

# AGRICULTURE OUTLOOK

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

<b>S. No</b>	<b>CONTENTS</b>	<b>Page</b>
<b>1</b>	<b>EXECUTIVE SUMMARY</b>	<b>3</b>
<b>2</b>	<b>CURRENT CROP SITUATION</b>	<b>4</b>
<i>2.1</i>	<i>Wheat Crop</i>	<b>4</b>
<i>2.2</i>	<i>Rice Crop</i>	<b>4</b>
<i>2.3</i>	<i>Cotton Crop</i>	<b>4</b>
<i>2.4</i>	<i>Sugarcane Crop</i>	<b>4</b>
<i>2.5</i>	<i>Horticulture</i>	<b>4</b>
<b>3</b>	<b>WEATHER SITUATION</b>	<b>5</b>
<b>4</b>	<b>DROUGHT SITUATION</b>	<b>6</b>
<b>5</b>	<b>WATER AVAILABILITY/ DAMS FLOW DATA</b>	<b>7</b>
<b>6</b>	<b>AVERAGE PRICES OF AGRI. COMMODITIES</b>	<b>8</b>
<b>7</b>	<b>TRADE SITUATION</b>	<b>10</b>
<b>8</b>	<b>FERTILIZER OFFTAKE SITUATION</b>	<b>12</b>
<b>9</b>	<b>NEWS TRENDS</b>	<b>14</b>
<b>10</b>	<b>AGRO ADVISORY SERVICES</b>	<b>15</b>



## 1. EXECUTIVE SUMMARY

During October 2025, Pakistan's agricultural landscape remained highly active, with wheat sowing progressing in Sindh and arid Punjab supported by DAP subsidies while rice and cotton harvesting continued across major plains. Premium rice varieties such as Super Basmati, Basmati-515, IRRI-6, and IRRI-9 showed strong performance, and CH804 cotton demonstrated excellent fiber length and disease resistance. Sugarcane growth remained steady as cooler weather reduced pest pressure, though lodging and subsequent rat infestations required timely control measures. Horticultural activities advanced nationwide: citrus harvesting began in Punjab and KPK, late-summer and early-winter vegetables were harvested in Sindh, dry fruits including apples, pears, and pomegranates were picked in Balochistan, and farmers in Gilgit-Baltistan focused on field preparation and winter seedling transplanting. Overall, crop conditions remained stable with active field operations and favorable weather aiding timely management across all regions.

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

As mentioned by the Pakistan Bureau of Statistics (PBS) during October, 2025 Tomatoes (58.64%), Onions (18.71%), Fresh Vegetables (12.22%), Wheat (10.51%), Wheat Flour (5.49%), Eggs (4.22%), Fish (3.83%), Wheat Products (2.61%), Fresh Fruits (2.44%), Butter (2.21%), Vegetable Ghee (1.91%) and Cooking Oil (1.02%) increased over September 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 September 2025 was 296 thousand tonnes while Total domestic fertilizer production during September 2025 was 784 thousand tonnes.



## 2. CURRENT CROP SITUATION

During October 2025, key agricultural activities across the plains of Pakistan included the sowing of wheat, the harvesting of rice and cotton, while sugarcane continued to exhibit healthy growth.

### 2.1. Wheat Crop:

Wheat cultivation in Sindh and the arid regions of Punjab began in mid-October and will continue until the second week of November, with both provincial governments announcing DAP subsidies to encourage wheat sowing. The agriculture departments of the relevant provinces are actively guiding farmers on recommended varieties and best management practices.

### 2.2. Rice Crop:

Rice harvesting is underway in Punjab and Sindh, with Super Basmati and Basmati-515 giving excellent aroma and long-grain quality, ideal for premium markets. IRRI-6 and IRRI-9 in Sindh are providing high yields due to their fast growth. Swat-1 and JP-5 are performing well in the cooler uplands of KPK, GB, and AJK. Farmers are advised to complete harvesting timely and ensure proper drying to maintain grain quality.

### 2.3. Cotton Crop:

Cotton is currently being harvested, and in the markets, it is sold according to fiber length. The CH804 variety has shown excellent results in terms of fiber length and strong resistance to diseases. In Sindh, cotton harvesting is also underway, with the produce being sold at reasonable prices in local agricultural markets.

### 2.4. Sugarcane

In Sindh and Punjab, the weather has started to cool down, which has reduced pest attacks, although lodging has caused some damage to crops in both provinces. Following lodging, rat infestations have increased, so farmers are advised to apply chlorpyrifos and tie 8–10 plants together to minimize losses. In KPK, crops are also affected by lodging, but farmers have implemented precautionary measures to protect their fields.

### 2.5. Horticulture

**In Punjab,** Onion seedlings, potato, and chili seedlings are being transplanted. Citrus orchards have entered the harvesting stage, and farmers are continuing management practices to protect their orchards from fungal diseases.

**In Sindh,** October is a key month for harvesting late-summer vegetables and also marks the beginning of the winter vegetable harvest in Sindh.



**In Khyber Pakhtunkhwa,** Citrus orchards have entered the harvesting stage, while farmers continue management practices in their other orchards and are also establishing new citrus plantations.

**In Balochistan,** Apples, pears, pomegranates, and other dry fruits are being harvested, while farmers are clearing vegetable fields and preparing their land for winter vegetable cultivation.

**In Gilgit-Baltistan,** Farmers are preparing their fields and transplanting winter seedlings.

**Source:**

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

**3.WEATHER SITUATION**

**Rainfall/Precipitation**

During the month, significant precipitation was recorded over Sindh, southeastern Balochistan, central and upper parts of Punjab, northern KPK (including Parachinar district) and Kashmir.

**Table: Chief amount of rainfall recorded across Pakistan during the month of September, 2025**

Sr.No.	Station	Rainfall(mm)	Sr.No.	Station	Rainfall(mm)
1	Thatta	197	11	Mangla	117.11
2	Narowal	194.5	12	Gujranwala	114.8
3	Mithi	178	13	Padidan	114.8
4	Sialkot cantt	157.4	14	Lahore city	111.4
5	Malam jabba	149	15	Dadu	109
6	Sialkot airport	138.92	16	Hyderabad city	106.61
7	Jhelum	136.2	17	Dir	103.5
8	Khairpur	136	18	Sheikhupura	101.4
9	Tandojam	121	19	Kakul	99
10	Islamabad, zeropoint	120.94	20	Murree	97.41



- **Relative Humidity (September 2025)**

Relative humidity during September 2025 remained high in areas affected by sustained monsoon spells during the first half of the month; many plain and lowland stations reported prolonged humid conditions with evening RH commonly rising into the 65–80% range in Punjab, Sindh and central regions following heavy rains, while northern highlands showed variable moisture and generally lower daytime RH; western and southern Balochistan stayed comparatively drier with mornings moderately humid but daytime RH often below 45% except where localized downpours occurred.

- **Temperature Regime during September 2025**

September 2025 was warmer than normal nationally, driven largely by unusually warm nights — national mean temperature was about 29.1°C with a positive anomaly (~+1.1°C) and minimum temperatures showing a strong anomaly (~+2.2°C), producing limited nighttime relief across many plains; daytime maxima remained high in southern and western Balochistan (extreme single-day highs near mid-40s at some sites) while northern mountainous areas recorded cooler nights but still showed above-normal mean temperatures for the month.

- **Weather Prediction for October 2025**

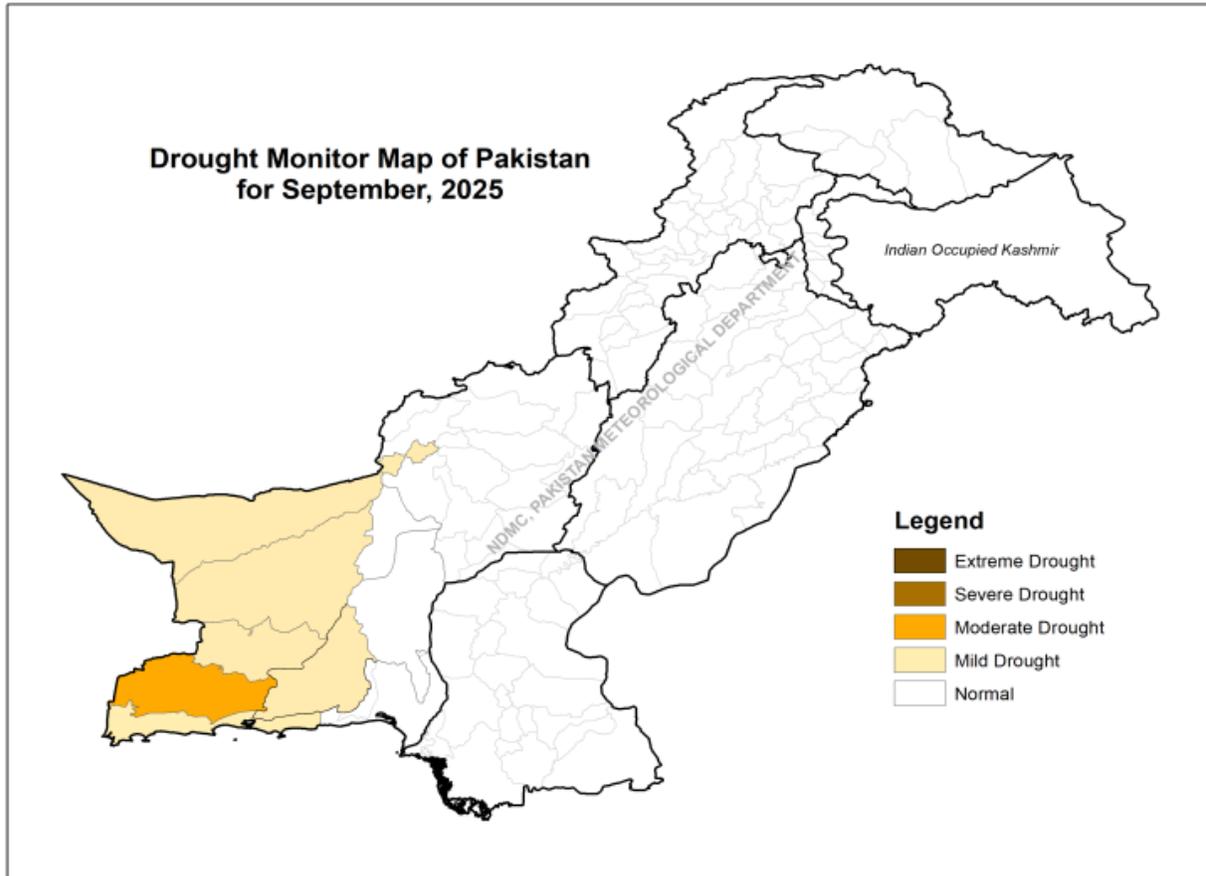
For October 2025 PMD's outlook indicated a transition toward monsoon withdrawal and generally drier conditions for much of the country, with below-normal rainfall likely over northern Pakistan (KP, AJK, GB and northern Punjab), near-normal to isolated light rainfall possible in parts of Sindh and southern Balochistan early in the month, and mean temperatures expected to remain near to slightly above normal — the overall expectation being reduced humidity, lower flood risk relative to September, but rising concern for soil moisture decline and increased irrigation demand in rain-fed and monsoon-dependent areas.

#### **4. DROUGHT SITUATION**

Based on multiple drought monitoring indices, as described above and ground station observations across the country, the spatial drought monitor map is presented in Figure below.



In the western parts of Balochistan, mild to moderate drought-like conditions are prevailing due to little or no summer monsoon rainfall. In contrast, most other regions of the country have received ample rainfall, resulting in normal conditions with sufficient water availability to meet demands for the next 2 to 3 months.

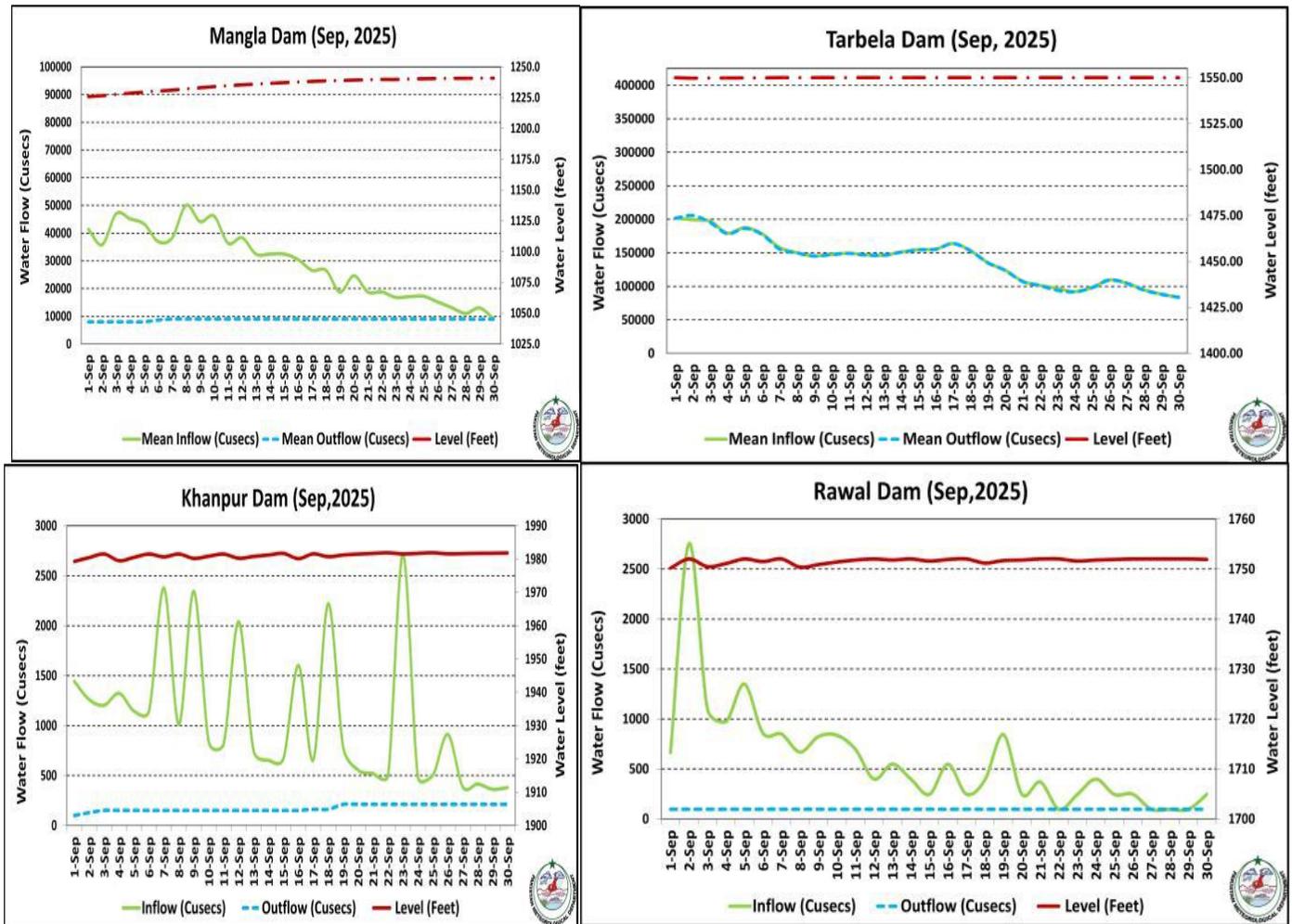


**Drought Monitor of Pakistan for the month of September, 2025**

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

## **5. WATER AVAILABILITY/DAMS FLOW DATA**

During the month, water inflow, outflow and storage levels of the Mangla, Tarbela, Khanpur, Rawal, and Simly dams are presented in Figures. The water levels at Mangla and Tarbela reservoirs have increased due to glacial melt and heavy rainfall during the month. Khanpur, Rawal, and Simly dams have also recorded notable rises in storage levels due to monsoon rainfall. The water levels at the major reservoirs, Tarbela and Mangla, stood 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 AGRICULTURAL COMMODITIES

- I. CPI inflation General, increased by 6.2% on year-on-year basis in October 2025 as compared to 5.6% of the previous month and 7.2% in October 2024. On month-on-month basis, it increased by 1.8% in October 2025 as compared to an increase of 2.0% in the previous month and an increase of 1.2% in October 2024.
- II. CPI inflation Urban, increased by 6.0% on year-on-year basis in October 2025 as compared to 5.5% of the previous month and 9.3% in October 2024. On month-on-month basis, it remained stable at 1.5% both in October 2025 and the previous month compared to an



increase of 1.1% in October 2024.

III. CPI inflation Rural, increased by 6.6% on year-on-year basis in October 2025 as compared to an increase of 5.8% in the previous month and 4.2% in October 2024. On month-on-month basis, it increased by 2.3% in October 2025 as compared to an increase of 2.8% in the previous month and an increase of 1.5% in October 2024.

S. No.	Description	Unit	Average Prices			%change Oct 25 over	
			Oct 25	Sep25	Oct 24	Sep 25	Oct 24
1	Wheat Flour Bag	20 Kg	2145.81	2099.93	1832.69	2.18	17.09
2	Rice Basmati Broken (Average Quality)	1 Kg	217.25	216.17	209.71	0.50	3.60
3	Rice IRRI-6/9 (Sindh/Punjab)	1 Kg	158.51	158.01	162.94	0.32	-2.72
4	Bread plain (Small Size)	Each	110.12	110.12	108.85	0.00	1.17
5	Beef with Bone (Average Quality)	1 Kg	1136.36	1122.85	1005.65	1.20	13.00
6	Mutton (Average Quality)	1 Kg	2089.82	2062.77	1933.15	1.31	8.10
7	Chicken Farm Broiler (Live)	1 Kg	329.15	416.65	442.54	-21.00	-25.62
8	Milk fresh (Un-boiled)	1 Ltr	202.75	202.20	196.69	0.27	3.08
9	Curd (Dahi) Loose	1 Kg	237.98	236.88	230.61	0.46	3.20
10	Powdered Milk NIDO 390 gm Polyba	Each	1107.45	1094.55	1032.32	1.18	7.28
11	Eggs Hen (Farm)	1 Dozen	329.42	311.10	305.14	5.89	7.96
12	Mustard Oil (Average Quality)	1 Kg	538.91	537.29	513.84	0.30	4.88
13	Cooking Oil DALDA or Other Similar	Each	2887.66	2874.42	2647.35	0.46	9.08
14	Vegetable Ghee DALDA/HABIB 2.5 k	Each	1476.50	1460.82	1319.63	1.07	11.89
15	Vegetable Ghee DALDA/HABIB or Ot	Each	577.42	568.59	516.39	1.55	11.82
16	Bananas (Kela) Local	1 Dozen	125.28	139.82	121.86	-10.40	2.81

17	Pulse Masoor (Washed)	1 Kg	294.32	295.39	306.86	-0.36	-4.09
18	Pulse Moong (Washed)	1 Kg	383.58	387.18	357.86	-0.93	7.19
19	Pulse Mash (Washed)	1 Kg	448.06	448.35	542.87	-0.06	-17.46
20	Pulse Gram	1 Kg	299.69	308.80	411.18	-2.95	-27.11
21	Potatoes	1 Kg	83.38	84.86	102.37	-1.74	-18.55
22	Onions	1 Kg	110.52	86.43	154.97	27.87	-28.68
23	Tomatoes	1 Kg	264.57	198.04	138.29	33.59	91.32
24	Sugar Refined	1 Kg	186.15	183.30	134.92	1.55	37.97
25	Gur (Average Quality)	1 Kg	248.71	246.26	215.01	0.99	15.67
26	Salt Powdered (NATIONAL/SHAN) 80	Each	72.66	72.56	70.90	0.14	2.48
27	Chilies Powder NATIONAL 200 gm Pa	Each	322.29	320.00	320.00	0.72	0.72
28	Garlic (Lehsun)	1 Kg	414.20	402.89	585.04	2.81	-29.20
29	Tea Lipton Yellow Label 190 gm Pack	Each	447.06	447.06	544.71	0.00	-17.93

Increase in Prices 

Decrease in price 

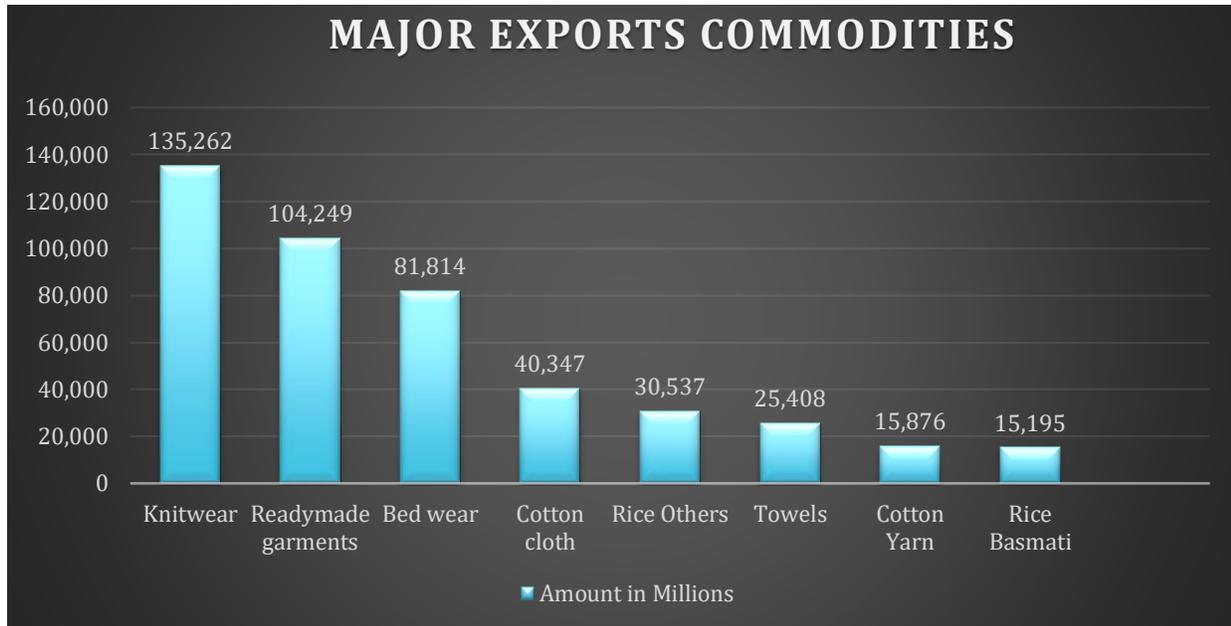
*Source: Pakistan Bureau of Statistics.*

## 7. TRADE SITUATION

### Exports

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during 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.

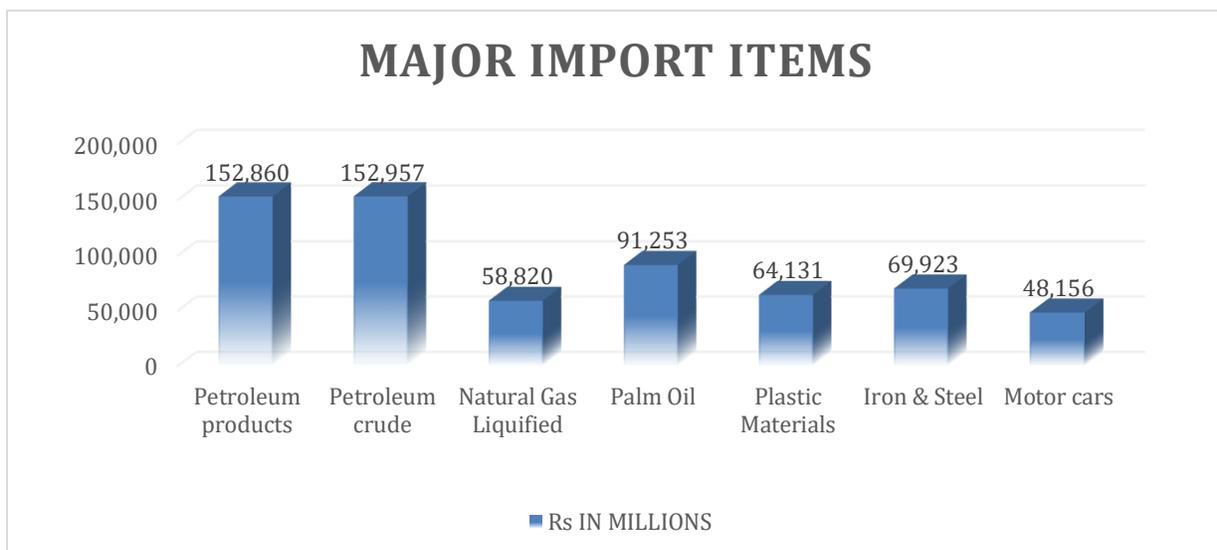
In terms of US dollars, the exports in October, 2025 totaled \$ 2,849 million (provisional) as compared to \$ 2,499 million in September, 2025 showing an increase of 14.01% over September, 2025 but a decrease of 4.46% as compared to \$ 2,982 million in October, 2024.



#### 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

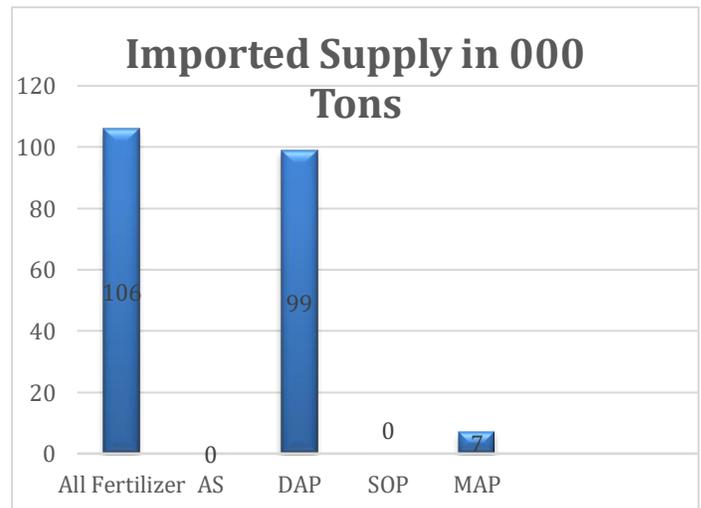
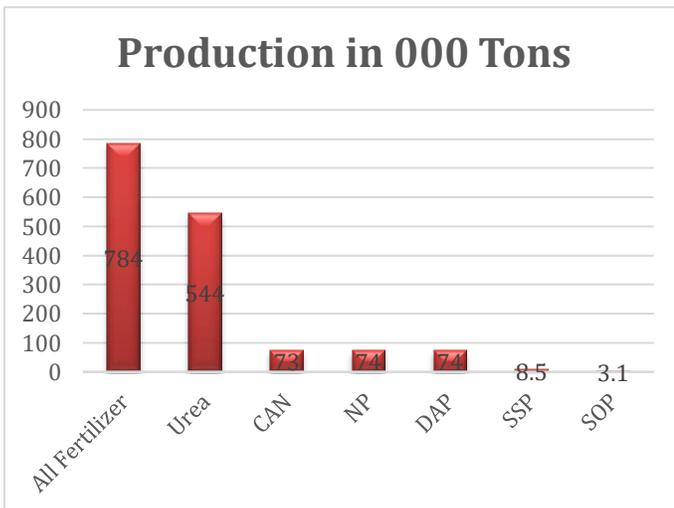


## 8. FERTILIZER OFFTAKE SITUATION

- Total nutrient offtake during September 2025 was 296 thousand tonnes, which increased by 2.4 per cent over September 2024
- Urea offtake was 429 thousand tonnes which increased by 17.4 per cent
- DAP offtake was 97 thousand tonnes which decreased by 27.3 per cent over September 2024.
- Nitrogen and potash offtake increased by 11.8 and 3.5 per cent, respectively while phosphate offtake decreased by 24.6 per cent.

### Fertilizer Production and Imported Supplies:

Total domestic fertilizer production during September 2025 was 784 thousand tonnes. Urea and DAP production was 544 and 74 thousand tonnes, respectively. Production of other products i.e. NP, CAN, SSP, NPKs and SOP was 74, 73, 8.5, 7.3 and 3.1 thousand tonnes, respectively. Imported supplies comprised of 99 thousand tonnes of DAP and 7 thousand tons of MAP.



**Source:** National Fertilizer Development Centre

## 9. NEWS TRENDS

- **Punjab Distributes 400,000 Free Seed Packs to Revive Vegetable Production:**

The Punjab government has launched a major initiative to distribute 400,000 free vegetable seed packets to farmers across the province, with special focus on flood-affected areas, to revive production and strengthen food security. Secretary Agriculture Punjab said the campaign aims to help growers re-cultivate damaged lands while meeting the nutritional needs of the rising population. Chairing a meeting in Lahore, he highlighted the importance of vegetables in a balanced diet and noted that farmers are being provided training on modern production technologies to achieve higher yields. He added that the department is also promoting kitchen gardening by offering seed packs containing eight vegetable varieties suitable for five marlas of land. The meeting was attended by senior officials.

- **SBP Launches Digital Platform “Zarkhez-e” to Enable Collateral-Free Loans for Small Farmers**

The State Bank of Pakistan has introduced a fully digital platform, earlier called NSFSI and now renamed “Zarkhez-e”, to provide collateral-free financing to subsistence farmers through banks and microfinance banks. The initiative expands the federal government’s Risk Coverage Scheme, offering 10% first-loss coverage and an Rs10,000 operational subsidies per new borrower. Through the centralized portal, farmers can apply online, undergo verification via the Land Information Management System (LIMS), and receive at least 75% in-kind inputs such as seed, fertilizers, and pesticides from approved agri-merchants. The remaining up to 25% may be given in cash for other farm needs, along with advisory services to boost productivity. SBP has also standardized the process flow to ensure seamless adoption across banks, aiming to enhance financial inclusion and support rural economic uplift.

- **Punjab, China to Form Joint Working Group on Agricultural Machinery Collaboration**

The Punjab government and the China Agriculture Machinery Distribution Association (CAMDA) have agreed to establish a joint working group to strengthen cooperation in agricultural machinery manufacturing and distribution. During an official visit to China, CAMDA—representing over 1,200 machinery manufacturers—expressed strong interest in investing in Punjab’s mechanization sector and plans to send a delegation soon. An agreement was also signed with China’s National Food and Strategic Reserves Administration to enhance cooperation on reducing post-harvest losses and advancing agricultural R&D.

**Sources:** Business Recorder

## 10. AGRO ADVISORY SERVICES FOR FARMERS

### زرعی سفارشات برائے کسان

#### گندم

- ☆ ہارائی علاقوں میں ہارٹس کے پانی کو محفوظ کرنے کے لیے گہرائی چلائیں تاکہ بوقت کاشت وترسایا ہو سکے۔
- ☆ زمین کی تیاری شروع کریں۔ اگر کھلی مٹی کھاد بھی تک نہ ڈالی ہو تو فوراً ڈالیں اور زمین میں اچھی طرح ملا دیں۔
- ☆ پٹی اور کھاد کا انتظام کریں۔ پنجاب کے تمام ہارائی علاقوں کے لیے محکمہ زراعت کی منظور شدہ گندم کی اقسام پاکستان 2013 فتح جنگ 2016، ہارائی 2017- مرکز-10، ماہم ایسے 21، لٹان 21 اور عروج 22 کو 15 اکتوبر سے 15 نومبر تک کاشت کریں۔
- ☆ پنجاب کے آبپاش علاقوں کے لیے فیصل آباد 2008، ماجالا 2016، جوہر 2016، بورلاگ 2016، زنگول 2016، لانج، 2017، فخر بھکر 17، بھکر، شاد 19، غازی 19، ماہم ایسے 21، سہانی 21، لٹان، 21، بولکھش 20، ماہم ایسے آری سپر، صادق 21، نواب 21، درہیر 21، ڈیورم 21 اور عروج 22 کے انتظام کریں۔
- ☆ گندم کی بوئی کیلئے پٹی کو صاف کر کے استعمال کریں۔
- ☆ بروقت کاشت یکم 20 نومبر کے لیے شرح 40:45:40 گرام، 21 نومبر 10:10:10 ڈسمبر شرح 50:50:50 گرام اور ہارائی علاقوں میں پٹی کی شرح 50:50:50 گرام فی ایکڑ رکھیں۔

#### روغن دار اجناس: توریا، رابا اور سرسوں (کیٹولا)

- ☆ کاشتکار زیادہ سے زیادہ قہر کیٹولا یعنی مٹیھی سرسوں کاشت کریں۔ اگر علیحدہ قہر سمیر نہ ہو تو ستمبر کاشت کماؤ، مچنے، گندم اور برسم وغیرہ میں کامیابی سے اس کی مخلوط کاشت کی جاسکتی ہے۔
- ☆ پٹی کے حصول اور کاشت کی امور کی رہنمائی کے لیے محکمہ زراعت توسیع کے عمل سے رجوع کریں۔
- ☆ ربیع اقسام میں سے کیٹولا اقسام بی اسے آری سی کیٹولا، رچنا کیٹولا، خانپور کیٹولا، ہارائی کیٹولا، سپر کیٹولا، بی ایم کیٹولا اور سائل کیٹولا وغیرہ منظور شدہ مخلوط اقسام کا وقت کاشت شمالی پنجاب میں 20 اکتوبر، وسطی اور جنوبی پنجاب میں یکم تا 31 اکتوبر، سپر رابا، خانپور رابا، پھول رابا، چوستان رابا، کیزولا، ہارائی سرسوں، ہارائی سٹار، پھول سرسوں 15 اکتوبر تک اور سرسوں ڈی بی ایل اور روہی سرسوں کا یکم تا 31 اکتوبر تک ہے جبکہ یواسے ایف 11 کا 15 اکتوبر تک ہے۔
- ☆ تارامیر اکادقت کاشت ہارائی علاقوں میں آخر اکتوبر تک اور آبپاش علاقوں میں شروع اکتوبر تا وسط نومبر ہے شرح پٹی آبپاش علاقوں کے لیے ڈیڑھ تا دو کلو گرام جبکہ ہارائی علاقوں میں دوتا اڑھائی کلو گرام فی ایکڑ رکھیں۔
- ☆ فصل کو تیار ہوں سے محفوظ رکھنے کے لیے پٹی کو پھونک دینا اور زہر تھائیو فینیل سے متعلق مسائل بحساب اڑھائی گرام فی کلو گرام پٹی کا کاشت کریں۔

#### کماؤ

- ☆ فروری کاشت کماؤ کی فصل کو 20 سے 30 دن کے وقف سے آبپاشی جاری رکھیں۔
- ☆ جن کھیتوں میں کنگیاری اور ریزروگ کا عمل ہو تو موڈھی فصل نہ رکھیں اور نہ ہی اس کا پٹی آئندہ فصل کے لیے کاشت کیا جائے۔

Source: Zarat Nama, Directorate of Agricultural Information

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

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