

AGRICULTURE OUTLOOK

Volume XI, ISSUE I, 2026



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

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1. EXECUTIVE SUMMARY

In January 2026, agricultural activities across Pakistan remained active under the Rabi season, with the wheat crop showing healthy growth in most regions of the country. In Punjab, early sown wheat reached the third irrigation stage and spike initiation phase, where balanced fertilizer application and disease management were recommended, while recent rains improved conditions in rainfed areas; wheat in Sindh and Khyber Pakhtunkhwa was also reported in good condition, and sowing continued in parts of Balochistan. Sugarcane harvesting progressed steadily, with about 50–60 percent of the crop harvested in Punjab, Sindh, and Khyber Pakhtunkhwa, as the ratoon crop neared completion and the February-sown crop entered peak harvesting. Oilseed crops such as sunflower, mustard, and rapeseed showed satisfactory growth, supported by irrigation in irrigated areas and recent rainfall in rainfed regions. Horticultural activities continued across provinces, with citrus, guava, carrot, potato, beetroot, radish, cabbage, spinach, peas, and other seasonal vegetables being harvested, while sowing of tomato, watermelon, and new seasonal vegetables remained in progress, and tobacco seedlings in Khyber Pakhtunkhwa showed healthy development for upcoming transplantation.

As mentioned by the Pakistan Bureau of Statistics (PBS) during December 2025, Fresh Fruits (6.78%), Wheat (3.48%), Dry Fruits (3.29%), Eggs (3.27%), Cooking Oil (2.84%), Milk Powder (2.03%), Wheat Flour (2.01%), Vegetable Ghee (1.92%), Fish (1.89%), Wheat Products (1.53%), Beans (0.63%) and Condiments & Spices (0.57%) increased over November 2025.

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during December, 2025 amounted to Rs. 635,970 million (provisional) as against Rs. 679,556 million in November, 2025 and Rs. 809,554 million during December, 2024 showing a decrease of 6.41% over November, 2025 and of 21.44% over December, 2024.

Imports into Pakistan during December, 2025 amounted to Rs. 1,714,983 million (provisional) as against Rs. 1,491,677 million in November, 2025 and Rs. 1,642,039 million during December, 2024 showing an increase of 14.97% over November, 2025 and of 4.44% over December, 2024.

Total nutrient offtake during December 2025 was 770 thousand tonnes, while total domestic fertilizer production during December 2025 was 754 thousand tonnes.



2. CURRENT CROP SITUATION

In January 2026, major agricultural activities include healthy wheat crops across the country. 50–60 percent of sugarcane has been harvested in Punjab, Khyber Pakhtunkhwa, and Sindh. Oilseed crops and horticultural crops, including fruits and vegetables, are in harvesting stages, while new season vegetables have been planted.

2.1. Wheat Crop

Early sown wheat in Punjab has now entered the third irrigation phase and is at the spike initiation stage. At this stage, it is recommended to apply potash along with urea and boron to ensure healthy grain formation. If possible, potash should be applied through flood irrigation; otherwise, it can be given as a foliar spray. Additionally, a suitable fungicide should be used to protect the crop from rust disease. Overall, the condition of the wheat crop in Punjab is good, and in rainfed areas, the crop has stabilized after recent rains. In Balochistan, wheat sowing is still ongoing, while in Sindh and Khyber Pakhtunkhwa, the wheat crop is also reported to be in good health.

2.2. Sugarcane

Sugarcane harvesting is ongoing, and about 50–60 percent of the crop has been harvested in Punjab and Khyber Pakhtunkhwa. The September ratoon crop is at the final stage of harvesting, as its harvesting started in November. Meanwhile, February-sown sugarcane has now entered the peak harvesting period.

2.3. Oil Seed Crops

The sunflower crop is showing healthy growth and timely management practices are essential. Mustard and rapeseed crops are exhibiting very good growth in irrigated areas, where they have received the second irrigation, while recent rains in rainfed areas have been very beneficial, overall resulting in good crop development.

2.4. Horticulture

In Punjab, Citrus and guava are available in the markets, and strawberry harvesting has also started. Sowing of watermelon, peas, tomato and other seasonal vegetables is in progress.

In Sindh, Vegetables like spinach, fenugreek, peas, and cauliflower are being harvested while tomato is being sown. Carrot and guava are also being harvested, watermelon



harvesting is expected soon, and no major disease has been reported except insect attack in tomato.

In Khyber Pakhtunkhwa, Citrus season is at its peak in the region, while tobacco seedlings are showing healthy growth and will be transferred to the field soon. potato, beetroot is also being harvested.

In Balochistan, Vegetables like radish, carrot, cabbage, and spinach are at the harvesting stage and being collected, while fruits are also being harvested and are available in the markets across the region.

In Gilgit-Baltistan, harvesting of seasonal vegetables is underway.

Source:

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

3. WEATHER SITUATION:

Rainfall/Precipitation

During the month, most parts of the country received rainfall, while eastern Punjab largely remained dry. Overall, most regions recorded below-normal rainfall, with pronounced negative departures over the northern parts of the country. In contrast, western Balochistan and parts of Sindh received slightly above-normal rainfall.

Chief amount of rainfall recorded across Pakistan during the month of December, 2025					
Sr.No.	Station	Rainfall(mm)	Sr.No.	Station	Rainfall(mm)
1	Kalam	46.1	11	Balakot	30.0
2	Garhi Dupatta	45.0	12	Rawalakot	29.8
3	Dir	40.0	13	Chitral	29.6
4	Murree	34.5	14	Astore	25.8
5	Quetta (Samungli)	34.0	15	Muzaffarabad AP	25.7
6	Pattan	32.0	16	Kakul	24.0
7	Rohri	32.0	17	Sukkur	24.0
8	Kalat	31.0	18	Jiwani	22.0
9	Mirkhani	30.1	19	Saidu Sharif	22.0
10	Muzaffarabad City	30.1	20	Drosh	20.0



Relative Humidity (December 2025):

During December 2025, relative humidity patterns across Pakistan reflected predominantly dry winter conditions as most parts of the country received below-normal rainfall. The dominance of dry continental air masses reduced overall moisture availability, particularly across central and southern regions. Morning and nighttime humidity remained relatively higher in Punjab, upper Sindh, and northern areas due to lower temperatures and fog formation, while afternoons were noticeably drier nationwide. Limited precipitation activity further suppressed sustained humidity levels, reinforcing seasonal dryness. Overall, humidity distribution during December was shaped by below-normal rainfall and strengthening winter stability.

Temperature Regime during December 2025:

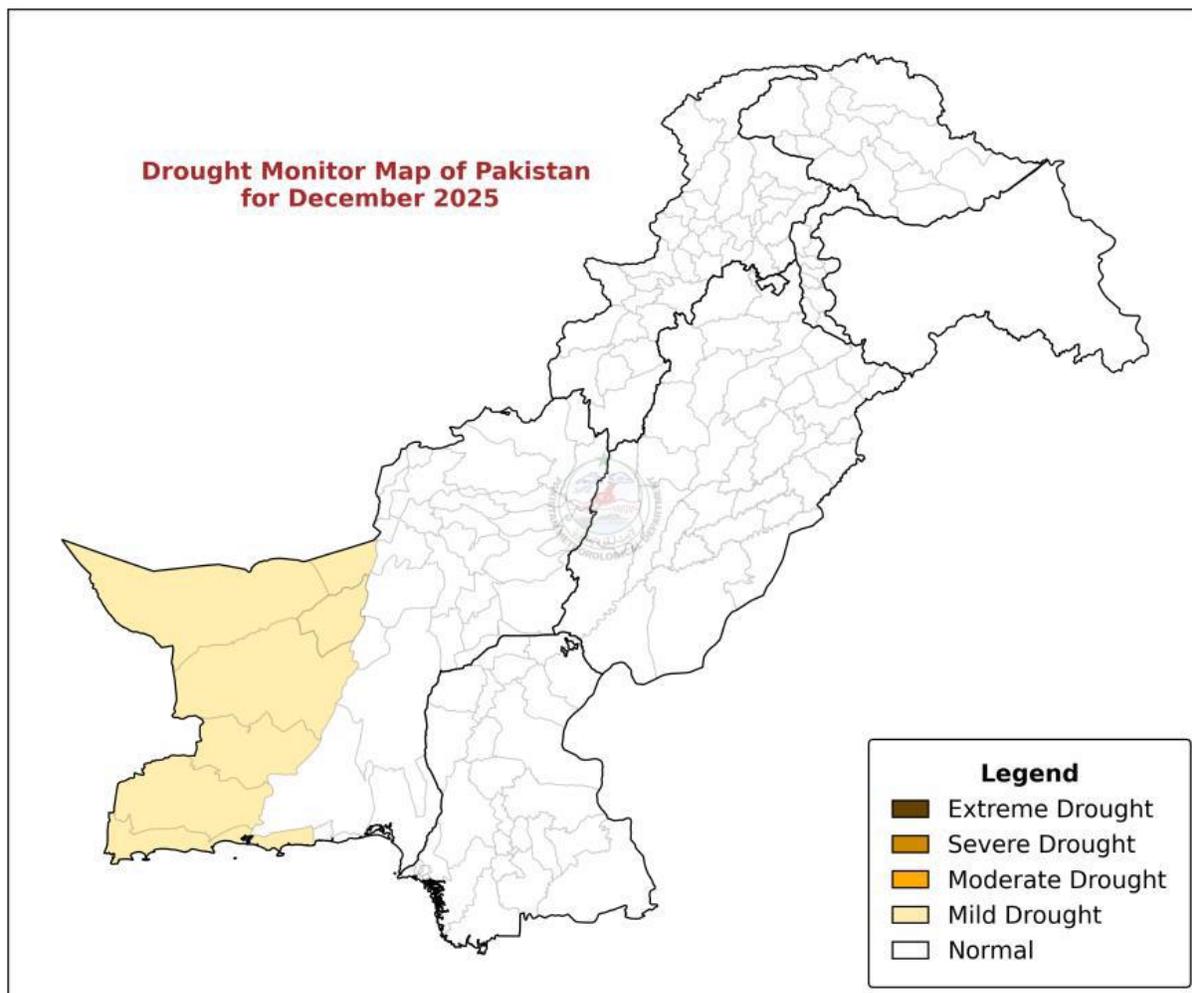
December 2025 temperatures showed mixed departures across the country, with mean temperature anomalies ranging from -2°C to $+4^{\circ}\text{C}$. While some regions experienced slightly below-normal conditions, others observed positive departures within this range. Northern and elevated areas recorded stronger cold conditions at night, whereas parts of the plains showed comparatively moderate daytime temperatures. The variability in temperature departures reflected regional contrasts under prevailing winter circulation patterns. Overall, the month demonstrated fluctuating thermal behavior but within a departure band of -2 to $+4^{\circ}\text{C}$ nationwide.

Weather Prediction for January 2026:

For January 2026, near-normal rainfall is expected over most parts of the country, with slightly negative rainfall anomalies projected over northeastern Punjab, Kashmir, and Gilgit-Baltistan. Mean temperatures are likely to remain above normal nationwide, with the highest positive departures anticipated over Gilgit-Baltistan, Kashmir, and northern Khyber Pakhtunkhwa. Despite expected near-normal precipitation, drought conditions are likely to persist over western and southwestern Balochistan. These projections indicate warmer-than-average conditions combined with spatial rainfall variability. Overall, January 2026 is forecast to exhibit above-normal temperatures, localized rainfall deficits in northern sectors, and continued drought stress in parts of Balochistan.

4. DROUGHT SITUATION

Figure illustrates the countrywide drought situation for December 2025, based on an integrated analysis of multiple drought-monitoring indicators and ground-based observations from meteorological stations. Although some drought-prone areas of western and southwestern Balochistan received rainfall ranging from below to slightly above normal, providing partial and short-term relief, the cumulative rainfall deficit remains substantial. Consequently, mild drought conditions continue to persist across these regions.



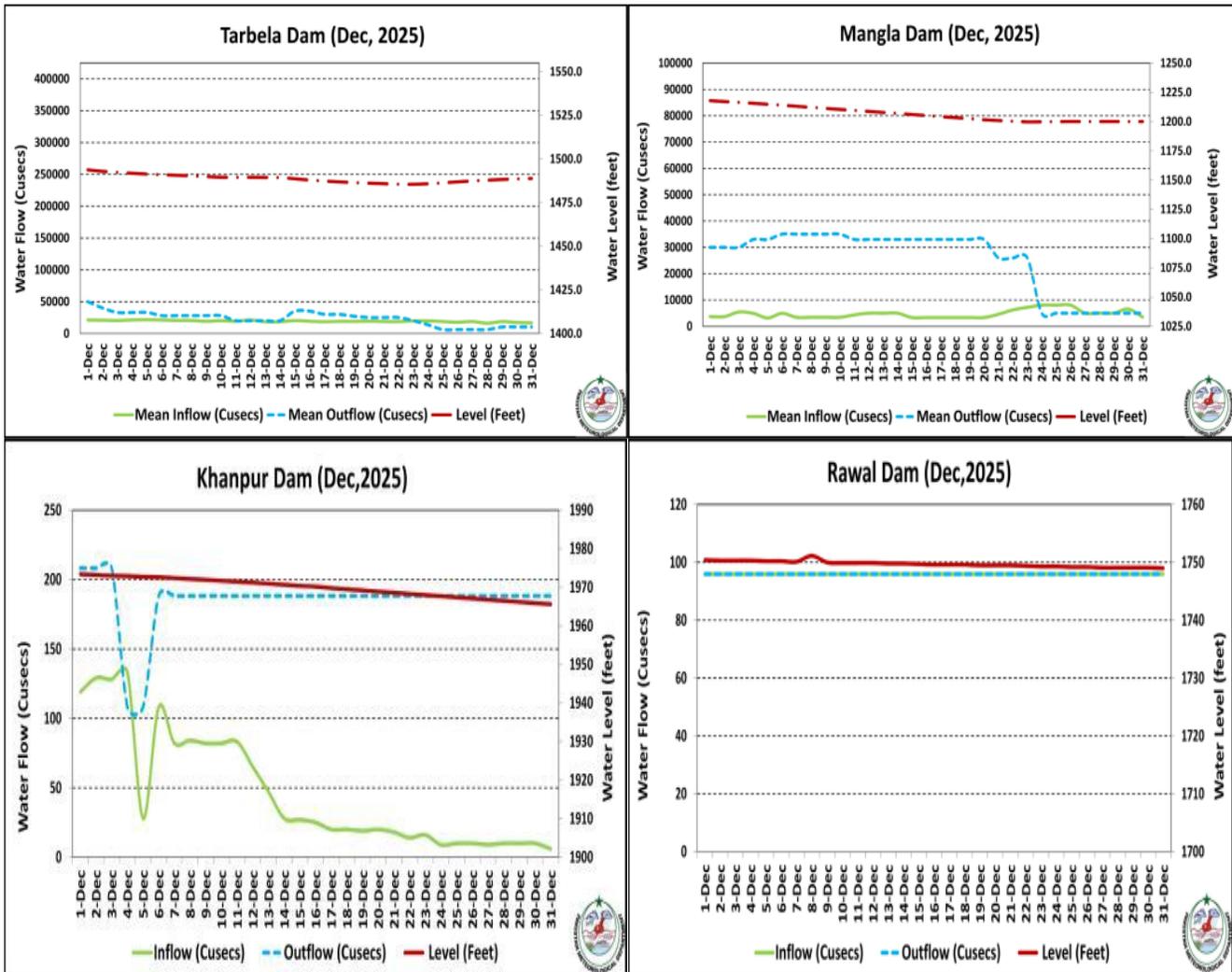
Drought Monitor of Pakistan for the month of December, 2025

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



5. WATER AVAILABILITY/DAMS FLOW DATA

Figure illustrates the water inflow, outflow, and storage levels of major reservoirs, including Mangla, Tarbela, Khanpur, Rawal, and Simly, during the month. A sharp decline in water level was observed at Tarbela, while other reservoirs experienced a more gradual decrease. Currently, the water levels at the key reservoirs, Tarbela and Mangla, stand at 1,490 feet and 1,200 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 December 2025 as compared to an increase of 6.1% in the previous month and 4.1% in December 2024. On month-on-month basis, it decreased by 0.4% in December 2025 as compared to an increase of 0.4% in the previous month and an increase of 0.1% in December 2024.
- II. CPI inflation Urban, increased by 5.8% on year-on-year basis in December 2025 as compared to an increase of 6.1% in the previous month and 4.4% in December 2024. On month-on-month basis, it decreased by 0.4% in December 2025 as compared to an increase of 0.5% in the previous month and a decrease of 0.1% in December 2024.
- III. CPI inflation Rural increased by 5.4% on year-on-year basis in December 2025 as compared to an increase of 6.3% in the previous month and 3.6% in December 2024. On month-on-month basis, it decreased by 0.6% in December 2025 as compared to an increase of 0.2% in the previous month and an increase of 0.3% in December 2024.

S. No.	Description	Unit	Average Prices			%change Dec 25 over	
			Dec 25	Nov25	Dec 24	Nov 25	Dec 24
1	Rice IRRI-6/9 (Sindh/Punjab)	1 Kg	156.63	156.95	159.95	-0.20	-2.08
2	Rice Basmati Broken (Average Quality)	1 Kg	214.72	215.98	203.90	-0.58	5.31
3	Wheat Flour Bag	20 Kg	2186.16	2165.20	1806.35	0.97	21.03
4	Bread plain (Small Size)	Each	111.36	110.73	108.84	0.57	2.32
5	Beef with Bone (Average Quality)	1 Kg	1159.01	1155.44	1022.15	0.31	13.39
6	Mutton (Average Quality)	1 Kg	2104.03	2099.38	1960.51	0.22	7.32
7	Chicken Farm Broiler (Live)	1 Kg	382.03	357.72	348.37	6.80	9.66
8	Milk fresh (Un-boiled)	1 Ltr	203.13	202.93	197.04	0.10	3.09
9	Curd (Dahi) Loose	1 Kg	238.88	238.55	231.06	0.14	3.38
10	Powdered Milk NIDO 390 gm Polyba	Each	1131.95	1120.14	1034.92	1.05	9.38

11	Eggs Hen (Farm)	1 Dozen	362.32	354.16	344.53	2.30	5.16
12	Mustard Oil (Average Quality)	1 Kg	540.76	540.66	566.63	0.02	-4.57
13	Cooking Oil DALDA or Other Similar	Each	3017.25	2933.79	2805.73	2.84	7.54
14	Vegetable Ghee DALDA/HABIB 2.5 k	Each	1523.81	1496.67	1440.21	1.81	5.80
15	Vegetable Ghee DALDA/HABIB or Ot	Each	588.96	583.40	568.08	0.95	3.68
16	Bananas (Kela) Local	1 Dozen	130.72	129.06	119.42	1.29	9.46
17	Pulse Masoor (Washed)	1 Kg	283.53	290.25	300.18	-2.32	-5.55
18	Pulse Moong (Washed)	1 Kg	381.49	377.90	387.27	0.95	-1.49
19	Pulse Mash (Washed)	1 Kg	437.48	443.56	506.52	-1.37	-13.63
20	Pulse Gram	1 Kg	268.04	281.01	378.97	-4.62	-29.27
21	Potatoes	1 Kg	64.68	80.40	116.85	-19.55	-44.65
22	Onions	1 Kg	99.62	143.35	141.85	-30.51	-29.77
23	Tomatoes	1 Kg	76.69	135.99	178.45	-43.61	-57.02
24	Sugar Refined	1 Kg	170.99	188.12	134.84	-9.11	26.81
25	Gur (Average Quality)	1 Kg	236.25	242.89	207.28	-2.73	13.98
26	Salt Powdered (NATIONAL/SHAN)	Each	67.45	70.64	71.47	-4.52	-5.62
27	Chilies Powder NATIONAL 200 gm	Each	332.21	322.29	320.00	3.08	3.82
28	Garlic (Lehsun)	1 Kg	423.64	414.80	686.75	2.13	-38.31
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 

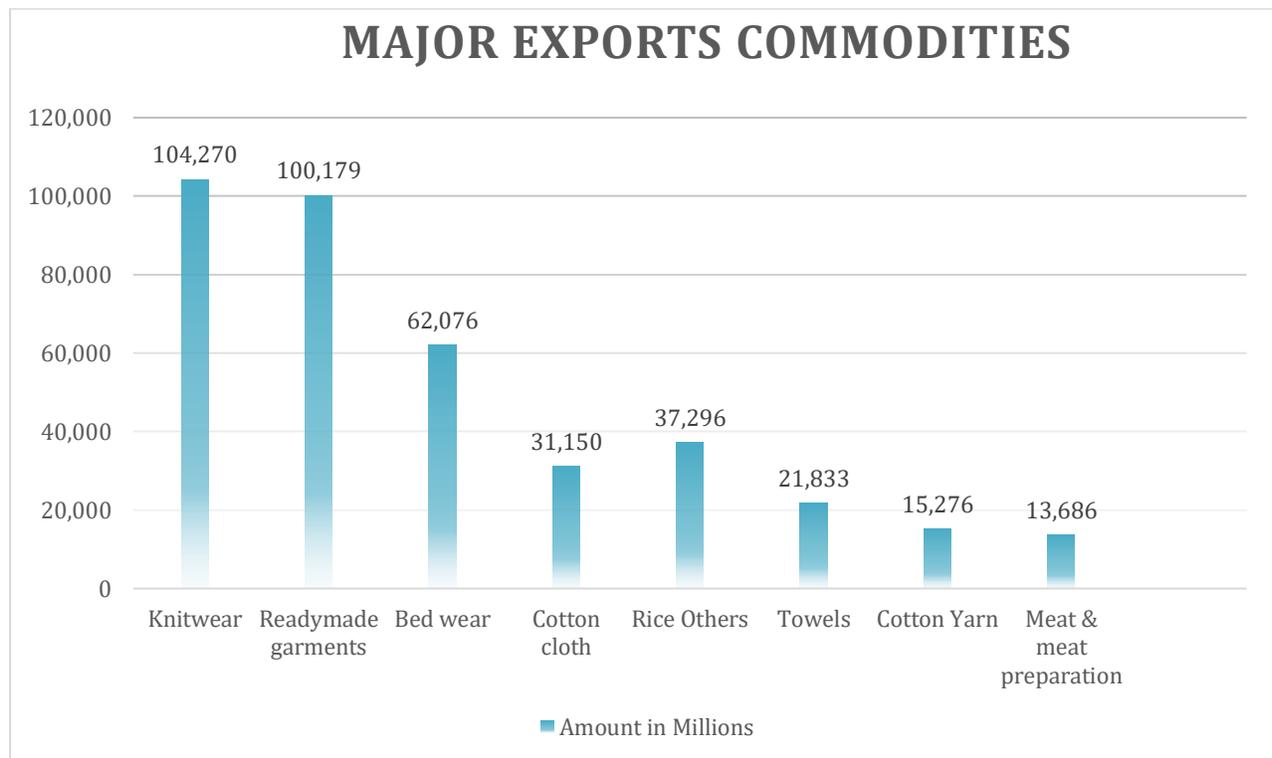
Source: Pakistan Bureau of Statistics.



7. TRADE SITUATION

Exports

According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during December, 2025 amounted to Rs. 635,970 million (provisional) as against Rs. 679,556 million in November, 2025 and Rs. 809,554 million during December, 2024 showing a decrease of 6.41% over November, 2025 and of 21.44% over December, 2024. In terms of US dollars, the exports in December, 2025 totaled \$ 2,269 million (provisional) as compared to \$ 2,420 million in November, 2025 showing a decrease of 6.24% over November, 2025 and of 22.05% as compared to \$ 2,911 million in December, 2024.

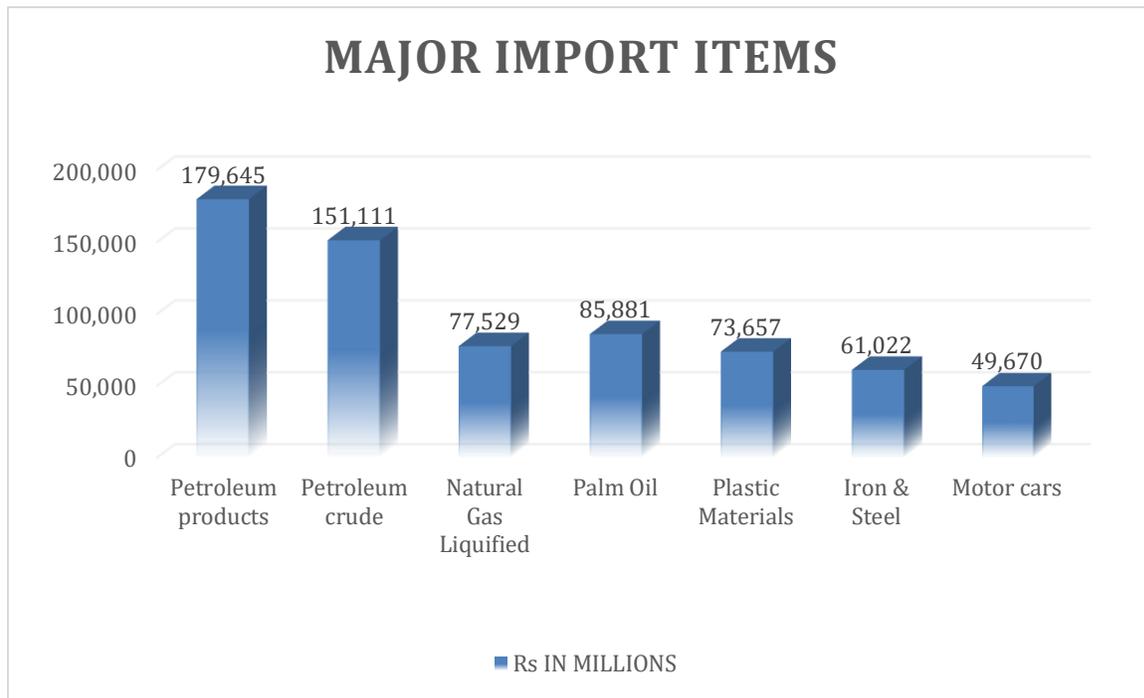


Imports:

Imports into Pakistan during December, 2025 amounted to Rs. 1,714,983 million (provisional) as against Rs. 1,491,677 million in November, 2025 and Rs. 1,642,039 million during December, 2024 showing an increase of 14.97% over November, 2025 and of 4.44%



over December, 2024. In terms of US dollars, the imports in December, 2025 totaled \$ 6,109 million (provisional) as compared to \$ 5,306 million in November, 2025 showing an increase of 15.13% over November, 2025 and of 3.47% as compared to \$ 5,904 million in December, 2024.



Source: Pakistan Bureau of Statistics

8. FERTILIZER OFFTAKE SITUATION

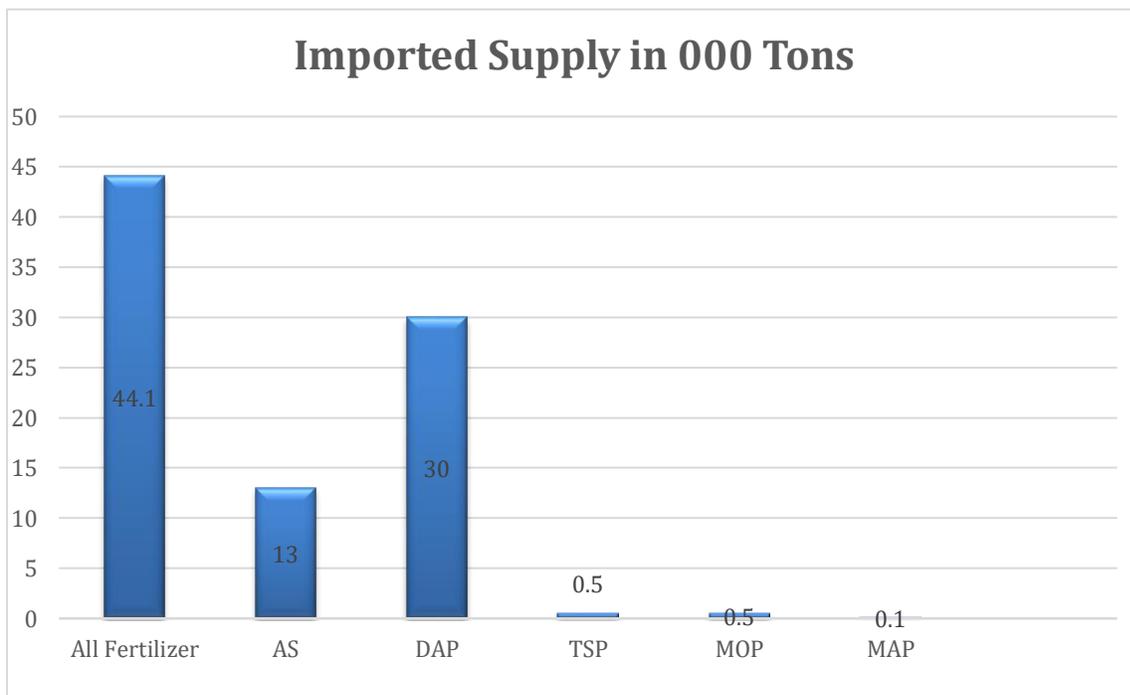
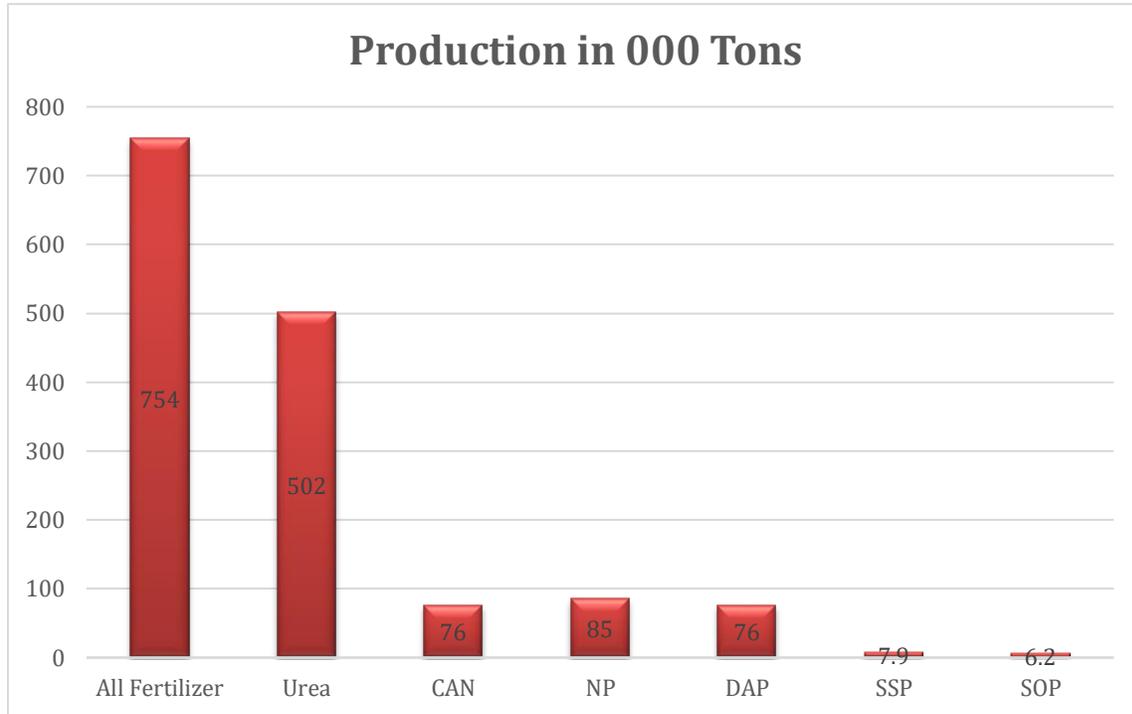
- Total nutrient offtake during December 2025 was 770 thousand tonnes, which increased by 23.2 per cent over December 2024.
- Urea offtake was 1,356 thousand tonnes which increased by 36.8 per cent.
- DAP offtake was 80 thousand tonnes which decreased by 44.6 per cent over November 2024.
- Nitrogen and potash offtake increased by 34 and 29.8 per cent, respectively while phosphate offtake decreased by 41.5 per cent.

Fertilizer Production and Imported Supplies:

Total domestic fertilizer production during December 2025 was 754 thousand tonnes. Urea and DAP production was 502 and 76 thousand tonnes, respectively. Production of other products i.e. NP, CAN, SSP, SOP and NPKs was 85, 76, 7.9, 6.2 and 1.1 thousand tonnes, respectively. Imported



supplies comprised of 30 thousand tonnes of DAP, 13 thousand tonne of AS, 0.5 thousand tonnes of TSP and MOP each and 0.1 thousand tonnes of MAP



Source: *National Fertilizer Development Centre*



9. NEWS TRENDS

Sindh Exceeds Federal Wheat Cultivation Target for 2025-26 Through Farmer Subsidy Support

Sindh has surpassed the federal wheat cultivation target for 2025-26 by achieving 14,95,589 hectares against the assigned 14,16,430 hectares, marking a 5.6% increase. This milestone was largely driven by the provincial wheat growers support Programme aimed at assisting small and medium-scale farmers. Under the initiative, farmers cultivating 1 to 25 acres received Rs 22,000 per acre as subsidy support for DAP and urea fertilizers. The financial assistance reduced input costs and encouraged expansion of wheat acreage despite rising agricultural expenses. As a result, the province strengthened its contribution to food security and demonstrated improved agricultural performance.

Over 91% Wheat Sowing Target Achieved for Rabi 2025-26:

Pakistan has achieved more than 91 percent of its wheat sowing target for Rabi 2025-26, with expected production of 29.678 million tons to meet domestic needs and maintain reserves. Punjab, Sindh and Khyber Pakhtunkhwa have largely met their targets, supported by improved availability of certified seed and fertilizers. Balochistan has lagged due to low rainfall but may recover if January rains occur. The government has assured that sufficient wheat stocks are available to ensure food security and market stability.

Punjab Farmers Granted Export Routes for Kinnow and Potatoes Through CM's Efforts

Owing to Chief Minister Punjab efforts, the federal government has approved alternative export routes for Punjab's kinnow and potatoes. A high-level committee is coordinating with ministries and stakeholders to facilitate exports and explore new international markets. Punjab produces about 95 percent of the country's kinnow and potato output, with projected production of 4 million tonnes of kinnow and 12 million tonnes of potatoes this year. The provincial government is taking practical measures to reduce export costs and maximize foreign exchange earnings while fully supporting farmers' prosperity.

Sources: *Business Recorder*

10. AGRO ADVISORY SERVICES FOR FARMERS

زرعی سفارشات برائے کسان

گندم

- ☆ کپاس، مکئی، کماڈ اور دھان کے بعد کاشت گندم کو دوسرا پانی بوائی کے 80 تا 90 دن بعد لگائیں۔ پچھستی کاشت فصل کو پہلا پانی بوائی کے 25 تا 30 دن بعد لگائیں۔ فصل علاقہ جات میں دوسرا پانی 40 تا 45 دن بعد لگائیں۔
- ☆ گندم کو بقیہ نائٹروجنی کھاد پہلے اور دوسرے پانی کے ساتھ برابر اقساط میں استعمال کریں جبکہ بیٹے علاقوں میں تین برابر اقساط میں ڈالیں کیونکہ ایسی زمینوں میں اس کے ضائع ہونے کا احتمال زیادہ ہوتا ہے۔
- ☆ گندم کی فصل میں چوڑے پتے والے اور نوکیلے پتے والی گھاس نما جڑی بوئیاں آگتی ہیں۔ دوسرے پانی کے بعد نوکیلے پتے والی جڑی بوئیوں کے لئے سہرے کی جائے۔ چوڑے پتے والی جڑی بوئیوں کے کٹرول کے لیے مناسب زہروں کا استعمال کریں۔ دونوں قسم کی جڑی بوئیوں کو ختم کرنے والی زہریں بھی میسر ہیں۔ تقریباً 45 تا 40 دن کی فصل پر کی جاسکتی ہیں۔

کماڈ کی برداشت

- ☆ فصل کی کٹائی کماڈ کی اقسام اور فصل کے پکنے کو مد نظر رکھ کر کریں۔ پہلے سببہر کاشت، مونڈھی اور گیتی پکنے والی اقسام برداشت کریں۔ اس کے بعد درمیانی اور پچھستی پکنے والی اقسام کی برداشت کریں۔ سیلاب زدہ، چوہے سے متاثرہ اور گرمی ہوئی فصل کو پہلے برداشت کریں۔
- ☆ فصل کی کٹائی جاری رکھیں۔ فصل کی کٹائی سطح زمین سے آدھا تا ایک انچ گہرا کریں کیونکہ زیر زمین پڑی آنکھیں زیادہ صحت مند ماحول میں چھوٹی ہیں اور مڈھوں میں موجود گزروں کی سٹہیاں تلف ہو جاتی ہیں۔
- ☆ کٹائی کے بعد گنا جلد از جلد مل کو سپلائی کریں تاکہ وزن اور ریکوری میں کمی نہ آئے۔

سورج کھئی

- ☆ بہاری میرا زمین سورج کھئی کی کاشت کے لیے بہت موزوں ہوتی ہے۔ نیم زدہ، کلراٹھی اور ریتی زمین اس کے لیے موزوں نہیں ہے۔
- ☆ جنوبی اور وسطی پنجاب کے اضلاع میں 31 جنوری تک اور شمالی پنجاب کے اضلاع میں 15 فروری تک کاشت مکمل کریں۔

ترشاہ پھل

- ☆ پیار، سوکھی اور غیر ضروری شاخوں کی کٹت چھانت کریں۔
- ☆ کنو، مسی وغیرہ کی برداشت جاری رکھیں اور برداشت شدہ پودوں کی شاخ تراشی تیز دھار آلات سے کرتے رہیں۔
- ☆ نئے باغات لگانے کے لیے زمین کی تیاری کریں اور گڑھے کھودیں۔

بارانی علاقوں کے لئے پھل دار پودوں کی سفارش کردہ اقسام

- ☆ پت جھڑ پودے
- انگور: سلطانہ، شوگر، ون، ہاری انگور، ون
- آلو: ارنلی گرینڈ، فلوریڈا انگ
- انجیر: بلیک ہال، سری لوپ
- سدا بہار پودے
- ☆ زیتون: ہاری زیتون-1، ہاری زیتون-2، آریستونا، کورگی، سمبلک اور پینڈولینو
- ☆ مالٹا: مسی، سکری، بلڈریڈ، سن جلیسو، سیلستیان، ویلنڈیالیٹ،
- ☆ لیموں: بویس، چانکا اور یوریکا

Source: Zarat Nama, Directorate of Agricultural Information

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