

AGRICULTURE OUTLOOK

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

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1. EXECUTIVE SUMMARY

In July 2025, Pakistan's crops showed mixed outcomes. Rice and cotton performed well, with good yields expected, while sugarcane improved after pest control and remained healthy in KP. Monsoon rains hurt mung bean but benefited sesame. Horticulture varied: Punjab's vegetables were damaged, Sindh's mango season ended successfully, and fruit harvesting continued in other regions. In Gilgit-Baltistan, cherries ended and apples and pears are being picked, though vegetables suffered heavy losses. Overall, rice, cotton, sugarcane, and sesame are promising, while pulses and vegetables faced setbacks.

In June 2025, Pakistan saw a slight rise in humidity with pre-monsoon activity, though Sindh and Balochistan stayed dry. Temperatures were 2–4°C above normal, causing heat stress and higher water needs for Kharif crops. For July, the monsoon is expected with above-normal rains in Punjab, Sindh, and Balochistan, easing temperatures but raising risks of flooding and waterlogging in some areas.

As mentioned by the Pakistan Bureau of Statistics (PBS) during July 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%) increased over June 2025.

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during June, 2025 amounted to Rs. 701,121 million (provisional) as against Rs. 752,392 million in May, 2025 and Rs. 712,281 million during June, 2024 showing a decrease of 6.81% over May, 2025 and of 1.57% over June, 2024.

Imports into Pakistan during June, 2025 amounted to Rs. 1,378,645 million (provisional) as against Rs. 1,475,181 million in May, 2025 and Rs. 1,382,232 million during June, 2024 showing a decrease of 6.54% over May, 2025 and of 0.26% over June, 2024.

Total nutrient offtake during June 2025 was 407 thousand tonnes while Total domestic fertilizer production during June 2025 was 790 thousand tonnes.



2. CURRENT CROP SITUATION

During July 2025, major agricultural activities in the plains of Pakistan included the near completion of rice transplanting, cotton reaching its maturity stage, and healthy growth of sugarcane.

2.1. Rice Crop:

In Punjab and Sindh, the rice crop is progressing well and is expected to reach full maturity by November. Early-sown varieties were affected by bacterial leaf blight; however, the situation is now under control. Late-sown varieties are anticipated to yield better results, as they are comparatively less prone to diseases and other adverse effects.

2.2. Cotton Crop:

In Punjab, the cotton crop has reached its maturity stage and is expected to deliver promising yields. However, many areas suffered severe crop damage due to the recent floods, resulting in substantial losses for farmers. The fields where the crop remained safe are progressing well and are expected to give good yields, as the remaining plants have a strong boll load. Harvesting is expected to begin in September and will continue through November. In Sindh, the crop is showing excellent growth and is on track to reach maturity on time.

2.3. Oilseed, Mung bean, and sesame:

In Punjab, the mung bean crop was severely affected in several areas due to heavy monsoon rains, leading to a decline in yield. Conversely, the rains proved beneficial for sesame, as the crop was at the flowering stage and responded positively. Overall, the monsoon rains had a mixed impact, favoring some crops while adversely affecting others.

2.4. Sugarcane

In Sindh and Punjab, the sugarcane crop was affected by pyrilla insect, but after heavy rains the pest was largely washed out and has now been controlled. In Khyber Pakhtunkhwa (KP), the sugarcane crop is showing good results with no significant negative impact from rainfall, although some areas did experience localized crop damage due to heavy rains.

2.5. Horticulture

In Punjab, summer vegetables such as okra, bitter melon, and chilies have been badly affected by the recent rains. The mango season is nearing its end, while dates, persimmon, guava, and pomegranate are now at the harvesting stage.



In Sindh, the mango season has concluded with satisfactory production, while fruits such as banana and guava have now entered the harvesting stage.

In Khyber Pakhtunkhwa, the summer fruit season has recently concluded, during which grapes, apricot, and cherries were cultivated. At present, citrus orchards are showing good growth with healthy fruit development.

In Balochistan, field crops have been completely harvested, while apple and peach harvesting has recently begun. Vegetable crops such as cucumber, okra, and green chilies are currently being harvested, and the process will continue through August and September.

In Gilgit-Baltistan, Cherry harvesting is almost complete, while apples and pears are approaching the harvesting stage, with picking already started in some areas. Seasonal vegetables have been badly affected by the recent rains, with tomato, onion, and potato suffering the most damage.

Source:

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

3.WEATHER SITUATION

Rainfall/Precipitation

During the month, most parts of the country received rainfall, whereas, western Balochistan remained dry. The major amounts were recorded in upper KPK, Potohar, Sindh and AJK.

Chief amount of rainfall recorded across Pakistan during the month of June , 2025

Sr.no.	Station	Rainfall(mm)	Sr.no.	Station	Rainfall(mm)
1	MALAMJABBA	249	11	G.DOPATTA	111.5
2	ATTOCK	186.8	12	HAFIZABAD	101
3	ISLAMABAD,ZEROPOINT	167.1	13	KAKUL	99
4	LAHORE, AIRPORT	155	14	MITHI	98
5	KOTLI	132	15	OKARA	93.5
6	SAIDU SHARIF	126	16	GUJRAT	91.2
7	KAMRA AIRBASE	123.6	17	SHEIKHUPURA	88.8
8	MURREE	123	18	NAROWAL	83.2
9	CHAKLALA AIRBASE	121.1	19	MUZAFFARABAD AIRPORT	80.9
10	MANGLA	113.6	20	CHAKWAL	80.4



Relative Humidity (June 2025)

The mean Relative Humidity (RH) during June 2025 showed a gradual increase compared to May, consistent with the onset of pre-monsoon activity. National average RH rose to around 35–38%, though conditions remained relatively dry in southern and western regions, particularly in Sindh and Balochistan. Punjab and Khyber Pakhtunkhwa experienced moderate improvement in atmospheric moisture, while northern areas including Gilgit-Baltistan and Azad Jammu & Kashmir observed higher evening humidity due to localized showers. Despite this rise, only a few stations recorded days with mean RH greater than or equal to 70%, indicating that dry-to-semi-dry conditions still dominated most agricultural plains.

Temperature Regime during June 2025

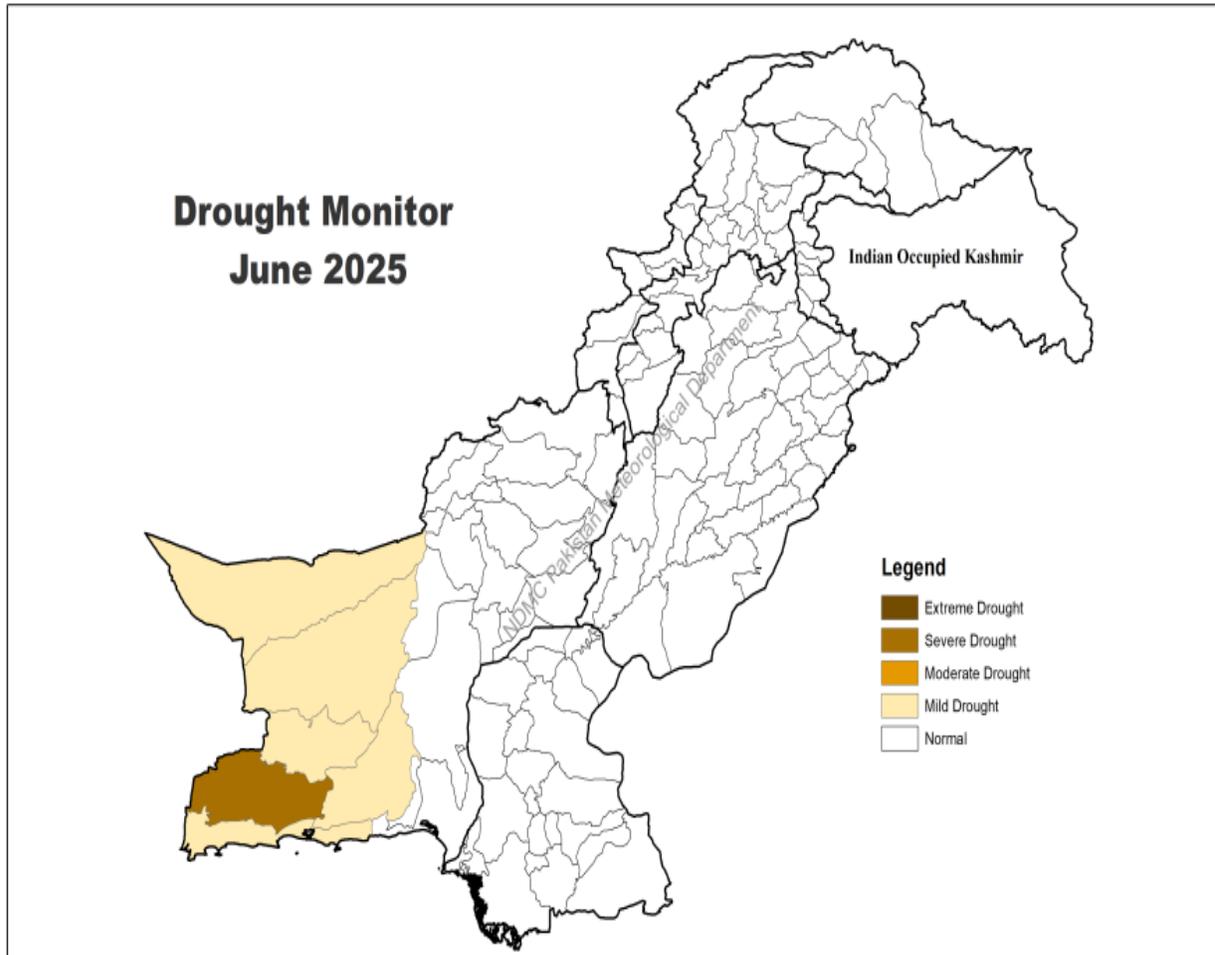
June 2025 remained markedly hotter than normal across Pakistan, with average daily temperatures 2–4°C above the long-term mean. Heatwave conditions persisted during the first half of the month before slight relief was observed with scattered pre-monsoon showers in Punjab and northern areas. Mean temperatures ranged between 32–34°C in Punjab, 34–36°C in Sindh, 28–30°C in KP, 16–22°C in Gilgit-Baltistan, and around 25°C in Quetta valley. Elevated heat stress further increased evapotranspiration and water requirements, posing challenges for Kharif crops, especially in rain-fed and canal-dependent zones.

Weather Prediction for July 2025

For July 2025, the Pakistan Meteorological Department anticipates the onset of the southwest monsoon, with above-normal rainfall likely over Punjab, Sindh, and parts of Balochistan. Northern regions including Gilgit-Baltistan, Azad Jammu & Kashmir, and upper Khyber Pakhtunkhwa are expected to receive near-normal to slightly below-normal rainfall. Temperatures are projected to remain above normal during early July but may gradually normalize with the strengthening monsoon currents. High humidity levels and frequent rain spells are expected to reduce heatwave intensity, although localized flooding and waterlogging risks may arise in central and southern Punjab as well as Sindh.

4. DROUGHT SITUATION

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



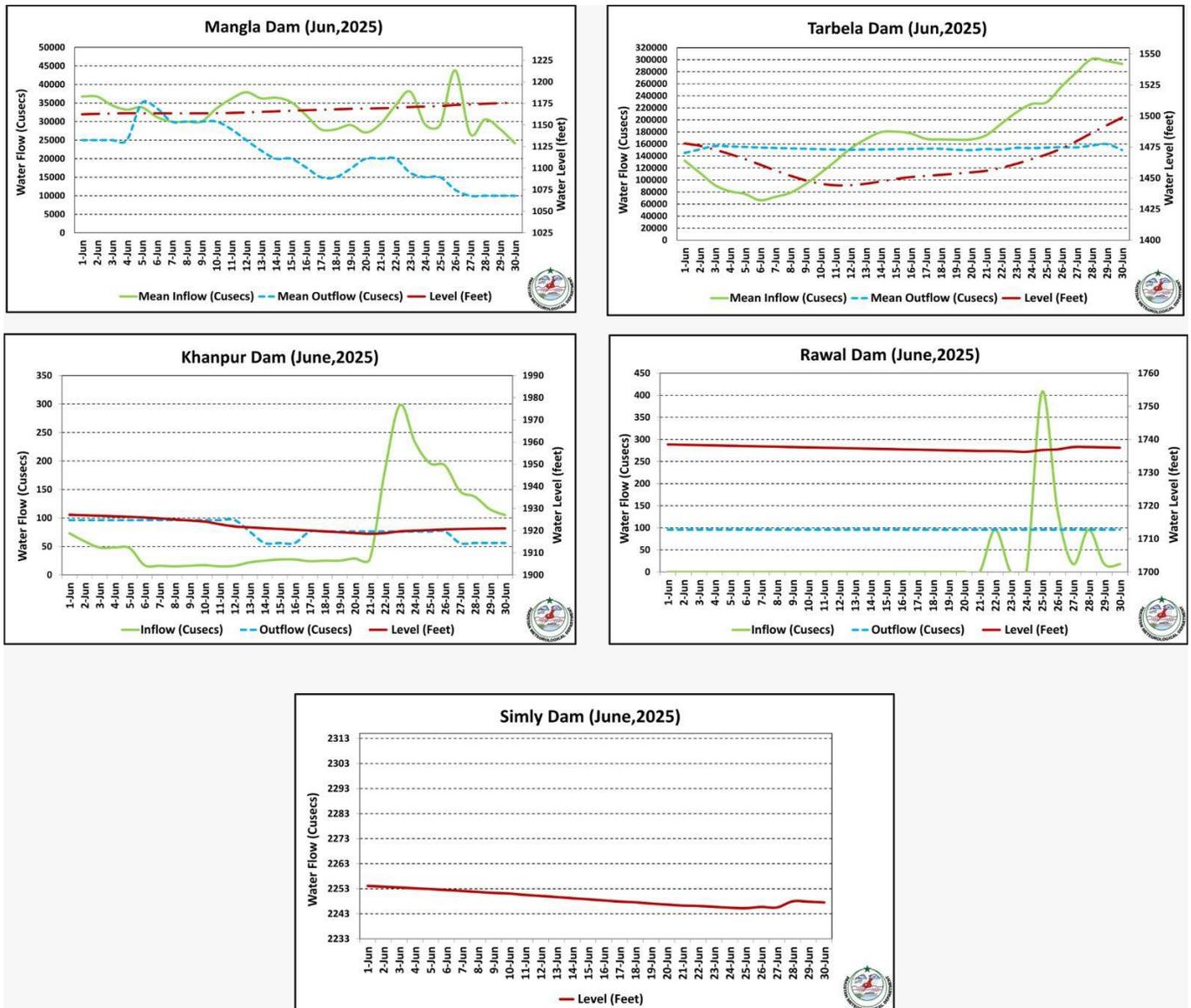
Drought Monitor of Pakistan for the month of June, 2025

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



5. WATER AVAILABILITY/DAMS FLOW DATA

During the month, water inflow, outflow and levels of the Rawal, Khanpur, Tarbela, Simly and Mangla dams are shown in Figure 14. The water level at Mangla and Tarbela has increased due to glacial melt and recent rainfall during the month. Rawal and Khanpur reservoirs have significantly increased due to moonsoon rainfall. The water levels at the major reservoirs, Tarbela and Mangla, stand at 1,504 feet and 1,176 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 to 4.1% on year-on-year basis in July 2025 as compared to 3.2% of the previous month and 11.1% in July 2024. On month-on-month basis, it increased by 2.9% in July 2025 as compared to an increase of 0.2% in the previous month and an increase of 2.1% in July 2024
- ii. CPI inflation Urban, increased to 4.4% on year-on-year basis in July 2025 as compared to 3.0% of the previous month and 13.2% in July 2024. On month-on-month basis, it increased by 3.4% in July 2025 as compared to 0.1% in the previous month and an increase of 2.0% in July 2024.
- iii. CPI inflation Rural, increased by 3.5% on year-on-year basis in July 2025 as compared to an increase of 3.6% in the previous month and 8.1% in July 2024. On month-on-month basis, it increased by 2.2% in July 2025 as compared to an increase of 0.5% in the previous month and an increase of 2.2% in July 2024.

Details are given below in table:

S. No.	Description	Unit	Average Prices			%change July 25 over	
			July 25	June 25	July 24	June 25	July 24
1	Wheat Flour Bag	20 Kg	1493.63	1516.42	1943.47	-1.50	-23.15
2	Rice Basmati Broken (Average Quality)	1 Kg	206.60	203.46	207.06	1.54	-0.22
3	Rice IRRI-6/9 (Sindh/Punjab)	1 Kg	154.28	153.11	161.85	0.76	-4.68
4	Bread plain (Small Size)	Each	108.83	108.83	110.77	0.00	-1.75
5	Beef with Bone (Average Quality)	1 Kg	1109.28	1106.96	966.15	0.21	14.81
6	Mutton (Average Quality)	1 Kg	2044.05	2033.76	1903.39	0.51	7.39
7	Chicken Farm Broiler (Live)	1 Kg	409.75	340.14	381.82	20.47	7.31
8	Milk fresh (Un-boiled)	1 Ltr	201.17	199.96	192.69	0.61	4.40
9	Curd (Dahi) Loose	1 Kg	235.66	232.27	226.55	1.46	4.02
10	Powdered Milk NIDO 390 gm	Each	1081.22	1066.25	992.20	1.40	8.97
11	Eggs Hen (Farm)	1 Dozen	272.39	299.08	250.82	-8.92	8.60
12	Mustard Oil (Average Quality)	1 Kg	527.76	530.31	496.02	-0.48	6.40
13	Cooking Oil DALDA or Other	Each	2876.42	2889.96	2672.91	-0.47	7.61
14	Ghee DALDA/HABIB 2.5 kg	Each	1461.76	1463.94	1299.02	-0.15	12.53
15	Ghee DALDA/HABIB 1 kg	Each	568.35	567.57	505.98	0.14	12.33
16	Bananas (Kela) Local	1 Dozen	170.35	182.92	159.79	-6.87	6.61
17	Pulse Masoor (Washed)	1 Kg	295.99	294.94	325.02	0.36	-8.93
18	Pulse Moong (Washed)	1 Kg	398.37	404.05	337.77	-1.41	17.94
19	Pulse Mash (Washed)	1 Kg	455.19	457.39	573.48	-0.48	-20.63



20	Pulse Gram	1 Kg	313.38	316.50	330.02	-0.99	-5.04
21	Potatoes	1 Kg	83.95	76.90	98.28	9.17	-14.58
22	Onions	1 Kg	55.97	47.99	112.88	16.63	-50.42
23	Tomatoes	1 Kg	85.63	69.03	165.10	24.05	-48.13
24	Sugar Refined	1 Kg	184.11	179.38	146.37	2.64	25.78
25	Gur (Average Quality)	1 Kg	238.35	229.06	212.65	4.06	12.09
26	Salt Powdered (National/Shan) 800 gm	Each	72.60	72.60	70.31	0.00	3.26
27	Chilies Powder National 200gm	Each	320.00	320.00	333.24	0.00	-3.97
28	Garlic (Lehsun)	1 Kg	370.08	333.14	481.02	11.09	-23.06
29	Tea Lipton Yellow Label 190 gm	Each	447.07	447.07	544.71	0.00	-17.93

Increase in Prices ■

Decrease in price ■

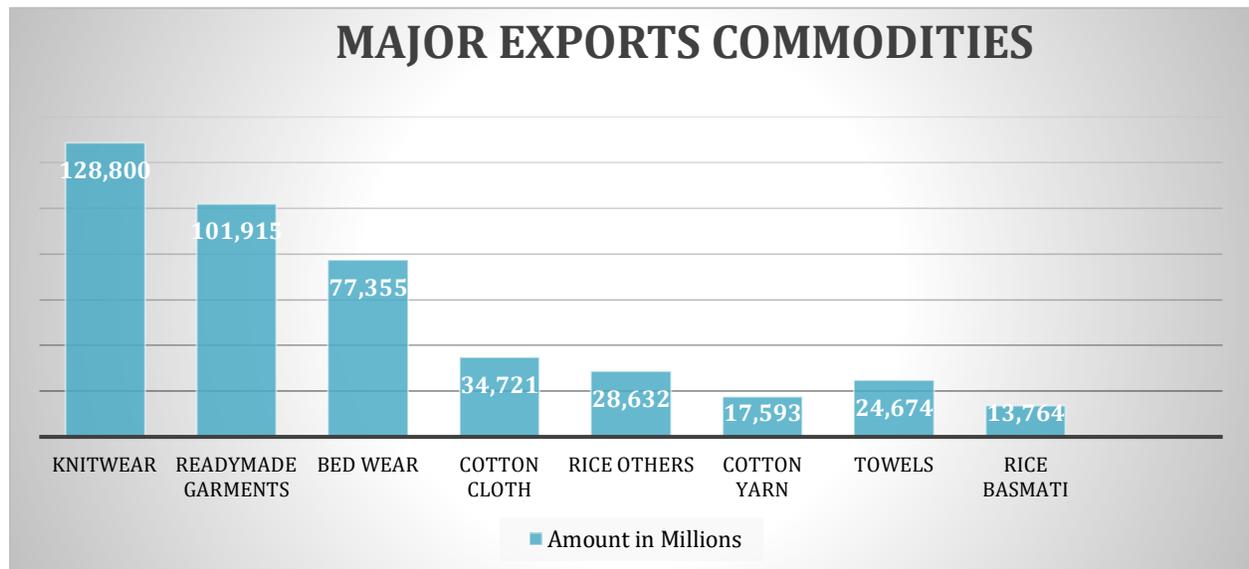
Source: Pakistan Bureau of Statistics.

7. TRADE SITUATION

Exports

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during June, 2025 amounted to Rs. 701,121 million (provisional) as against Rs. 752,392 million in May, 2025 and Rs. 712,281 million during June, 2024 showing a decrease of 6.81% over May, 2025 and of 1.57% over June, 2024.

In terms of US dollars, the exports in June, 2025 totaled \$ 2,477 million (provisional) as compared to \$ 2,671 million in May, 2025 showing a decrease of 7.26% over May, 2025 and of 3.17% as compared to \$ 2,558 million in June, 2024.





Imports:

Imports into Pakistan during June, 2025 amounted to Rs. 1,378,645 million (provisional) as against Rs. 1,475,181 million in May, 2025 and Rs. 1,382,232 million during June, 2024 showing a decrease of 6.54% over May, 2025 and of 0.26% over June, 2024.

In terms of US dollars, the imports in June, 2025 totaled \$ 4,872 million (provisional) as compared to \$ 5,237 million in May, 2025 showing a decrease of 6.97% over May, 2025 and of 1.85% as compared to \$ 4,964 million in June, 2024.



Source: Pakistan Bureau of Statistics

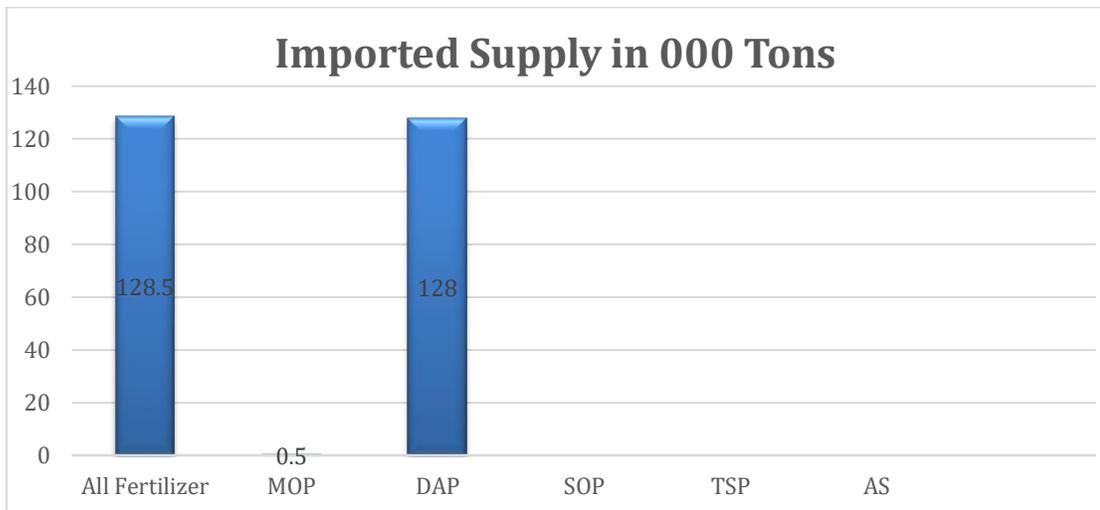
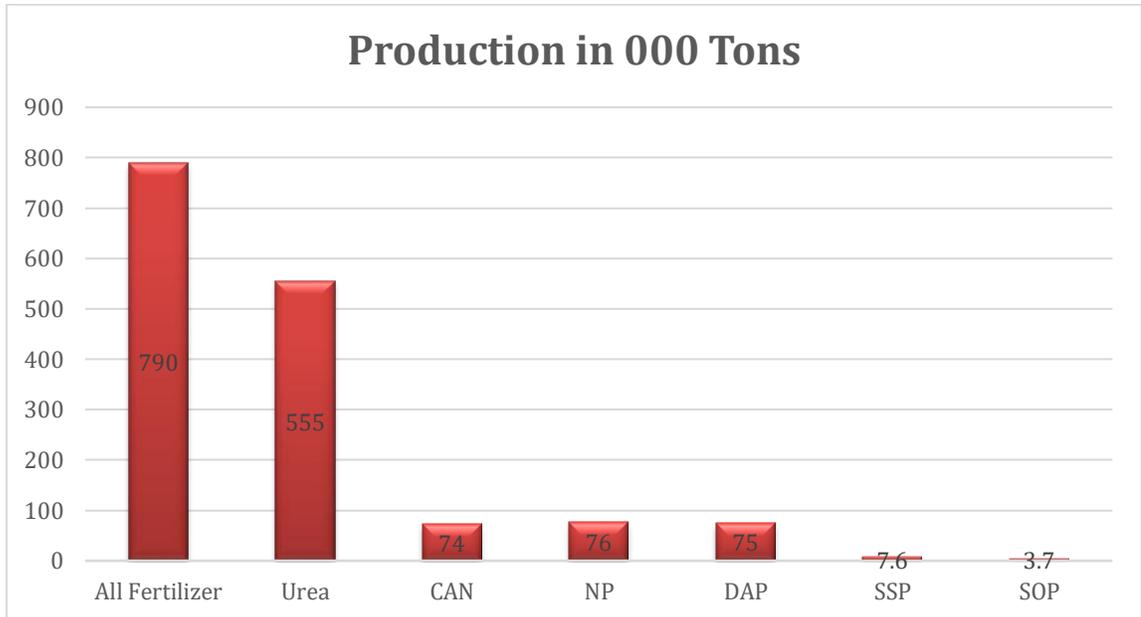
8. FERTILIZER OFFTAKE SITUATION

- Total nutrient offtake during June 2025 was 407 thousand tonnes, which increased by 11 per cent over June 2024.
- Urea offtake was 582 thousand tonnes which increased by 20.6 per cent.
- DAP offtake was 115 thousand tonnes which decreased by 6.6 per cent over June 2024
- Nitrogen and potash offtake increased by 15.7 and 41.2 per cent, respectively while phosphate offtake decreased by 6.7 per cent.



Fertilizer Production and Imported Supplies:

Total domestic fertilizer production during June 2025 was 790 thousand tonnes. Urea and DAP production was 555 and 75 thousand tonnes, respectively. Production of other products i.e. NP, CAN, SSP and SOP was 76, 74, 7.6, and 3.7 thousand tonnes, respectively. Imported supplies comprised of 128 thousand tonnes of DAP and 0.5 thousand tonne of MOP.



Source: National Fertilizer Development Centre



9. NEWS TRENDS

- **Punjab Launches Second Phase of Green Tractor Scheme:**

The Punjab Agriculture Department is set to roll out the second phase of the Green Tractor Programme, under which 10,000 locally manufactured tractors (50–65 HP) will be distributed to farmers with a subsidy of Rs. 500,000 each. Another 10,000 tractors of 75 HP and above, both locally made and imported, will be subsidized with Rs. 1 million per unit. Further, 1,000 tractors had also been prepared under the Wheat Incentive Support Programme, with 700 already delivered and the remaining 300 to be handed over within two weeks. Highlighting government initiatives, the minister said Rs. 12 billion have been distributed among farmers under the wheat support scheme. Moreover, the first phase of the Kissan Card Scheme issued 500,000 cards, enabling Rs. 55 billion in interest-free loans, 85 percent of which were used for fertilizer purchases. In its second phase, Rs. 100 billion were allocated, with Rs. 84 billion already disbursed. The construction of four Model Agriculture Malls is near completion, while 10 more will be established in the next phase. Progress is also being made in Solarization of tube wells, Smog control measures through distribution of super seeders, and provision of hi-tech machinery worth Rs. 30 billion in FY 2025–26.

- **Punjab Announces Rs. 20 Billion DAP Fertilizer Subsidy for Rabi Wheat:**

The Punjab government will provide a Rs. 20 billion subsidies on DAP fertilizer for the upcoming Rabi season to boost wheat cultivation. Farmers owning up to 25 acres will get Rs. 3,000 per bag, capped at 12 acres, allowing a maximum benefit of Rs. 36,000. The scheme is expected to benefit 98 percent of Punjab's farmers. At a review meeting chaired by Agriculture Minister, it was shared that over 3,000 registered Kissan Card dealers will supply fertilizer at subsidized rates under strict monitoring. Secretary Agriculture said the process has been digitalized: farmers will be verified through the Fertilizer App, PLRA land records, and NADRA biometric checks. Once verified, they will pay their share while the subsidy is transferred directly to the dealer's bank account.

Sources: Business Recorder

10. AGRO ADVISORY SERVICES FOR FARMERS

زرعی سفارشات برائے کسان

ملک بھر میں جولائی کے مہینے میں مون سون کی بارشوں کا آغاز ہو جاتا ہے اور درج حرارت 35 سے 40 ڈگری سینٹی گریڈ کے درمیان رہتا ہے۔ تاہم ہوا میں نمی کا تناسب 50 سے 60 فیصد تک بڑھ جاتا ہے۔ جو کہ فصلات کی بڑھوتری پر اثر انداز ہوتا ہے۔ لہذا مون سون کے موسم میں فصلات میں پانی کے نکاس کو یقینی بنائیں اور فصلات میں آبپاشی محکمہ موسمیات کی پیشین گوئی کو مدنظر رکھ کر کریں۔

موسیٰ مکی

- ☆ مکی کاشت کے لیے بھاری میراژ ریز زمین بہت موزوں ہے۔
- ☆ بارانی علاقوں میں مکی مون سون شروع ہونے سے پہلے کاشت کریں تاکہ پودے جڑوں کا نظام اچھی طرح قائم کر لیں اور مون سون کی بارشوں کا صحیح فائدہ اٹھا سکیں۔
- ☆ محکمہ زراعت کی منظور شدہ عام اقسام ملکہ 2016 اگست 2002 ایم ایم آر آئی پی اور پرل جبکہ دوغلی اقسام ایف ایف ایف 1046 ایف ایف ایف 949 اور وائی ایف 1898 کاشت کریں۔ یہ اقسام پنجاب سید کارپوریشن اور لوکل سیڈ ڈیلر سے دستیاب ہوں گی۔
- ☆ بارانی علاقوں میں مکی کی کاشت سنگل رو کٹن ڈرل / پلانٹر سے آڑھائی فٹ کے فاصلے پر کریں۔ قطاروں کا درمیانی فاصلہ دو سے اڑھائی فٹ رکھیں۔
- ☆ موسیٰ مکی کی دوغلی اقسام کے لیے پودوں کی تعداد 29 ہزار سے 30 ہزار فی ایکڑ جبکہ عام اقسام کے لیے پودوں کی تعداد 25 سے 26 ہزار فی ایکڑ رکھیں۔

مونگ اور ماش

- ☆ مونگ کی کاشت کے لیے بہتر نکاسی والی میراژ زمین موزوں ہے۔ جبکہ کلراٹھی اور سبز زہدہ زمین غیر موزوں ہے۔
- ☆ بارانی علاقوں کے کاشتکار مونگ اور ماش کی کاشت مون سون کی پہلی بارش کے بعد تر آنے پر کریں۔ ان دونوں فصلوں کی کاشت جولائی کے آخر تک کی جاسکتی ہے۔
- ☆ مطلوبہ پودوں کی تعداد حاصل کرنے کے لیے فی ایکڑ 8 سے 10 کلوگرام بیج کاشت بذریعہ پھلے اور ڈرل سے کاشت کے لیے 12 سے 15 کلوگرام بیج فی ایکڑ استعمال کریں۔ اور جب پودے 8 سے 10 دن کے ہوں جائیں تو چھدرائی مکمل کر کے زائد اور کمزور پودے نکال دیں۔
- ☆ آبپاش علاقوں میں منظور شدہ اقسام نیاب مونگ 2011، ازری مونگ 2006 اور چکوال ایم 6 کاشت کریں، جبکہ بارانی علاقوں میں نیاب مونگ 2011 ازری مونگ 2006، نیاب مونگ 2016 اور بہاول پور 2017 جبکہ ماش کی کاشت کے لیے ماش 97، چکوال ماش اور عروج 2011 موزوں ترین اقسام ہیں
- ☆ اچھی پیداوار کے لیے بوقت کاشت ایک بوری ڈی اے پی اور آدھی بوری پوناشیم سلفیٹ استعمال کریں۔
- ☆ قطاروں درمیانی فاصلہ 30 سینٹی میٹر جبکہ بیج کی گہرائی 3 سے 5 سینٹی میٹر رکھیں اور پودوں کا درمیانی فاصلہ 8 سے 10 سینٹی میٹر رکھیں۔

تل

- ☆ تل کی کاشت کے لیے پانی جذب کرنے والی درمیانی اور بھاری میراژ زمین کا انتخاب کریں تاہم یہ ہر قسم کی زمین میں بھی کاشت کی جاسکتی ہے۔
- ☆ شرح بیج ڈرل یا قطاروں میں کاشت کے لیے ڈبڑے سے دو کلوگرام بیج فی ایکڑ رکھیں۔
- ☆ پنجاب میں عام کاشت کے لیے سفید تلوں کی منظور شدہ اقسام ٹی ایف 6 ٹی ایس 5 ہیں جو بہتر پیداوار کی صلاحیت رکھتی ہیں۔ جبکہ ان میں سے ٹی ایف 6 بہتر پیداوار کی حامل ہے۔
- ☆ اچھی پیداوار کے حصول کے لیے 15 جولائی تک کاشت مکمل کر لیں۔

Source: Zarat Nama, Directorate of Agricultural Information

پلاننگ اینڈ ریسرچ ڈیپارٹمنٹ

زرعی ترقیاتی بینک لمیٹیڈ

ہیڈ آفس، اسلام آباد

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