estimate) from December 2017 for 2017-18 is at 7,481.8⁹ thousand MT (milled basis) from an estimated area of 2,882.8 thousand hectares, indicating an increase of 9.2 percent from last year's production of 6,849.3 thousand MT. Punjab and Sindh together produce approximately 91 percent of total rice production.



Livestock production

Livestock is an important sub-sector of agriculture in Pakistan. In 2016-17, livestock contributed 58.33 percent to agricultural value addition and 11.39 percent to GDP. It witnessed a growth of 3.43 percent compared to 3.36 percent during corresponding period last year. Nearly 8 million families are engaged in livestock production and earn more than 35 percent of their income from this activity. It is often the only source of income for the rural and most marginalized people¹⁰.

Major livestock products are milk and meat. During 2016-17, the gross production of milk and meat have increased by 3.2 percent and 4.8 percent, respectively, compared to 2015-2016.

Markets and Food Prices

During the reporting period, the market prices in Pakistan remained stable for most of the products. Prices of cereals (wheat, wheat flour, rice *Irri-6* and *Basmati*) slightly increased with the lowest prices recorded for wheat and wheat flour during the post-harvest months while highest prices for all staples were recorded during December 2017. In contrast,

⁸Business Recorder, 12th October 2017.

⁹Economic Wing of Ministry of National Food Security & Research, Government of Pakistan.

¹⁰Pakistan Economic Survey 2016-17, Ministry of Finance, Government of Pakistan.

the prices of majority of non-cereal food commodities significantly decreased with the exception of significant increase in price of eggs and slight increase in price of vegetable ghee and cooking oil.

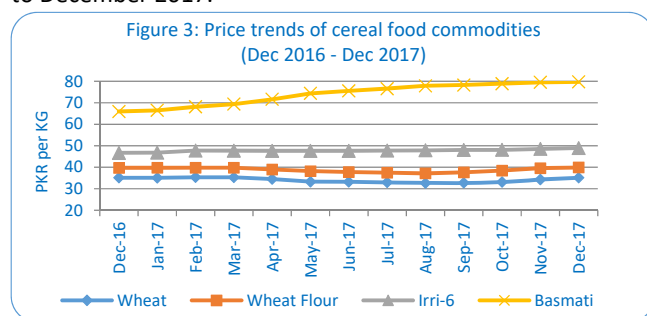
Staple prices (wheat, wheat flour, rice *Irri-6* and *Basmati*)

Prices of staples (wheat and wheat flour) remained stable with slight fluctuations during the reporting period.

In December 2017, compared to June 2017, the prices of wheat and wheat flour slightly increased by 5.8 percent and 5.7 percent, respectively. The highest price of wheat and wheat flour was reported at PKR 35.2 and PKR 39.9 per kg, respectively, in December 2017. Whereas, the lowest price of wheat and wheat flour was recorded at PKR 32.6 and PKR 37.2 per kg, respectively, in August 2017, mainly due to increased supply of both commodities in the market during post wheat harvest season. On a one-year comparison between December 2017 and December 2016, the prices of wheat and wheat flour negligibly increased by 0.1 percent and 0.5 percent, respectively.

During the reporting period, the prices of rice *Irri-6* and *Basmati* negligibly varied on a monthly basis. In December 2017, compared to June 2017, the price of *Irri-6* and *Basmati* slightly increased by 2.7 percent and 5.6 percent, respectively. On a one-year comparison between December 2017 and December 2016, the price of *Irri-6* increased by 4.8 percent, while that of *Basmati* significantly increased by 20.9 percent¹¹.

Figure 3 shows price trends of cereals from December 2016 to December 2017.



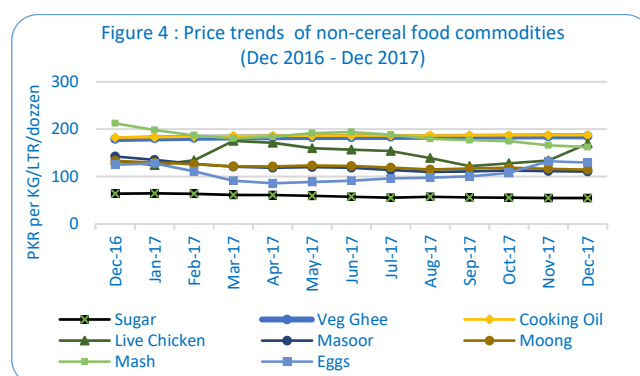
Prices of non-cereal food commodities (chicken, pulses, sugar, cooking oil)

In December 2017 compared to June 2017, prices decreased for pulses *Dal Mash* (16.3 percent), *Dal Moong* (6.5 percent), lentil *Dal Masoor* (6.6 percent), and sugar (4.1 percent). Whereas, a significant increase in price was recorded for eggs (42.3 percent), and a slight increase was noted in price of live

chicken (8.2 percent) vegetable ghee (1.2 percent) and cooking oil (0.7 percent).

On a one-year comparison with December 2016, significant price decreases were reported for pulse *Dal Mash* (23.7 percent), lentil *Dal Masoor* (22.5 percent), *Dal Moong* (14.2 percent), and sugar (14 percent). Whereas, the prices of vegetable ghee and cooking oil were recorded higher by 3.3 percent and 2.6 percent, respectively. There was a significant increase in price of live chicken (27.3 percent) and a slight increase in the price of eggs (3.8 percent).

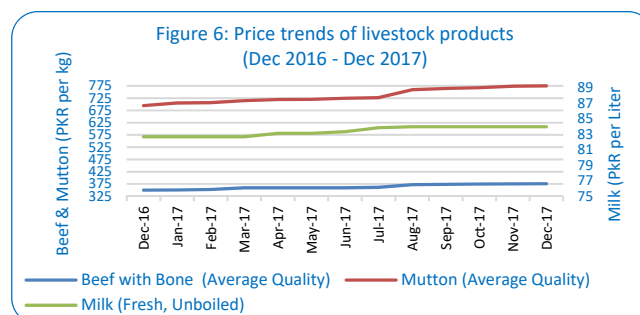
Figure 4 shows that the prices trends of the non-cereal commodities from December 2016 to December 2017.



Livestock products prices

Prices of livestock products slightly increased during the reporting period (**Figure 5**). In December 2017, compared to June 2017, the prices of mutton, milk, and beef increased by 7.1 percent, 0.8 percent, and 4.5 percent, respectively.

On a one-year comparison with December 2016, the prices of mutton, milk, and beef slightly increased by 11.7 percent, 1.5 percent, and 7.4 percent, respectively.



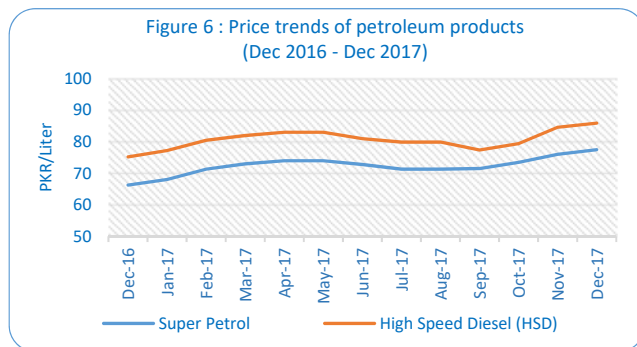
Fuel prices

The retail prices of Super Petrol and High Speed Diesel (HSD) decreased steadily and by July 2017 price of petrol was lower by 2.1 percent and for HSD by 1.4 percent. In August, the prices remained unchanged. However, from September the price for petrol took a U-turn and began rising. For HSD, price

¹¹ Pakistan Bureau of Statistics, Government of Pakistan.

continued decreasing and in September it was lower by 3.1 percent compared to previous month. However, from October, the price for HSD also started increasing. Price for petrol and HSD increased by 1.9 percent and 1.6 percent, respectively, in December 2017.

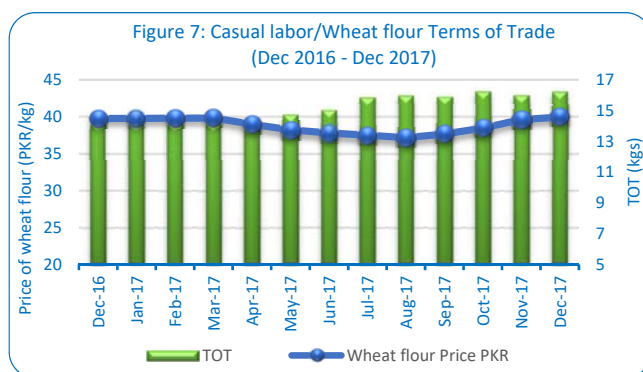
On a six-month comparison with June 2017, the prices of Super Petrol and HSD slightly increased by 6.4 percent and 6.1 percent, respectively. Whereas, compared to a year ago (December 2016), a significant increase by 16.9 percent for Super Petrol and 14.3 percent for HSD was recorded, as shown in **Figure 6**.



Terms of trade (ToT)¹²

The ToT is measured as the quantity of wheat flour that can be purchased with one day’s income of an unskilled wage laborer¹³. **Figure 7** shows that the ToT remained stable during the reporting period. In December 2017, it was recorded at 16.2 kg. Compared to June 2017, the ToT increased by 7.9 percent, mainly due to increased daily wages despite a slight increase in wheat flour price recorded at the same time.

Compared to a year ago (December 2016), the ToT in December 2017 significantly improved by 14.6 percent mainly due to increased daily labor wage. This improvement in purchasing capacity suggests some improvement in household food security amongst the poorest households whose main income comes from daily wage labor.



¹² Terms of trade (ToT) is the ratio of the price of the primary income good relative to the price of the primary expenditure good, it simply measures the purchasing power of a particular livelihood group.

Livelihood and Food Security Assessment (LFSA)
for four Drought Affected Districts of Sindh

The Pakistan Food Security Cluster (FSC), co-led by FAO and WFP, conducted the Livelihood and Food Security Assessment (LFSA) in four districts of Sindh, namely, Jamshoro, Sanghar, Tharparkar and Umerkot in April/May of 2017. The detailed assessment was aimed at assessing the situation of food security and livelihoods in the targeted districts.

The four target districts are highly prone to drought and have persistently experienced a drought-like situation since 2013. Although the situation slightly improved in 2015-16, it stayed precarious requiring continuous monitoring for early warning and timely response planning.

The Report findings indicate that overall 31 percent of surveyed households have poor food consumption; 26 percent fall in borderline category who may fall into poor category if situation deteriorates further or in the event of another major shock. Limited economic access to food remains a big concern and major challenge, with above half of the surveyed households (51 percent) spending a very high share (more than 75 percent) of their total household expenditure on food. This challenge is further confirmed by another fact that in order to cope with a lack of food or lack of money to buy food, 37 percent of the households reported adopting emergency irreversible coping strategies which may potentially negatively impact their food security and livelihood situation in the future.

The Report recommends that households in Tharparkar and Sanghar districts would require immediate assistance to reduce high food insecurity and protect livelihoods, while those in Umerkot and Jamshoro districts would require medium to long term interventions to deal with structural causes of food insecurity.

The LFSA Report, published in December 2017, was widely disseminated by the FSC/Working Group and was well-received by the stakeholders. Full report can be accessed at: <http://fscluster.org/pakistan/document/livelihood-and-food-security-assessment>

¹³ The income base for computation of ToT is the average wage rate in five main cities (Lahore, Multan, Karachi, Peshawar & Quetta).

IPC Acute Malnutrition Classification

IPC Acute Malnutrition (AMN) is a set of protocols to classify areas based on the prevalence of acute malnutrition, identify major contributing factors to acute malnutrition, and provide actionable knowledge by consolidating wide-ranging evidence on the said factors.

In July 2017, WFP and FAO conducted a pilot training and analysis workshop on IPC AMN for three districts of Sindh: Jamshoro, Umerkot and Tharparkar. Experts and analysts on nutrition, health and food security from Pakistan Federal Government, Provincial Government of Sindh, UN organizations, and International/Local NGOs with the support from IPC Global (Rome) and Regional (Bangkok) team carried out the analysis. The analysis, based on fresh evidence from Livelihoods and Food Security Assessment (LFSA), was conducted by the Food Security Working Group. For this analysis, the outcome indicator for IPC AMN GAM by MUAC was used, whereas evidence on contributing factors was collected from SMART nutrition surveys conducted by UNICEF and partners, Multiple Indicator Cluster Survey (MICS) 2014, and Pakistan Social and Living Standard Measurement (PSLM) conducted in 2014-15.

Based on analysis, all three analysed districts (Jamshoro, Umerkot and Tharparkar) were classified in phase 4 (Critical phase) of IPC AMN scale during April – June 2017, which is the lean/post-harvest period in majority of the areas of these districts. Overall, more than 88,000 children were found affected by acute malnutrition in all 3 districts. The major factors contributing to acute malnutrition include very poor quality of food, high prevalence of diseases, poor sanitation system and poor feeding practices. Several structural issues especially human, physical, and financial capitals were also identified as major factors contributing to acute malnutrition in these areas.

Lack of long-term and/or up-to-date information on the food security outcome related indicators and contributing factors was a limitation faced during the analysis. Hence data gaps identified included lack of accurate screening data with quality checks on data of age, sex, and standard deviation, and need for improved quality of MUAC measurements. The Final Report of the analysis has been submitted to the Provincial Nutrition Steering Committee (Sindh) for review and endorsement.

Weather Outlook¹⁴ (March 2018)

The North Atlantic Oscillation (NAO), Indian Ocean Dipole (IOD) and ENSO are likely to be in neutral phase, during

March-April 2018 (Spring Season) and its effect on the weather pattern is not pronounced.

Outlook for the month of March, 2018 has been prepared, based upon regional and global weather conditions, incorporating the climate system anomalies. Following are the main features of weather expected in March, 2018:

- Upper parts of the country including upper Punjab, Federally Administered Tribal Areas (FATA), Khyber Pakhtunkhwa (KP), Gilgit-Baltistan (GB) and Kashmir are expected to receive slightly above normal precipitation with snowfall over the hilly areas of KP, GB and Kashmir. Lower half of the country may receive below normal to normal rainfall during the month.
- Three to four spells of short duration are expected over upper parts of the country to produce precipitation along with thunderstorm, gusty winds and high risk of hailstorm.
- The average temperatures across major cities of the country are likely to be slightly above normal during the month.
- Moderate drought like conditions over south - west Balochistan may be aggravated to severe and prevailing mild drought conditions over Tharparkar may transform into moderate, due to deficient rainfall.
- Precipitation in the month of March is not likely to improve the water stocks in major reservoirs considerably and stress conditions may continue.

Food Security Outlook

The performance of the agriculture subsectors has remained positive and it can safely be forecast that food supply is not going to be a critical issue in the country this year.

Overall, the food availability situation is stable in the country owing to sufficient production of the main staple crops – wheat and rice. Meanwhile, Pakistan's estimated wheat ending stocks for 2016/17 are recorded at 4.33¹⁵ million MT, and total estimated cereal production has increased by 3 percent at 43.1¹⁶ million MT, thus, indicating a relatively promising outlook.

At the global level, world wheat output for 2017 is currently forecast at 1 percent lower than in 2016 and world rice production in 2017 is forecast marginally below the 2016 level. The world cereal supplies in the 2017/18 season are

¹⁴ The outlook is based on recent data by Pakistan Meteorological Department which is updated monthly.

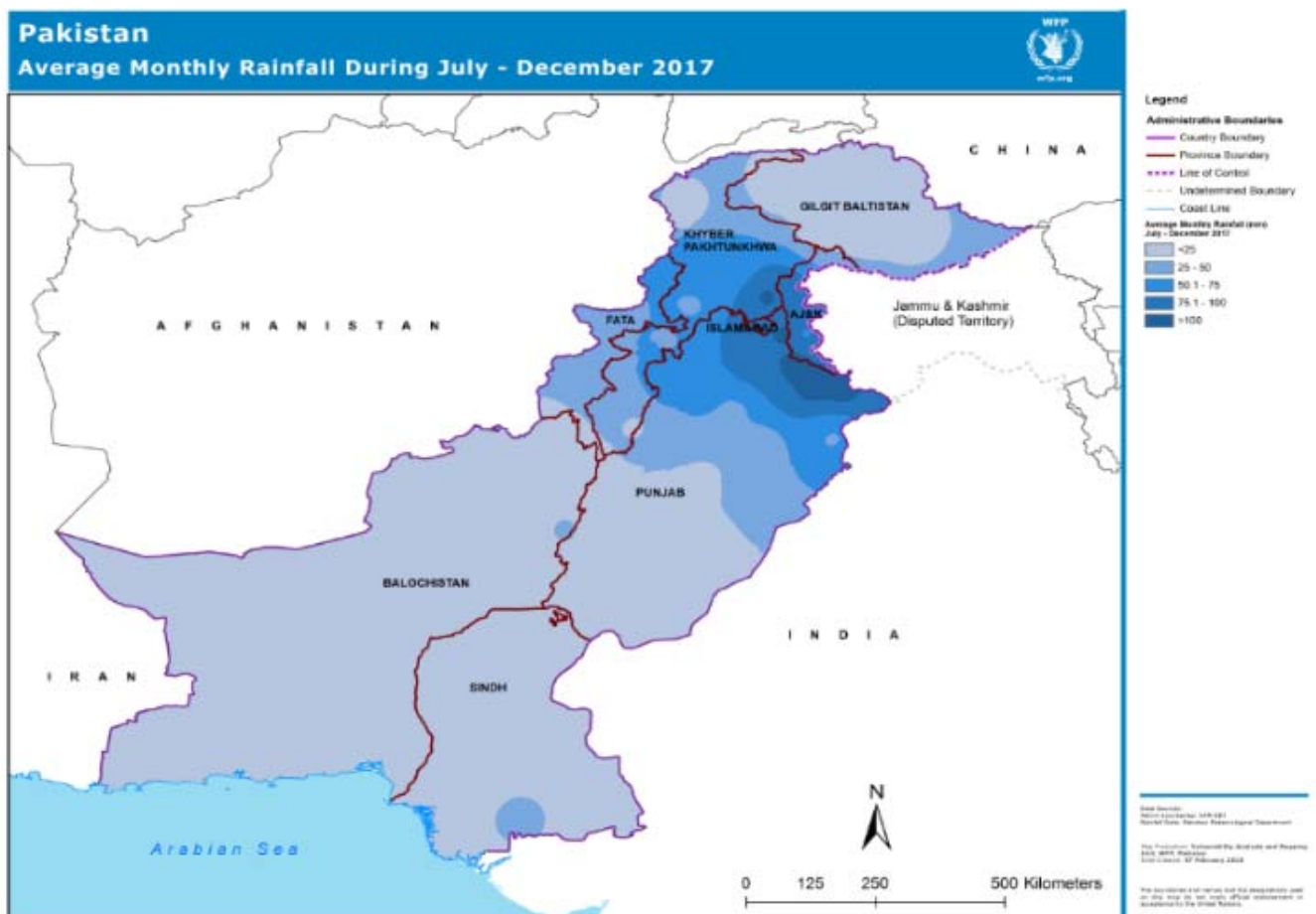
¹⁵ World Agricultural Supply and Demand Estimates, USDA, June 2017.

¹⁶ Crop Prospects and Food Situation, FAO, June 2017.

expected to rise to an all-time high and global wheat stocks (ending in 2018) are also forecast to hit an all-time high¹⁷.

As earlier mentioned, the national Terms of Trade in December 2017 also slightly improved by 7.9 percent compared to six months ago and significantly improved by 14.6 percent compared to one year ago due to mainly increased daily labour wage rates.

Though the supply of food seems sufficient in the country, important factors affecting food security remain of concern including poverty leading to limited economic access to food, low education levels, extreme environmental conditions, and natural and man-made disasters. Together, these factors deplete the affordability of households and limit their access to adequate nutritious food.



For further information and feedback, please contact the Vulnerability Analysis and Mapping Unit, UN World Food Programme, Islamabad, Pakistan at: Islamabad.vam@wfp.org

¹⁷ FAO Cereal Supply and Demand Brief, 7 December 2017.