

# AGRICULTURE OUTLOOK

Volume X, ISSUE XII, 2025

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

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## 1. EXECUTIVE SUMMARY

In December 2025, major farming activities across Pakistan included satisfactory growth of the wheat crop following the completion of sowing, with ongoing irrigation, fertilizer application, and weed management operations, although moisture stress was observed in some rainfed areas due to dry weather. Sugarcane harvesting remained at its peak in Punjab and Sindh and continued steadily in Khyber Pakhtunkhwa, with overall yields reported as healthy despite localized lodging. Meanwhile, sowing of oilseed crops such as sunflower, mustard, and rapeseed progressed well, keeping farmers actively engaged in Rabi season operations. Horticultural activities remained active, with harvesting of citrus, guava, potatoes, and seasonal vegetables continuing across major producing regions. In Khyber Pakhtunkhwa, harvesting of potato and cabbage crops was underway alongside preparations for the next cropping cycle, including nursery raising of tobacco seedlings. In Gilgit-Baltistan and Balochistan, routine agricultural activities continued smoothly, with seasonal fruits and vegetables being harvested and winter vegetable sowing in progress.

As mentioned by the Pakistan Bureau of Statistics (PBS) during December, Fresh Fruits (6.78%), Wheat (3.48%), Dry Fruits (3.29%), Eggs (3.27%), Cooking Oil (2.84%), Milk Powder (2.03%), Wheat Flour (2.01%), Vegetable Ghee (1.92%), Fish (1.89%), Wheat Products (1.53%), Beans (0.63%) and Condiments & Spices (0.57%) increased over November 2025.

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during November, 2025 amounted to Rs. 679,745 million (provisional) as against Rs. 800,551 million in October, 2025 and Rs. 786,953 million during November, 2024 showing a decrease of 15.09% over October, 2025 and of 13.62% over November, 2024.

Imports into Pakistan during November, 2025 amounted to Rs. 1,502,775 million (provisional) as against Rs. 1,713,648 million in October, 2025 and Rs. 1,384,210 million during November, 2024 showing a decrease of 12.31% over October, 2025 but an increase of 8.57% over November, 2024.

Total nutrient offtake during November 2025 was 616 thousand tonnes while total domestic fertilizer production during November 2025 was 780 thousand tonnes.



## **2. CURRENT CROP SITUATION**

In December 2025, major agricultural activities include satisfactory growth of wheat crops across key producing regions. Sugarcane harvesting is underway in Punjab, Khyber Pakhtunkhwa, and Sindh, with good yields being reported. Meanwhile, the sowing of oilseed crops, including sunflower and mustard, is in progress, keeping the farming community actively engaged in seasonal agricultural operations.

### **2.1. Wheat Crop**

Wheat sowing has been completed across both rainfed and irrigated tracts of Punjab, and the October sown crop has now entered the second irrigation stage. The first round of urea fertilizer application has been successfully carried out, while weed control measures have been fully implemented for timely sown wheat and are still underway for late-sown fields. However, prolonged dry weather has led to moisture stress in certain rainfed pockets. In Sindh, the wheat crop is progressing through the tillering phase. In Khyber Pakhtunkhwa, wheat growth and development remain generally satisfactory, although rainfed areas are experiencing moisture stress. Similarly, in Balochistan, crop condition is largely satisfactory, but limited rainfall has caused moisture stress in some locations.

### **2.2. Sugarcane**

In Punjab and Sindh, crop harvesting is at its peak, with farmers harvesting in line with prevailing mill rate ratios, and this activity is expected to continue until January. In Khyber Pakhtunkhwa, harvesting is also underway, with reports indicating satisfactory yields. Overall, the crop is exhibiting healthy production across the country, despite some localized damage caused by lodging.

### **2.3. Oil Seed Crops**

Sunflower sowing is underway across Punjab and other provinces, and timely sowing of the crop can result in very good per-acre yields with a recommended seed rate of about 2 kg per acre. At the same time, mustard and rapeseed crops are also being sown widely in Punjab and Sindh as part of the ongoing Rabi season planting activities.

### **2.4. Horticulture**

**In Punjab**, Potato harvesting is currently in progress, while the harvesting of citrus and guava is at its peak across major producing areas. Meanwhile, other green vegetables peas and carrot are exhibiting healthy growth and favorable crop conditions.



**In Sindh,** Vegetables are showing good growth, and the guava harvesting season is currently ongoing.

**In Khyber Pakhtunkhwa,** Citrus harvesting is in full swing across the region, while potato and cabbage crops are actively being harvested. At the same time, preparations for the next cropping cycle are underway, with tobacco seedlings being raised in nurseries under favorable conditions.

**In Balochistan,** Seasonal fruits and vegetables are being harvested across the region, while sowing of winter vegetables is actively underway.

**In Gilgit-Baltistan,** Routine agricultural activities are continuing as planned, with strawberry seedlings currently being shifted to fields for transplantation.

**Source:**

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

**3. WEATHER SITUATION:**

**Rainfall/Precipitation**

During the month, below normal rainfall was observed over the country. Overall, most parts of KPK, Northern Punjab and Baluchistan experienced below-normal rainfall.

<b>Chief amount of rainfall recorded across Pakistan during the month of November, 2025</b>					
<b>Sr.No.</b>	<b>Station</b>	<b>Rainfall(mm)</b>	<b>Sr.No.</b>	<b>Station</b>	<b>Rainfall(mm)</b>
1	SAIDUSHARIF	61.0	11	MUZAFFARABAD AIRPORT	11.9
2	MITHI	22	12	RAWALAKOT	10
3	LOWERDIR	20	13	ISLAMABAD,ZEROPOINT	10
4	KAKUL	20	14	MALAMJABBA	08
5	KASUR	19	15	CHILAS	08
6	G.DOPATTA	18	16	BALAKOT	08
7	DIR	16	17	MUZAFFARABADCITY	06
8	PATTAN	15	18	DROSH	5.2
9	KALAM	13	19	SIALKOTCANTT	05
10	ASTORE	13	20	ISLAMABAD,AIRPORT	05



### **Relative Humidity (November 2025):**

During November 2025, relative humidity across Pakistan generally declined as dry continental air became dominant with the onset of winter. Morning and night humidity remained relatively higher in the northern highlands and some plain areas due to cooler temperatures and fog formation, while afternoons were noticeably drier in most regions. Smog and fog episodes contributed to elevated morning surface humidity in Punjab and Upper Sindh, but daytime relative humidity typically stayed lower over central and southern Pakistan under prevailing dry conditions. Overall, humidity patterns reflected the seasonal transition with increasing dryness by late November as cold, dry air masses replaced residual post-monsoon moisture.

### **Temperature Regime during November 2025:**

November 2025 temperatures showed a shift toward cooler seasonal norms across much of Pakistan. Plains of Punjab, Sindh, and KP recorded moderate daytime temperatures, while nights became noticeably cooler, particularly in central and northern regions, signaling the advance of winter. Northern mountainous areas experienced significant cooling, with late-month lows approaching near-freezing at higher altitudes. Meanwhile, southern Pakistan, including Balochistan and lower Sindh, observed relatively milder days but colder nights as dry winter winds prevailed. Overall, mean temperatures trended downward throughout November, with clear signs of the winter chill intensifying toward month's end.

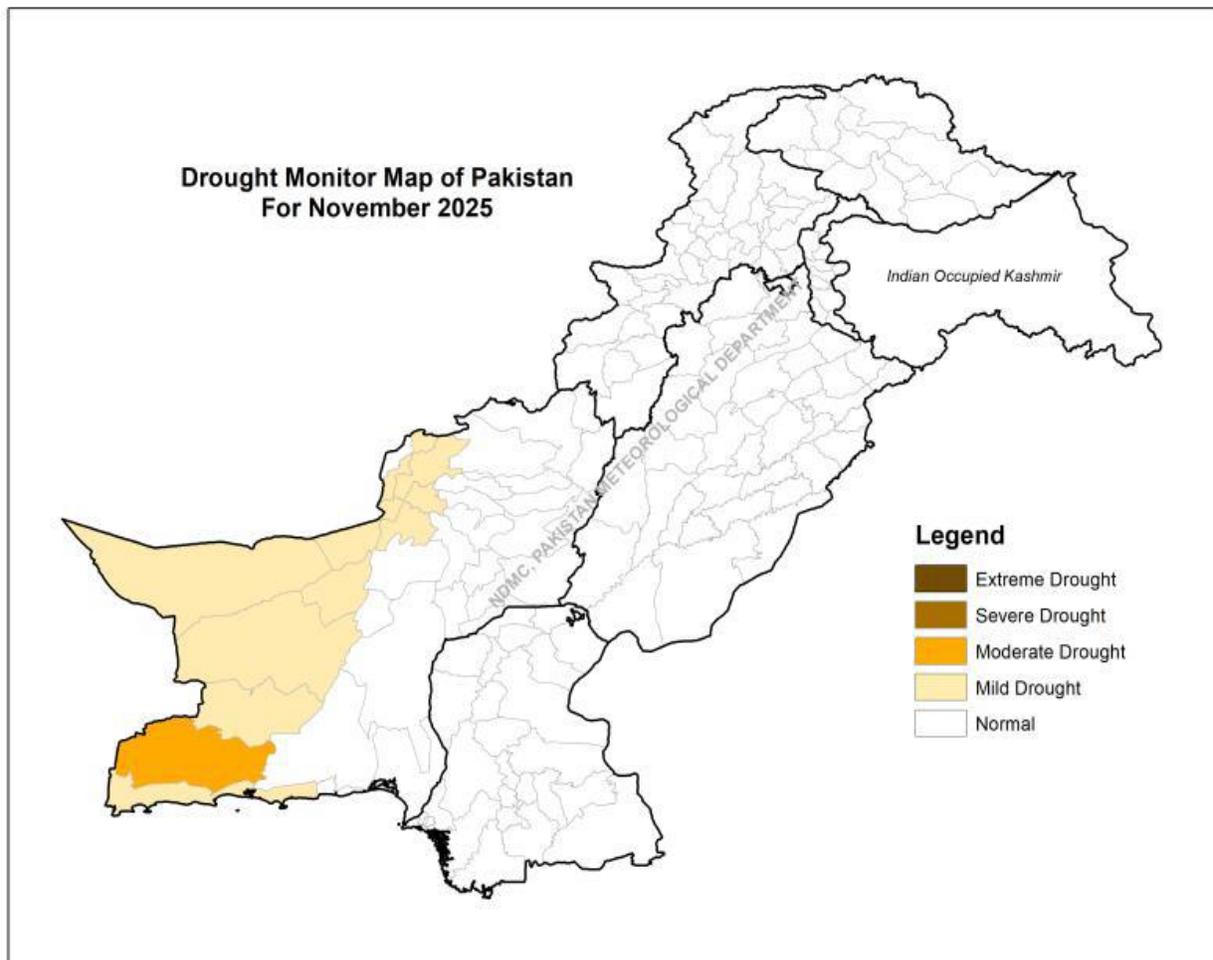
### **Weather Prediction for December 2025:**

For December 2025, weather projections indicate typical winter conditions across the country, marked by predominantly cold and dry weather with occasional wet spells in the northern and western highlands. Pakistan Meteorological Department (PMD) forecasts dry and cold conditions in most plains, with persistent morning fog and smog episodes in Punjab, Upper Sindh, and KP, increasing atmospheric haze and low visibility. Westerly disturbances may trigger intermittent rainfall and moderate to heavy snowfall over parts of Gilgit-Baltistan, KP hills, and northern Kashmir mid-to-late December. Daytime temperatures in the plains are expected to range from cool to chilly, while nighttime lows will drop significantly, especially in northern and elevated areas, where sub-zero conditions and snow accumulation are likely. Southern regions such as Sindh and Balochistan will remain largely dry with cooler nights, and smog is projected to persist early in the month due to stable atmospheric conditions. Overall, December will be characterized by stable dry periods, enhanced smog hazards, occasional winter precipitation in hilly zones, and a marked strengthening of winter cold.

#### 4. DROUGHT SITUATION

Based on the analysis of multiple drought-monitoring indicators and ground-based observations from meteorological stations across the country. The results show that mild to moderate drought-like conditions persist across the western parts of Balochistan, primarily due to significantly below-normal or absent summer monsoon rainfall in these areas. These prolonged dry conditions have contributed to reduced soil moisture, stressed vegetation, and emerging hydrological deficits.

Overall, the drought situation remains localized, with the most critical concern concentrated in western Balochistan, requiring close monitoring and preparedness actions by relevant authorities.

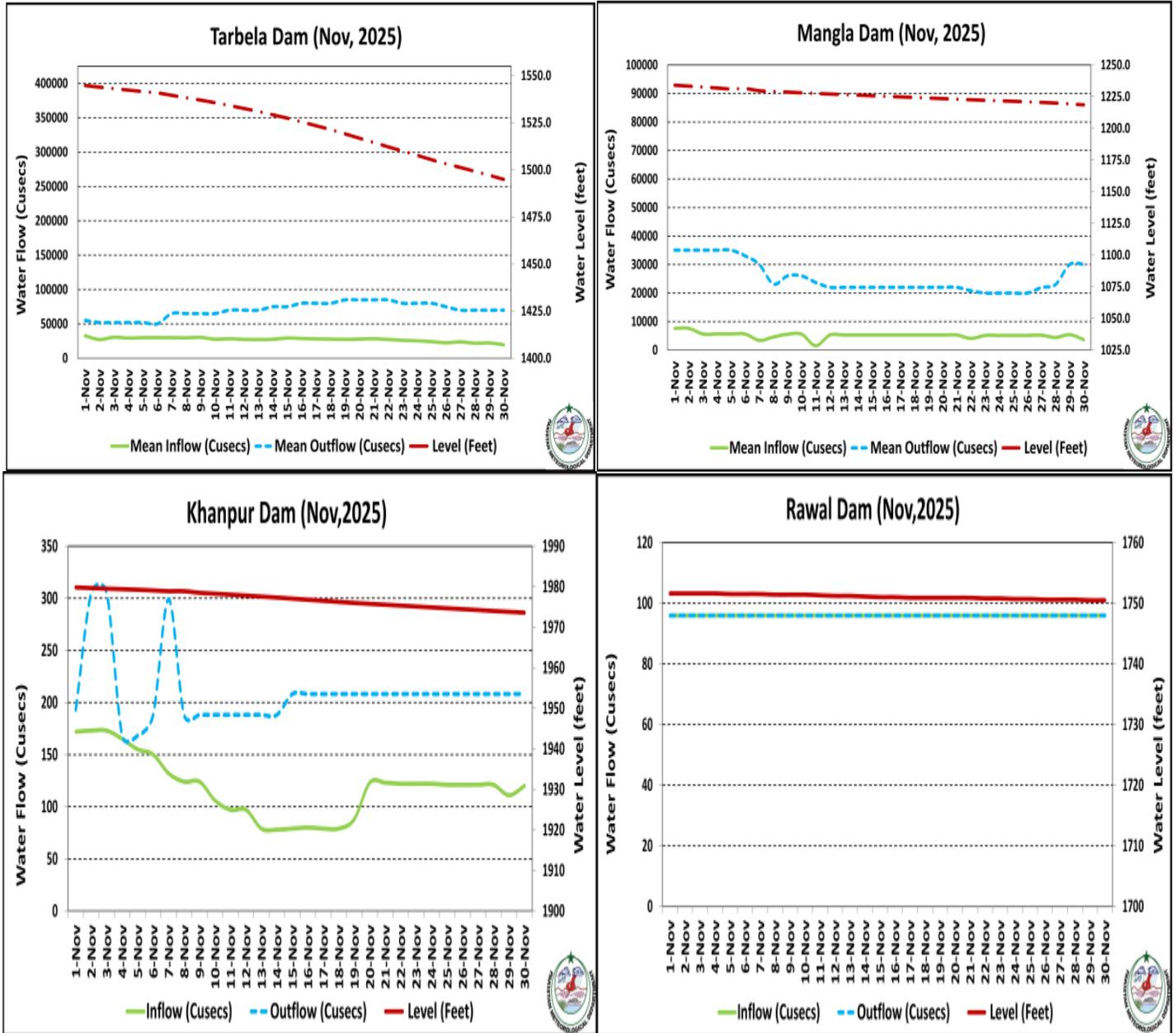


**Drought Monitor of Pakistan for the month of November, 2025**

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, Rawal, Simly and dams are shown in Figures. The water levels at the major reservoirs, Tarbela and Mangla, stand at 1,495 feet and 1218.6 feet respectively.



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

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



## 6. AVERAGE PRICES OF AGRI. COMMODITIES:

- I. CPI inflation General, increased by 5.6% on year-on-year basis in December 2025 as compared to an increase of 6.1% in the previous month and 4.1% in December 2024. On month-on-month basis, it decreased by 0.4% in December 2025 as compared to an increase of 0.4% in the previous month and an increase of 0.1% in December 2024.
- II. CPI inflation Urban, increased by 5.8% on year-on-year basis in December 2025 as compared to an increase of 6.1% in the previous month and 4.4% in December 2024. On month-on-month basis, it decreased by 0.4% in December 2025 as compared to an increase of 0.5% in the previous month and a decrease of 0.1% in December 2024.
- III. CPI inflation Rural increased by 5.4% on year-on-year basis in December 2025 as compared to an increase of 6.3% in the previous month and 3.6% in December 2024. On month-on-month basis, it decreased by 0.6% in December 2025 as compared to an increase of 0.2% in the previous month and an increase of 0.3% in December 2024.

S. No.	Description	Unit	Average Prices			%change Dec 25 over	
			Dec 25	Nov25	Dec 24	Nov 25	Dec 24
1	Wheat Flour Bag	20 Kg	2186.16	2165.20	1806.35	0.97	21.03
2	Rice Basmati Broken (Average Quality)	1 Kg	214.72	215.98	203.90	-0.58	5.31
3	Rice IRRI-6/9 (Sindh/Punjab)	1 Kg	156.63	156.95	159.95	-0.20	-2.08
4	Bread plain (Small Size)	Each	111.36	110.73	108.84	0.57	2.32
5	Beef with Bone (Average Quality)	1 Kg	1159.01	1155.44	1022.15	0.31	13.39
6	Mutton (Average Quality)	1 Kg	2104.03	2099.38	1960.51	0.22	7.32
7	Chicken Farm Broiler (Live)	1 Kg	382.03	357.72	348.37	6.80	9.66
8	Milk fresh (Un-boiled)	1 Ltr	203.13	202.93	197.04	0.10	3.09
9	Curd (Dahi) Loose	1 Kg	238.88	238.55	231.06	0.14	3.38

10	Powdered Milk NIDO 390 gm Polyba	Each	1131.95	1120.14	1034.92	1.05	9.38
11	Eggs Hen (Farm)	1 Dozen	362.32	354.16	344.53	2.30	5.16
12	Mustard Oil (Average Quality)	1 Kg	540.76	540.66	566.63	0.02	-4.57
13	Cooking Oil DALDA or Other Similar	Each	3017.25	2933.79	2805.73	2.84	7.54
14	Vegetable Ghee DALDA/HABIB 2.5 k	Each	1523.81	1496.67	1440.21	1.81	5.80
15	Vegetable Ghee DALDA/HABIB or Ot	Each	588.96	583.40	568.08	0.95	3.68
16	Bananas (Kela) Local	1 Dozen	130.72	129.06	119.42	1.29	9.46
17	Pulse Masoor (Washed)	1 Kg	283.53	290.25	300.18	-2.32	-5.55
18	Pulse Moong (Washed)	1 Kg	381.49	377.90	387.27	0.95	-1.49
19	Pulse Mash (Washed)	1 Kg	437.48	443.56	506.52	-1.37	-13.63
20	Pulse Gram	1 Kg	268.04	281.01	378.97	-4.62	-29.27
21	Potatoes	1 Kg	64.68	80.40	116.85	-19.55	-44.65
22	Onions	1 Kg	99.62	143.35	141.85	-30.51	-29.77
23	Tomatoes	1 Kg	76.69	135.99	178.45	-43.61	-57.02
24	Sugar Refined	1 Kg	170.99	188.12	134.84	-9.11	26.81
25	Gur (Average Quality)	1 Kg	236.25	242.89	207.28	-2.73	13.98
26	Salt Powdered (NATIONAL/SHAN)	Each	67.45	70.64	71.47	-4.52	-5.62
27	Chilies Powder NATIONAL 200 gm	Each	332.21	322.29	320.00	3.08	3.82
28	Garlic (Lehsun)	1 Kg	423.64	414.80	686.75	2.13	-38.31
29	Tea Lipton Yellow Label 190 gm Pack	Each	447.06	447.06	543.78	0.00	-17.79

Increase in Prices 

Decrease in price 

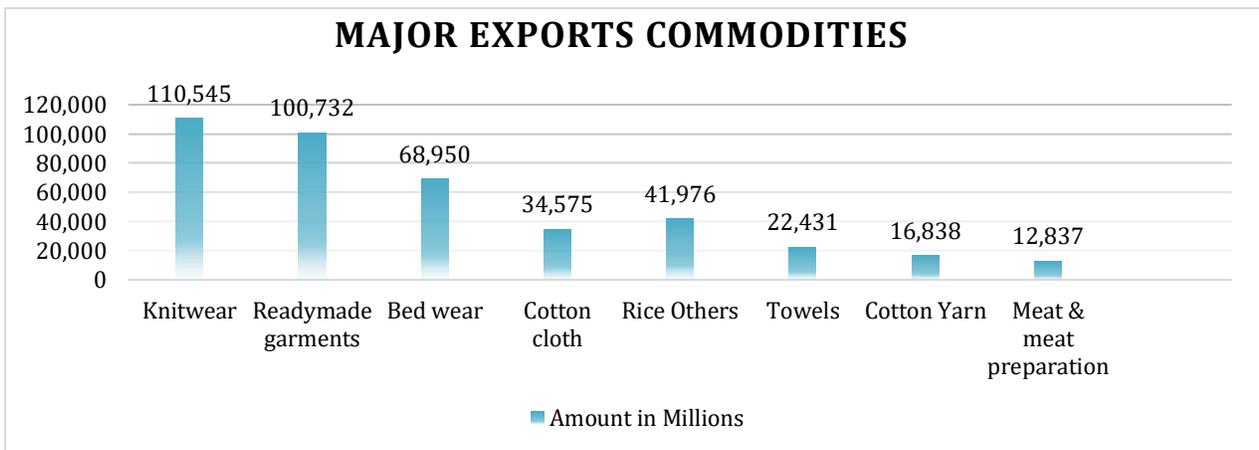
*Source: Pakistan Bureau of Statistics.*



## 7. TRADE SITUATION

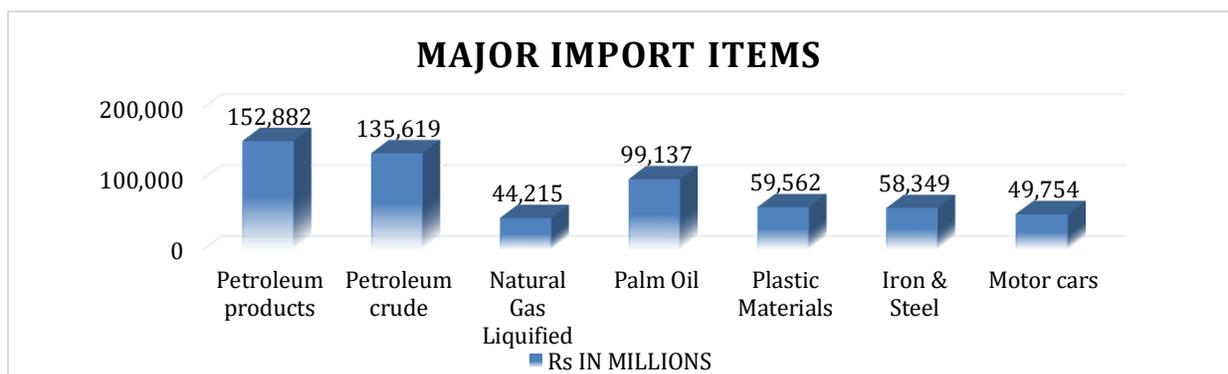
### Exports

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during November, 2025 amounted to Rs. 679,745 million (provisional) as against Rs. 800,551 million in October, 2025 and Rs. 786,953 million during November, 2024 showing a decrease of 15.09% over October, 2025 and of 13.62% over November, 2024. In terms of US dollars, the exports in November, 2025 totaled \$ 2,421 million (provisional) as compared to \$ 2,848 million in October, 2025 showing a decrease of 14.99% over October, 2025 and of 14.54% as compared to \$ 2,833 million in November, 2024.



### Imports:

Imports into Pakistan during November, 2025 amounted to Rs. 1,502,775 million (provisional) as against Rs. 1,713,648 million in October, 2025 and Rs. 1,384,210 million during November, 2024 showing a decrease of 12.31% over October, 2025 but an increase of 8.57% over November, 2024. In terms of US dollars, the imports in November, 2025 totaled \$ 5,345 million (provisional) as compared to \$ 6,087 million in October, 2025 showing a decrease of 12.19% over October, 2025 but an increase of 7.26% as compared to \$ 4,983 million in November, 2024.



Source: *Pakistan Bureau of Statistics*

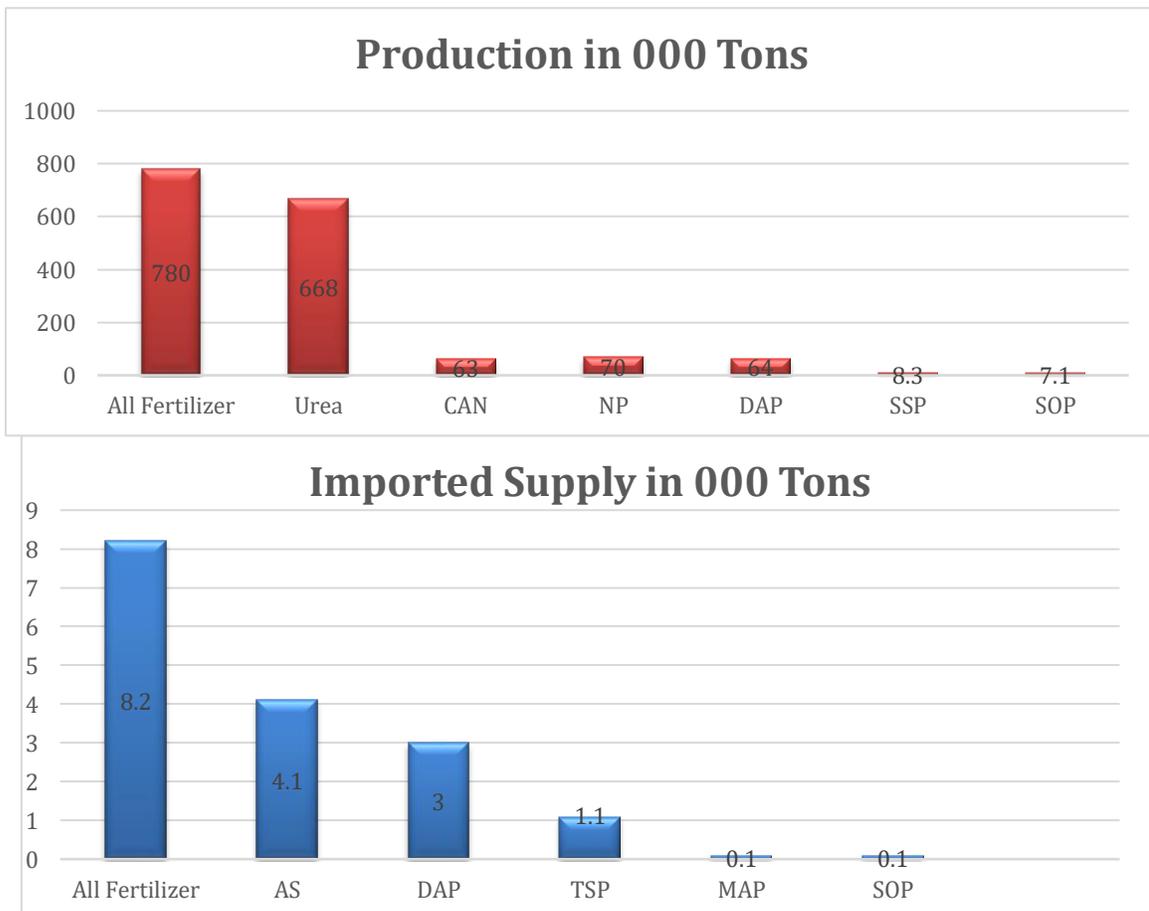


## 8. FERTILIZER OFFTAKE SITUATION

- Total nutrient offtake during November 2025 was 616 thousand tonnes, which increased by 13.9 per cent over November 2024.
- Urea offtake was 819 thousand tonnes which increased by 25.3 per cent.
- DAP offtake was 245 thousand tonnes which decreased by 2.8 per cent over November 2024.
- Nitrogen and potash offtake increased by 20.2 and 48.8 per cent, respectively while phosphate offtake decreased by 3.6 per cent due to higher prices.

### Fertilizer Production and Imported Supplies:

Total domestic fertilizer production during November 2025 was 780 thousand tonnes. Urea and DAP production was 668 and 64 thousand tonnes, respectively. Production of other products i.e. NP, CAN, SSP and SOP was 70, 63, 8.3 and 7.1 thousand tonnes, respectively. Imported supplies comprised of 3 thousand tonnes of DAP, 4.1 thousand tonne of AS, 1.1 thousand tonnes of TSP, 0.1 thousand tonnes of MAP and SOP.



Source: *National Fertilizer Development Centre*



## 9. NEWS TRENDS

### **KP Agriculture Department Signs MoU with FACE to Modernize Agriculture:**

The Khyber Pakhtunkhwa Agriculture Department and the Food Security and Agriculture Center of Excellence (FACE) have signed an MoU to promote modern, climate-smart, and technology-driven agriculture in the province. The agreement focuses on agricultural research, olive cultivation, improved model farms, and addressing climate change impacts. It also includes digitization of farmer services, training programs, and the transformation of the Research Wing into an ICT-based system. FACE will provide technical assistance, modern technologies, and capacity building for field staff. The initiative aims to raise farm productivity, improve incomes, and ensure sustainable agriculture in Khyber Pakhtunkhwa.

### **IFC Launches \$120 Million Local Currency Fund to Strengthen Pakistan's Agri-Value Chain:**

The International Finance Corporation (IFC) has launched a Rs33.6 billion (\$120 million) local currency fund to strengthen Pakistan's agriculture-value chain and support farmers through long-term financing. The initiative will facilitate Pakistani rupee-denominated financing from Standard Chartered Bank Pakistan Limited to Engro Fertilizers Limited, enabling capital investments in plant maintenance and operational turnarounds to ensure uninterrupted supply of urea and other fertilizers. The investment, supported by a first-loss counter guarantee from the IFC-Canada Facility for Resilient Food Systems, marks IFC's first local currency investment in Pakistan and aims to mobilize local capital, enhance food security, and improve financial resilience in a sector that contributes 24 percent to GDP and employs around 40 percent of the workforce.

### **Punjab Govt Moves to Ensure Year-Round Tomato Supply Through Hydroponic Technology:**

The Punjab government has decided to promote hydroponic technology to ensure uninterrupted, year-round supply of tomatoes and other vegetables across the province. The agriculture department has sought recommendations from experts to identify suitable areas for off-season tomato cultivation and to promote hydroponic farming at both commercial and household levels. Under the plan, training workshops will be organized in different regions to encourage growers to adopt hydroponics, while technical support will be provided for installing small-scale systems on household rooftops to promote urban agriculture. The initiative was finalized during a special meeting attended by senior government officials and agricultural experts, aimed at extending the tomato production season, ensuring affordable prices for consumers, enhancing farmers' incomes, and strengthening food security and market stability in Punjab.

**Sources:** [Business Recorder](#)

## 10. AGRO ADVISORY SERVICES FOR FARMERS

### زرعی سفارشات

#### گندم

- ﴿ تکبختی کاشت گندم کو پہلا پانی شامیں نکلنے وقت بوائی کے 25 تا 30 دن بعد لگائیں۔
- ﴿ گندم کی اچھی اور زیادہ پیداوار حاصل کرنے کے لیے جڑی بوٹیوں کی تلخی انتہائی ضروری ہے۔ ایک اندازے کے مطابق جڑی بوٹیوں کی وجہ سے 42 فیصد تک پیداوار کم ہو سکتی ہے۔ جڑی بوٹیوں کی تلخی کے لیے مندرجہ ذیل باتوں کا خیال رکھیں۔
- ﴿ پہلی آبپاشی کے بعد کھیت وتر حالت میں آنے پر دوہری بارہیر و چلائیں۔
- ﴿ جڑی بوٹیوں کی تلخی کے لیے فصل کی ابتدائی حالت میں پہلے پانی کے بعد جڑی بوٹیوں کی شناخت کو مد نظر رکھتے ہوئے جڑی بوٹی مارادویات کا فورا سپرے کریں۔ چوڑے اور نوکیلے چوں والی دوٹیوں اقسام کی جڑی بوٹیوں کی صورت میں دوٹیوں طرح کے زہروں کو مٹا کر یا ان کے تیار شدہ بکسچر جو کہ مارکیٹ میں دستیاب ہیں سپرے کریں۔ ورنہ طلعہ طلعہ سپرے کریں۔
- ﴿ دوسرے پانی کے بعد اگر نوکیلے چوں والی جڑی بوٹیاں نظر آئیں تو ان کے لیے موبو سفارش کردہ زہر ضرور استعمال کریں۔
- ﴿ رتیے کھراٹھے نیز بارانی علاقوں کی زمینوں میں جڑی بوٹی مار زہروں کا استعمال محکمہ زراعت کے عملہ کے مشورہ سے کریں۔

#### سورج بھسی

- ﴿ ہماری میرا زمین سورج بھسی کی کاشت کے لیے بہت موزوں ہے۔ سم زدہ اور بہت رتیلی زمین اس کے لیے موزوں نہیں ہے۔
- ﴿ جنوبی اضلاع میں یکم جنوری سے 31 جنوری تک اور وسطی و شمالی اضلاع میں 15 جنوری سے 15 فروری تک کاشت مکمل کریں۔
- ﴿ ڈیرہ قازی خان اور راجن پور اضلاع میں 31 جنوری تک کاشت مکمل کریں۔
- ﴿ سورج بھسی کی اچھی پیداوار حاصل کرنے کے لیے فصل کو قطاروں میں کاشت کریں۔ قطاروں کا درمیانی فاصلہ اڑھائی فٹ اور پودوں کا درمیانی فاصلہ آٹھ فٹ 9 انچ رکھیں

#### کماڈ

- ﴿ فصل کی کٹائی جاری رکھیں۔ فصل کی کٹائی سطح زمین سے آدھا تا ایک انچ گہرا کریں کیونکہ زیر زمین پڑی آنکھیں زیادہ صحت مند ماحول میں پھومتی ہیں اور لمبوں میں موجود گزروں کی سنڈیاں تلف ہو جاتی ہیں۔
- ﴿ کٹائی کے بعد گنا جلد از جلد مل کو سپلائی کریں تاکہ وزن اور ریکوری میں کمی نہ آئے۔

Source: *Zarat Nama, Directorate of Agricultural Information*

پلاننگ اینڈ ریسرچ ڈیپارٹمنٹ

زرعی ترقیاتی بینک لمیٹیڈ

ہیڈ آفس، اسلام آباد

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