

AGRICULTURE OUTLOOK

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

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1. EXECUTIVE SUMMARY

In November 2025, major farming activities across Pakistan included peak wheat sowing in Punjab and Sindh, near-completion of rice harvesting, continued cotton picking, and the start of sugarcane harvesting. Wheat fields showed good germination, and officials stressed timely fertilizer use. Rice harvesting was almost complete except in a few pockets, though Punjab's super basmati crop faced heavy flood losses, while Sindh finished most of its harvest. Cotton harvests were wrapping up, but nationwide production is expected to decline due to severe flood damage, especially in Multan. Sugarcane harvesting preparations continued smoothly as mills began operations. Horticulture remained active across all regions.

Punjab reported strong potato growth, vegetable harvesting, and the start of kinnow marketing. Sindh harvested high-quality tomatoes and bananas, while KP's citrus and winter vegetables reached markets. Balochistan continued harvesting pomegranates, apples, and vegetables, and Gilgit-Baltistan saw ongoing fruit and dry-fruit harvesting. Overall, November marked an active transition month with multiple crops moving from growth to harvest stages across the country.

As mentioned by the Pakistan Bureau of Statistics (PBS) during November, 2025 Onions (47.94%), Chicken (17.36%), Eggs (7.92%), Fish (2.94%), Potatoes (2.67%), Fresh Fruits (2.27%), Dry Fruits (1.90%), Meat (1.81%), Wheat Products (1.61%), Cooking Oil (1.55%), Wheat (1.12%) and Milk Products (0.98%). increased over October 2025.

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during October, 2025 amounted to Rs. 800,841 million (provisional) as against Rs. 703,779 million in September, 2025 and Rs. 828,052 million during October, 2024 showing an increase of 13.79% over September, 2025 but a decrease of 3.29% over October, 2024.

Imports into Pakistan during October, 2025 amounted to Rs. 1,726,145 million (provisional) as against Rs. 1,648,853 million in September, 2025 and Rs. 1,399,579 million during October, 2024 showing an increase of 4.69% over September, 2025 and of 23.33% over October, 2024.

Total nutrient offtake during October 2025 was 372 thousand tonnes while Total domestic fertilizer production during October 2025 was 853 thousand tonnes.



2. CURRENT CROP SITUATION

In November 2025, farmers across Pakistan's plains focused on several important agricultural activities. Wheat sowing and germination progressed steadily, rice harvesting approaching its final stage, cotton picking was continued in many areas, and sugarcane harvesting was set to commence soon, keeping the farming community actively engaged.

2.1. Wheat Crop:

Wheat cultivation is in its peak in Punjab and Sindh, starting from October and continuing till the end of November. Agriculture departments have advised the recommended varieties for both arid and irrigated areas along with the proper seed rates. For October sowing, farmers are advised to keep a close eye on their crop and ensure timely fertilizer application to promote better tillering.

2.2. Rice Crop:

Overall rice harvesting has been completed across most regions, with only a few areas such as Shakargarh and Narowal still in progress as the season reaches its peak. In Punjab, the 130-day super basmati crop suffered around 60% damage due to flooding, while Sindh has completed nearly 95% of harvesting. Farmers are strongly advised to avoid burning crop residues and instead use combine or Super Seeders for proper stubble management, as this practice helps protect the environment and improves soil health for the upcoming crop.

2.3. Cotton Crop:

Cotton harvesting has been completed in most parts of Punjab, with only a few areas still finishing the process, while Sindh has also entered its final harvesting phase. However, this year's crop has suffered significant losses due to severe flooding. In Multan alone, nearly 80% of the cotton crop has been damaged, along with considerable losses in several other regions. This widespread damage is expected to negatively impact the final production output for the season.

2.4. Sugarcane

In Punjab and Sindh, preparations for harvesting have begun and will continue until December. Sugar mills are open, and farmers have started harvesting according to crop maturity. Lodging during the last month affected the crop, but farmers who took precautionary measures maintained better stands. In KPK, the crop was also impacted by lodging, though losses remained minimal, and harvesting is expected to start by the end of this month.

2.5. Horticulture

In Punjab, newly grown potato crops are showing healthy growth, while onion seedlings are being actively transplanted. Harvesting of vegetables such as tomato, turnip, chilies, and early potato varieties is underway in many areas. Kinnow harvesting has also started across the region, with growers bringing the fruit to local markets.



In Sindh, Best-quality tomatoes are being harvested in the region, and other vegetables are also coming into harvest. Banana harvesting is also in progress.

In Khyber Pakhtunkhwa, Citrus harvesting is at its peak, with Kinnow and Feutrell's Early available in markets. Harvesting of vegetables like potato, peas, and spinach has also started.

In Balochistan, Pomegranate and apple harvesting is also in progress, while vegetables like tomato and carrots are being picked across the region.

In Gilgit-Baltistan, Persimmon harvesting has begun, pear harvesting is underway, tomatoes have reached the market, and dry fruits are also under harvest across the region.

Sources:

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

3. WEATHER SITUATION

- **Rainfall/Precipitation**

During the month, significant rainfall was recorded over Punjab, KPK, Sindh, GB and AJK. However, the Balochistan remained predominantly dry.

Chief amount of rainfall recorded across Pakistan during the month of October, 2025					
Sr.No.	Station	Rainfall(mm)	Sr.No.	Station	Rainfall(mm)
1	Muzaffarabad AP	129.6	11	Cherat	58
2	Muzaffarabad City	114.6	12	Balakot	55
3	Rawalakot	105	13	Mangla	53.5
4	Murree	95	14	Multan AP	53.5
5	Kakul	80	15	Malamjabba	50
6	Pattan	80	16	Kotli	48
7	Parachinar	69	17	Dir	46.5
8	G.Dopatta	67	18	Bahawalpur City	44
9	Noorpur Thal	62	19	Chaklala AB	43
10	T.T. Singh	59	20	Faisalabad AP	42



- **Relative Humidity (October 2025)**

Relative humidity during October 2025 showed a clear decline across Pakistan as monsoon influence withdrew, with most plain and lowland areas experiencing much drier afternoons where RH commonly dropped to 30–45%, while mornings and evenings remained moderately humid (50–60%) in Punjab, upper Sindh, KP plains, and central regions due to residual surface moisture. Southern Sindh and western Balochistan stayed significantly drier, with daytime RH often falling below 30% except in areas that received isolated light rainfall during the first week of the month.

- **Temperature Regime during October 2025**

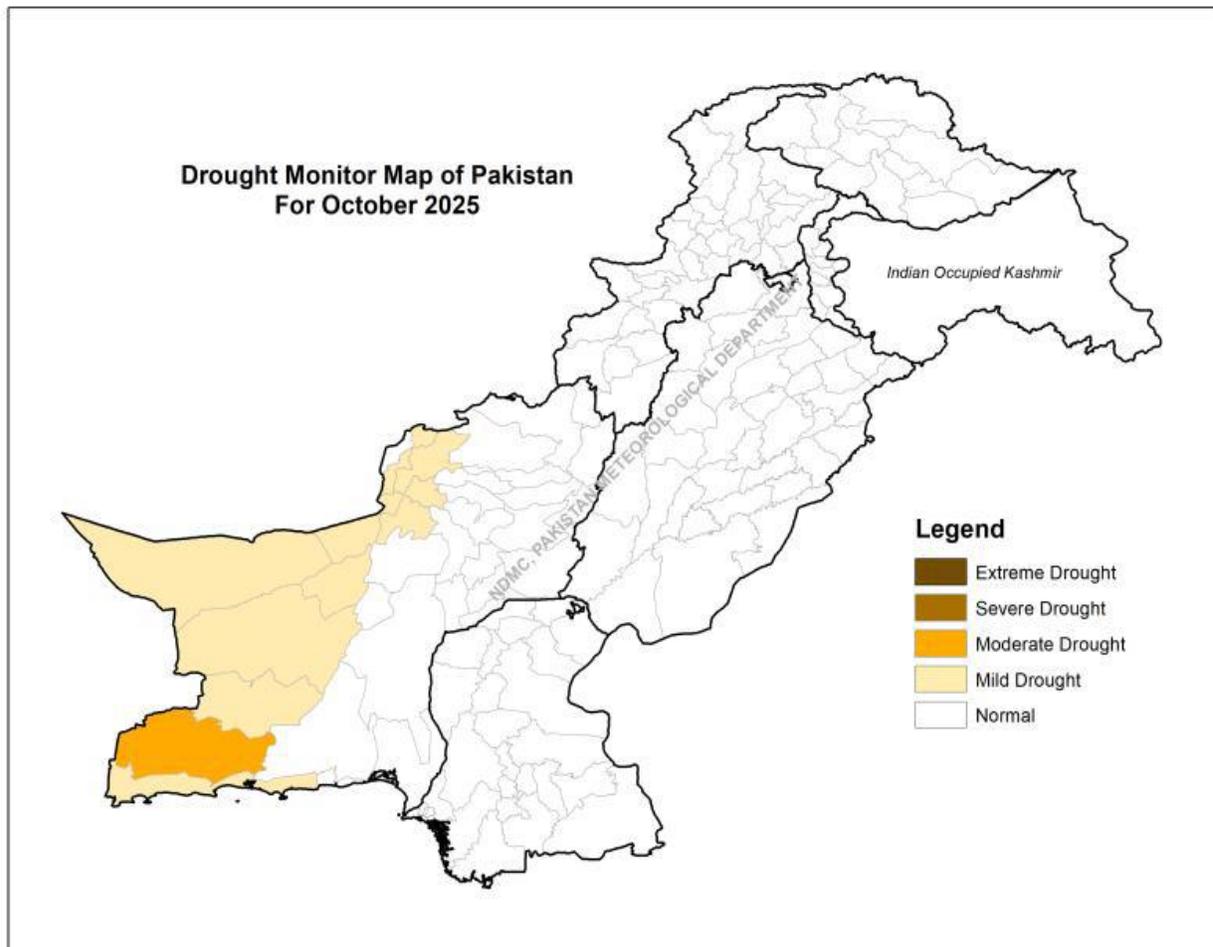
October 2025 remained warmer than average across most of Pakistan, with national temperatures showing a slight positive anomaly as warm days and mild nights persisted. Plains of Punjab and Sindh recorded daytime temperatures mostly between 30–35°C, while nights gradually cooled to 16–22°C, indicating a slow seasonal transition. Southern and western Balochistan experienced higher afternoon heat (33–38°C), driven by clear skies and dry winds, whereas the northern mountainous regions showed distinct cooling, with daytime highs between 15–25°C and nights dropping close to single digits at some elevated stations.

- **Weather Prediction for November 2025**

For November 2025, national weather projections indicate predominantly dry conditions across most regions, with below-normal rainfall expected in Punjab, Sindh, Balochistan, and KP plains, while only isolated light rain or snowfall is likely in northern highlands (GB, AJK, Upper KP). Temperature patterns are expected to shift toward cooler conditions: plains will likely observe daytime temperatures of 25–30°C and nighttime temperatures of 12–18°C, while higher elevations will turn significantly colder with sub-zero night temperatures at upper valleys. Relative humidity will further decline due to dry continental winds, increasing evaporation rates and irrigation demand in rain-fed and post-monsoon cropping areas. Overall, November is expected to bring stable dry weather, reduced atmospheric moisture, minimal flood risk, and rising concerns over soil-moisture depletion for winter crop establishment.

4. DROUGHT SITUATION

Based on the indices, the spatial drought assessment indicates that moderate drought conditions, depicted in orange color, are prevailing in the Turbat region. Mild drought conditions, shown in pale yellow, are spread across western and southwestern Balochistan, reflecting prolonged dry periods and reduced rainfall. Regions not affected by drought are classified as “Normal”, represented in white color, signifying adequate rainfall and soil moisture conditions.

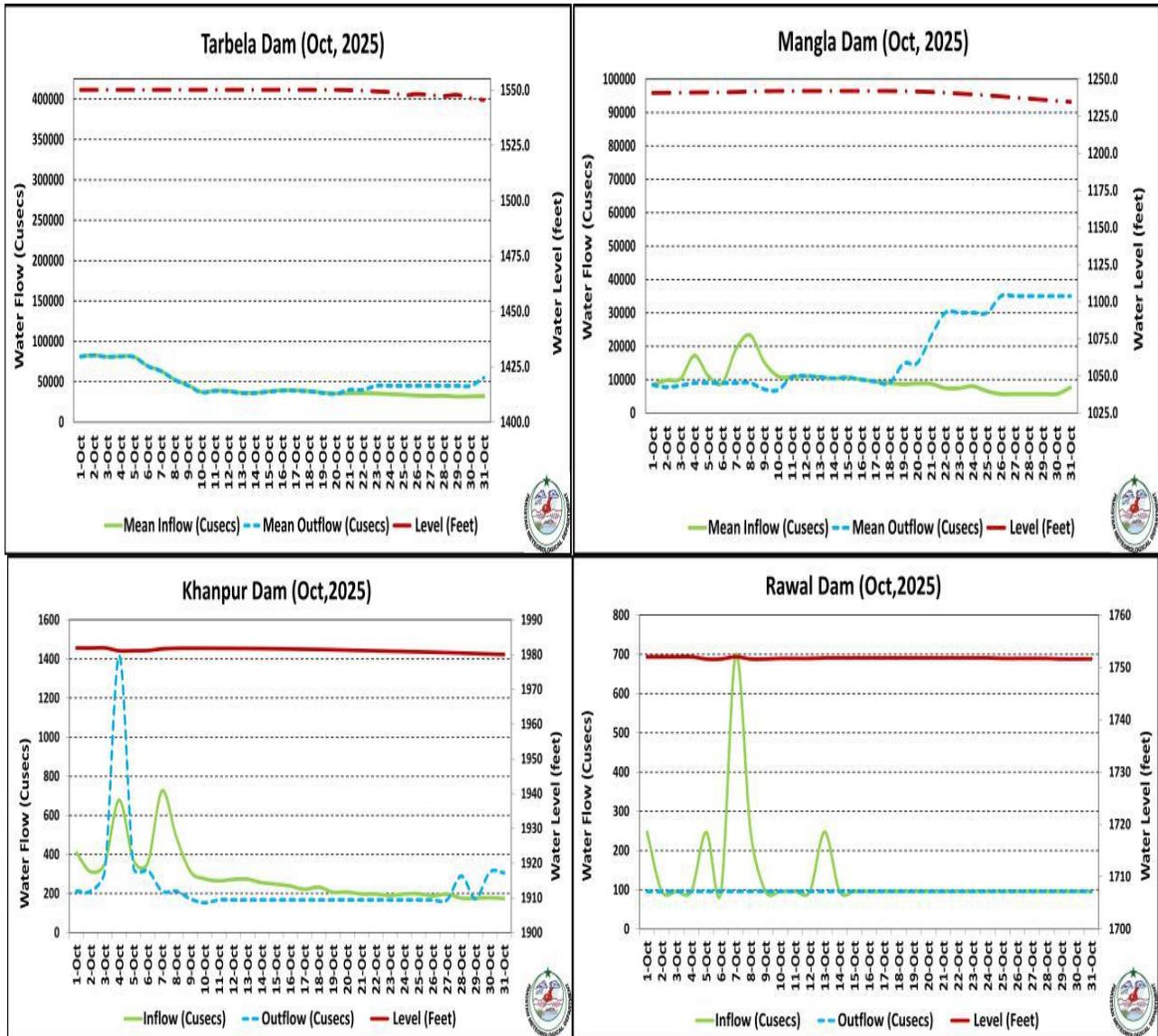


Drought Monitor of Pakistan for the month of October, 2025

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 presented in Figure. The above-mentioned reservoirs are adequately filled due to glacial melting (in case of Tarbela and Mangla only) and abundant rainfall during monsoon season. The water levels at the major reservoirs, Tarbela and Mangla, stand at 1,550 feet and 1241 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 6.1% on year-on-year basis in November 2025 as compared to 6.2% of the previous month and 4.9% in November 2024. On month-on-month basis, it increased by 0.4% in November 2025 as compared to an increase of 1.8% in the previous month and an increase of 0.5% in November 2024.

- II. CPI inflation Urban, increased by 6.1% on year-on-year basis in November 2025 as compared to 6.0% of the previous month and 5.2% in November 2024. On month-on-month basis, it increased by 0.5% in November 2025 as compared to an increase of 1.5% in the previous month and an increase of 0.5% in November 2024.

- III. CPI inflation Rural, increased by 6.3% on year-on-year basis in November 2025 as compared to an increase of 6.6% in the previous month and 4.3% in November 2024. On month-on-month basis, it increased by 0.2% in November 2025 as compared to an increase of 2.3% in the previous month and an increase of 0.5% in November 2024.

S. No.	Description	Unit	Average Prices			%change Nov 25 over	
			Nov 25	Oct 25	Nov 24	Oct 25	Nov 24
1	Wheat Flour Bag	20 Kg	2165.20	2145.81	1835.59	0.90	17.96
2	Rice Basmati Broken	1 Kg	215.98	217.25	207.35	-0.58	4.16
3	Rice IRRI-6/9 (Sindh/Punjab)	1 Kg	156.95	158.51	161.81	-0.98	-3.00
4	Bread plain (Small Size)	Each	110.73	110.12	108.85	0.55	1.73
5	Beef with Bone	1 Kg	1155.44	1136.36	1015.12	1.68	13.82
6	Mutton	1 Kg	2099.38	2089.82	1948.62	0.46	7.74
7	Chicken Farm Broiler (Live)	1 Kg	357.72	329.15	373.66	8.68	-4.27
8	Milk fresh (Un-boiled)	1 Ltr	202.93	202.75	196.96	0.09	3.03
9	Curd (Dahi) Loose	1 Kg	238.55	237.98	231.02	0.24	3.26
10	Powdered Milk NIDO 390 gm	Each	1120.14	1107.45	1034.92	1.15	8.23



ZTBL

11	Eggs Hen (Farm)	1 Dozen	354.16	329.42	344.55	7.51	2.79
12	Mustard Oil (Average Quality)	1 Kg	540.66	538.91	547.27	0.32	-1.21
13	Cooking Oil DALDA 5 kg	Each	2933.79	2887.66	2713.29	1.60	8.13
14	Vegetable Ghee DALDA 2.5 kg	Each	1496.67	1476.50	1358.61	1.37	10.16
15	Vegetable Ghee DALDA 1 kg	Each	583.40	577.42	544.93	1.04	7.06
16	Bananas (Kela) Local	1 Dozen	129.06	125.28	116.33	3.02	10.94
17	Pulse Masoor (Washed)	1 Kg	290.25	294.32	305.09	-1.38	-4.86
18	Pulse Moong (Washed)	1 Kg	377.90	383.58	385.25	-1.48	-1.91
19	Pulse Mash (Washed)	1 Kg	443.56	448.06	523.56	-1.00	-15.28
20	Pulse Gram	1 Kg	281.01	299.69	398.51	-6.23	-29.48
21	Potatoes	1 Kg	80.40	83.38	110.93	-3.57	-27.52
22	Onions	1 Kg	143.35	110.52	149.69	29.71	-4.24
23	Tomatoes	1 Kg	135.99	264.57	165.65	-48.60	-17.91
24	Sugar Refined	1 Kg	188.12	186.15	131.61	1.06	42.94
25	Gur (Average Quality)	1 Kg	242.89	248.71	207.64	-2.34	16.98
26	Salt Powdered (NATIONAL/SHAN) 800 gm	Each	70.64	72.66	71.31	-2.78	-0.94
27	Chilies Powder NATIONAL 200 gm Pack	Each	322.29	322.29	320.00	0.00	0.72
28	Garlic (Lehsun)	1 Kg	414.80	414.20	651.33	0.14	-36.31
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.

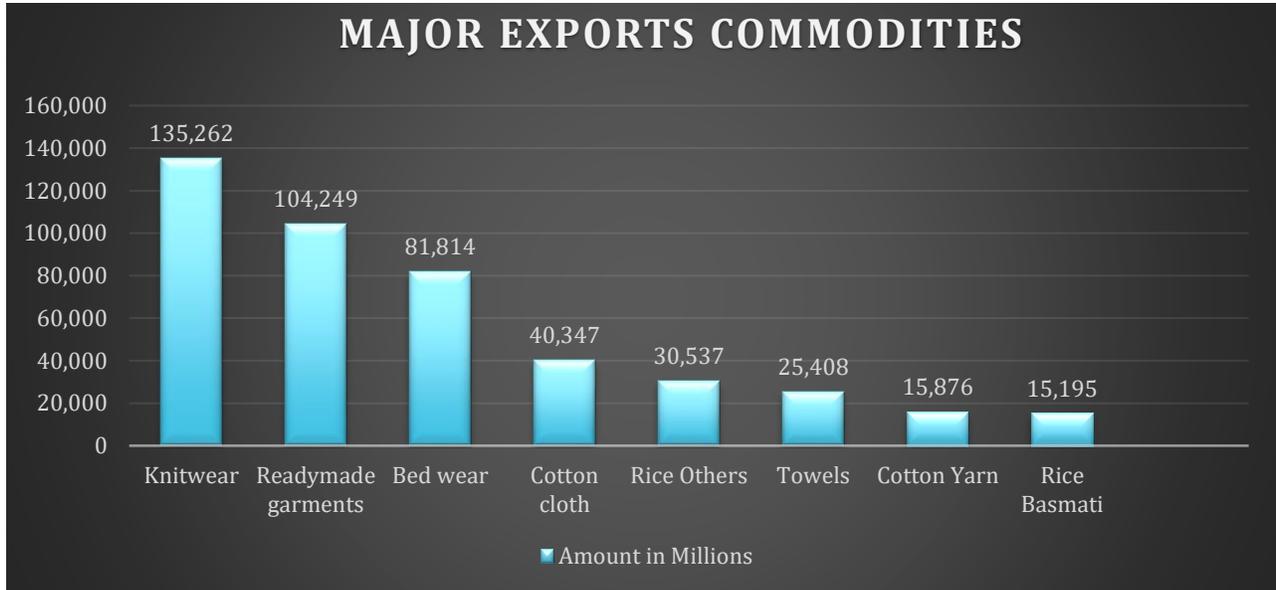
7. TRADE SITUATION

Exports

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during October, 2025 amounted to Rs. 800,841 million (provisional) as against Rs. 703,779 million in September, 2025 and Rs. 828,052 million during October, 2024 showing an increase of 13.79% over September, 2025 but a decrease of 3.29% over October, 2024.



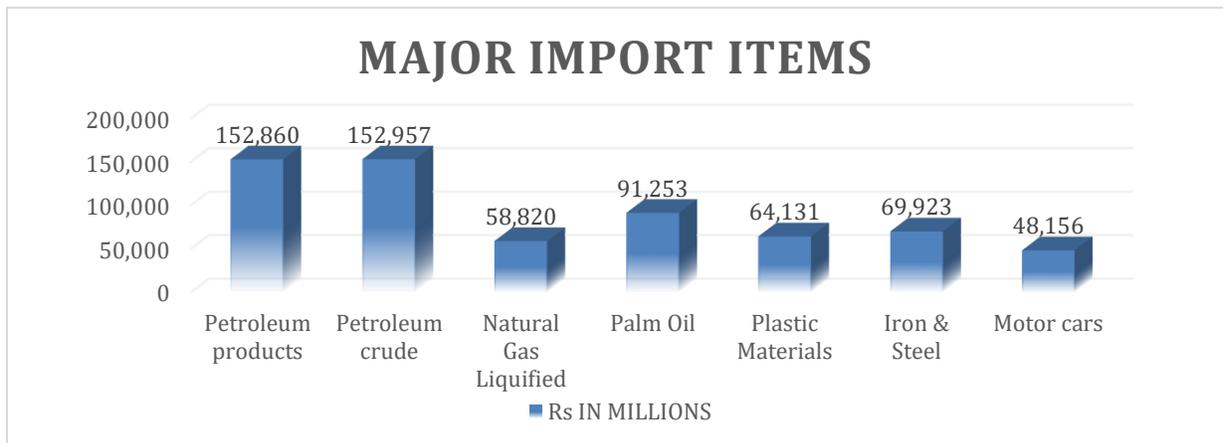
In terms of US dollars, the exports in October, 2025 totaled \$ 2,849 million (provisional) as compared to \$ 2,499 million in September, 2025 showing an increase of 14.01% over September, 2025 but a decrease of 4.46% as compared to \$ 2,982 million in October, 2024.



Imports:

Imports into Pakistan during October, 2025 amounted to Rs. 1,726,145 million (provisional) as against Rs. 1,648,853 million in September, 2025 and Rs. 1,399,579 million during October, 2024 showing an increase of 4.69% over September, 2025 and of 23.33% over October, 2024.

In terms of US dollars, the imports in October, 2025 totaled \$ 6,131 million (provisional) as compared to \$ 5,848 million in September, 2025 showing an increase of 4.84% over September, 2025 and of 21.65% as compared to \$ 5,040 million in October, 2024.



Source: Pakistan Bureau of Statistics

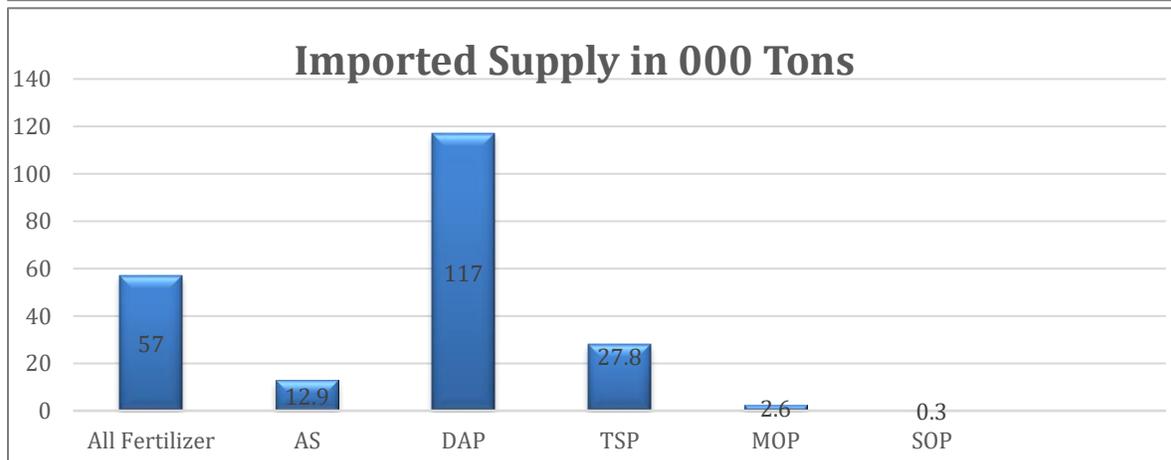
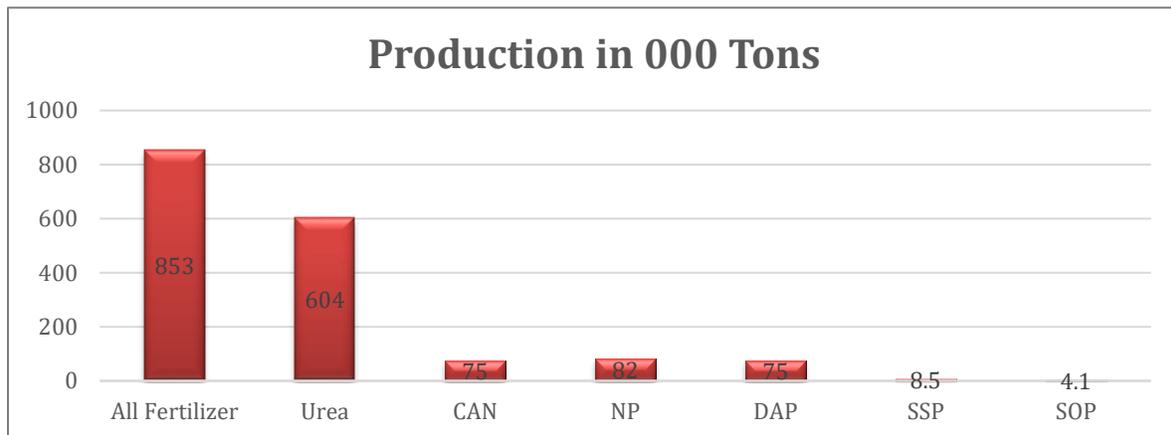


8. FERTILIZER OFFTAKE SITUATION

- Total nutrient offtake during October 2025 was 372 thousand tonnes, which decreased by 10.9 per cent over October 2024.
- Urea offtake was 350 thousand tonnes which decreased by 2.2 per cent.
- DAP offtake was 219 thousand tonnes which decreased by 27.2 per cent over October 2024.
- Nitrogen and phosphate offtake decreased by 5.1 and 20.8 per cent, respectively while potash offtake increased by 18.9 per cent.

Fertilizer Production and Imported Supplies:

Total domestic fertilizer production during October 2025 was 853 thousand tonnes. Urea and DAP production was 604 and 75 thousand tonnes, respectively. Production of other products i.e. NP, CAN, SSP, NPKs and SOP was 82, 75, 8.5, 4.8 and 4.1 thousand tonnes, respectively. Imported supplies comprised of 117 thousand tonnes of DAP, 27.8 thousand tonne of TSP, 12.9 thousand tonnes of AS, 2.6 thousand tonnes of MOP and 0.3 thousand tonnes of SOP.



Source: National Fertilizer Development Centre



9. NEWS TRENDS

- **Punjab Government Distributes High-Power Tractors to Boost Agriculture:**

The Agriculture Department (Extension) Rawalpindi distributed 165 high-power tractors to farmers through a transparent balloting process during a ceremony held on Sunday. MNA highlighted that the Punjab government aims to economically strengthen farmers by providing modern machinery and helping them compete in global markets. Farmers hailed the Rs1 million subsidy per tractor as historic relief amid rising production costs, calling the initiative a timely step to support the backbone of the rural economy. They also praised Chief Minister farmer-friendly policies and expressed hope that such schemes would be expanded to benefit more small and medium-scale growers.

- **JICA Organizes Farmers Training Programme to Strengthen Agriculture in KP:**

The Japan International Cooperation Agency (JICA), Pakistan, conducted a three-day Farmers Training Programme at the National Agriculture Research Council (NARC), Islamabad, from November 24–26 as part of its continued support under the Knowledge Co-Creation Program (KCCP). This second batch of farmers received specialized training aimed at improving technical knowledge and promoting modern, sustainable farming practices in Khyber Pakhtunkhwa. So far, 100 participants from the merged districts have benefited from enhanced agricultural skills through this initiative. Jointly organized by JICA, NARC, and the Directorate General Agriculture Extension KP, the training covered modern crop production, efficient input and water-use management, high-value agriculture, and value-chain development through both classroom sessions and field demonstrations.

- **Sindh Extends Registration Deadline for Wheat Growers Support Program**

The Sindh government has extended the registration deadline for the Wheat Growers Support Program to November 8, 2025, to ensure maximum participation of farmers. According to the Sindh Agriculture Department, the initiative aims to promote wheat cultivation and strengthen food security by providing DAP and Urea fertilizers at subsidized rates. The extension will benefit farmers who are sowing wheat in the upcoming winter season but were unable to register before the earlier deadline of October 31, 2025. Officials stated that the decision was taken to allow more wheat growers to avail themselves of the subsidy and support timely crop production.

Sources: *Business Recorder*

10. AGRO ADVISORY SERVICES FOR FARMERS

زرعی سفارشات برائے کسان

گندم

- ☆ ہجرتی کاشت ہر صورت وسط دسمبر سے پہلے جہاں ضروری ہو وہاں خشک ہوائی کر کے مکمل کر لیں۔ مزید شرح (منظور شدہ 50±60 کا گرام) فی ایکڑ اضافے کے ساتھ استعمال کیا جائے۔
- ☆ آچاش علاقوں میں کم از کم زمین میں 2 بوری ڈی اے پی ایک بوری یو ریا اور ایک بوری ایس او پی جبکہ اوسط زمین میں 1.25 بوری ڈی اے پی + ایک بوری یو ریا اور ایک بوری ایس او پی اور زرخیز زمین کے لیے سوا بوری ڈی اے پی؛ ایک بوری یو ریا اور ایک بوری ایس او پی فی ایکڑ بوقت کاشت استعمال کریں۔
- ☆ کپاس کٹی اور کساد کے بعد کاشت کی گئی گندم کو پہلا پانی کاشت کے 20±25 دن بعد اور دھان کے بعد کاشت کی گئی فصل کو 35±45 دن بعد پانی لگائیں۔

کماؤ

- ☆ بہار یہ کاشت فصل کی کٹائی کے لیے 25 سے 30 دن قبل پانی دینا بند کر دیں اور فصل کی کٹائی سطح زمین سے آدھا تا ایک انچ اوپر تک کریں۔
- ☆ فصل کی کٹائی شوگر ملز کی طرف سے پر مٹ/اجازت نامہ ملنے کی صورت میں کریں کٹائی کے بعد زیادہ در فصل رکھنے کی صورت میں وزن میں کمی واقع ہو سکتی ہے۔
- ☆ ستمبر کا کاشت؛ موٹھی فصل اور اگستی پکنے والی اقسام پہلے برداشت کریں۔ اس کے بعد درمیانی پکنے والی اقسام برداشت کریں۔
- ☆ موٹھی فصل رکھنے کے لیے کماؤ کو کم جنوری کے بعد برداشت کریں۔

روغن دار اجناس

- ☆ سورج بھسی کی کاشت کے لیے بیماری میرا زمین کا انتخاب کریں۔ کلرٹھی اور بہت رتیلی زمین کاشت کے لیے موزوں نہیں ہے۔
- ☆ کیٹولا اقسام کی بوائی جلد از جلد مکمل کریں۔ کاشت تروتز میں کریں۔ بیج ایک تا ڈیڑھ انچ گہرائی پر کاشت کریں۔ شرح بیج ڈیڑھ تا دو کلوگرام فی ایکڑ رکھیں۔
- ☆ سرسوں تو ریا ریا اور کیٹولا کی اقسام پر اگر تیلہ یا لشکری سنڈی وغیرہ کا حملہ نظر آئے تو محکمہ زراعت کے زرعی ماہرین سے مشورہ کر کے کیسیائی ادویات کا سپرے کریں۔

دالیں

- ☆ چنے کی فصل کا باقاعدگی سے معائنہ کرتے رہیں اگر فصل میں ٹو کے کا حملہ نظر آئے تو سفارش کردہ زہروں کا سپرے کریں۔
- ☆ مسورا اور چنے کی فصل پر مختلف بیماریاں حملہ آور ہوتی ہیں۔ جن میں مرجھا جھلساؤ، کنگلی اور؛ مسور کی پھوٹندی زیادہ اہم ہیں۔ اس کے علاوہ ان پر دیکن؛ ٹو کا چور کیٹرا؛ رس چوسنے والے کیڑے مثلاً ست تیلہ؛ سفید کھسی؛ تھریس؛ لشکری سنڈی کا بھی حملہ ہو سکتا ہے۔ لہذا ان سے بچاؤ کے لیے سفارش کردہ زہروں کا سپرے کریں۔

سبزیات و باغات

- ☆ چھوٹی اور تازک سبزیوں کو سردی اور کورے سے بچانے کے لیے پلاسٹک شیٹ کا استعمال کریں۔
- ☆ چھوٹے پلاٹوں میں ایسی سبزیات کاشت کی جائیں جو کافی دیر تک پیداوار دیں مثلاً پالک؛ دھنیا؛ مٹھی وغیرہ جبکہ 3 سے 5 مرلہ کے پلاٹ میں ان سبزیوں کے علاوہ گوبھی؛ ٹماٹر؛ گاجر؛ شلجم؛ مولی وغیرہ لگائیں۔
- ☆ درمیانے موسم میں کتنے داے تر شاہ پھلوں کی اقسام کی فروخت شروع کریں۔
- ☆ باغات کو کورے سے بچائیں اور فاسفورس اور پوناش والی کھاد کی پوری مقدار دسمبر میں ڈالیں۔

Source: Zarat Nama, Directorate of Agricultural Information

پلاننگ اینڈ ریسرچ ڈیپارٹمنٹ

زرعی ترقیاتی پیسک لیبٹیڈ

ہیڈ آفس، اسلام آباد

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