

# AGRICULTURE OUTLOOK

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## 1. EXECUTIVE SUMMARY

During September 2025, major agricultural activities across Pakistan included active rice crop growth and the start of harvesting in Sindh, Punjab, and KP, where overall crop condition and market prices remained encouraging. Cotton harvesting continued at a fast pace in Punjab and Sindh, with healthy crop stands, though earlier flood losses in some areas may slightly reduce the final output. Maize sowing in Punjab was nearly completed, with early-sown fields showing good germination, while Sindh and KP also reported healthy early crop establishment. Harvesting of mung bean, sesame, and other oilseed crops progressed across Punjab, but heavy monsoon rains caused noticeable yield reductions. Sugarcane crops in Punjab and Sindh showed strong recovery after pest attacks and flooding, supported by timely management, and farmers were advised to apply potash to enhance stalk strength and sugar recovery; KP maintained stable and satisfactory crop conditions. Horticultural activity remained strong nationwide, including potato sowing and onion transplanting in Punjab, guava and banana harvesting in Sindh, citrus and vegetable harvests in KP, ongoing dry-fruit harvesting in Balochistan, and active fruit harvests along with winter vegetable preparation in Gilgit-Baltistan, reflecting overall steady agricultural momentum across the country.

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

As mentioned by the Pakistan Bureau of Statistics (PBS) during August, 2025 Tomatoes (65.04%), Wheat (37.58%), Wheat Flour (34.43%), Onions (28.48%), Fresh Vegetables (9.03%), Wheat Products (6.86%), Potatoes (5.72%), Eggs (4.49%), Butter (3.55%), Sugar (2.74%), Rice (2.59%), Gur (1.50%), Pulse Gram (1.45%), Besan (0.98%) and Fresh Fruits (0.92%) increased over August 2025.

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during August, 2025 amounted to Rs. 683,369 million (provisional) as against Rs. 762,578 million in July, 2025 and Rs. 769,399 million during August, 2024 showing a decrease of 10.39% over July, 2025 and of 11.18% over August, 2024. Imports into Pakistan during August, 2025 amounted to Rs. 1,502,453 million (provisional) as against Rs. 1,658,969 million in July, 2025 and Rs. 1,385,326 million during August, 2024 showing a decrease of 9.43% over July, 2025 but an increase of 8.45% over August, 2024.

Total nutrient offtake during August 2025 was 531 thousand tonnes while Total domestic fertilizer production during August 2025 was 835 thousand tonnes.



## **2. CURRENT CROP SITUATION**

During September 2025, major agricultural activities in the plains of Pakistan included the rice crop growth, cotton harvesting, and sugarcane is also showing healthy growth.

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

In Sindh, rice harvesting begins from late September to early October and continues into November depending on crop maturity. In Punjab and KP, the crop is growing well, harvesting has begun, and the produce is being sold at good prices in local agricultural markets.

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

Cotton harvesting is underway in Punjab as the crop reaches full maturity, with large-scale picking in progress. In Sindh, harvesting has also started and the crop is showing good growth, although earlier flood damage is expected to affect the final yield despite generally favorable market prices.

### **2.3. Maize:**

In Punjab maize crop sowing is almost completed and in some areas where early sowing was done germination has started and in Sindh and KPK crop is also showing healthy germination growth

### **2.3. Oilseed, Mung bean, and sesame:**

Mung bean is harvested in September in most areas of Punjab, while sesame and other oilseed crops are also nearly harvested. However, yields have declined due to damage caused by the severe monsoon.

### **2.4. Sugarcane:**

In Sindh and Punjab, crops that were previously affected by pest attacks and floodwater have shown marked improvement this month and are now advancing toward maturity. Although both regions experienced notable damage, timely management efforts enabled a strong recovery. Farmers are advised to apply potash to further enhance plant strength and increase final weight. In Khyber Pakhtunkhwa, the crop situation remains satisfactory, with fields generally maintaining a healthy and stable condition.



## 2.5. Horticulture

**In Punjab,** Potato sowing has started, and the transplanting of onion seedlings is in progress. Farmers are advised to control shoofly and citrus canker, and to apply potash to enhance crop growth and yield.

**In Sindh,** Guava and banana are still under harvest and are giving good yields, while vegetables are also progressing well across the region.

**In Khyber Pakhtunkhwa,** Citrus orchards nearly ready to harvest, and the fruit quality is good. Vegetables such as spinach, beans, and tomatoes are also under harvest.

**In Balochistan,** Dry fruits such as Pine Nuts, almond, and walnut are being harvested, and other fruits and vegetables are also showing good growth.

**In Gilgit-Baltistan,** Fruits such as persimmon, apple, and pear are under harvest. Summer vegetables are nearing the end of their season, and in most areas, preparation for winter vegetable cultivation is underway.

**Source:**

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

## 3. WEATHER SITUATION

### Rainfall/Precipitation

During August 2025, the country received moderate to heavy rainfall. The spatial distribution of this rainfall is illustrated. The major amounts were recorded Upper Punjab and Potohar region.

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

Sr. No.	Station	Rainfall(mm)	Sr. No.	Station	Rainfall(mm)
1	Sialkot Cantt	730.8	11	Murree	274.0
2	Sialkot Airport	481.1	12	Kotli	274.0
3	Gujrat	426.4	13	Muzaffrabad City	273.0
4	Narowal	361.5	14	Mangla	272.7
5	Kakul	361.0	15	Islamabad A/P	270.9
6	Malamjabba	327.0	16	Lahore City	253.1
7	Rawalakot	323.4	17	Garhi Dopatta	243.0
8	Muzaffrabad A/P	280.6	18	Tando Jam	235.0
9	Jhelum	280.3	19	Gujranwala	230.7
10	Lahore Airport	275.2	20	Hafizabad	226.0



- **Relative Humidity (August 2025):**

Relative Humidity during August 2025 increased further with peak monsoon activity. National RH mostly stayed between 55–65%, with Punjab and Sindh remaining humid after repeated rain spells, often recording evening RH above 70%. KP, AJK, and Gilgit-Baltistan showed persistently high moisture levels with evening RH over 75% due to cloud cover and frequent showers. Western and southern Balochistan remained comparatively drier, where daytime RH commonly fell to 35–40%, though mornings stayed moderately humid.

- **Temperature Regime during August 2025:**

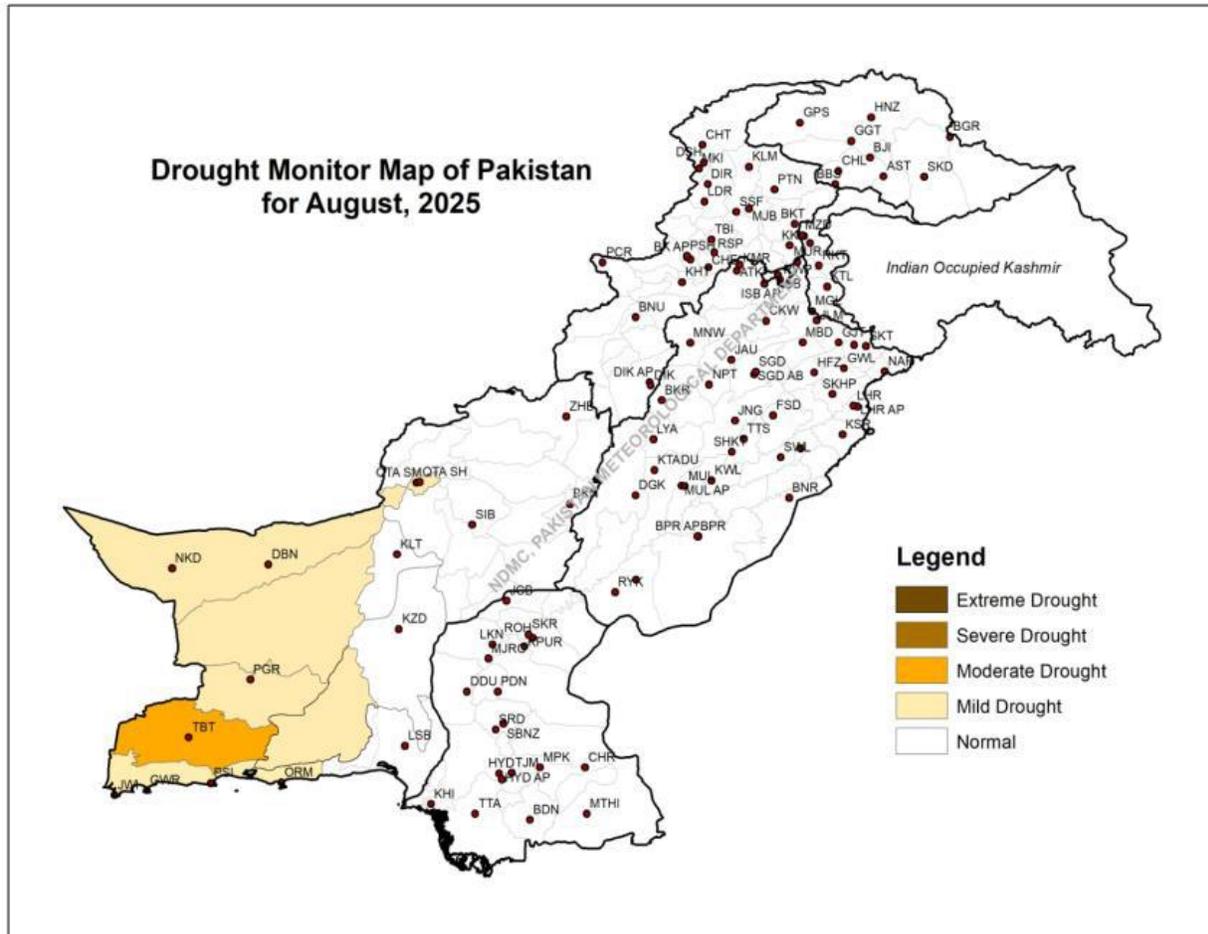
August 2025 stayed warmer than normal, mainly due to elevated night temperatures and high atmospheric moisture. National average temperature reached 30.6°C, around 0.4°C above normal, while minimum temperatures showed a strong anomaly of +0.8°C. Punjab recorded 31–34°C with humid heat, Sindh 33–37°C, and KP around 26–28°C. Gilgit-Baltistan remained cool at 14–20°C, whereas parts of Balochistan, especially Dalbandin, peaked near 45°C. High humidity maintained increased heat stress and limited nighttime relief.

- **Weather Prediction for September 2025:**

For September 2025, PMD predicted an active monsoon pattern in the first half, with above-normal rainfall likely in Punjab, KP, AJK, GB, and eastern Balochistan. Sindh was expected to receive near-normal totals, though a strong Arabian Sea system could bring localized heavy rainfall. Temperatures were forecast to stay slightly above normal, and nights more humid with RH rising to 65–80% in northern and central areas. Risks of flash flooding, waterlogging, and landslides were highlighted, while western and southern Balochistan were expected to remain relatively semi-dry as monsoon activity weakened later in the month.

#### 4. DROUGHT SITUATION

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

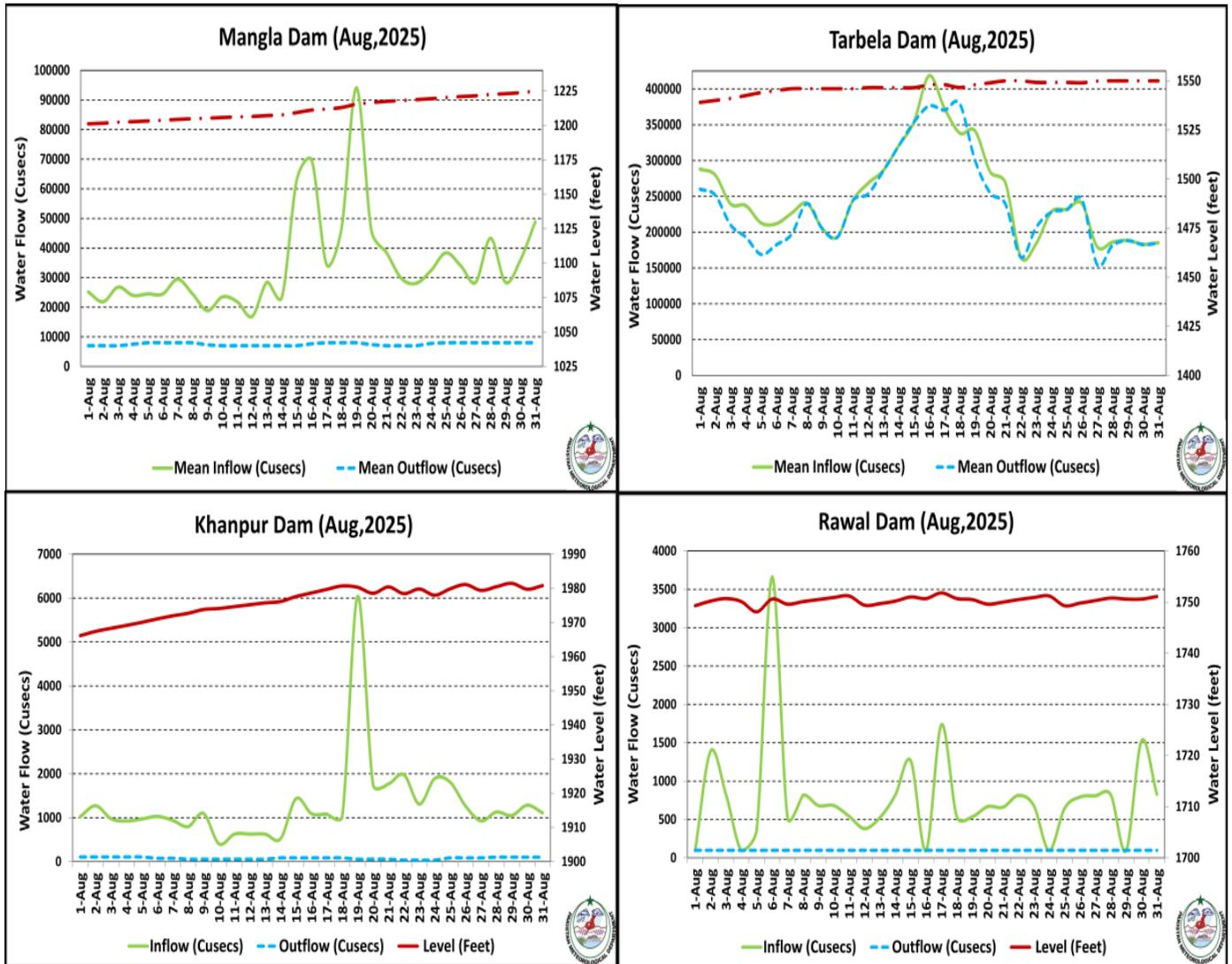


**Drought Monitor of Pakistan for the month of August, 2025**

*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 shown in Figure. The water level at Mangla and Tarbela has increased due to glacial melt and recent heavy rainfall in its catchments during the month. Khanpur, Rawal, and Simly dams have also seen increase in level due to heavy moonsoon rainfall. The water levels at the major reservoirs, Tarbela and Mangla, stand at 1,550 feet and 1226 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 5.6% on year-on-year basis in September 2025 as compared to 3.0% of the previous month and 6.9% in September 2024. On month-on-month basis, it increased by 2.0% in September 2025 as compared to a decrease of 0.6% in the previous month and a decrease of 0.5% in September 2024.



II. CPI inflation Urban, increased by 5.5% on year-on-year basis in September 2025 as compared to 3.4% of the previous month and 9.3% in September 2024. On month-on-month basis, it increased by 1.5% in September 2025 as compared to a decrease of 0.7% in the previous month and a decrease of 0.5% in September 2024.

III. CPI inflation Rural, increased by 5.8% on year-on-year basis in September 2025 as compared to an increase of 2.4% in the previous month and 3.6% in September 2024. On month-on-month basis, it increased by 2.8% in September 2025 as compared to a decrease of 0.5% in the previous month and in September 2024.

S. No.	Description	Unit	Average Prices			%change Sep 25 over	
			Sep 25	August 25	Sep 24	August 25	Sep 24
1	Wheat Flour Bag	20 Kg	2099.93	1599.94	1744.64	31.25	20.36
2	Rice Basmati Broken (Average Quality)	1 Kg	216.17	207.53	211.22	4.16	2.34
3	Rice IRRRI-6/9 (Sindh/Punjab)	1 Kg	158.01	154.27	163.08	2.42	-3.11
4	Bread plain (Small Size)	Each	110.12	108.83	109.00	1.19	1.03
5	Beef with Bone (Average Quality)	1 Kg	1122.85	1116.19	999.37	0.60	12.36
6	Mutton (Average Quality)	1 Kg	2062.77	2053.78	1923.88	0.44	7.22
7	Chicken Farm Broiler (Live)	1 Kg	416.65	446.03	441.61	-6.59	-5.65
8	Milk fresh (Un-boiled)	1 Ltr	202.20	201.73	196.20	0.23	3.06
9	Curd (Dahi) Loose	1 Kg	236.88	236.66	229.83	0.09	3.07
10	Powdered Milk NIDO 390 gm Polyba	Each	1094.55	1091.92	1031.99	0.24	6.06
11	Eggs Hen (Farm)	1 Dozen	311.10	300.07	304.83	3.68	2.06
12	Mustard Oil (Average Quality)	1 Kg	537.29	530.87	504.77	1.21	6.44
13	Cooking Oil DALDA or Other Similar	Each	2874.42	2872.88	2652.11	0.05	8.38
14	Vegetable Ghee DALDA/HABIB 2.5 k	Each	1460.82	1461.33	1312.34	-0.03	11.31
15	Vegetable Ghee DALDA/HABIB or Ot	Each	568.59	568.03	512.46	0.10	10.95
16	Bananas (Kela) Local	1 Dozen	139.82	156.33	131.81	-10.56	6.08
17	Pulse Masoor (Washed)	1 Kg	295.39	295.31	311.65	0.03	-5.22



18	Pulse Moong (Washed)	1 Kg	387.18	382.13	336.24	1.32	15.15
19	Pulse Mash (Washed)	1 Kg	448.35	447.58	568.62	0.17	-21.15
20	Pulse Gram	1 Kg	308.80	307.55	390.40	0.41	-20.90
21	Potatoes	1 Kg	84.86	81.92	102.33	3.59	-17.07
22	Onions	1 Kg	86.43	69.73	149.20	23.95	-42.07
23	Tomatoes	1 Kg	198.04	112.16	117.82	76.57	68.09
24	Sugar Refined	1 Kg	183.30	180.19	141.33	1.73	29.70
25	Gur (Average Quality)	1 Kg	246.26	242.21	218.52	1.67	12.69
26	Salt Powdered (NATIONAL/SHAN) 80	Each	72.56	72.57	70.75	-0.01	2.56
27	Chilies Powder NATIONAL 200 gm Pa	Each	320.00	320.00	320.00	0.00	0.00
28	Garlic (Lehsun)	1 Kg	402.89	386.37	551.25	4.28	-26.91
29	Tea Lipton Yellow Label 190 gm Pack	Each	447.06	447.07	544.71	0.00	-17.93

Increase in Prices 

Decrease in price 

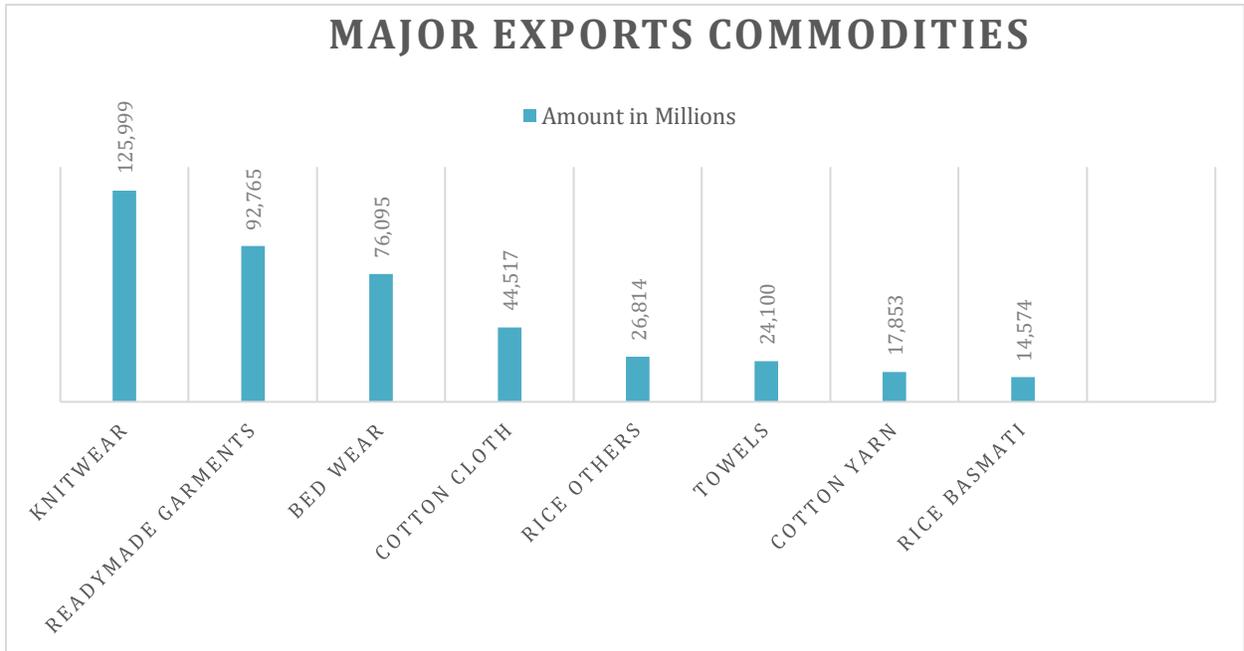
*Source: Pakistan Bureau of Statistics.*

## 7. TRADE SITUATION

### Exports

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during August, 2025 amounted to Rs. 683,369 million (provisional) as against Rs. 762,578 million in July, 2025 and Rs. 769,399 million during August, 2024 showing a decrease of 10.39% over July, 2025 and of 11.18% over August, 2024.

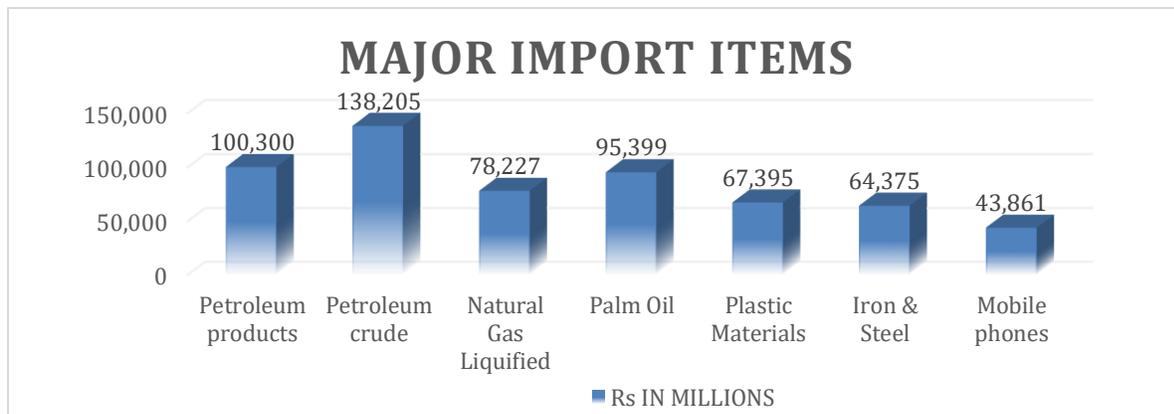
In terms of US dollars, the exports in August, 2025 totaled \$ 2,417 million (provisional) as compared to \$ 2,685 million in July, 2025 showing a decrease of 9.98% over July, 2025 and of 12.49% as compared to \$ 2,762 million in August, 2024.



### Imports:

Imports into Pakistan during August, 2025 amounted to Rs. 1,502,453 million (provisional) as against Rs. 1,658,969 million in July, 2025 and Rs. 1,385,326 million during August, 2024 showing a decrease of 9.43% over July, 2025 but an increase of 8.45% over August, 2024.

In terms of US dollars, the imports in August, 2025 totaled \$ 5,314 million (provisional) as compared to \$ 5,830 million in July, 2025 showing a decrease of 8.85% over July, 2025 but an increase of 7.01% as compared to \$ 4,966 million in August, 2024.



Source: Pakistan Bureau of Statistics

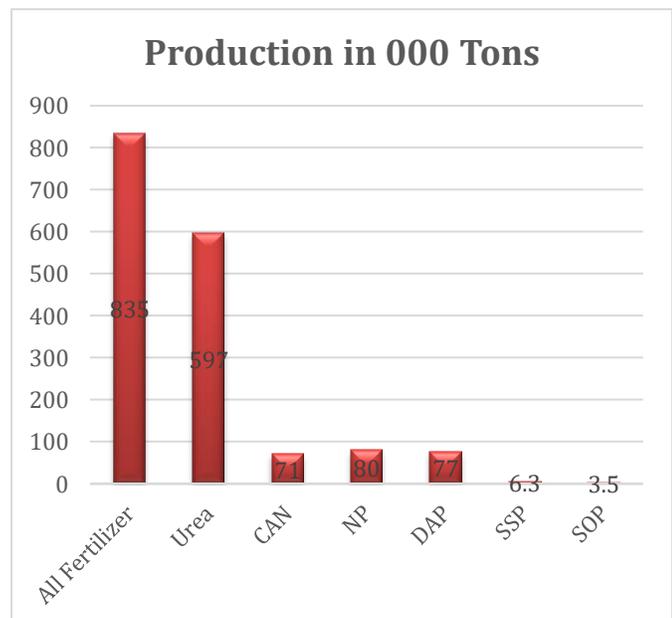
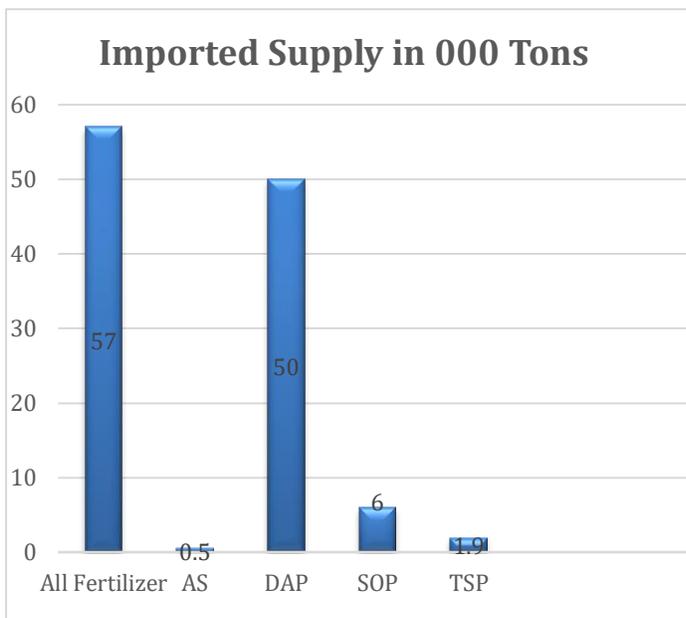


## 8. FERTILIZER OFFTAKE SITUATION

- Total nutrient offtake during August 2025 was 531 thousand tonnes, which increased by 53.4 per cent over August 2024.
- Urea offtake was 817 thousand tonnes which increased by 46.2 per cent.
- DAP offtake was 136 thousand tonnes which increased by 53.2 per cent over July 2024.
- Nitrogen and phosphate offtake increased by 50.7 and 69.3 per cent, respectively while, potash offtake increased by 49.3 per cent.

### Fertilizer Production and Imported Supplies:

Total domestic fertilizer production during August 2025 was 835 thousand tonnes. Urea and DAP production was 597 and 77 thousand tonnes, respectively. Production of other products i.e. NP, CAN, SSP, NPKs and SOP was 80, 71, 6.3, 1.1 and 3.5 thousand tonnes, respectively. Imported supplies comprised of 50 thousand tonnes of DAP, 6 thousand tonne of SOP, 1.9 thousand tonne of TSP and 0.5 thousand tonne of AS and UP each.



Source: National Fertilizer Development Centre



## 9. NEWS TRENDS

- **Modern Technology: The Key to Pakistan’s Agricultural Transformation:**

Pakistan stands at a critical crossroads where its agricultural survival now depends on abandoning outdated practices and urgently adopting modern scientific tools. At the “Tools of Modern Agriculture” workshop, experts warned that rising population pressure, climate stress, and declining arable land demand an immediate shift toward biotechnology, GM crops, advanced breeding, and safer crop protection methods. GM maize emerged as a top priority, especially as the poultry sector—valued at \$5 billion—consumes 70% of the country’s maize, which is growing by 10–12% each year. Yet progress remains slow due to widespread myths and regulatory delays, despite global proof that GM crops are safe and can boost yields by 20–30%. Speakers called for reforms in the biosafety system under Pak-EPA and the National Biosafety Committee to make it more transparent and science-driven. They also highlighted the importance of bio-pesticides and modern gene-editing tools like CRISPR for developing climate-resilient, high-yielding local varieties. The workshop concluded with a unified message: Pakistan must modernize its agriculture now to secure food security, strengthen farmer incomes, and safeguard the country’s economic future.

- **Boosting Citrus Exports Through Innovation and Quality Enhancement:**

Federal Minister for Commerce reaffirmed the government’s strong commitment to strengthening Pakistan’s agricultural exports, especially citrus, through value addition, innovation, and improved quality standards. Highlighting the importance of Kinnow mandarin in the country’s export portfolio, he emphasized restoring its competitiveness in global markets through modern farming practices, better compliance, and upgraded logistics. Referring to the Agri Expo Sargodha, the minister appreciated PHDEC’s technical workshop where experts from the Citrus Research Institute guided farmers on pest control, harvesting, and post-harvest management. The National Logistics Corporation also introduced reefer container solutions to support temperature-controlled exports ahead of the December citrus season. Federal Minister stressed that strong partnerships between farmers, exporters, and institutions are essential for a competitive horticulture sector. PHDEC reiterated its commitment to enhancing the citrus value chain and ensuring Pakistani exports meet international quality expectations.

**Sources:** *Business Recorder*

## زرعی سفارشات برائے کسان

### کپاس

- ☆ ستمبر کا مہینہ کپاس کی فصل کے لیے انتہائی اہم ہے۔ موسمی حالات پر نگاہ رکھیں۔ اس کے مطابق آبپاشی؛ سپرے اور دوسرے امور سرانجام دیں۔ بارش کی صورت میں اگر زراعت پانی کھیت میں کھڑا ہو جائے تو اس کی نکاسی کا بندوبست کریں۔ اس مقصد کے لیے کھیتوں کے ارد گرد چھوٹے تالاب یا کھالیاں بنائیں۔
- ☆ جہاں فصل پانی کھڑا رہنے کی وجہ سے کمزور حالت میں ہے وہاں فصل پر بڑھوتری کو تیز کرنے والے کییمیکل کا سپرے کریں۔
- ☆ رس چوسنے والے کیڑے مثلاً چست تیلہ؛ ست حملہ، سفید کھمی اور قھر پس تیزی سے افزائش لے کر تے ہیں اور رس چوس کر فصل کو کمزور کر دیتے ہیں۔ ستمبر میں ان کے ساتھ ہی سنڈیوں کا حملہ بھی ہو جاتا ہے۔ لہذا محکمہ زراعت تو سب کے حملہ کی ہدایات کے مطابق ایسی زرعی ادویات استعمال کریں جو ان دونوں قسم کے کیڑوں کو تلافی کر دیں لیکن ان کے استعمال سے پہلے پیسٹ سکاؤٹنگ کے ذریعے نقصان کی معاشی حد معلوم کرنا انتہائی ضروری ہے۔
- ☆ چنائی شروع کرنے کا موزوں ترین وقت صبح 10:00 بجے کے بعد شروع ہوتا ہے۔ جس وقت فصل پر ٹینڈوں پر سے رات کی شبخ خشک ہو جائے۔ کپاس بدرنگ نہ ہونے پائے اور نمی کی وجہ سے جنگ کے دوران مشکلات کا سامنا بھی نہیں ہوتا۔ شام 4:00 بجے چنائی بند کر دینی چاہیے۔
- ☆ چنائی ہمیشہ پودے کے نچلے حصے سے مکمل کھلے ہوئے ٹینڈوں سے شروع کریں اور بتدریج اوپر کو چنائی کرتے جائیں تاکہ پودے کے سوکھے پتے چنی ہوئی کپاس میں شامل نہ ہوں۔ چنائی کرتے وقت ٹینڈوں سے کپاس کو اچھی طرح نکال لینا چاہیے۔
- ☆ چنائی کے لیے استعمال ہونے والا کھڑا (جمولی) سوتی ہونا چاہیے اور چنی ہوئی پھٹی کو صاف اور خشک سوتی کپڑے پر رکھا جائے اور اس کے بعد صاف اونچی اور خشک جگہ پر اکٹھا کیا جائے تاکہ پھٹی آلودگی سے محفوظ رہ سکے۔
- ☆ چنائی کے بعد پھٹی کو ایک دو دھوپ ضرور لگوائیں تاکہ نمی کو مناسب سطح پر لایا جاسکے۔ بارش کے دنوں میں چنائی نہ کریں بلکہ جب کپاس سوکھ جائے تو چنائی کریں۔

### دھان

- ☆ اگر چوں پر سیاہی نائل بھورے دھبے نظر آئیں جو بعد میں زنگ آلود دکھائی دیں تو یہ زنگ کی کمی کی علامت ہے۔ ایسی صورت میں منتقلی کے 30 دن بعد سوکادیں۔ زیادہ کمی کی صورت میں 10 کلوگرام زنگ سلیفٹ (21 فیصد) کا کھڑے پانی میں چھو دیں۔
- ☆ اگر کھیت میں پتہ لپیٹ اور ستے کی سنڈی کا حملہ نظر آئے تو پیسٹ سکاؤٹنگ کے بعد اس کے نقصان کی معاشی حد کی کوئی نظر رکھ کر محکمہ زراعت کے عملے سے مشورہ کر کے سفارش کردہ مناسب اور محفوظ زرعی زہروں کا استعمال کریں۔
- ☆ دھان کے بھبکا سے بچاؤ کے لیے گوبھ سے لیکر دانہ بننے تک کھیت میں پانی کھڑا رکھیں۔
- ☆ دھان کی کٹائی کے لیے تریجی ہاروس ہاروسٹر استعمال کریں اور فصل پوری طرح پکنے پر کٹائیں اور اس کو اچھی طرح کر کے ذخیرہ کریں۔

### کماؤ

- ☆ کانگاری سے متاثرہ پودے نکال کر زمین میں دبا دیں۔ جن کھیتوں میں کانگاری اور رتہ روگ کا حملہ ہو تو ان کو موٹھ می فصل کے لیے نہ رکھیں اور نہ ہی وہاں آئندہ کاشت کیا جائے۔
- ☆ چار چار پودوں کو آپس میں ملا کر باندھ دیا جائے تاکہ خراب موسم میں فصل نہ گرے۔
- ☆ ستمبر کاشت کے لیے زمین کو اچھی طرح تیار کریں۔ نیز محکمہ زراعت کی سفارش کردہ اقسام اگتی تیار ہونے والی اقسام کاشت کریں۔

Source: Zarat Nama, Directorate of Agricultural Information

پلاننگ اینڈ ریسرچ ڈیپارٹمنٹ

زرعی ترقیاتی بینک لمیٹڈ

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