

AGRICULTURE OUTLOOK

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

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1. EXECUTIVE SUMMARY

In May 2025, farming activities continued smoothly across Pakistan's main agricultural areas. In Punjab and Sindh, land preparation and nursery raising for rice have been started with emphasis on using certified seed varieties. Cotton sowing in Punjab and Sindh is largely completed, showing good germination due to favorable weather, while efforts continue to expand the cultivated area. Land preparation for Oilseed crops such as sesame are underway in Punjab and KP, and pulses are growing normally, with moong sowing underway. In Sindh, oilseed crops are in good condition, with rapeseed & mustard mostly harvested and safflower, linseed, and sunflower at advanced stages. Spring sugarcane is at the tillering stage with healthy growth reported in Punjab, Sindh, and KP. Horticultural activities vary by region: Punjab faced some damage to vegetables due to recent rains and storms, while sowing continues; Sindh's seasonal fruits like guava, banana, and cheeko show satisfactory progress; KP's winter vegetables and citrus reported good yields despite weather-related delays; Baluchistan's orchards, including apple and cherry, experienced weather damage but harvesting is mostly completed and Gilgit Baltistan's orchards and vegetables are growing satisfactorily.

During April 2025, light to moderate rainfall occurred at a few stations in Khyber Pakhtunkhwa, Kashmir, Gilgit Baltistan, Punjab, and Balochistan, while the rest of the country received little to no rain. Higher rainfall totals were recorded in upper KP, Kashmir, and GB, but overall, rainfall remained below normal except in Skardu, Gilgit, Chilas, and Astore. In May 2025, the Pakistan Meteorological Department forecasts below-normal precipitation across most of the country, including Punjab, Balochistan, and Sindh. Central and upper Khyber Pakhtunkhwa and Azad Jammu and Kashmir are also expected to receive below-normal rainfall, while Gilgit-Baltistan is likely to experience near-normal conditions.

As mentioned by the Pakistan Bureau of Statistics (PBS) during May 2025, prices of Eggs (24.38%), Chicken (8.63%), Milk Powder (2.80%), Potatoes (1.64%), Fresh Fruits (1.21%), Pulse Gram (1.09%), Beverages (0.87%) and Meat (0.82%) increased over April 2025.

As reported by the Pakistan Bureau of Statistics (PBS), exports from Pakistan during May, 2025 amounted to Rs. 752,728 million (provisional) as against Rs. 610,190 million in April, 2025 and Rs. 789,940 million during May, 2024 showing an increase of 23.36% over April, 2025 but a decrease of 4.71% over May, 2024. Imports of Pakistan during May, 2025 amounted to Rs. 1,485,297 million (provisional) as against Rs. 1,570,883 million in April, 2025 and Rs. 1,367,656 million during May, 2024 showing a decrease of 5.45% over April, 2025 but an increase of 8.60% over May, 2024.



As published by the National Fertilizer Development Centre(NFDC), total nutrient offtake during April 2025 was 222 thousand tonnes. Total domestic fertilizer production during April 2025 was 784 thousand tonnes.

2. CURRENT CROP SITUATION

During May 2025, the main field activities in the agricultural plains of Pakistan included rice nursery raising, completion of cotton sowing and healthy growth of oilseeds and pulses.

2.1 Rice Crop:

In Punjab and Sindh provinces land preparation and nursery raising for rice crop has been started. Farmers were advised to cultivate the recommended seed varieties of Rice crop approved by the Federal Seed Certification & Research Department.

2.2 Cotton Crop:

In Punjab most of the farmers have completed early sowing of cotton crop and good germination has been reported because of favorable weather condition. However, some farmers are still preparing their land for the cultivation of cotton crop. Farmers in Sindh province have completed the sowing of cotton crop and good germination has been reported. Department of Agriculture Extension in both Punjab and Sindh are given target to motivate farmers to cultivate cotton in order to increase the area under cultivation.

2.3 Oilseed, Gram, and Lentils:

In Punjab and Khyber Pakhtunkhwa (KP), farmers are preparing their land for sesame cultivation. Pulses, including masoor (lentil), are progressing at a normal growth rate. Meanwhile, land preparation for the upcoming moong is actively underway.

In Sindh, the condition of oilseed crops is reported as satisfactory. Rapeseed and mustard has been harvested in most parts of the province. Safflower and linseed are approaching maturity, while sunflower is currently at the vegetative stage.

2.4 Sugarcane

In Punjab and Sindh provinces, spring sugarcane is at tillering stage. Good growth has been reported. In KPK, sugarcane crop condition has been reported satisfactory.

2.5. Horticulture

In Punjab, recent rainfall and hailing/gusty winds caused damage to seasonal vegetables. Sowing of seasonal vegetables are in progress. In Sindh, Seasonal fruits such as guava, banana, cheeko, and apple stone (Bare) are reported to have satisfactory growth and production. Sowing of seasonal vegetables is in progress in some parts.

In Khyber Pakhtunkhwa, Picking and marketing of winter vegetables remained in progress. Growth of orchid remained satisfactory and good yield of citrus has been reported. During the month of



April, some rain events, hailing/gusty winds caused damage to seasonal vegetables and delays its harvesting activities in some particular regions.

- In Balochistan, Reports of rainfall/thunderstorm and hailstorm damage have been received in areas where orchards including apple, cherry, apricot and plum etc. were fully ripe. Depending on weather conditions, harvesting has been completed in some districts, while in others, it is still in progress.
- The growth of seasonal orchards and vegetables is also reported satisfactory in Gilgit Baltistan.

Source:

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

3. WEATHER SITUATION:

Rainfall/Precipitation

During April 2025, Below-normal rainfall was observed across the country, except in Skardu, Gilgit, Chilas and Astore.

Amount of rainfall recorded across Pakistan during the month of April, 2025					
Sr.No.	Station	Rainfall(mm)	Sr.No.	Station	Rainfall(mm)
1	Dir	99.0	11	Muzaffarabad city	54.0
2	Pattan	95.0	12	Rawalakot	49.2
3	Skardu	93.0	13	Bagrote	47.0
4	Astore	91.5	14	Chilas	47.0
5	Murree	73.8	15	Mirkhani	44.8
6	Kalam	72.8	16	Gupis	41.8
7	G.Dopatta	69.4	17	Drosh	38.2
8	Muzaffarabad A/P	62.0	18	Chaklala Airbase	36.0
9	Kakul	61.0	19	Takht Bai	35.4
10	Balakot	54.0	20	Islamabad, Zeropoint	33.8

Relative Humidity

The mean Relative Humidity (RH) remained nearly normal to below normal over most parts (Selected locations) of the country, particularly Khyber Pakhtunkhwa, Potohar region, Central Punjab, and Quetta valley. The maximum value of mean RH was observed as 42% at Peshawar and Rawalpindi each, 41% at Tandojam, and 39% at Faisalabad. None of the stations reported the maximum number of days with mean RH greater than or equal to 80%.

Temperature Regime during April, 2025

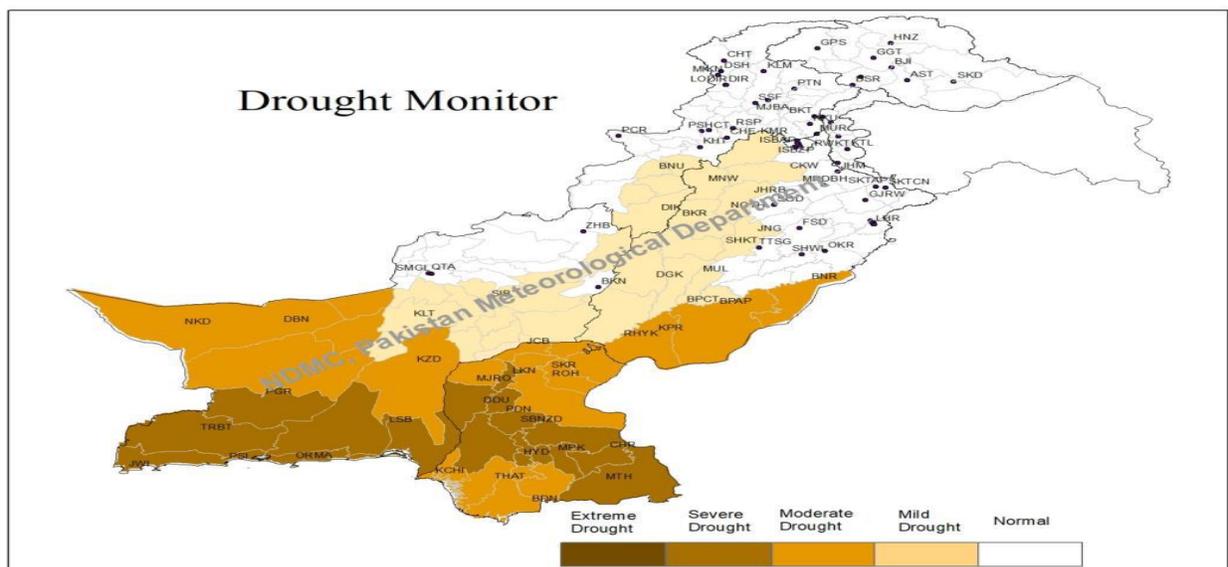
During April 2025, Pakistan experienced significantly elevated temperatures across most agricultural plains, with the average daily temperature being 3-4°C higher than normal in most areas and reaching 6-7°C in some regions. Specifically, Khyber Pakhtunkhwa saw temperatures between 23-25°C, Potohar plateau between 22-24°C, Punjab between 25-26°C, Sindh at 27°C, Gilgit Baltistan between 9-15°C, and Quetta valley at 15°C.

Weather Prediction for May, 2025

In May 2025, below-normal precipitation is anticipated across most of Pakistan, with Punjab, Balochistan, and Sindh expected to experience slightly below-normal rainfall. Central and upper regions of Khyber Pakhtunkhwa and Azad Jammu and Kashmir are also forecast to receive below-normal precipitation, while Gilgit-Baltistan is expected to have near-normal rainfall, according to the Pakistan Meteorological Department.

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.

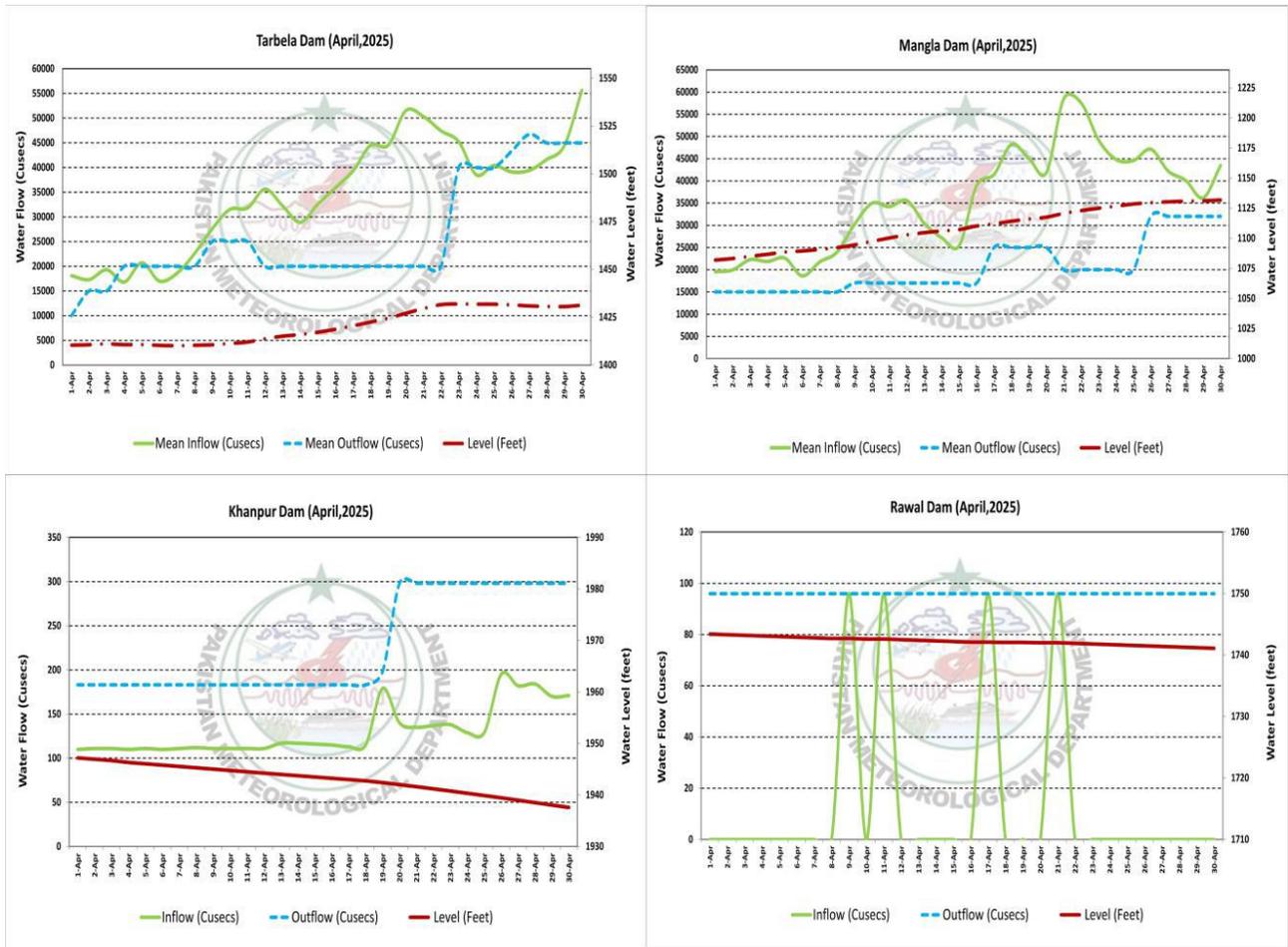


Source: <http://www.ndmc.pmd.gov.pk/>

5. WATER AVAILABILITY/DAMS FLOW DATA

During May, water inflow, outflow and levels of the Rawal, Khanpur, Tarbela, and Mangla dams. The water level at Mangla, Tarbela, Rawal and Khanpur reservoirs has started to increase due to glacial melt and recent rainfall received during the month. The water levels at the major reservoirs, Tarbela and Mangla, stand at 1,435 feet and 1,128 feet respectively. These levels have risen due to increased water inflow from glacial melt and rainfall in the upper catchment areas.

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 3.5% on year-on-year basis in May 2025 as compared to 0.3% of the previous month and 11.8% in May 2024. On month-on-month basis, it decreased by 0.2% in May 2025 as compared to a decrease of 0.8% in the previous month and a decrease of 3.2% in May 2024.
- II. CPI inflation Urban, increased to 3.5% on year-on-year basis in May 2025 as compared to

0.5% of the previous month and 14.3% in May 2024. On month-on-month basis, it increased to 0.1% in May 2025 as compared to a decrease of 0.7% in the previous and a decrease of 2.8% in May 2024.

- III. CPI inflation Rural, increased to 3.4% on year-on-year basis in May 2025 as compared to a decrease of 0.1 in the previous month and 8.2% in May 2024. On month-on-month basis, it decreased by 0.5% in May 2025 as compared to a decrease of 1.0% in the previous month and a decrease of 3.9% in May 2024.

Average prices of commodities during May, 2025 are given below in table:

Sr. No.	Description	Unit	Average Prices			%change Over	
			May 25	April 25	May24	April 25	May 24
1	Wheat Flour Bag	20 Kg	1,509.29	1,615.51	1,907.34	-6.58	-20.87
2	Rice Basmati Broken (Average Quality)	1 Kg	199.98	201.00	217.50	-0.51	-8.06
3	Rice IRRI-6/9 (Sindh/Punjab)	1 Kg	152.75	155.40	167.29	-1.71	-8.69
4	Bread plain (Small Size)	Each	108.83	108.71	116.17	0.11	-6.32
5	Beef with Bone (Average Quality)	1 Kg	1,105.87	1,084.21	933.39	2.00	18.48
6	Mutton (Average Quality)	1 Kg	2,026.24	2,006.54	1,876.99	0.98	7.95
7	Chicken Farm Broiler (Live)	1 Kg	456.48	445.60	347.09	2.44	31.52
8	Milk fresh (Un-boiled)	1 Ltr	198.65	198.39	187.15	0.13	6.14
9	Curd (Dahi) Loose	1 Kg	231.51	230.67	219.26	0.36	5.59
10	Powdered Milk NIDO 390 gm Polybag	Each	1,050.82	1,036.88	850.25	1.34	23.59
11	Eggs Hen (Farm)	1 Dozen	295.78	240.38	252.43	23.05	17.17
12	Mustard Oil (Average Quality)	1 Kg	527.64	542.09	495.43	-2.67	6.50
13	Cooking Oil DALDA or Other Similar Brand (SN) 5 Litre Tin	Each	2,898.98	2,913.96	2,652.29	-0.51	9.30
14	Vegetable Ghee DALDA/HABIB 2.5 kg Tin	Each	1,472.38	1,482.73	1,292.15	-0.70	13.95
15	Vegetable Ghee DALDA/HABIB 1 kg Pouch	Each	568.40	575.38	503.29	-1.21	12.94
16	Bananas (Kela) Local	1 Dozen	176.55	182.93	146.63	-3.49	20.41
17	Pulse Masoor (Washed)	1 Kg	293.92	294.35	320.94	-0.15	-8.42
18	Pulse Moong (Washed)	1 Kg	400.82	396.84	308.75	1.00	29.82
19	Pulse Mash (Washed)	1 Kg	457.78	461.89	548.27	-0.89	-16.50
20	Pulse Gram	1 Kg	314.58	309.75	260.01	1.56	20.99
21	Potatoes	1 Kg	62.85	64.04	87.85	-1.86	-28.46
22	Onions	1 Kg	45.51	54.83	113.91	-17.00	-60.05
23	Tomatoes	1 Kg	49.05	62.19	67.68	-21.13	-27.53
24	Sugar Refined	1 Kg	174.19	168.61	143.78	3.31	21.15
25	Gur (Average Quality)	1 Kg	219.56	213.31	204.63	2.93	7.30
26	Salt Powdered (NATIONAL) 800 gms Packet	Each	72.60	72.34	69.90	0.36	3.86
27	Chilies Powder NATIONAL 200 gm Packet	Each	320.00	320.00	362.50	0.00	-11.72
28	Garlic (Lehsun)	1 Kg	367.18	450.24	549.07	-18.45	-33.13
29	Tea Lipton Yellow Label 190 gm Packet	Each	448.35	452.21	544.71	-0.85	-17.69

Increase in Prices 

Decrease in price 

Source: Pakistan Bureau of Statistics

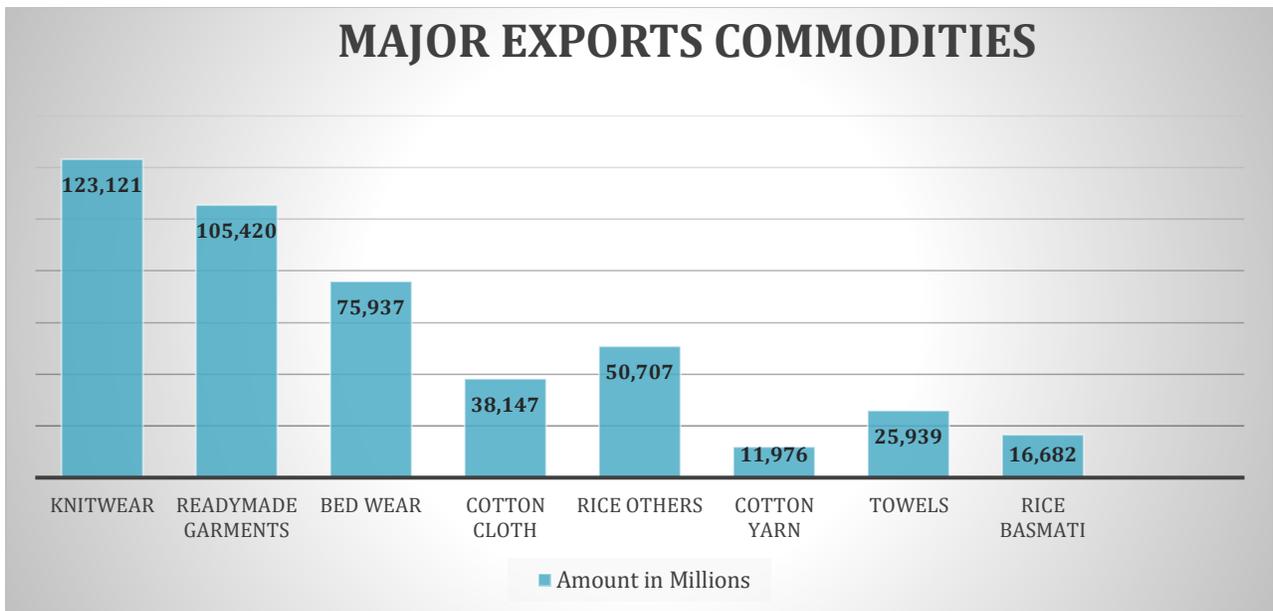


7. TRADE SITUATION

Exports

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during May, 2025 amounted to Rs. 752,728 million (provisional) as against Rs. 610,190 million in April, 2025 and Rs. 789,940 million during May, 2024 showing an increase of 23.36% over April, 2025 but a decrease of 4.71% over May, 2024.

In terms of US dollars, the exports in May, 2025 totaled \$ 2,672 million (provisional) as compared to \$ 2,174 million in April, 2025 showing an increase of 22.91% over April, 2025 but a decrease of 5.88% as compared to \$ 2,839 million in May, 2024.



Imports

Imports into Pakistan during May, 2025 amounted to Rs. 1,485,297 million (provisional) as against Rs. 1,570,883 million in April, 2025 and Rs. 1,367,656 million during May, 2024 showing a decrease of 5.45% over April, 2025 but an increase of 8.60% over May, 2024.

In terms of US dollars, the imports in May, 2025 totaled \$ 5,273 million (provisional) as compared to \$ 5,596 million in April, 2025 showing a decrease of 5.77% over April, 2025 but an increase of 7.28% as compared to \$ 4,915 million in May, 2024.



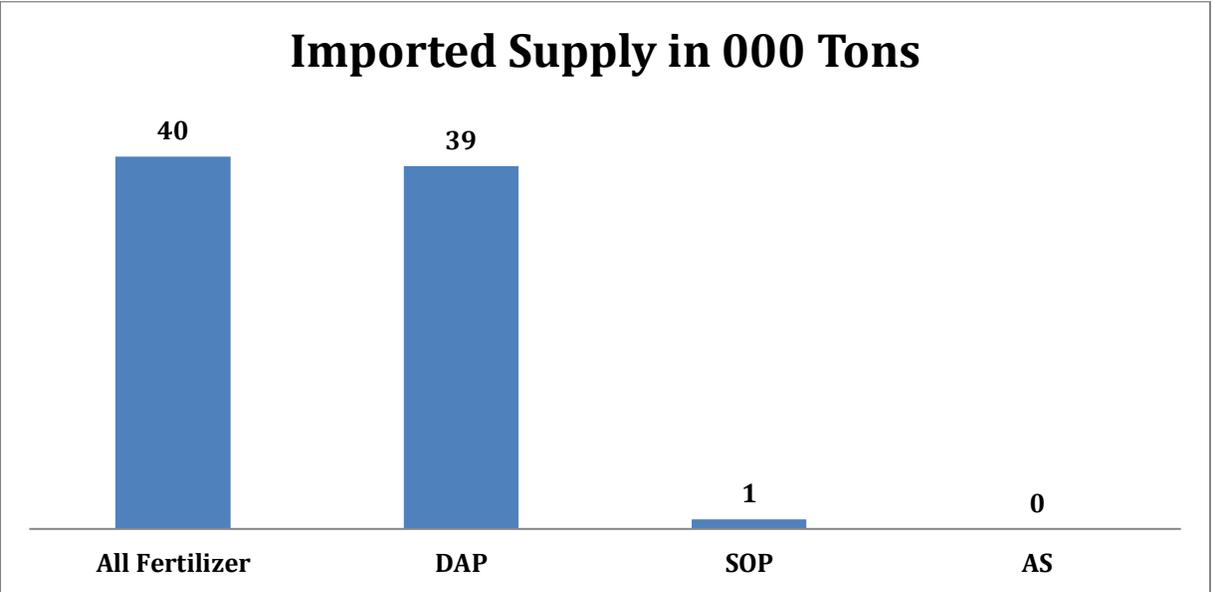
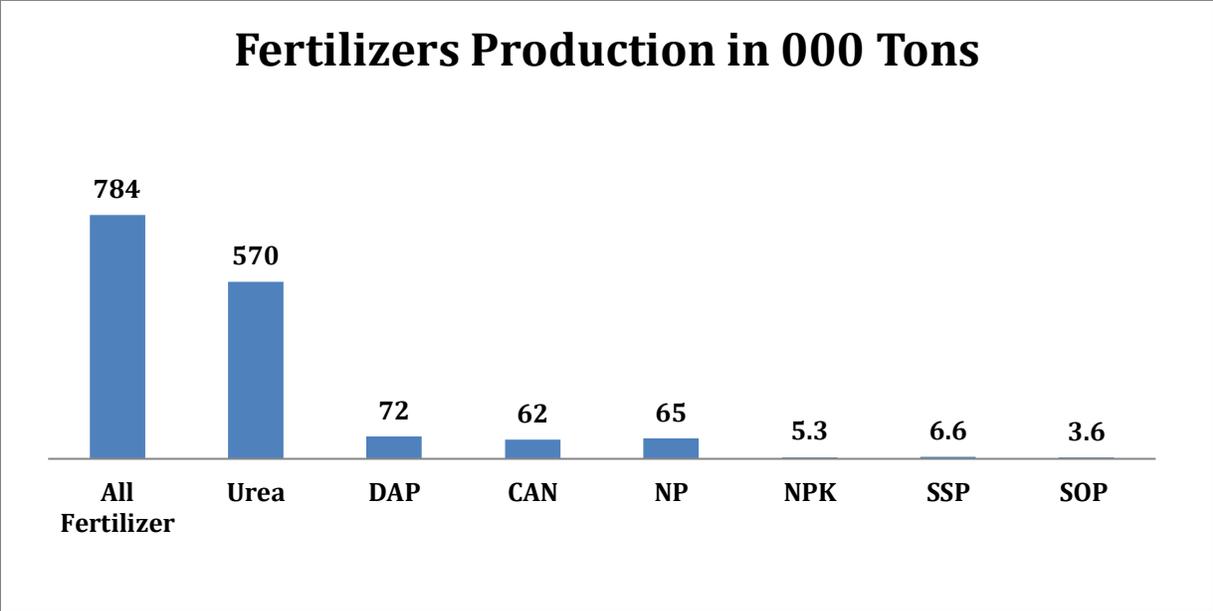
Source: Pakistan Bureau of Statistics

8. FERTILIZER OFFTAKE SITUATION

- Total nutrient offtake during April 2025 was 222 thousand tonnes which decreased by 8.8 percent over April 2024.
- Urea offtake was 251 thousand tonnes which decreased by 23.5 per cent.
- DAP offtake was 95 thousand tonnes which increased by 2.6 per cent over April 2024.
- Nitrogen offtake decreased by 14.6 per cent while phosphate and potash offtake increased by 10.1 and 30.9 per cent, respectively.

Fertilizer Production and Imported Supplies

Total domestic fertilizer production during April 2025 was 784 thousand tonnes. Urea and DAP production was 570 and 72 thousand tonnes, respectively. Production of other products i.e. NP, CAN, SSP, NPKs and SOP was 65, 62, 6.6, 5.3 and 3.6 thousand tonnes, respectively. Total imported supplies were 40 thousand tonnes comprising 39 thousand tonnes of DAP and one thousand tonne of SOP.



Source: National Fertilizer Development Centre



9. NEWS & TRENDS

Certified Seeds Drive Pakistan’s Cotton Revival for 2025–26:

Pakistan is set to meet its cotton seed demand for the upcoming 2025–26 Kharif season, with over 50,000 metric tons of certified seed already available against a requirement of nearly 54,000 metric tons, according to the Ministry of National Food Security and Research (MNFS&R). At a meeting chaired by Federal Minister, the Federal Committee on Agriculture fixed a cotton production target of 10.18 million bales on 2.2 million hectares. The minister voiced strong concerns about the sale of non-certified, substandard, and smuggled seeds — practices blamed for undermining crop yields. In response, the government has banned 392 companies for selling fake seeds and is working with law enforcement to stop illegal seed smuggling, especially from India. To strengthen seed quality and regulation, the National Seed Development Authority (NSDA) has been set up to oversee certification, compliance, and licensing. The minister stressed the need for certified seeds, better domestic seed production, price stability, and good farming practices to raise yields and ensure long-term agricultural sustainability.

Punjab, UK to Partner for Agricultural and Livestock Development

The Punjab government and the British High Commission have agreed to collaborate on supporting farmers, tackling climate change, enhancing university linkages, improving animal breeding, and controlling foot-and-mouth disease (FMD) to strengthen Punjab’s agriculture and livestock sectors. In a meeting with the British High Commission, Punjab’s Minister for Agriculture and Livestock, highlighted key initiatives under Chief Minister Rs 400 billion “Transforming Punjab Agriculture” program, including interest-free loans through Kissan and Livestock Cards, subsidized modern equipment, 9,500 tractors with Rs 1 million subsidy each, and upcoming agriculture malls for low-cost machinery rentals. A new breed improvement program across 10 districts and dedicated FMD zones are also planned to boost milk and meat production. The UK side praised Punjab’s agricultural reforms and pledged continued support.

Sources: *Business Recorder*

10. AGRO ADVISORY SERVICES FOR FARMERS

زرعی سفارشات برائے کسان

دھان

- ☆ دھان کی پیہری کی کاشت کا وقت برائے موٹی اقسام (اری) 10 مئی تا 7 جون، فائن اقسام یکم جون تا 20 جون اور شاہین باستی 15 تا 30 جون جبکہ ہائبرڈ اقسام کے لیے 20 مئی تا 15 جون ہے۔
- ☆ اچھے اور بہتر اگاؤ کیلئے بیج کو کاشت سے پہلے نیکن پانی میں (بجساب 25 گرام نمک فی لیٹر) ڈالیں اور نیچے بیٹھ جانے والے بیجوں کو کاشت کریں۔
- ☆ فصل کو بکائی اور پتوں کے بھورے دھوں والی جینیسی بیماریوں سے محفوظ رکھنے کے لیے بیج کو بوائی سے دو ہفتہ پہلے پھپھوندی کش زہر قنائی ٹریٹمنٹ میٹھال 2 سے 25 گرام فی کلونچ کو لگائیں۔
- ☆ دھان کی منظور شدہ موٹی اقسام کے ایس 282 نیاب اری 9 اری کے ایس 6، کے ایس 133، کے ایس کے 434 اور نیاب 2013 جبکہ باستی اقسام جیسا کہ سپر باستی، باستی 515، غیر باستی اقسام بی ایس 2 اور پی کے 386 کے بیج کا انتظام کریں۔

کپاس

- ☆ کپاس کے مرکزی علاقہ جات میں فصل کی کاشت 31 مئی تک مکمل کر لیں۔ کاشت پٹریوں پر کریں اور ہموار زمین پر قطاروں میں کاشت کی صورت میں پہلی آبپاشی کے بعد پودوں کی ایک لائن چھوڑ کر دوسری لائن میں مٹی چڑھا کر پٹریاں بنائیں۔
- ☆ ڈرل سے لائنوں میں کاشت کی گئی کپاس کو پہلی آبپاشی 3 سے 4 دن بعد اور پھر دوسری، تیسری اور چوتھی 6 سے 9 دن کے وقفے سے کریں۔
- ☆ محکمہ زراعت کی سفارش کردہ روایتی اقسام سی آئی ایم۔ 496 سی آئی ایم۔ 506 سی آئی ایم۔ 554 نیاب۔ 777 سی آئی ایم۔ 608 ایم این ایچ۔ 786 سی آر ایم۔ 38 سی آئی ایم۔ 573 ایس ایل ایچ۔ 317 ٹی۔ 115 نیاب۔ 852 نیاب کرن نیاب۔ 112، جی ایس۔ 1 سائو۔ 124، اور نیاب 2008 کاشت کریں۔

- ☆ کھادوں کا متوازن استعمال اچھی پیداوار کے لیے نہایت ضروری ہے۔ مرکزی علاقہ جات میں کپاس کو 69 کلوگرام نائٹروجن، 35 کلوگرام فاسفورس اور 25 کلوگرام پوٹاش فی ایکڑ ڈالیں۔ جبکہ ثانوی علاقہ جات میں 58 کلوگرام نائٹروجن، 35 کلوگرام فاسفورس اور 25 کلوگرام پوٹاش فی ایکڑ ڈالیں۔

کما اور بہاریہ مٹی

- ☆ کما کی بھر پور فصل کے لیے بہاریہ کاشت کو فی 164 ایکڑ اچھ پانی اور ستمبر فصل کیلئے 180 ایکڑ اچھ پانی درکار ہوتا ہے پانی کی کمی فی ایکٹر پیداوار پر برا اثر ڈالتی ہے۔ لہذا 10 سے 12 دن بعد کے وقفے سے آبپاشی کرتے رہیں۔
- ☆ مٹی کی فصل کو مناسب وقفے سے آبپاشی کریں اور آنے پر کسی صورت میں بھی پانی کی کمی نہ آنے دیں اور کھیت کو ہمیشہ تروترو حالت میں رکھیں تاکہ دانہ بننے میں مدد مل سکے۔
- ☆ مٹی کی فصل کو آبپاش علاقوں میں بقیہ 3 اقساط میں ڈالی جانے نائٹروجن 3 سے 5 پتے نکالنے پر، 8 سے 10 پتے نکالنے پر اور پھول آنے سے 14 سے 15 دن قبل سفارش کردہ مقدار کے مطابق ضرور استعمال کریں۔

سبزیات و باغات

- ☆ ٹماٹر کی فصل کو صبح یا شام کے وقت توڑیں اور ان کو ٹھنڈا کرنے کے لیے پانی سے ڈھولیں تاکہ ان کی تازگی برقرار رہے۔
- ☆ موسم گرم سبزیوں کی جہاں ضرورت ہو گوڈی کریں اور 8 سے 10 دن کے وقفے سے آبپاشی کریں۔
- ☆ آم کے باغات میں آبپاشی کا وقفہ 20 دن رکھیں۔

Source: Zarat Nama, Directorate of Agricultural Information



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