

AGRICULTURE OUTLOOK

Volume X, ISSUE VIII, 2025



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

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1. EXECUTIVE SUMMARY

During August 2025, rice in Punjab and Sindh neared harvest, though floods reduced overall yield in Punjab. Early cotton harvesting started in Punjab, while Sindh's crop showed promising growth; flood-affected areas suffered losses. Oilseed, mung bean, and sesame are being harvested with reduced yields due to heavy rains. Sugarcane remained generally healthy, with minor pest issues controlled by rainfall and timely management. In horticulture, persimmon, dates, guava, pomegranate, and Kinnow are at or near harvest, while citrus orchards show healthy growth. In Sindh, banana and guava harvesting continues, and vegetables like tomatoes and chili are progressing well. In KP, seasonal vegetables and citrus orchards are developing well, with some nearing harvest. In Balochistan, almonds, pistachios, and apples are being harvested, with chilies and cucumber also at harvesting stage. In Gilgit-Baltistan, apples and pears are being harvested, persimmon is nearing maturity, cherry picking is almost complete, and remaining vegetables are in satisfactory condition despite rain damage.

During August 2025, the country received moderate to heavy rainfall. The spatial distribution of this rainfall is illustrated. The major amounts were recorded Upper Punjab and Potohar region.

As mentioned by the Pakistan Bureau of Statistics (PBS) during August, 2025 Fresh Vegetables (45.76%), Chicken (29.73%), Tomatoes (19.92%), Potatoes (10.97%), Onions (9.36%), Sugar (6.11%), Gur (3.48%), Rice (1.46%), Meat (0.61%), Butter (0.55%), Milk Powder (0.48%), Pulse Masoor (0.46%), Milk Products (0.33%), Milk Fresh (0.28%) and Pulse Gram (0.26%) increased over July 2025.

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during July, 2025 amounted to Rs. 762,746 million (provisional) as against Rs. 701,091 million in June, 2025 and Rs. 642,272 million during July, 2024 showing an increase of 8.79% over June, 2025 and of 18.76% over July, 2024.

Imports into Pakistan during July, 2025 amounted to Rs. 1,669,239 million (provisional) as against Rs. 1,516,458 million in June, 2025 and Rs. 1,328,237 million during July, 2024 showing an increase of 10.07% over June, 2025 and of 25.67% over July, 2024.

Total nutrient offtake during July 2025 was 395 thousand tonnes while Total domestic fertilizer production during July 2025 was 814 thousand tonnes.



2. CURRENT CROP SITUATION

During August 2025, major agricultural activities in the plains of Pakistan included the rice crop growth, cotton harvesting will start at the end of this month, and sugarcane is also showing healthy growth.

2.1. Rice Crop:

In Sindh and Punjab, the rice crop is near to harvesting and in some areas of Punjab early sown Varieties harvesting has been started with good yield apart from the damaged done by monsoon flood that has decreased the overall 30% yield of rice crop.

2.2. Cotton Crop:

In Punjab, early sown Varieties are at harvesting stage in some areas, cito 551, 888 varieties are showing very great numbers of cotton balls and crop is nearing its maturity stage and is expected to deliver very good yield. In Sindh, variety 682 is showing promising growth with healthy balls and showing excellent growth and expected to start harvesting in mid of September. Recent flood in Pakistan Punjab has heavily damaged the cotton crop and the crop which has remain spare from flood is in satisfactory condition.

2.3. Oilseed, Mung bean, and sesame:

In Punjab, moong previously affected by rains but somehow gets its condition and its harvesting is started. Sesame crop is being harvesting and showing good yield. Monsoon season has badly affected the crops and yield is also decreased.

2.4. Sugarcane

In Sindh and Punjab, the sugarcane crop continued to face pressure from pyrilla and whitefly due to high humidity, though heavy monsoon rains helped reduce pest populations in many areas. The agriculture departments of both provinces actively monitored the situation and advised farmers on timely control measures. In Sindh, crop growth remained moderate with some areas showing below-normal yields, while in Punjab the crop maintained good vigor where pest management was effectively applied. In Khyber Pakhtunkhwa, the sugarcane crop performed well overall, with only minor localized damage in areas hit by intense rainfall.

2.5. Horticulture

In Punjab, in some areas, early varieties of cotton have started harvesting, and fields are being cleared for potato sowing, while onion seedlings are being transplanted. Persimmon



is being harvested, and dates, guava, and pomegranate have now reached the harvesting stage. Citrus orchards continue to show healthy growth, and harvesting of Kinnow will start this month.

In Sindh, mango harvesting concluded in July, while banana and guava continued, and vegetables like tomatoes and chili progressing well under favorable monsoon rains.

In Khyber Pakhtunkhwa, citrus orchards continued healthy fruit development, while seasonal vegetables like beans, peas, spinach, and tomatoes progressing well, with some fields approaching harvest.

In Balochistan, dry fruits like almond and pistachio will start harvesting at the end of the month, followed by the drying process. Apples are also being harvested and showing good yield. Vegetables such as chilies and cucumber are at the harvesting stage.

In Gilgit-Baltistan, Apples and pears are being harvesting, while persimmon is at ripping stage. Cherry harvesting is almost complete. Seasonal vegetables were badly damaged by the heavy rains, but the remaining crops are in satisfactory condition.

Source:

Agriculture Bulletins, Pakistan Metrological Department
Department of Agriculture Extension (Punjab, KP, Sindh and Bloachistan)

3.WEATHER SITUATION

Rainfall/Precipitation

During July 2025, most parts of the country—particularly the northeastern regions—received rainfall, while western Balochistan remained dry. The highest amounts were recorded in the Pothohar region, northeast Punjab, and Kashmir.

Chief amount of rainfall recorded across Pakistan during the month of July, 2025					
Sr. No.	Station	Rainfall(mm)	Sr. No.	Station	Rainfall(mm)
1	Islamabad ZP	611.7	11	Chakwal	382.3
2	Jhelum	594.5	12	Kakul	372.0
3	Chaklala A/P	557.0	13	Murree	364.0
4	Sheikhupura	538.0	14	Mangla	348.6
5	Lahore AP	527.9	15	Muzaffrabad A/P	346.0
6	Okara	494.8	16	Muzaffrabad City	337.0



7	Lahore City	472.3	17	Narowal	308.2
8	Mandibahauddin	434.1	18	Hafizabad	308.2
9	Islamabad A/P	425.4	19	Attock	284.0
10	Kotli	392.4	20	Gujranwala	281.8

Relative Humidity (July 2025)

The mean Relative Humidity (RH) during July 2025 showed a significant rise compared to June, consistent with the full onset of the southwest monsoon. National average RH increased to around 45–50%, with noticeable moisture buildup across Punjab and Sindh due to frequent rain spells. Khyber Pakhtunkhwa and Azad Jammu & Kashmir observed consistently high evening humidity, often exceeding 70%, following monsoon showers. Northern areas, including Gilgit-Baltistan, also remained moist with cooler nights and persistent cloud cover. Despite these improvements, drier conditions were still reported in western and southern Balochistan, where daytime RH often remained below 35–40%.

Temperature Regime during July 2025

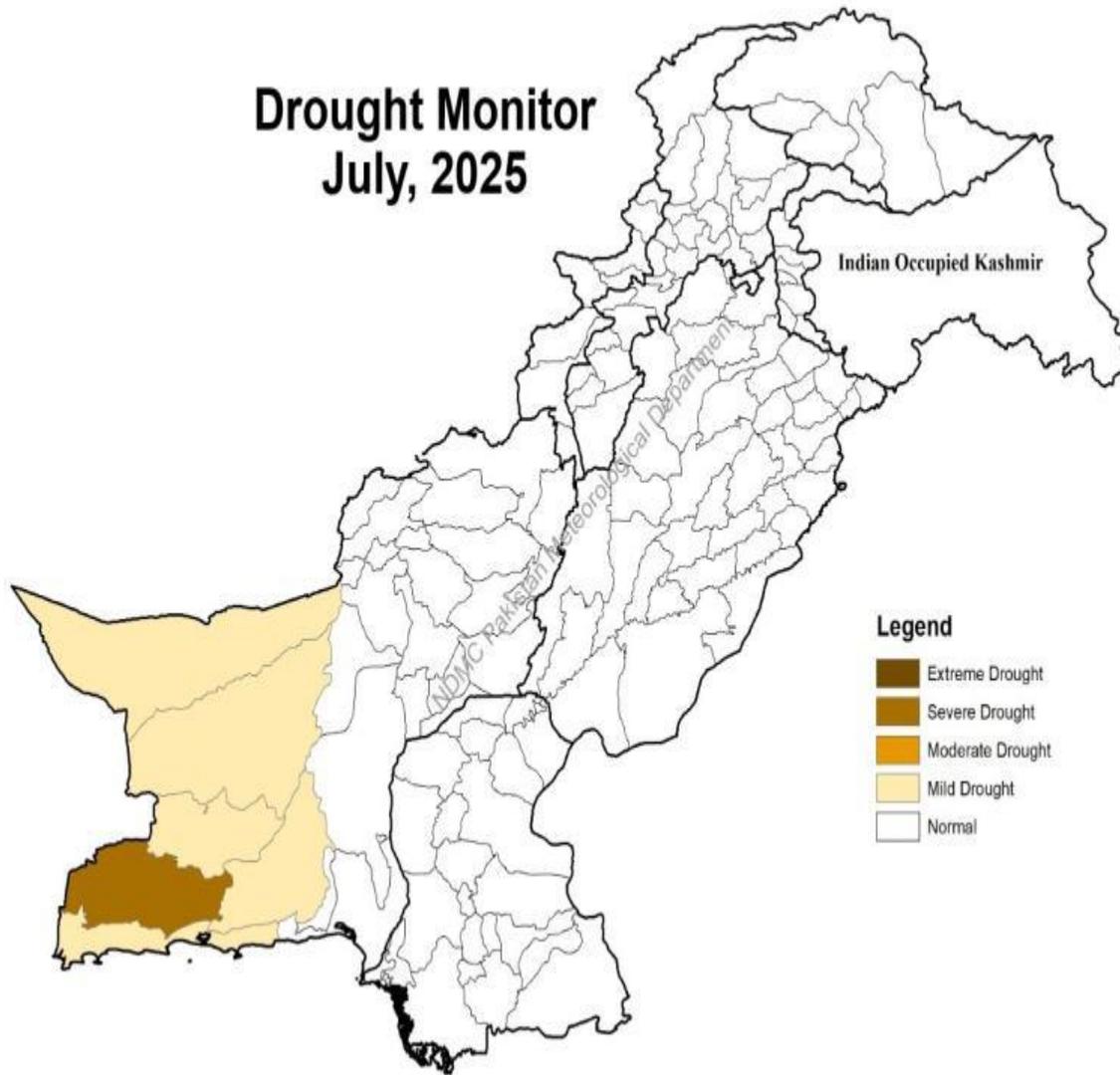
July 2025 remained hotter than normal in most parts of Pakistan, though rainfall and cloud cover provided partial relief compared to June. Average daily temperatures stayed about 1–2°C above long-term mean, with plains experiencing warm, humid conditions. Mean temperatures ranged between 30–32°C in Punjab, 31–34°C in Sindh, 26–28°C in KP, 14–20°C in Gilgit-Baltistan, and around 23°C in Quetta valley. Persistent humidity increased heat stress, particularly in central and southern plains, while enhanced evapotranspiration sustained high crop water requirements despite rainfall improvements.

Weather Prediction for August 2025

For August 2025, the Pakistan Meteorological Department projected above-normal rainfall over Punjab, Gilgit-Baltistan, Azad Jammu & Kashmir, and parts of Balochistan, while Sindh was expected to receive near-normal rainfall. Daytime temperatures were forecast to remain slightly above normal, with nights comparatively warmer due to high humidity. The persistence of moist monsoon currents was expected to elevate evening RH to 65–80% in most northern and central regions, while southern and western Balochistan were likely to remain semi-dry. Risks of localized flooding, waterlogging, and fungal crop diseases were anticipated, particularly in flood-prone districts of Punjab and Sindh.

4. DROUGHT SITUATION

Based on the different drought monitoring indices, as narrated above and ground station data observed by the Pakistan Meteorological Department Network across the country, the spatial drought monitor map is represented in Figure below.



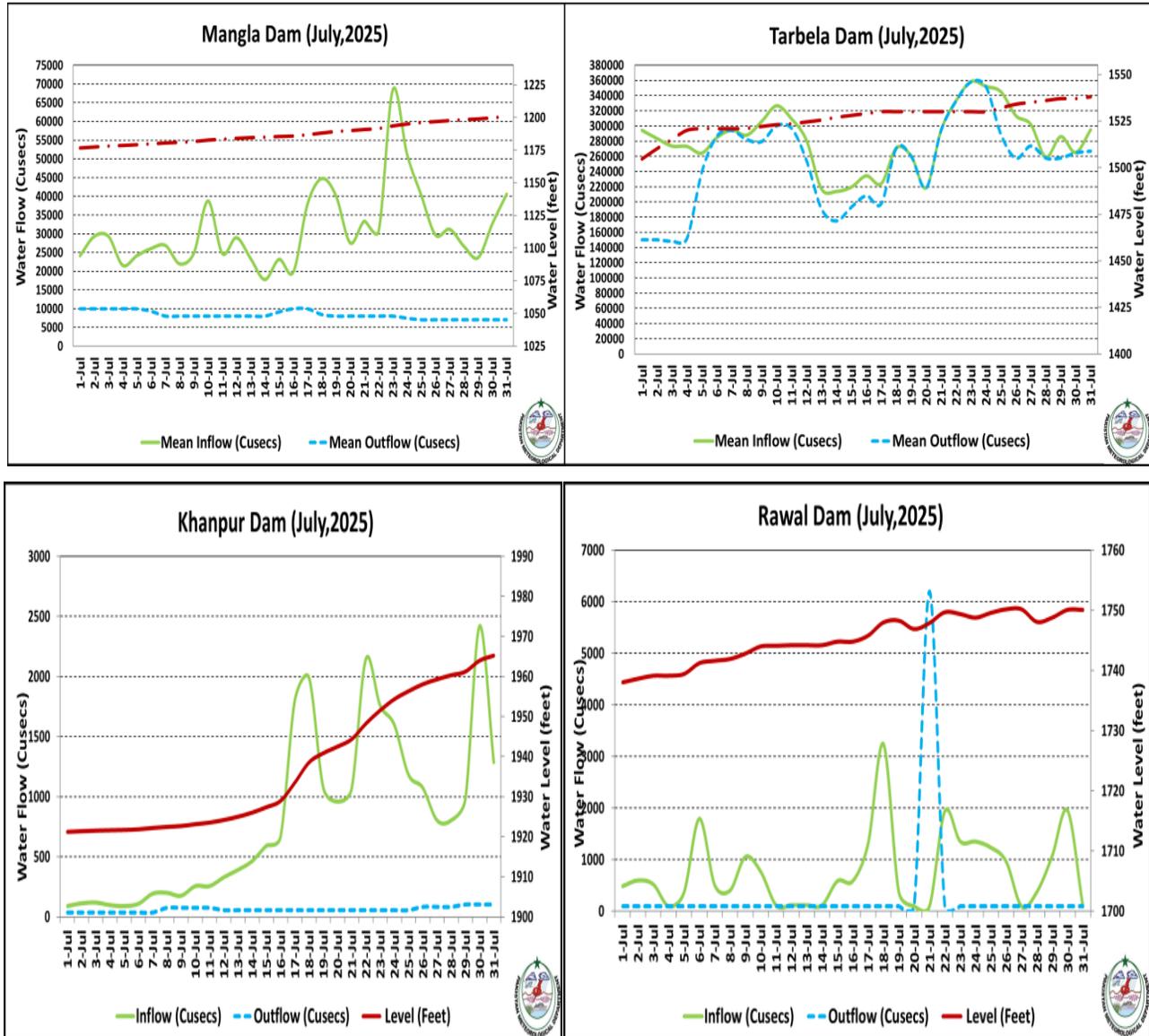
Drought Monitor of Pakistan for the month of July, 2025

Source:

<http://www.ndmc.pmd.gov.pk/>

5. WATER AVAILABILITY/DAMS FLOW DATA

During the month, water inflow, outflow and levels of the Mangla, Tarbela, Khanpur and Rawal dams are shown in Figure. The smaller reservoirs (Khanpur, Rawal, and Simly) have similarly benefited from monsoon rainfall, demonstrating consistent water level rises. Both Mangla and Tarbela dams have shown significant water level increases, with Tarbela reaching 1,545 feet and Mangla at 1,204 feet.



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

Source: <http://www.ndmc.pmd.gov.pk/>



6. AVERAGE PRICES OF AGRICULTURAL COMMODITIES

- I. CPI inflation General, increased by 3.0% on year-on-year basis in August 2025 as compared to 4.1% of the previous month and 9.6% in August 2024. On month-on-month basis, it decreased by 0.6% in August 2025 as compared to an increase of 2.9% in the previous month and an increase of 0.4% in August 2024.
- II. CPI inflation Urban, increased by 3.4% on year-on-year basis in August 2025 as compared to 4.4% of the previous month and 11.7% in August 2024. On month-on-month basis, it decreased by 0.7% in August 2025 as compared to 3.4% in the previous month and an increase of 0.3% in August 2024.
- III. CPI inflation Rural, increased by 2.4% on year-on-year basis in August 2025 as compared to an increase of 3.5% in the previous month and 6.7% in August 2024. On month-on-month basis, it decreased by 0.5% in August 2025 as compared to an increase of 2.2% in the previous month and an increase of 0.6% in August 2024.

S. No.	Description	Unit	Average Prices			%change August 25 over	
			August 25	July 25	August 24	July 25	August 24
1	Wheat Flour Bag	20 Kg	1599.94	1493.63	1846.25	7.12	-13.34
2	Rice Basmati Broken (Average Quality)	1 Kg	207.53	206.60	209.22	0.45	-0.81
3	Rice IRRI-6/9 (Sindh/Punjab)	1 Kg	154.27	154.28	163.35	-0.01	-5.56
4	Bread plain (Small Size)	Each	108.83	108.83	110.32	0.00	-1.35
5	Beef with Bone (Average Quality)	1 Kg	1116.19	1109.28	982.27	0.62	13.63
6	Mutton (Average Quality)	1 Kg	2053.78	2044.05	1911.47	0.48	7.45
7	Chicken Farm Broiler (Live)	1 Kg	446.03	409.75	449.27	8.85	-0.72
8	Milk fresh (Un-boiled)	1 Ltr	201.73	201.17	195.07	0.28	3.41
9	Curd (Dahi) Loose	1 Kg	236.66	235.66	228.83	0.42	3.42
10	Powdered Milk NIDO 390 gm	Each	1091.92	1081.22	1031.14	0.99	5.89
11	Eggs Hen (Farm)	1 Dozen	300.07	272.39	284.71	10.16	5.39
12	Mustard Oil (Average Quality)	1 Kg	530.87	527.76	501.36	0.59	5.89
13	Cooking Oil DALDA 5 kg	Each	2872.88	2876.42	2681.19	-0.12	7.15
14	Ghee DALDA/HABIB 2.5 kg	Each	1461.33	1461.76	1306.07	-0.03	11.89
15	Ghee DALDA/HABIB 1Kg	Each	568.03	568.35	510.25	-0.06	11.32
16	Bananas (Kela) Local	1 Dozen	156.33	170.35	143.87	-8.23	8.66
17	Pulse Masoor (Washed)	1 Kg	295.31	295.99	320.92	-0.23	-7.98
18	Pulse Moong (Washed)	1 Kg	382.13	398.37	341.16	-4.08	12.01
19	Pulse Mash (Washed)	1 Kg	447.58	455.19	581.03	-1.67	-22.97
20	Pulse Gram	1 Kg	307.55	313.38	354.44	-1.86	-13.23
21	Potatoes	1 Kg	81.92	83.95	100.61	-2.42	-18.58
22	Onions	1 Kg	69.73	55.97	134.87	24.58	-48.30



23	Tomatoes	1 Kg	112.16	85.63	132.16	30.98	-15.13
24	Sugar Refined	1 Kg	180.19	184.11	145.37	-2.13	23.95
25	Gur (Average Quality)	1 Kg	242.21	238.35	216.34	1.62	11.96
26	Salt Powdered (NATIONAL/SHAN) 80	Each	72.57	72.60	70.42	-0.04	3.05
27	Chilies Powder NATIONAL 200 gm Pa	Each	320.00	320.00	328.82	0.00	-2.68
28	Garlic (Lehsun)	1 Kg	386.37	370.08	517.36	4.40	-25.32
29	Tea Lipton Yellow Label 190 gm Pack	Each	447.07	447.07	544.71	0.00	-17.93

Increase in Prices ■

Decrease in price ■

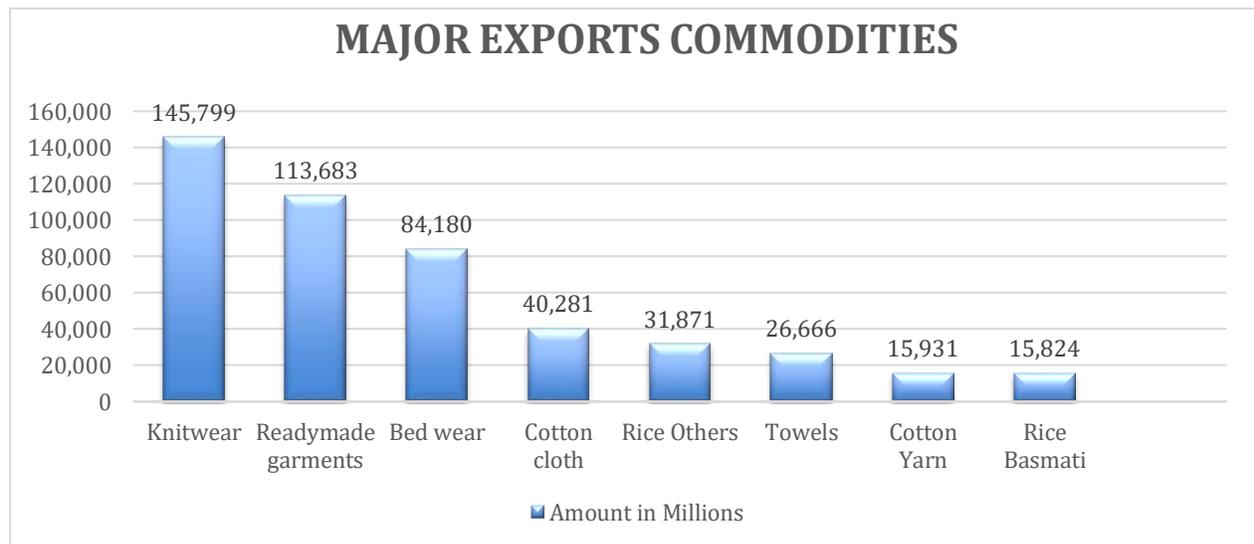
Source: Pakistan Bureau of Statistics.

7. TRADE SITUATION

Exports

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during July, 2025 amounted to Rs. 762,746 million (provisional) as against Rs. 701,091 million in June, 2025 and Rs. 642,272 million during July, 2024 showing an increase of 8.79% over June, 2025 and of 18.76% over July, 2024.

In terms of US dollars, the exports in July, 2025 totaled \$ 2,686 million (provisional) as compared to \$ 2,477 million in June, 2025 showing an increase of 8.44% over June, 2025 and of 16.43% as compared to \$ 2,307 million in July, 2024.





Imports:

Imports into Pakistan during July, 2025 amounted to Rs. 1,669,239 million (provisional) as against Rs. 1,516,458 million in June, 2025 and Rs. 1,328,237 million during July, 2024 showing an increase of 10.07% over June, 2025 and of 25.67% over July, 2024.

In terms of US dollars, the imports in July, 2025 totaled \$ 5,866 million (provisional) as compared to \$ 5,353 million in June, 2025 showing an increase of 9.58% over June, 2025 and of 23.13% as compared to \$ 4,764 million in July, 2024.



Source: *Pakistan Bureau of Statistics*

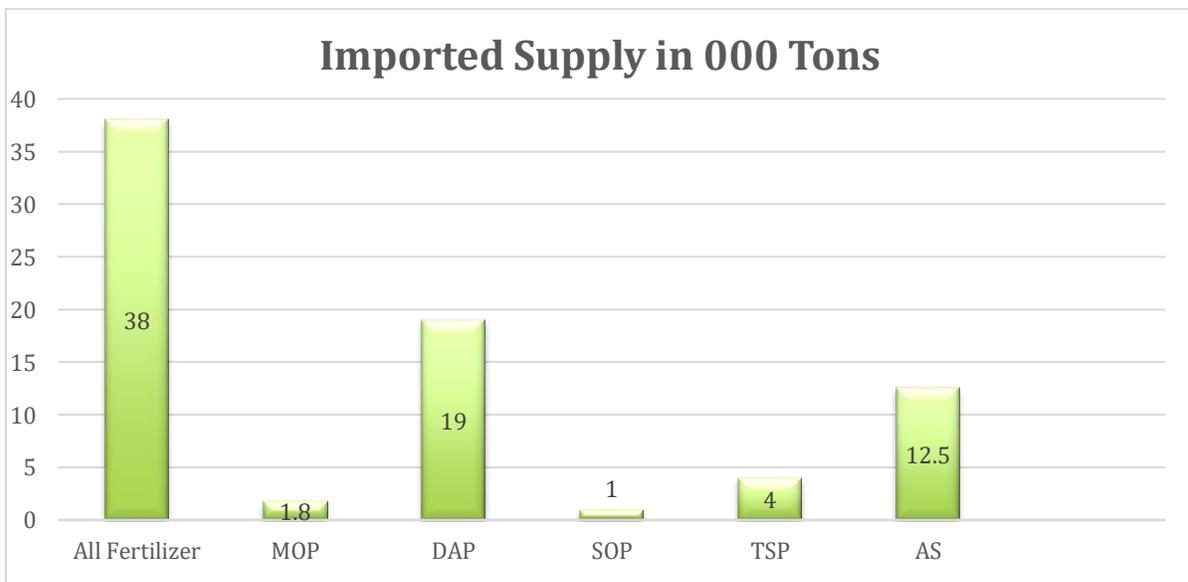
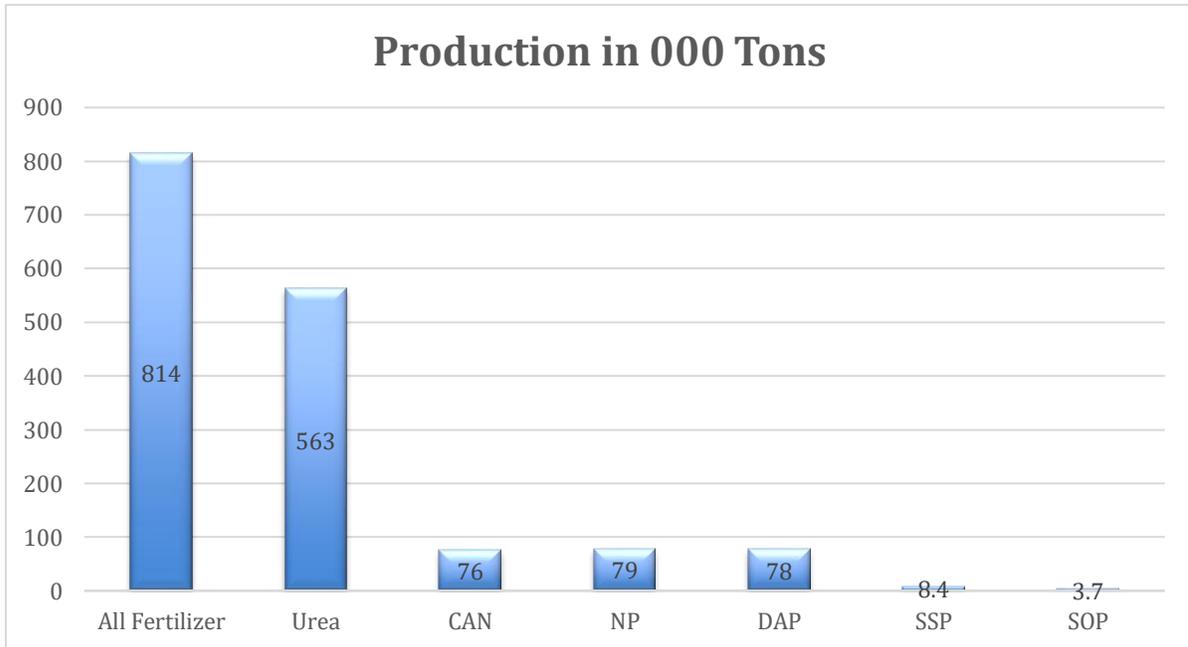
8. FERTILIZER OFFTAKE SITUATION

- Total nutrient offtake during July 2025 was 395 thousand tonnes, which decreased by 12 per cent over July 2024.
- Urea offtake was 608 thousand tonnes which decreased by 0.6 per cent.
- DAP offtake was 107 thousand tonnes which decreased by 34.6 per cent over July 2024
- Nitrogen and phosphate offtake decreased by 5.7 and 35.4 per cent, respectively while potash offtake increased by 40.7 per cent.



Fertilizer Production and Imported Supplies:

Total domestic fertilizer production during July 2025 was 814 thousand tonnes. Urea and DAP production was 563 and 78 thousand tonnes, respectively. Production of other products i.e. NP, CAN, SSP, NPKs and SOP was 79, 76, 8.4, 6 and 3.7 thousand tonnes, respectively. Imported supplies comprised of 19 thousand tonnes of DAP, 1 thousand tonne of SOP, 1.8 thousand tonne of MOP, 2.5 thousand tonne of MAP, 12.5 thousand tonne of AS and 4 thousand tonne of TSP.



Source: National Fertilizer Development Centre



9. NEWS TRENDS

- **Chinese Delegation Explores Investment Opportunities in Punjab's Agriculture Sector**

A high-level 20-member Chinese delegation, accompanied by officials from the Green Pakistan Initiative, visited the Agriculture House in Lahore to explore investment opportunities in Punjab's agriculture sector. The delegation was received by representatives from the provincial agriculture and livestock departments, who discussed potential areas of collaboration. It was highlighted that Punjab, with a cultivable area of 29.65 million acres, contributes nearly 70 percent of Pakistan's total agricultural production and offers vast investment potential in quality seeds, fertilizers, drone technology, irrigation systems, and modern farm machinery. Officials emphasized that the provincial government, in partnership with the Green Pakistan Initiative, is implementing measures to modernize farming and promote sustainable agricultural growth. The Chinese side expressed strong interest in introducing advanced technologies across the agricultural value chain to strengthen Punjab's agriculture sector.

- **Progressive Farmers Support Corporate Farming but Oppose Use of State Lands:**

Progressive farmers in Pakistan believe that corporate farming can strengthen the agriculture sector and raise the value of private farmland but stress that it should not come at the cost of state-owned lands. Unlike in Europe, the United States, and Australia, where corporate farmers work on private lands to boost yields and exports, Pakistan still has vast barren state lands in deserts and remote regions. Farmers suggest that these lands should be given to landless farmers who can make them productive instead of leasing them to corporations. Experts note that corporate farming on private lands can increase yields through modern techniques, set up processing units, and enhance food security. With about 60 million acres of cultivable land nationwide, including 12 million in Sindh, experts emphasize the need for innovation and climate-resilient methods supported by research. They maintain that corporate farming should focus on private lands to promote sustainable growth and protect opportunities for small and landless farmers.

Sources: Business Recorder

10. AGRO ADVISORY SERVICES FOR FARMERS

زرعی سفارشات برائے کسان

حالیہ بارشوں کے پانی کو محفوظ کرنے کے لیے ڈھلوان کی مخالف سمت گہرائی چلائیں، کھیتوں کو ہموار رکھیں، دھت بندی مشورہ کریں اور جزی بوٹیاں تک کریں۔ اس مقصد کے لیے دسی کھاد یا سبز کھاد کا استعمال بھی بڑھایا جاسکتا ہے کیونکہ اس سے وتر زیادہ دیر تک محفوظ رہ سکتا ہے۔

کھیتی

- ☆ کھیتی کی اگیتی اقسام کی کاشت 20 اگست تک مکمل کر لیں، جبکہ بارانی علاقوں میں مون سون کی بارشوں کے مطابق کاشت کریں یا دیر ہے کہ موسم خزاں میں باہر ڈالیں۔
- ☆ ڈال سے کاشت کی صورت میں 12 سے 15 کلوگرام کھسلیوں پر کاشت کی صورت میں 8 سے 10 کلوگرام اور بلور چارہ 40 سے 50 کلوگرام بیج فی ایکڑ استعمال کریں۔
- ☆ کھیتی کی بہترین پیداوار کے لیے 3 سے 4 فروری کو برکی گلی سٹری کھاد زمین کی تیاری کے وقت ضرور ڈالیں۔

کپاس

- ☆ حالیہ مون سون بارشوں کی وجہ سے جن کھیتوں میں زیادہ پانی کھڑا ہو جائے تو اس کے نکاس کا بروقت انتظام کریں۔ کھیت کے ایک طرف لمبائی کے رخ دو فٹ چوڑی چار فٹ گہری کھائی کھود کر پانی جمع کر لیں۔
- ☆ زیادہ درجہ حرارت ہونے اور زیادہ ٹینڈے لگنے کی وجہ سے فصل کا پھل گرنا شروع ہو جاتا ہے۔ اس سے بچاؤ کے لیے نائٹروجنی کھاد کے استعمال کے علاوہ زمین میں بوران اور زنگ کی کمی پائی گئی ہو وہاں بوران اور زنگ کا استعمال بذریعہ پیرے کریں۔
- ☆ اگر کپاس کی فصل بارشوں کی وجہ سے سفید کھسی سبزیتا تھرپس اور ٹی بک کا حملہ ہوا اور یہ نقصان کی معاشی حد سے بڑھ رہا ہو تو جتنے میں دو بار پیسٹ سکاؤٹنگ کریں اور نکلے زراعت کے مقامی عملہ کے سفارش کردہ زہروں کا پیرے کریں۔

دھان

- ☆ زنگ کی زیادہ کمی کی صورت میں لالہ لگانے کے 10 دن بعد تک زنگ سلفیٹ 33% والا 6 کلوگرام یا زنگ سلفیٹ 21% والا 10 کلوگرام فی ایکڑ چھو دیں۔
- ☆ لالہ کی منتقلی کے 35 دن بعد نائٹروجنی کھاد کا بقیہ حصہ ڈالنے سے پہلے 4 سے 5 دن کے لیے فصل کو پلکا سا سوکادیں اس کے بعد کھاد کا چھو دیکر پانی لگا دیں۔
- ☆ ناقص پانی سے سیراب ہونے والی زمینوں میں اچھے نتائج حاصل کرنے کے لیے جیسوم حساب 5 پوری بیج ایکڑ چھو دیں۔

سبزیات و باغات

- ☆ ٹماٹر اور گوبھی کی پھیری کی کاشت جاری رکھیں۔
- ☆ ٹماٹر کی منظور شدہ اقسام رومہ گھنیزہ، پاکٹ نعیم اور دوغلی اقسام ۲ اور سالار وغیرہ کاشت کریں۔
- ☆ پھول گوبھی کی منظور شدہ اقسام فیصل آباد نمبر 1, 2, 3, 4 وغیرہ کاشت کریں۔
- ☆ ترشادہ پھلوں کے پودوں کو نائٹروجن کی تیسری قسط ڈالیں۔

Source: Zarat Nama, Directorate of Agricultural Information

پلاننگ اینڈ ریسرچ ڈیپارٹمنٹ
زرعی ترقیاتی بینک لمیٹیڈ
ہیڈ آفس، اسلام آباد

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