

# AGRICULTURE OUTLOOK

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

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## 1. EXECUTIVE SUMMARY

During June 2025, agricultural activities across Pakistan showed steady progress with key crops developing well. Rice transplanting began in Punjab and Sindh, supported by proper field preparation. Cotton in Punjab is at fruiting and boll formation stages, while Sindh reports healthy crop conditions. Sugarcane growth remains satisfactory nationwide, advancing from tillering to stem elongation. Oilseed and pulse crops like sesame, masoor, and moong are establishing well, while sunflower is budding and safflower harvesting is underway. Horticultural activity is vibrant: mango and pear harvesting is active in Punjab and Sindh, stone fruit harvesting continues in KP, and Balochistan and Gilgit-Baltistan are seeing good progress in fruit and vegetable harvesting. Overall, the crop outlook remains promising under favorable weather and effective field management.

In May 2025, Pakistan experienced varied climatic conditions. While significant rainfall occurred in Potohar, AJK, and Hazara, western Balochistan remained predominantly dry. Relative humidity averaged around 26%, indicating persistently arid conditions, particularly in KP, northern Punjab, and Balochistan. A sustained heatwave led to temperatures 3–5°C above normal, notably in Gilgit-Baltistan, Kashmir, and upper KP, resulting in elevated evapotranspiration and increased agricultural water requirements.

As mentioned by the Pakistan Bureau of Statistics (PBS) during June 2025, prices of Tomatoes (57.33%), Potatoes (25.74%), Onions (15.26%), Eggs (8.82%), Rice (1.67%), Wheat Flour (1.53%), Sugar (1.52%), Fresh Fruits (1.38%), Milk Fresh (0.40%), increased over May 2025.

As reported by the Pakistan Bureau of Statistics (PBS), 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 May 2025 was 311 thousand tonnes, while total domestic fertilizer production stood at 849 thousand tonnes.



## **2. CURRENT CROP SITUATION**

During June 2025, the main field activities in the agricultural plains of Pakistan are transplanting of rice, and healthy growth of cotton and sugarcane is underway.

### **2.1. Rice Crop:**

In Punjab and Sindh, the transplanting of rice seedlings from nurseries to main fields has begun in several areas, especially where early nurseries were sown in May. Farmers have been actively preparing fields through puddling and leveling to ensure proper water retention for transplanting.

### **2.2. Cotton Crop:**

In Punjab, late-sown cotton has started fruiting, while early-sown fields are progressing well with boll formation underway. Farmers in Sindh are witnessing strong and healthy crop growth, expressing satisfaction with this season's progress. The Departments of Agriculture Extension in both Punjab and Sindh are working diligently in the field, providing on-ground support and guidance to farmers.

### **2.3. Oilseed, Gram, and Lentils:**

In KP and Punjab, sesame has been sown and early crop establishment is underway. Masoor is at the vegetative stage, while moong has emerged and is progressing well. In Sindh, safflower and linseed have matured and harvesting has begun, while sunflower has entered the budding stage under satisfactory conditions.

### **2.4. Sugarcane**

In Khyber Pakhtunkhwa (KP), the crop condition remains satisfactory with steady development. In Sindh and Punjab, spring sugarcane has progressed from tillering to the stem elongation stage, with healthy crop growth reported. The crop outlook remains promising, supported by timely irrigation and active field management by farmers.

### **2.5. Horticulture**

**In Punjab**, summer vegetables like okra, bitter melon, and cucumber are now at the fruiting and harvesting stages. Mango harvesting is ongoing, and pear harvesting has also begun in some areas. Meanwhile, persimmon, guava, and pomegranate orchards are currently in the fruit development stage.



**In Sindh**, mango harvesting is nearing completion. Fruits like guava, banana, and chikoo are showing good growth, and sowing of late summer vegetables continues in some areas.

**In Khyber Pakhtunkhwa**, harvesting of stone fruits such as plum and peach is in progress. Citrus orchards are in early fruit development, and vegetable marketing continues steadily.

**In Balochistan**, harvesting of cherries, apricots, and early apple varieties is underway. Vegetables like tomato and capsicum are also reaching maturity and being harvested.

**In Gilgit-Baltistan**, cherry harvesting is ongoing, and apples and pears are in the fruit development stage. Seasonal vegetables are being harvested in lower areas, while higher zones prepare for late sowing.

**Source:**

*Agriculture Bulletins, Pakistan Metrological Department*

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

### 3. WEATHER SITUATION

#### Rainfall/Precipitation

During May 2025, most parts of the country received rainfall, whereas, western Balochistan remained dry. The Potohar region, AJK and adjoining areas of Hazara Division received significant amounts of rainfall.

**Amount of rainfall recorded across Pakistan during the month of May, 2025**

Sr. No.	Station	Rainfall(mm)	Sr.No.	Station	Rainfall(mm)
1	Muzaffarabad	182.3	11	Attock	82.6
2	Murree	177.0	12	Kotli	74.4
3	G.Dopatta	136.3	13	Joharabad	71.4
4	Islamabad, Zeropoint	118.2	14	Balakot	63.0
5	Kakul	107.0	15	Noorpur Thal	56.8
6	Chaklala Airbase	103.0	16	Pattan	55.0
7	Cherat	95.4	17	Saidu Sharif	54.0
8	Rawalakot	94.8	18	Lasbella	51.5
9	Malam Jabba	93.0	19	Mangla	51.4
10	Chakwal	87.0	20	Narowal	51.1



### **Relative Humidity (May 2025)**

The mean Relative Humidity (RH) remained generally below normal across most parts of the country during May 2025. Dry conditions prevailed especially over Khyber Pakhtunkhwa, northern Punjab, and Balochistan. None of the selected stations reported any significant number of days with mean RH greater than or equal to 80%, indicating persistently dry atmospheric conditions. The national average RH remained among the lowest in the year, roughly around 26%, consistent with seasonal climatic behavior.

### **Temperature Regime during May, 2025**

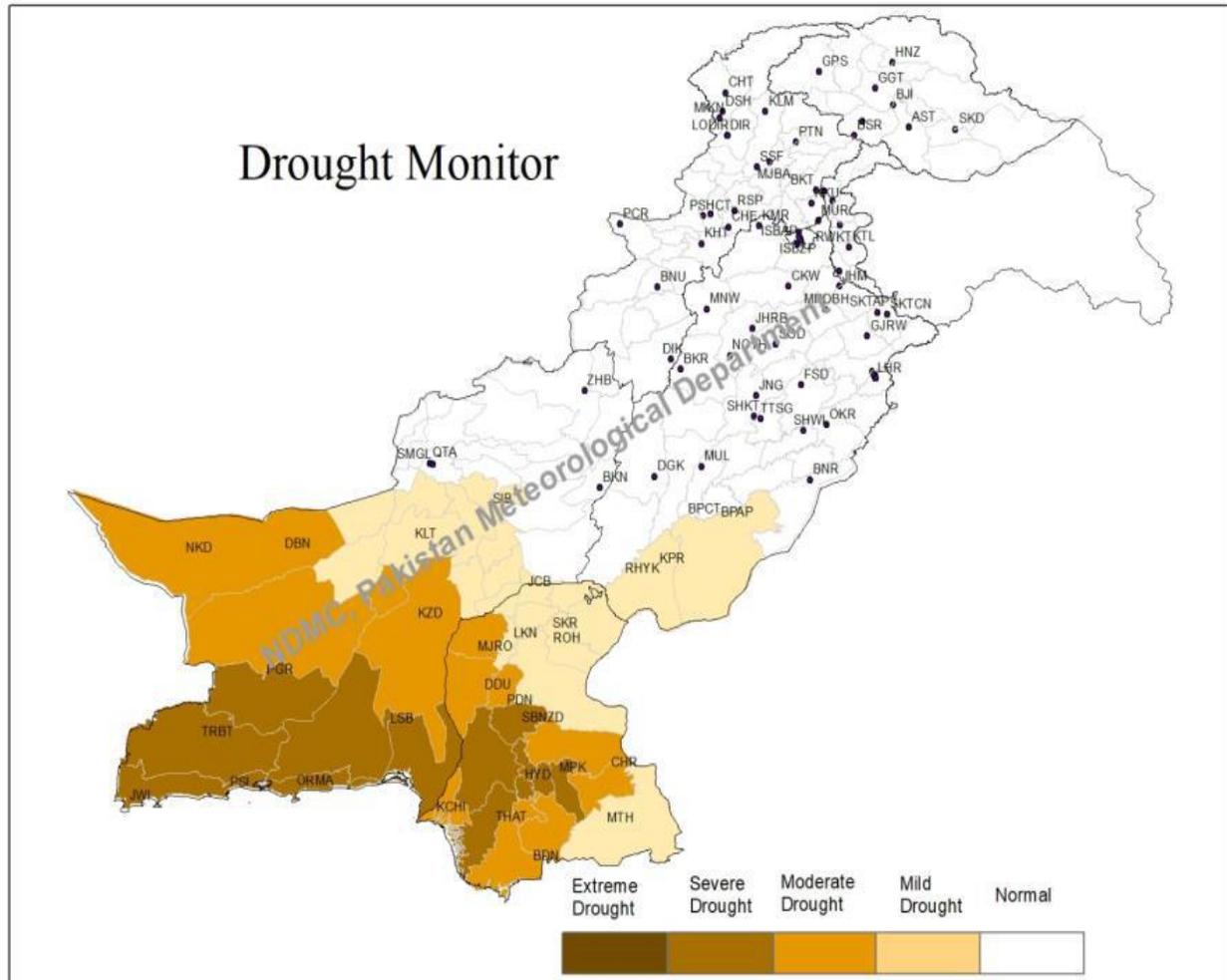
During May 2025, most agricultural plains of Pakistan experienced significantly elevated temperatures. The average daily temperature remained 3–5°C above normal, continuing the intense heatwave pattern observed since April. The highest temperature anomalies were observed in northern regions such as Gilgit-Baltistan, Kashmir, and upper Khyber Pakhtunkhwa. Mean temperatures ranged between 26–28°C in Punjab, 28–30°C in Sindh, 24–26°C in KP, 10–17°C in Gilgit-Baltistan, and around 20°C in Quetta valley. The sustained heat stress impacted water demand for crops and increased evapotranspiration levels across major growing zones.

### **Weather Prediction for June, 2025**

For June 2025, near-normal to slightly above-normal rainfall is forecast for most parts of the country, including Punjab, Sindh, and Balochistan. However, northern areas such as Gilgit-Baltistan, Azad Jammu and Kashmir, and upper Khyber Pakhtunkhwa may receive near- to slightly below-normal precipitation. Temperatures are expected to remain above normal throughout the country, with the most intense anomalies likely over northern high-altitude regions. The Pakistan Meteorological Department anticipates elevated heat stress conditions to persist, particularly in rain-fed areas, potentially affecting early Kharif crop sowing and irrigation scheduling.

#### 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 May, 2025*

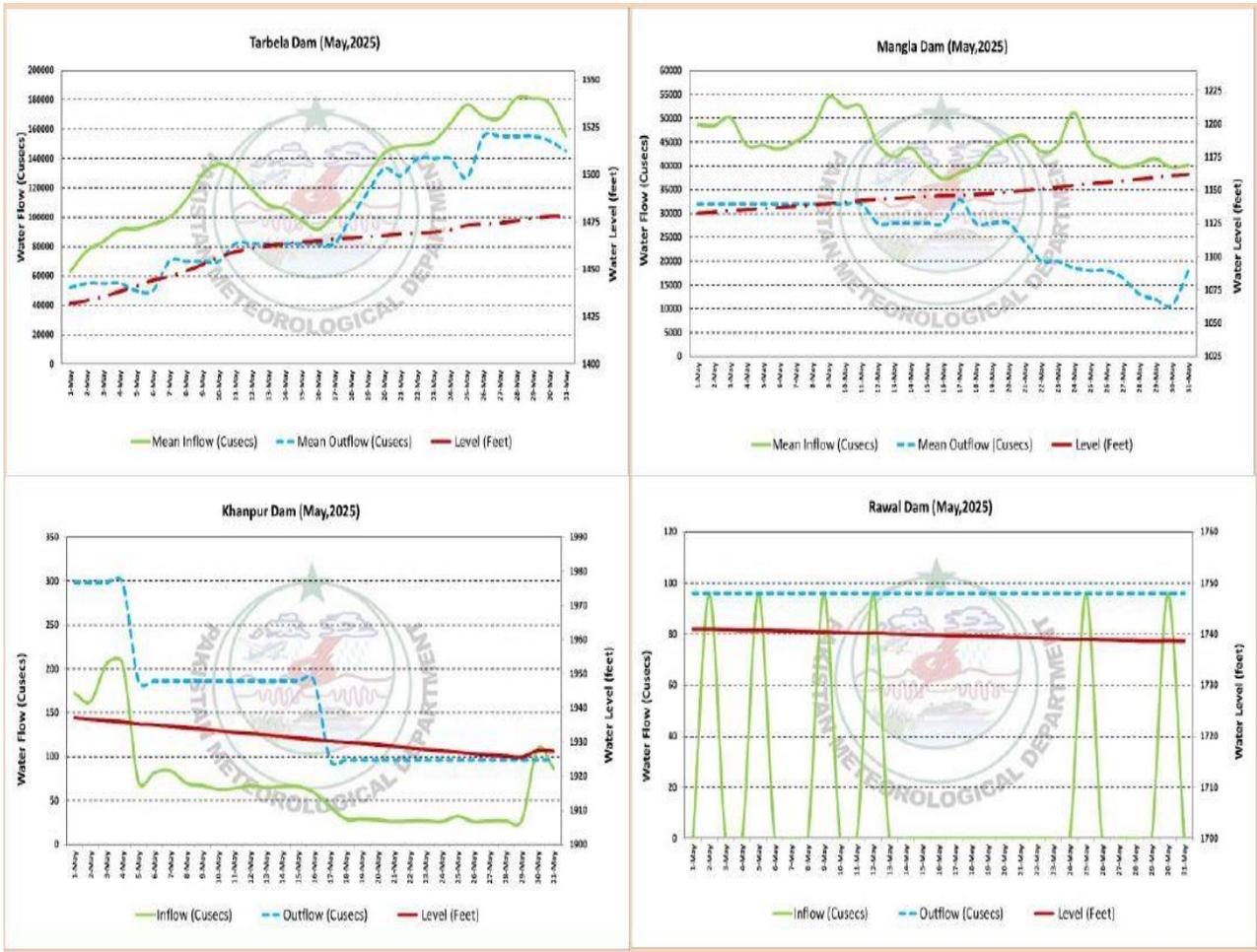
Source: <http://www.ndmc.pmd.gov.pk/>

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

During the month, water inflow, outflow and levels of the Rawal, Khanpur, Tarbela, and Mangla dams are shown in Figure. The water level at Mangla and Tarbela has increased due to glacial melt and recent rainfall received during the month, whereas, Rawal and Khanpur reservoirs have



slightly decreased due to an increase in demand of water during summer season. The water levels at the major reservoirs, Tarbela and Mangla, averages at 1,461 feet and 1,146 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, decreased to 3.2% on year-on-year basis in June 2025 as compared to 3.5% of the previous month and 12.6% in June 2024. On month-on-month basis, it increased by 0.2% in June 2025 as compared to a decrease of 0.2% in the previous month and an increase of 0.5% in June 2024.
- ii. CPI inflation Urban, decreased to 3.0% on year-on-year basis in June 2025 as compared to 3.5% of the previous month and 14.9% in June 2024. On month-on-month basis, it



remained stable at 0.1% in June 2025 as compared to 0.1% in the previous month and 0.6% in June 2024.

- iii. CPI inflation Rural, increased by 3.6% on year-on-year basis in June 2025 as compared to an increase of 3.4% in the previous month and 9.3% in June 2024. On month-on-month basis, it increased by 0.5% in June 2025 as compared to a decrease of 0.5% in the previous month and an increase of 0.3% in June 2024.

Details are given below in table:

Sr. No.	Description	Unit	Average Prices			%change Over	
			June 25	May 25	June24	May 25	June24
1	Wheat Flour Bag	20 Kg	1516.42	1509.29	1773.12	0.47	-14.48
2	Rice Basmati Broken (Average Quality)	1 Kg	203.46	199.98	206.30	1.74	-1.38
3	Rice IRRI-6/9 (Sindh/Punjab)	1 Kg	153.11	152.75	160.46	0.24	-4.58
4	Bread plain (Small Size)	Each	108.83	108.83	111.58	0.00	-2.46
5	Beef with Bone (Average Quality)	1 Kg	1106.96	1105.87	952.80	0.10	16.18
6	Mutton (Average Quality)	1 Kg	2033.76	2026.24	1896.53	0.37	7.24
7	Chicken Farm Broiler (Live)	1 Kg	340.14	456.48	341.91	-25.49	-0.52
8	Milk fresh (Un-boiled)	1 Ltr	199.96	198.65	189.24	0.66	5.66
9	Curd (Dahi) Loose	1 Kg	232.27	231.51	222.43	0.33	4.42
10	Powdered Milk NIDO 390 gm Polybag	Each	1066.25	1050.82	852.26	1.47	25.11
11	Eggs Hen (Farm)	1 Dozen	299.08	295.78	246.38	1.12	21.39
12	Mustard Oil (Average Quality)	1 Kg	530.31	527.64	492.51	0.51	7.67
13	Cooking Oil DALDA or Other	Each	2889.96	2898.98	2659.67	-0.31	8.66
14	Vegetable Ghee DALDA/HABIB 2.5 kg	Each	1463.94	1472.38	1293.35	-0.57	13.19
15	Vegetable Ghee DALDA/HABIB/	Each	567.57	568.40	503.93	-0.15	12.63
16	Bananas (Kela) Local	1 Dozen	182.92	176.55	161.01	3.61	13.61
17	Pulse Masoor (Washed)	1 Kg	294.94	293.92	314.68	0.35	-6.27
18	Pulse Moong (Washed)	1 Kg	404.05	400.82	313.54	0.81	28.87
19	Pulse Mash (Washed)	1 Kg	457.39	457.78	564.73	-0.09	-19.01
20	Pulse Gram	1 Kg	316.50	314.58	293.21	0.61	7.94
21	Potatoes	1 Kg	76.90	62.85	95.40	22.35	-19.39
22	Onions	1 Kg	47.99	45.51	129.98	5.45	-63.08
23	Tomatoes	1 Kg	69.03	49.05	108.42	40.73	-36.33
24	Sugar Refined	1 Kg	179.38	174.19	143.27	2.98	25.20
25	Gur (Average Quality)	1 Kg	229.06	219.56	208.85	4.33	9.68
26	Salt Powdered (NATIONAL/SHAN) 80	Each	72.60	72.60	70.09	0.00	3.58



27	Chilies Powder NATIONAL 200 gm Pkt	Each	320.00	320.00	334.49	0.00	-4.33
28	Garlic (Lehsun)	1 Kg	333.14	367.18	473.49	-9.27	-29.64
29	Tea Lipton Yellow Label 190 gm Pack	Each	447.07	448.35	544.71	-0.29	-17.93

Increase in Prices ■

Decrease in price ■

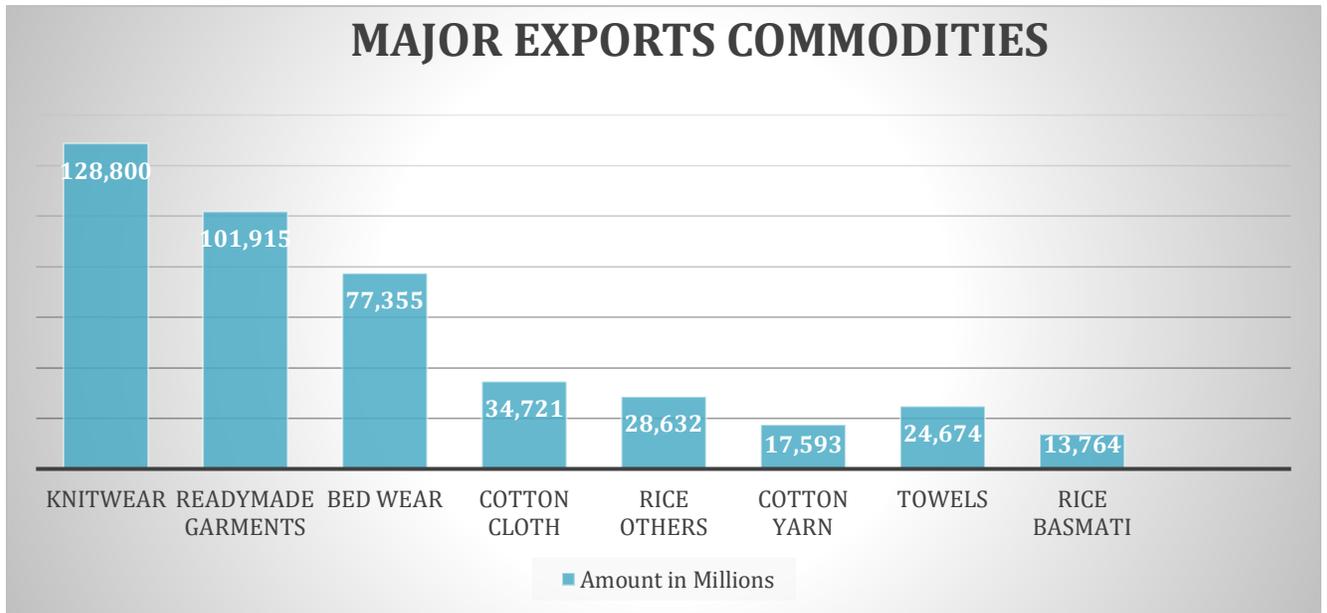
*Source: Pakistan Bureau of Statistics.*

## 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.

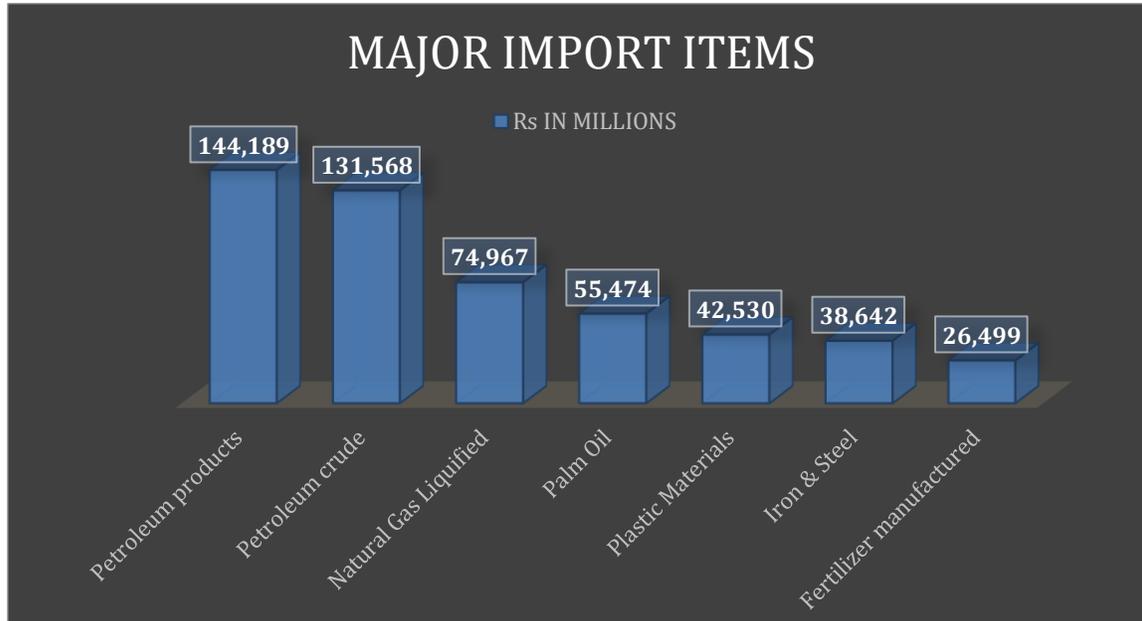
In terms of US dollars, the exports in June, 2025 totaled \$ 2,477 million (provisional) as compared to \$ 2,671 million in May, 2025 showing a decrease of 7.26% over May, 2025 and of 3.17% as compared to \$ 2,558 million in June, 2024.



### 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.



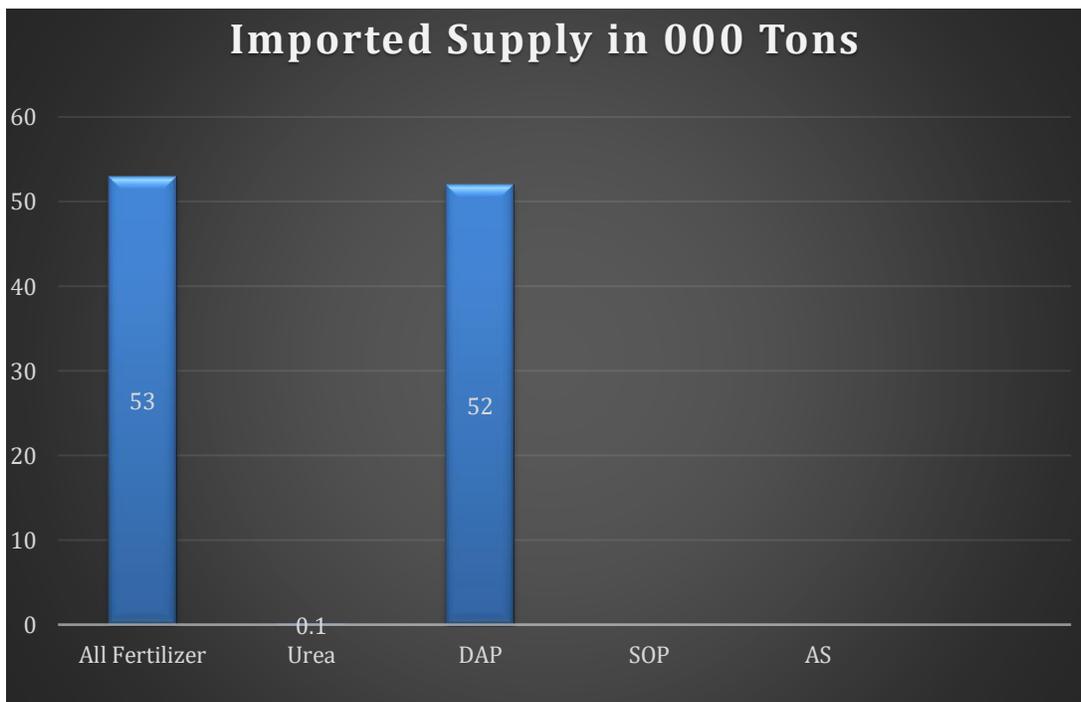
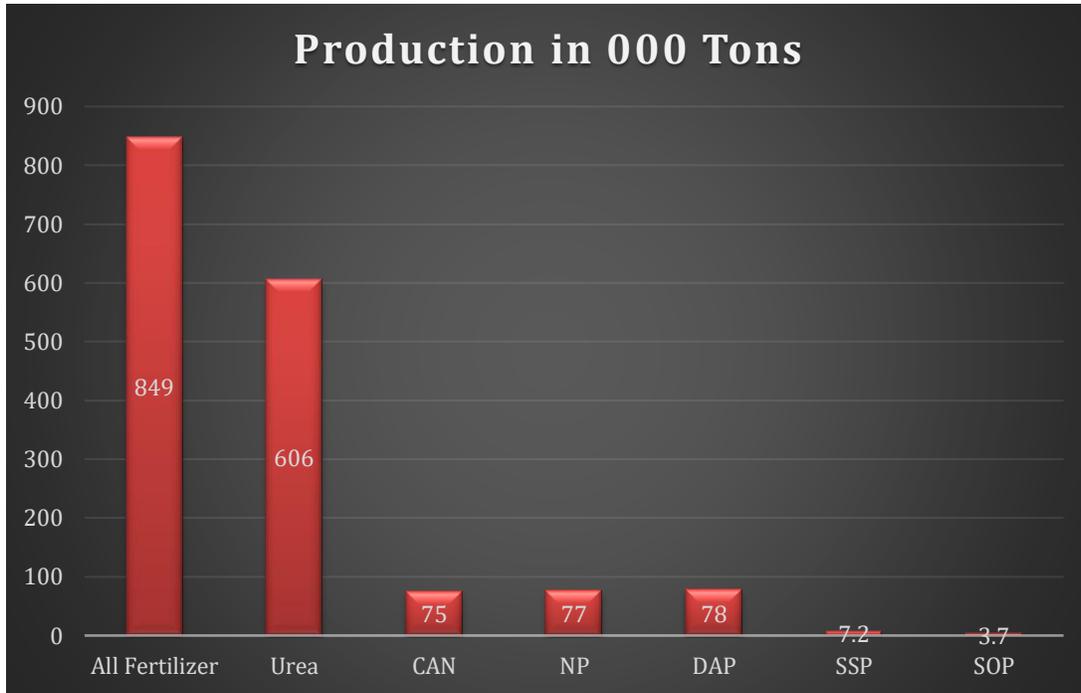
*Source: Pakistan Bureau of Statistics*

## 8. FERTILIZER OFFTAKE SITUATION

- Total nutrient offtake during May 2025 was 311 thousand tonnes, which increased by 27.3 per cent over May 2024.
- Urea offtake was 418 thousand tonnes which increased by 4.6 per cent.
- DAP offtake was 95 thousand tonnes which also increased by 135.2 per cent over May 2024.
- Nitrogen and phosphate offtake increased by 17 and 108 per cent, respectively while potash offtake decreased by 18.7 per cent.

### Fertilizer Production and Imported Supplies

Total domestic fertilizer production during May 2025 was 849 thousand tonnes. Urea and DAP production was 606 and 78 thousand tonnes, respectively. Production of other products i.e. NP, CAN, SSP, NPKs and SOP was 77, 75, 7.2, 0.7 and 3.7 thousand tonnes, respectively. Total imported supplies were 53 thousand tonnes comprising 52 thousand tonnes of DAP, one thousand tons of SOP and 0.1 thousand tons of urea phosphate.



Source: National Fertilizer Development Centre



## 9. NEWS TRENDS

- **Pakistan Approves Rs34 Billion Agriculture Budget with Focus on Cotton Revival**

The National Assembly approved a Rs34 billion agriculture budget for FY 2025–26, emphasizing cotton revival, fertilizer surplus, and increased exports. Key allocations include Rs23.068 billion for the National Food Security Division, Rs6.724 billion for PARC, and Rs4.253 billion for development work.

Federal Minister announced a multi-pronged strategy to modernize agriculture, including a Rs50 billion solar tube well project in Balochistan. Cotton production is targeted at 10 million bales, supported by an 18% duty on imported cotton to protect local farmers. Fertilizer supply is now surplus, with prices stable or below official rates. The Punjab government has distributed 10,000 tractors, while Pakistani farmers are receiving international training in China to adopt modern techniques.

- **5,000 Super Seeders to Transform Rice Cultivation in Punjab:**

The Punjab government is nearing completion of distributing 5,000 super seeders across rice-growing areas to combat stubble burning and reduce smog. This move is part of a broader strategy to modernize rice farming through mechanization and boost agricultural productivity. Announced by Agriculture Secretary during a rice consultative conference, the initiative also includes introducing modern Transplanters and harvesters. Rice is cultivated on about 6 million acres in Punjab annually. The government aims to increase rice exports and support farmers with modern tools and techniques, while ensuring the use of only approved pesticides. Farmers, exporters, and agricultural experts participated in the conference, and their input will shape future departmental plans.

Sources: *Business Recorder*

## 10. AGRO ADVISORY SERVICES FOR FARMERS

### زرعی سفارشات برائے کسان

#### دھان

کھیت میں لابل کی منتقلی کے وقت پھیری کی عمر 30 سے 40 دن ہونی چاہیے۔ اور منتقلی اس طرح کریں کہ فی ایکڑ پودوں کی تعداد 10000 لاکھ 60 ہزار ہو۔  
 پھیری منتقل کرنے سے پہلے 15 دن تک کھیت میں پانی کھڑا رکھیں تاکہ پیداوار اچھی ہو۔  
 دھان کی پھیری پر زہر پاشی دو بار کی جائے پہلی بار 8 تا 10 دن کی پھیری پر پھرے کے وقت کھیت تروتڑ حالت ہونا چاہیے۔  
 اگر پھیری کمزور نظر آئے تو 250 گرام یوریا یا 400 گرام نیشیم امونیم نائٹریٹ مرلہ کے حساب سے پھیری کی منتقلی سے دس دن پہلے ڈالیں۔

#### کپاس

چھدرائی کا عمل ہوائی کے بعد 20 سے 25 دن کے دوران یا پہلے پانی سے قبل یا خشک گوڈی کے بعد ہر حالت میں ایک دنہ عمل کیا جائے۔  
 کم آبپاشی والے علاقوں میں متبادل کھیلوں میں پانی دینے سے بہتر پیداوار لی جاسکتی ہے۔  
 سفید کھسی، ملی بگ، ہنگری سنڈی اور لیف کرل وائرس کے میزبان پودوں کو تلف کریں کیونکہ یہ کیٹروں کی محفوظ پناہ گاہیں ہوتی ہیں۔  
 کپاس کی ہر قسم کی علیحدہ علیحدہ پیسٹ سکاؤٹنگ کرتے رہیں اور پھرے کا فیصلہ مختلف کیٹروں کے نقصان کی وحاشی حد کے مطابق کریں۔

#### موگ۔ ماش

بارانی علاقوں کے کاشتکار موگ ماش کی کاشت مونسون کی پہلی بارش کے بعد وتر آنے پر کریں۔ موگ کی کاشت جوائی کے آخر تک کی جاسکتی ہے۔  
 مطلوبہ پودوں کی تعداد حاصل کرنے کے لیے فی ایکڑ 8 سے 10 کلوگرام بیج استعمال کریں۔  
 پودوں کی بڑھوتری کے لیے 8 سے 10 کلوگرام نائٹروجن فی ایکڑ استعمال کریں اور فاسفورس اور پوناش 23 کلوگرام آخری بل چانے کے بعد محدود کریں۔  
 ریج ڈرل یا کیرا کے طریقے سے کاشت کریں اور قطاروں کا درمیانی فاصلہ 30 سینٹی میٹر جبکہ بیج کی گہرائی 3 سے 5 سینٹی میٹر رکھیں۔

#### جنتر

یہ ایک پھلی دار فصل ہے جو زمین کی زرخیزی بڑھانے کے لیے کاشت کی جاتی ہے۔ تاہم چند علاقوں میں بطور چارہ بھی کاشت کی جاتی ہے۔  
 یہ فصل اگست تک کاشت کی جاتی ہے۔ البتہ مونسون کی بارشوں کے دوران کاشت کی جانی تو بڑھوتری اچھی ہوتی ہے۔  
 چارہ اور بزرگھاد کے لیے کاشت کی جانے والی فصل کے لیے 20 تا 25 کلوگرام جبکہ بیج والی فصل کے لیے 10 تا 12 کلوگرام بیج فی ایکڑ استعمال کریں۔  
 بہتر پیداوار کے لیے ایک بوری ڈی اے پی ٹی ایکٹریوٹ کاشت ڈالیں۔ پہلا پانی ہوائی کی 18 تا 22 دن بعد لگائیں۔ بزرگھاد کاشت کے بعد 40 سے 50 دن بعد پھول آنے پر دیں۔

#### سبزیات و باغات

ترشادہ باغات کو 10 سے 15 دن کے وقفہ اور آم کے باغات کو 12 تا 14 دن کے وقفہ سے آبپاشی کریں۔  
 سبزیات کو کیٹروں اور بیماریوں سے محفوظ رکھنے کیلئے زرعی ماہرین کی سفارش کردہ زہر/ ادویات کا استعمال کریں۔  
 امرود کی زہری لگانے کے لیے زمین کی تیاری کریں اور انگور کی فصل کی بردداشت اور مارکیٹنگ کریں۔

Source: Zarat Nama, Directorate of Agricultural Information

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

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