

AGRICULTURE OUTLOOK

Volume XI, ISSUE 4, 2026



PLANNING & RESEARCH DEPARTMENT
ZARAI TARAQIATI BANK LIMITED
HEAD OFFICE, ISLAMABAD

S. No	CONTENT	PAGE
1	EXECUTIVE SUMMARY	03
2	CURRENT CROP SITUATION	04
2.1	<i>Wheat Crop</i>	04
2.2	<i>Sugarcane Crop</i>	04
2.3	<i>Oil Seed Crops</i>	04
2.4	<i>Horticulture</i>	04
3	WEATHER SITUATION	05
4	DROUGHT SITUATION	06
5	WATER AVAILABILITY/ DAMS FLOW DATA	07
6	AVERAGE PRICES OF AGRI. COMMODITIES	08
7	TRADE SITUATION	10
8	FERTILIZER OFFTAKE SITUATION	11
9	NEWS TRENDS	13
10	AGRO ADVISORY SERVICES	14

1. EXECUTIVE SUMMARY

Agricultural activities during April 2026 remained focused on harvesting of wheat and mustard crops, while preparations for sowing of major Kharif crops, particularly cotton and rice, gained momentum across the country. Wheat harvesting has progressed in all provinces and, despite localized crop lodging in some areas, overall production prospects remain satisfactory.

Pakistan's wheat production for Rabi 2025-26 is estimated at 29.31 million tonnes, which is 3.13 percent higher than last year's production, indicating a relatively comfortable domestic supply situation.

The horticulture sector remained active with harvesting of seasonal fruits and vegetables across provinces, while cotton sowing commenced in Sindh and land preparation activities continued in Punjab. Oilseed crops, particularly mustard and sunflower, showed satisfactory performance, supporting domestic edible oil production.

Weather conditions during March 2026 were generally favourable for agricultural activities. Significant rainfall was received in upper parts of the country, improving soil moisture conditions and supporting crop growth.

According to drought monitoring indicators, drought conditions have largely subsided across the country due to improved precipitation, reducing immediate moisture stress concerns for the agriculture sector.

Water availability in major reservoirs remained adequate to meet irrigation requirements despite gradual declines in storage levels. The current water situation is expected to support Kharif crop sowing and early crop development activities.

Inflationary pressures persisted during March 2026, with CPI inflation rising to 7.3 percent on a year-on-year basis. However, prices of several essential food commodities, including wheat flour, potatoes, tomatoes, pulses and sugar, recorded declines compared to the previous month, reflecting improved market supplies.

External trade indicators showed a contraction in both exports and imports during March 2026 compared to the corresponding period of last year. While lower imports may ease pressure on the external account, subdued export performance continues to pose challenges for overall economic growth.

Fertilizer availability remained comfortable, supported by strong domestic production and imports. Total nutrient offtake during March 2026 increased significantly over the same period last year, reflecting strong fertilizer demand ahead of the Kharif season.

2. CURRENT CROP SITUATION

In April 2026, major agricultural activities include the harvesting of wheat and mustard, which has already started. Farmers are preparing land for cotton and rice sowing, while maize and fodder crops are also being sown

2.1. Wheat Crop

Harvesting of crops started in the second week and is now midway, and it is expected to be completed in Punjab by the first week of May. The crop has been affected by lodging, but overall yield is looking satisfactory. In Sindh, harvesting is near completion and farmers are preparing land for other crops. In Khyber Pakhtunkhwa, harvesting has also started, while in Balochistan the crop is growing well.

2.2. Cotton

In Punjab, farmers are preparing their land for cotton sowing and are seeking guidance from the Agriculture Department regarding proper seed selection. Meanwhile, in Sindh, cotton sowing has already begun. Farmers who planted early maturing varieties are experiencing good crop growth but thrips infestation has started to appear, causing the leaves to turn yellow. Farmers are therefore advised to apply Abamectin at the recommended dose of 60 ml per acre or adopt other precautionary measures to protect the crop.

2.3. Oil Seed Crops

Mustard crop harvesting has also started for oil extraction, while other oilseed crops such as sunflower are showing good growth. Flowering in the crop has also begun.

2.4. Sugarcane

The September-sown and ratoon crops are showing healthy growth, while the February-sown crop is also progressing satisfactorily. However, farmers are advised to apply a suitable weedicide in a timely manner to control all types of weeds so that weed competition does not adversely affect the crop's growth

2.5. Horticulture

In Punjab, Peach, melon, and watermelon harvesting has started, while guava and strawberry are also being harvested. Vegetables such as spinach, peas, cabbage, and ladyfinger are also being harvested.

In Sindh, Due to hot weather, vegetable harvesting is at its peak in the region. Crops such as ladyfinger, bitter gourd, melon, and watermelon are also at the harvesting stage

In Khyber Pakhtunkhwa, Tobacco transplanting has been completed and the crop is growing well. Fruits and vegetables are also being harvested

In Balochistan, Seasonal vegetables such as chilies, ladyfinger, tomato, bottle gourd, bitter gourd, and other crops have completed sowing, and farmers are adopting best practices for better growth. The melon and watermelon season is at its peak, while other fruits are also being harvested.

In Gilgit-Baltistan, Tunnel farming is ongoing in the region, where sowing and harvesting are being carried out simultaneously.

3. WEATHER SITUATION

Rainfall/ Precipitation

During the month, the rainfall was recorded across the country. The upper parts of the country, including Khyber Pakhtunkhwa (KP), Gilgit-Baltistan (GB), Azad Jammu and Kashmir (AJK), upper Punjab, northern and southwestern Balochistan received significant amount of rainfall. Upper parts of the country except northwestern KP and southern parts of Sindh and Balochistan received above-normal rainfall whereas, central parts of the country and northwestern Balochistan received below-normal rainfall. Major amounts of rainfall recorded during the period are depicted in table below:

Chief amount of rainfall recorded across Pakistan during the month of March, 2026					
Sr. No.	Station	Rainfall (mm)	Sr. No.	Station	Rainfall (mm)
1	Malam Jabba	315	11	Dir	171
2	Pattan	227	12	Balakot	148
3	Cherat	204.6	13	Saidu Sharif	145.4
4	Kakul	198.7	14	Garhi Dupatta	144.8
5	Muzaffarabad AP	194.4	15	Joharabad	127.5
6	Murree	185.2	16	Chakwal	124
7	Parachinar	182	17	Islamabad Zeropoint	121
8	Rawalakot	180.1	18	Risalpur	116.5
9	Muzaffarabad City	172.7	19	lower Dir	115.7
10	Kalam	172.3	20	Astore	106.5

Temperature Regime during March 2026

In March 2026, minimum temperatures remained generally above normal across most agricultural regions of the country, indicating relatively warmer than usual conditions during the late Rabi season. However, near normal to slightly below normal temperatures were observed in a few isolated pockets, particularly in parts of central Balochistan and coastal areas.

Overall, mean temperatures ranged between 6°C and 28°C. Relatively lower temperatures, between 6°C and 24°C, were observed over parts of upper Punjab, Balochistan, upper Khyber Pakhtunkhwa, AJK, and Gilgit-Baltistan. In contrast, relatively higher temperatures prevailed in southern Punjab, Sindh, and coastal areas and western parts of Balochistan, where mean values ranged between 24°C and 28°C.

Weather Prediction for April 2026

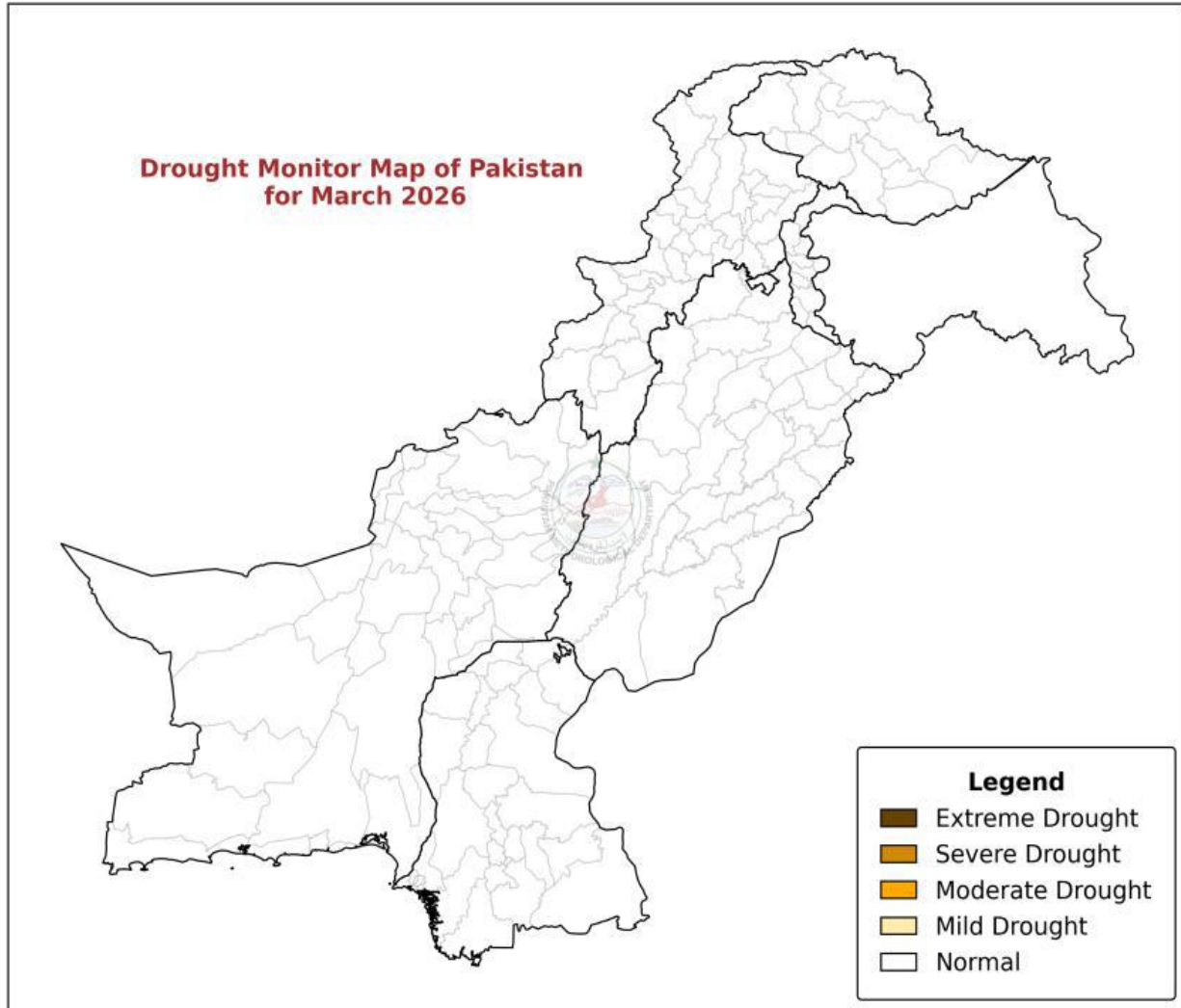
A general tendency for above-normal rainfall is anticipated across most parts of the country during April 2026, with the most pronounced positive anomalies concentrated over western to central regions, particularly Khyber Pakhtunkhwa and adjoining areas of central Punjab and northern Balochistan. Slightly above-normal rainfall is expected over the remaining parts of the country, including southern Punjab, southern Balochistan, Gilgit-Baltistan, Kashmir and Sindh during the month.

Overall, April 2026 is expected to be predominantly above-normal rainfall nationwide, with northwestern regions experiencing the highest positive deviations.

Mean temperatures are expected to remain above normal nationwide, with maximum departure over Gilgit-Baltistan, Kashmir and northern Khyber Pakhtunkhwa in April 2026.

4. DROUGHT SITUATION

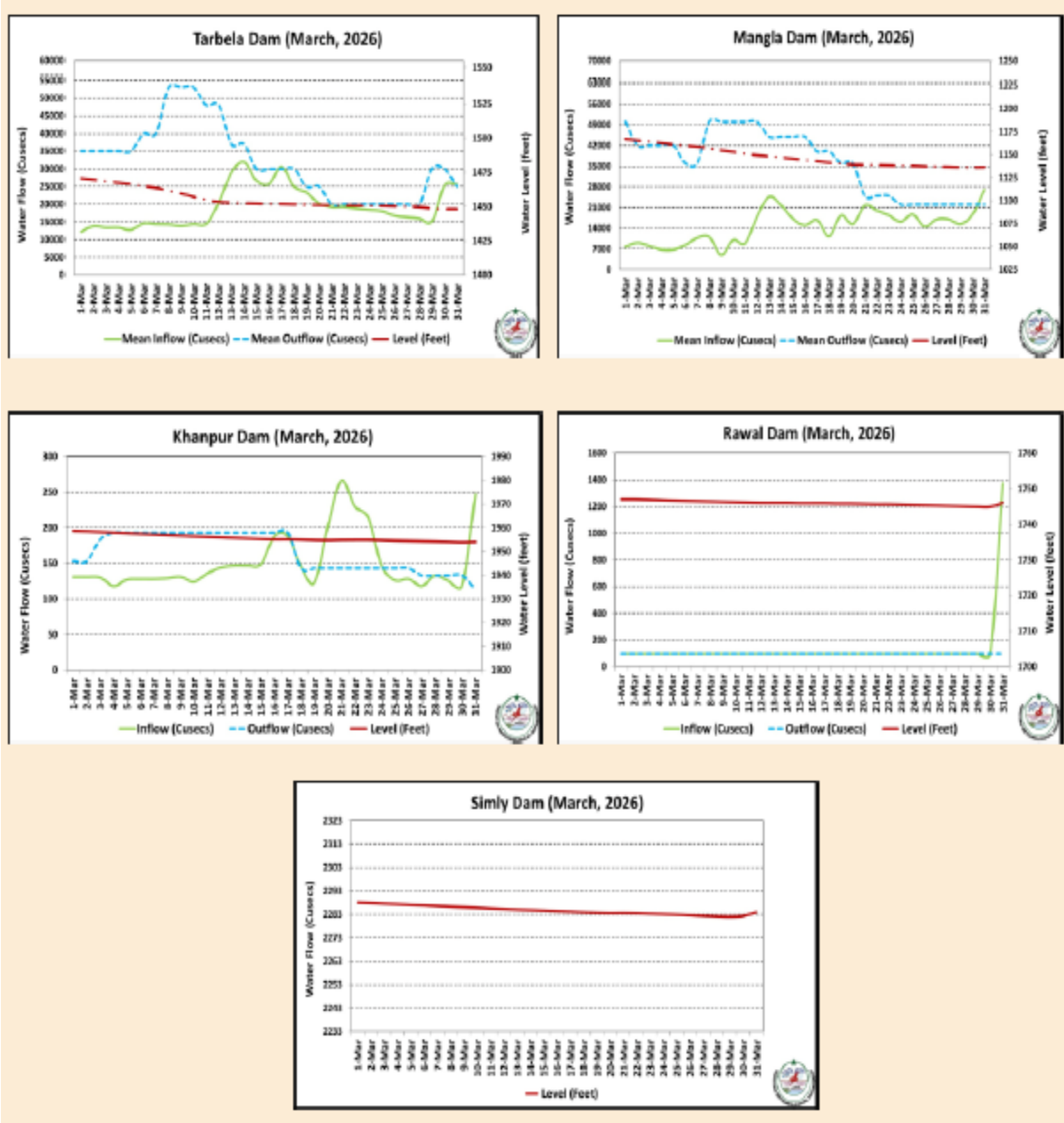
Figure below illustrates the countrywide drought situation for March 2026, based on an integrated analysis of multiple drought-monitoring indicators and ground-based observations from meteorological stations. During March, sufficient rainfall has been received across the country including drought-affected districts of Balochistan. Consequently, normal conditions are now prevailing across the country.



Drought Monitor of Pakistan for the month of March, 2026

5. Water Availability/ Dams Flow Data

Figures below illustrate the water inflow, outflow, and storage levels of major reservoirs, including Mangla, Tarbela, Khanpur, Rawal, and Simly, during the month of March, 2026. The water level has gradually declined in all reservoirs. Currently, the water levels at the key reservoirs, Tarbela and Mangla, stand at 1,448 feet and 1,147 feet, respectively. Therefore, sufficient water is available in these reservoirs to meet irrigation and drinking water requirements.



Water inflow, outflow and level of Rawal, Khanpur, Tarbela and Mangla Dams, March 2026

6. AVERAGE PRICES OF AGRI. COMMODITIES

CPI inflation General, increased by 7.3% on year-on-year basis in March 2026 as compared to an increase of 7.0% in the previous month and 0.7% in March 2025. On month-on-month basis, it increased by 1.2% in March 2026 as compared to an increase of 0.3% in the previous month and an increase of 0.9% in March 2025.


CPI inflation Urban, increased by 7.4% on year-on-year basis in March 2026 as compared to an increase of 6.8% in the previous month and an increase of 1.2% in March 2025. On month-on-month basis, it increased by 1.3% in March 2026 as compared to an increase of 0.3% in the previous month and an increase of 0.8% in March 2025.

CPI inflation Rural, increased by 7.2% on year-on-year basis in March 2026 as compared to an increase of 7.3% in the previous month and no change observed in March 2025. On month-on-month basis, it increased by 1.0% in March 2026 as compared to an increase of 0.3% in the previous month and an increase of 1.1% in March 2025.

Average Monthly Prices of Essential Items for the month of March 2026

S. No.	Description	Unit	Average Prices			%change Mar 26 over	
			Mar 26	26-Feb	25-Mar	26-Feb	25-Mar
1	Wheat Flour Bag	20Kg	2225.35	2331.17	1758.84	-4.54	26.52
2	Rice Basmati Broken (Average Quality)	1 Kg	215.83	216.25	202.79	-0.19	6.43
3	Rice IRRI-6/9 (Sindh/Punjab)	1 Kg	154.88	155.84	158.13	-0.62	-2.06
4	Bread plain (Small Size)	Each	111.28	111.62	108.23	-0.30	2.82
5	Beef with Bone (Average Quality)	1 Kg	1198.57	1174.75	1067.39	2.03	12.29
6	Mutton (Average Quality)	1 Kg	2199.45	2145.53	1995.29	2.51	10.23
7	Chicken Farm Broiler (Live)	1 Kg	398.29	360.38	498.22	10.52	-20.06
8	Milk fresh (Un-boiled)	1 Ltr	203.75	203.54	197.88	0.10	2.97
9	Curd (Dahi) Loose	1 Kg	239.91	239.42	229.15	0.20	4.70
10	Powdered Milk NIDO 390 gm Polybag	Each	1141.72	1139.48	1036.86	0.20	10.11
11	Eggs Hen (Farm)	1Dzn	222.63	275.21	280.58	-19.11	-20.65
12	Mustard Oil (Average Quality)	1 Kg	555.17	552.59	554.63	0.47	0.10
13	Cooking Oil Dalda/Habib, 5 Litre Tin	Each	2985.11	3000.83	2923.13	-0.52	2.12
14	Vegetable Ghee Dalda/Habib 2.5 kg Tin	Each	1512.18	1520.09	1485.63	-0.52	1.79
15	Vegetable Ghee Dalda/Habib or Other superior Quality 1 kg Pouch	Each	588.91	588.64	578.48	0.05	1.80
16	Bananas (Kela) Local	1Dzn	212.21	180.72	209.65	17.42	1.22
17	Pulse Masoor (Washed)	1 Kg	260.97	264.58	293.89	-1.36	-11.20
18	Pulse Moong (Washed)	1 Kg	388.49	391.61	396.07	-0.80	-1.91
19	Pulse Mash (Washed)	1 Kg	465.34	455.64	463.12	2.13	0.48
20	Pulse Gram	1 Kg	249.55	252.58	309.31	-1.20	-19.32
21	Potatoes	1 Kg	31.12	36.33	62.95	-14.34	-50.56
22	Onions	1 Kg	68.13	68.89	69.80	-1.10	-2.39
23	Tomatoes	1 Kg	71.38	93.80	73.04	-23.90	-2.27
24	Sugar Refined	1 Kg	150.59	153.92	168.40	-2.16	-10.58
25	Gur (Average Quality)	1 Kg	225.14	225.75	209.94	-0.27	7.24

26	Salt Powdered (NATIONAL/SHAN) 800 gm Packet	Each	63.00	63.27	72.03	-0.43	-12.54
27	Chilies Powder NATIONAL 200 gm Packet	Each	368.65	367.12	320.00	0.42	15.20
28	Garlic (Lehsun)	1 Kg	513.80	494.71	625.10	3.86	-17.81
29	Tea Lipton Yellow Label 190 gm Packet	Each	447.06	447.06	456.48	0.00	-2.06

Increase in Prices 

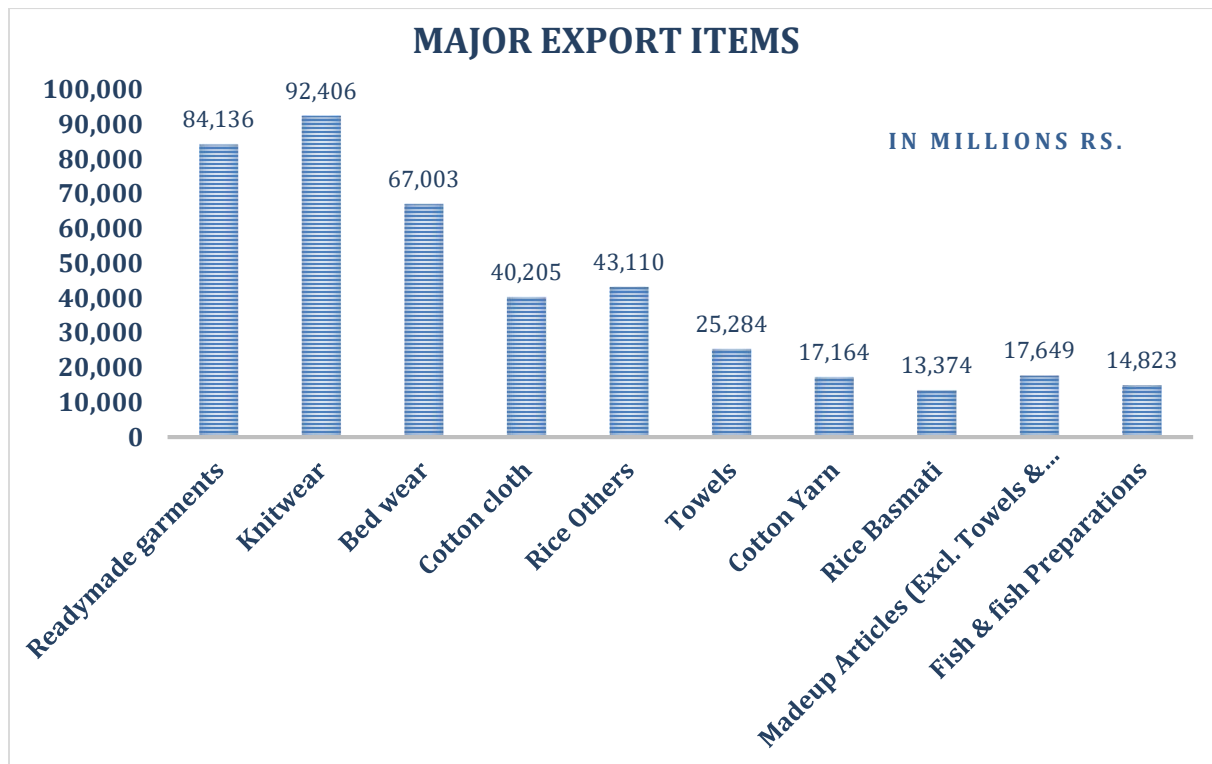
Decrease in price 

7. TRADE SITUATION

EXPORTS

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during March, 2026 amounted to Rs.635,497 million (provisional) as against Rs. 636,585 million in February, 2026 and Rs. 740,800 million during March, 2025 showing a decrease of 0.17% over February, 2026 and of 14.21% over March, 2025.

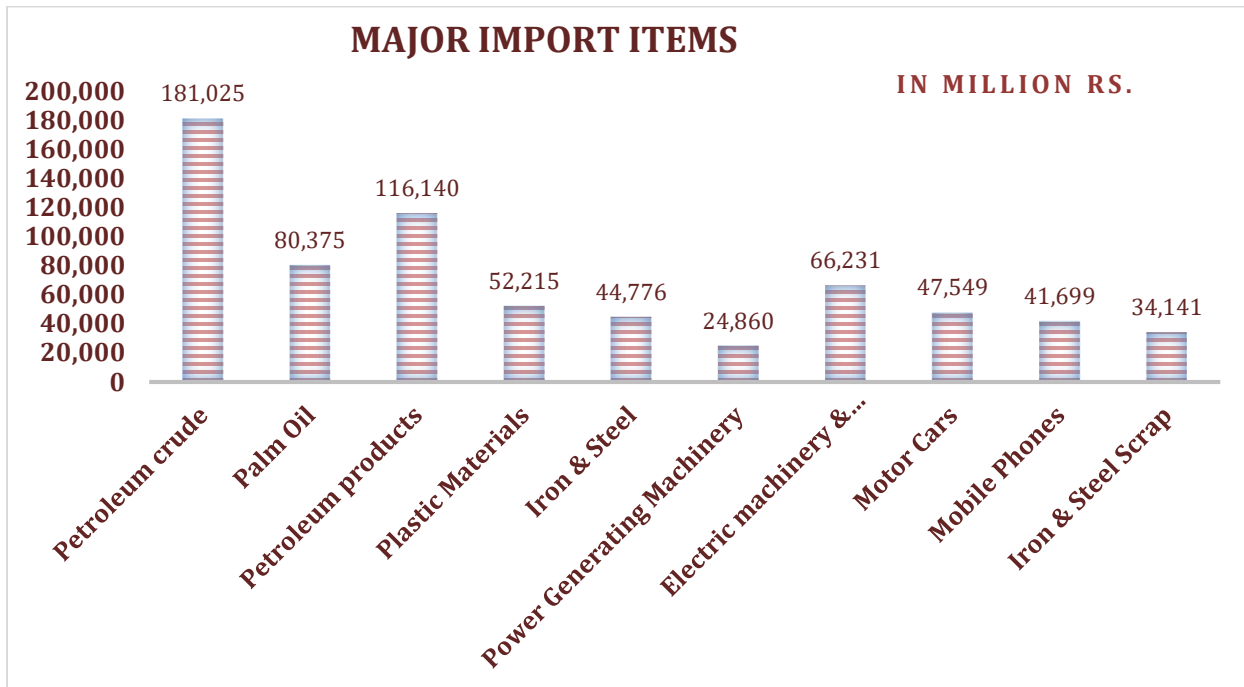
In terms of US dollars, the exports in March, 2026 totaled \$ 2,275 million (provisional) as compared to \$ 2,276 million in February, 2026 showing a decrease of 0.04% over February, 2026 and of 13.99% as compared to \$ 2,645 million in March, 2025.



Imports

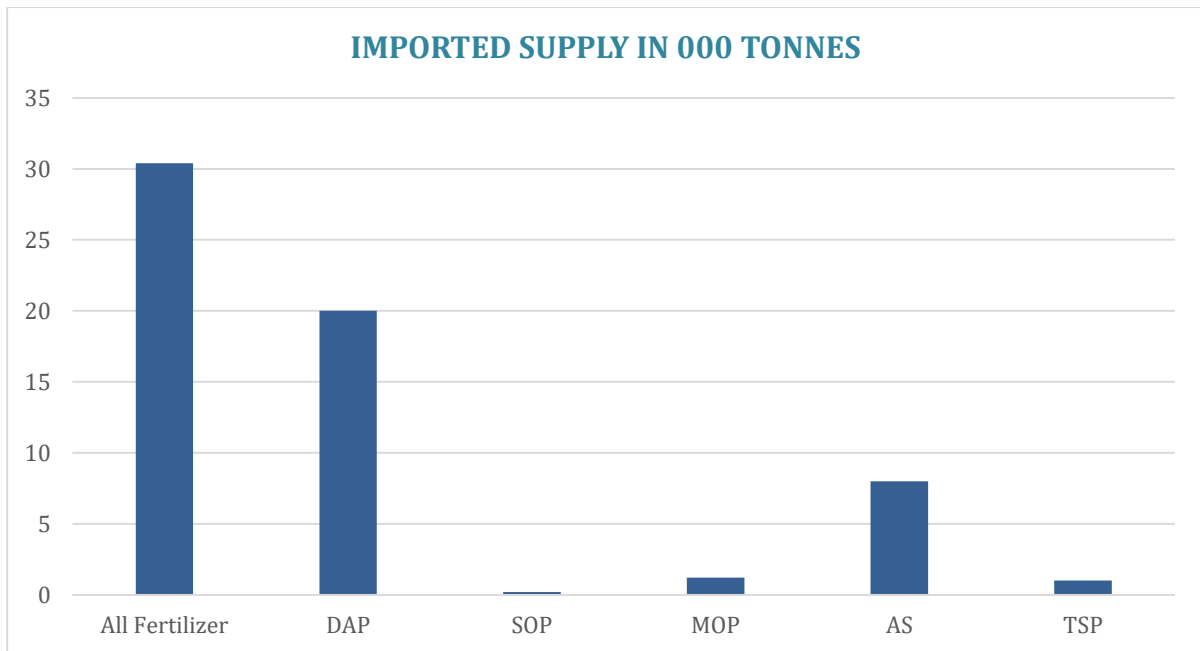
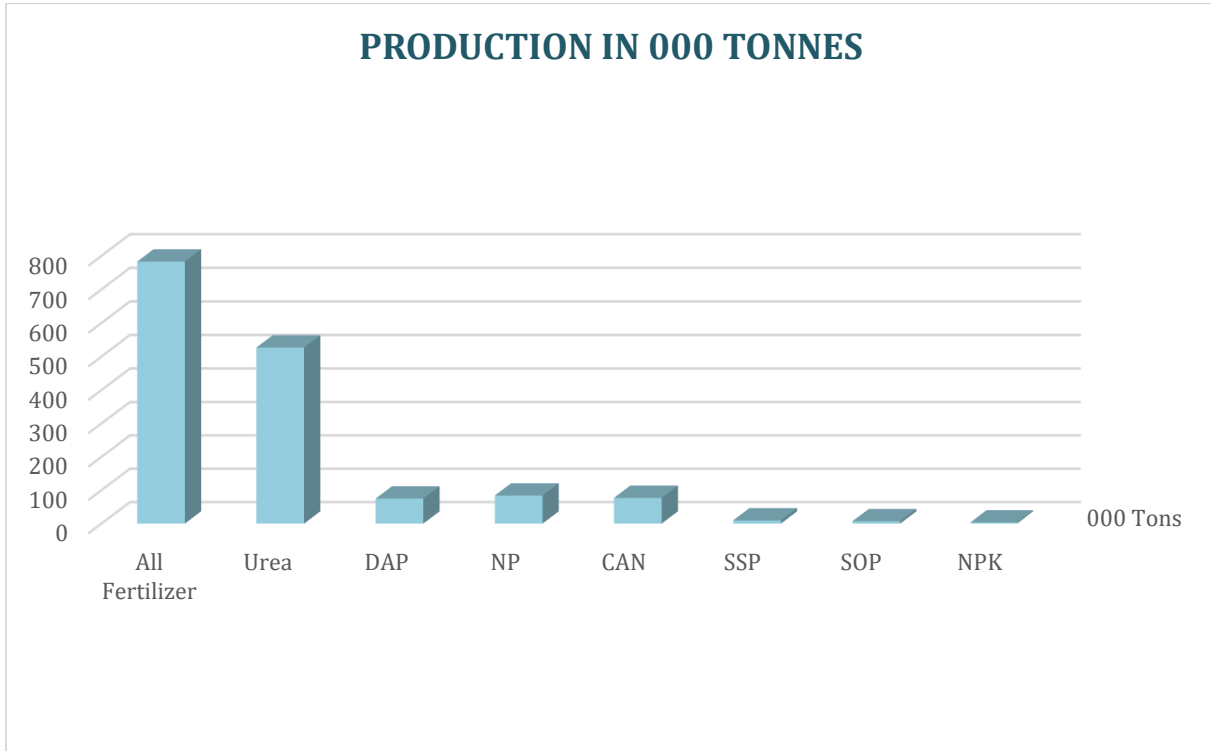
Imports into Pakistan during March, 2026 amounted to Rs. 1,430,328 million (provisional) as against Rs. 1,481,293 million in February, 2026 and Rs. 1,478,379 million during March, 2025 showing a decrease of 3.44% over February, 2026 and of 3.25% over March, 2025.

In terms of US dollars, the imports in March, 2026 totaled \$ 5,114 million (provisional) as compared to \$ 5,290 million in February, 2026 showing a decrease of 3.33% over February, 2026 and of 3.11% as compared to \$ 5,278 million in March, 2025.



8. FERTILIZER OFFTAKE SITUATION

- Total nutrient offtake during March 2026 was 414 thousand tonnes, which increased by 88.2 per cent.
- Urea and DAP offtake was 569 and 150 thousand tonnes which increased by 85.6 and 209.6 per cent over March 2025.
- Nitrogen, phosphate and potash offtake was increased by 80.6, 129.6 and 39.4 per cent, respectively.



9. NEWS TRENDS

Middle East Tensions Disrupt Fertilizer Supply Chains

Ongoing tensions in the Hormuz Strait and disruptions in maritime routes have adversely affected global fertilizer trade, resulting in sharp increases in urea and ammonia prices. According to agricultural experts, urea prices at the New Orleans hub rose from \$516 to \$683 per ton, while prices in some Middle Eastern markets exceeded \$700 per ton. Ammonia prices increased by 20–24 percent. As nearly one-third of global fertilizer trade passes through this route, supply uncertainties have intensified. For Pakistan, which relies on fertilizer imports, global price fluctuations may affect the domestic market. However, sufficient stocks of urea and DAP have reportedly been arranged for the Kharif season, along with measures against hoarding. Long-term strategies suggested include enhancing domestic fertilizer production and diversifying import sources.

Punjab Allowed Potato Exports into Russia

Russia has permitted the import of potatoes from Punjab with effect from April 8, 2026, lifting phytosanitary restrictions imposed since May 2025. Initially, three Pakistani exporters have been approved, with additional registrations expected in due course. Pakistan is estimated to produce around 12 million tons of potatoes this season. The new market access is expected to help absorb surplus stocks, stabilize domestic prices, support farmers, and generate foreign exchange earnings. The development resulted from coordinated efforts of the Ministry of National Food Security & Research, Department of Plant Protection, TDAP, PHDEC, and Pakistan's Trade Mission in Moscow.

Wheat Production Estimated at 29.31 Million Tons

Pakistan is expected to produce 29.31 million tons of wheat during the 2025–26 Rabi season from 9.385 million hectares, slightly below the target of 29.678 million tons but 3.13 percent higher than last year's production of 28.42 million tons. Punjab is projected to contribute 22.04 million tons, followed by Sindh (4.402 million tons), Khyber Pakhtunkhwa (1.411 million tons), and Balochistan (1.450 million tons). Potato production is estimated to increase by 23.2 percent to 12.171 million tons, while gram production is projected to rise by 52.4 percent. The Federal Committee on Agriculture also fixed Kharif 2026–27 production targets for cotton, rice, sugarcane and other crops, while noting adequate availability of seeds and fertilizer, including comfortable urea supplies due to local production and existing stocks.

10. AGRO ADVISORY SERVICES FOR FARMERS

پتے

☆ مٹی کو فصل کو صوب میں خشک کرنے کے بعد پتے کی گہائی والی تقریباً کے ساتھ گہائی کریں۔

☆ بیج کو خشک اور صاف کر کے شور میں رکھیں یا فروخت کریں۔ اس میں مٹی کی مقدار 10-8 فیصد سے زیادہ نہیں ہونی چاہیے۔

بہاریہ مٹی

☆ موسمی حالات دیکھتے ہوئے فصل کو حسب ضرورت مناسب وقت سے آبیاری کریں۔ پورے پتے پر کسی صورت میں پانی کی کمی نہ آنے دیں۔ پورے پتے پر کھیت کو ہمیشہ تر حالات میں رکھیں تاکہ دانہ بننے میں مدد ملے لیکن پانی گھرائیں ہونا چاہیے۔

☆ گوڑی کریں آخری گوڑی کرتے وقت پودوں کے ساتھ مٹی چڑھا دیں۔

☆ ہا ہیرڈ اقسام کو درمیانی زمین میں پانچ چھ پتے لگنے پر آٹھ دن پتے لگنے پر اور پھول آنے سے تقریباً 15 دن قبل ایک ایک پوری پوری یا کھادنی ایکڑ ڈالیں۔

☆ مٹی کے گڑبڑوں اور کوئیل کی کمی کے تدارک کے لیے مناسب داندہ راز ہروں کا استعمال محکمہ توسیع زراعت کے مقامی عملہ کے مشورہ سے کریں۔

موہج پھلی

☆ موہج پھلی کی کاشت کے لیے زمین کی تیاری کریں۔ موہج پھلی کی کاشت کے لیے مٹی، برہلی، میرا یا انگی میرا زمین موزوں ہے۔

☆ زمین کی تیاری کے وقت گہرائی چلائیں تاکہ اوپر والی مٹی عمل طور پر نیچے چلی جائے اور جڑی بوٹیاں بھی تلف ہو جائیں۔ ہارانی علاقوں میں موہج پھلی کی کاشت محفوظ کیے ہوئے وتر میں وسط مارچ تا آخر مئی میں کرنی چاہیے۔ اہلہ فصل کے آپاش علاقوں میں موہج پھلی کی کاشت 15 اپریل تا 31 مئی تک کرنی چاہیے۔

☆ اچھی پیداوار کے لیے معیاری بیج کا استعمال کریں۔ ایک 2019، پھول ہار اور این اے آری 2019 کے لیے موزوں وقت کاشت 15 مارچ تا 30 اپریل جبکہ پاری 2011، فخر پکوال، گولڈنڈا اور فخر ایک کے لیے 15 مارچ تا 31 مئی ہے۔

☆ بیج کی شرح این اے آری 2019 کے لیے 35 اور فخر پکوال کے لیے 50 کلوگرام گریاں فی ایکڑ جبکہ باقی اقسام کے لیے 40 کلوگرام گریاں فی ایکڑ رکھیں۔

☆ گہائی کرتے وقت تقاروں کا درمیانی فاصلہ 1.5 فٹ اور پودوں کا درمیانی فاصلہ 8x6 انچ رکھیں۔

☆ جڑی بوٹیوں کے کیمائی انسداد کے لیے اگاؤ سے پہلے اور اگاؤ کے بعد استعمال ہونے والی جڑی بوٹی مارز ہریں محکمہ توسیع زراعت کے عملہ کے مشورہ سے کریں۔

سہریات

☆ سہریات کی گوڑی کریں۔ جہاں ضرورت ہوتی ہے ساتھ مٹی چڑھا لیں۔ موسمی حالات کو مد نظر رکھتے ہوئے 8 تا 10 دن کے وقفے سے آبیاری کریں۔

☆ کیڑے اور بیماریوں کے حملے کی صورت میں محکمہ زراعت کے عملہ کے مشورہ سے پھلے کریں۔

باقات

ترشا اور پھل

☆ پودوں کے کچے گلے اور غیر معمولی بڑھوتری والی شاخیں کاٹیں۔

☆ جن پودوں پر پھل بن چکا ہے وہاں ٹائٹروجن کھاد فوری طور پر ڈالیں اور عناصر صاف پھلہ کا پھلے بھی کریں۔

☆ موسمی حالات اور زمین کی ساخت و کیفیت کو مد نظر رکھتے ہوئے 15 دن کے وقفے سے آبیاری کریں۔

☆ ہارٹوں کے دوران مٹریں کینکڑ پھیلنے کا خدشہ ہوتا ہے۔ اس لیے اس بیماری کو زمری میں ہی کنٹرول کریں۔ نیز اس سے بچنے کے لیے ایف۔ مائٹر کے انسداد پر خصوصی توجہ دیں۔

آم

☆ جڑی بوٹیوں کا تدارک نہروں سے کریں۔ پوری کٹائی جاری رکھیں اور کٹائی کے بعد زخمی جگہ پر پورڈ پیسٹ لگائیں۔

☆ ٹائٹروجن کھاد (یوریا) پورڈ دوسری خوراک 1 کلوگرام فی پودا ڈالیں۔

☆ پھل کی کھسی کے خلاف جنسی پھندوں کا پھرے کریں۔

☆ امر 20

☆ زسری کے لیے صبر اور پختہ پھل سے بیج حاصل کریں۔

☆ اگر پھل یا کھاد مارچ میں شڈائی گئی ہو تو اس ماہ ڈال دیں۔

☆ موسمی حالات کو مد نظر رکھتے ہوئے 12 سے 15 دن کے وقفے سے آبیاری کریں۔

☆ پھل کی کھسی کے نقصان سے بچنے کے لیے پھل کی برداشت تک خشے پھندے لگائیں۔

☆

☆ جب پھل تیار ہو جائے تو اس کی پھدائی کریں۔ 50% پھل ہر شاخ سے اتار دیں۔

☆ بادلوں کے موسم یا زیادہ گرمی میں پھلوں پر پھوندی کا حملہ ہونے کی صورت میں پھوندی کش ذہر کا پھرے کریں۔

SOURCES

- ✓ *Agriculture Bulletins, Pakistan Metrological Department*
- ✓ *Department of Agriculture Extension (Punjab, KP, Sindh and Balochistan)*
- ✓ <http://www.ndmc.pmd.gov.pk/>
- ✓ <http://www.ndmc.pmd.gov.pk/>
- ✓ *Pakistan Bureau of Statistics.*
- ✓ *National Fertilizer Development Centre*
- ✓ *Business Recorder*
- ✓ *Zarat Nama, Directorate of Agricultural Information*
