

# AGRICULTURE OUTLOOK

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

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## 1. EXECUTIVE SUMMARY

Harvesting of Rabi crops, picking of seasonal vegetables, fruits and land preparation and sowing of Kharif crops were the major field activities over most of the agricultural plains in the lower half of the country during the month of April 2024. On the other hand, Rabi crops including wheat etc. have been harvested in the central parts and upper parts of the country. The agricultural activities remained slow due to extreme cold conditions in most parts of the Gilgit Baltistan, however, in the lower belt including the Gilgit region, the farmers have been resuming their activities in terms of vegetables and seasonal fruits.

During the month of March 2024, moderate to heavy rainfall events were reported across the country which give some relief to the few drought affected areas of Balochistan and Sindh. During the month of April 2024, overall, a tendency for near normal rainfall is expected in most parts of the country.

As mentioned by Pakistan Bureau of Statistics (PBS), during the month of March 2024 prices of Tomatoes (52.14%), Onions (28.04%), Potatoes (23.65%), Fresh Fruits (21.90%), Fresh Vegetables (12.82%), Meat (3.99%), Pulse Moong (1.95%), Gram Whole (1.92%), Beverages (1.75%), Sweetmeat (1.19%), Nimco (1.13%), Readymade Food (1.08%), Sugar (0.65%), Condiments and Spices (0.60%), Besan (0.60%) and Pulse Masoor (0.54%) were increased over February 2024.

As reported by Pakistan Bureau of Statistics (PBS), Exports during July – March, 2023 - 2024 FY2023-24 totaled Rs. 6,519,178 million (provisional) as against Rs. 4,948,510 million during the corresponding period of last year showing an increase of 31.74%. Imports during July – March, 2023 - 2024 FY2023-24 totaled Rs. 11,389,402 million (provisional) as against Rs. 10,194,382 million during the corresponding period of last year showing an increase of 11.72%.

As published by the National Fertilizer Development Centre (NFDC), total urea availability during March 2024 was 845,000 tons, which comprised 270,000 tons of previous month leftover and 575,000 tons domestic production. Urea offtake during March 2024 was 671,000 tons, leaving a closing balance of 174,000 tons. Total availability of DAP during March 2024 was 185,000 tons, which included 89,000 tons stock of previous month, 20,000 tons of imported supply, and 76,000 tons domestic production. Its offtake was 107,000 tons leaving a closing balance of 78,000 tons.



## 2. CURRENT CROP SITUATION

### i. Wheat Crop

In Rabi season, wheat is the major crop in Punjab. During the month, wheat has been harvested in some areas of the province and land preparation for Kharif crops activities are reported. Also, recent rains and hailing/gusty winds caused damage to seasonal vegetables and wheat at particular areas of Punjab which ultimately delayed the wheat harvesting and land preparation activities for the Kharif crops. In Sindh, wheat crop has been harvested in most parts and good yield has been reported so far. In Khyber Pakhtunkhwa, wheat crop is approaching to harvesting stage in some parts.

### ii. Cotton Crop

Sowing of cotton remained in progress in some parts of Sindh.

### iii. Oilseed Crop

In Sindh, Condition of oil seed crops is reported as satisfactory. Rape mustard has also been harvested in most parts. Safflower and linseed etc have approaching their maturity stages, while sunflower is near vegetative stage. The growth of oil seed crops including newly introduced biofuel crop Jatropha is reported satisfactory in Khyber Pakhtunkhwa.

### iv. Horticulture

- In Punjab, recent rains and hailing/gusty winds caused damage to seasonal vegetables.
- In Sindh, growth and production of seasonal fruits like guava, banana, cheeko and apple stone (Bare) is reported satisfactory. Sowing of seasonal vegetables, rice, and cotton 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, some rain events, hailing/gusty winds caused damage to seasonal vegetable
- In Balochistan, condition of standing crops and orchards is reported satisfactory. Most varieties of apples have completed their maturity stages and picking of the fruit is in progress. Yield of winter vegetables are reported well and these are available in the market.

Source:

*Monthly Bulletin, National Agromet Centre, Pakistan Meteorological Department*

*Directorate of Agricultural information Punjab, Sindh, KP*



### 3. WEATHER SITUATION

#### Rainfall/Precipitation

During this month of March, near normal to slightly above-normal rains were reported from most parts of the country particularly in Central to Northern parts of Khyber Pakhtunkhwa. However, below normal rainfall reported from an isolated location of northwestern Khyber Pakhtunkhwa, central/southeastern Punjab and Lasbella in southeastern Balochistan. A considerable amount of rainfall was reported from most of the upper half of the country particularly Khyber Pakhtunkhwa, Gilgit Baltistan, Kashmir, Potohar region along the northwestern parts of Balochistan. While light rainfall was observed in the rest of the country. Maximum number of rainy days were recorded 09 at Joharabad, Garhi Dopatta, Rawalakot, Dir, Kalam, Mirkhani, Pattan, Quetta (Samungli) each.

Chief Amount of Rainfall Recorded across Pakistan during the Month of March, 2024

Sr. No.	Station	Rainfall(mm)	Sr. No.	Station	Rainfall(mm)
1	Dir	331	11	Risalpur	197
2	Malamjabba	296	12	Kakul	193
3	Muzaffarabad A/P	272	12	Cherat	191
4	Pattan	268	14	Chitral	190
5	Lower Dir	260	15	Peshawar	168
6	Rawalakot	250	16	Mirkhani	161
7	Saidu Sharif	212	17	Takht Bai	159
8	Kalam	211	18	Drosh	158
9	Gari.Dopatta	208	19	Bacha Khan Airport	155
10	Risalpur	197	20	Balakot	149

#### Relative Humidity

The mean Relative Humidity (RH) remained nearly normal to below normal over most parts (Selected locations) of the country particularly the Potohar region, Sargodha, and Faisalabad in Central Punjab, Southern Punjab, and Gilgit Baltistan. The maximum value of mean RH was observed as 58% at Rawalpindi, 57% at Jhelum, 56% at D. I. Khan, 55% at Peshawar and Faisalabad each. None of the station observed mean RH greater than or equal to 80%.



## **Temperature Regime during March, 2024**

Temperature plays a vital role in the growth and development of crops. Thermal regime particularly the nighttime temperatures remained mostly normal to slightly below normal over the most parts of the country particularly eastern/southeastern belt of Balochistan and some parts of eastern Khyber Pakhtunkhwa along the adjoining areas of Gilgit Baltistan and Potohar region. The lowest temperatures were observed over the upper parts including Northern Khyber Pakhtunkhwa, Gilgit Baltistan and Kashmir. The night-time temperature at selected locations remained normal to below normal with the departure of  $-0.8^{\circ}\text{C}$  at Peshawar in Khyber Pakhtunkhwa,  $-1.4^{\circ}\text{C}$  in Potohar region,  $-0.7^{\circ}\text{C}$ , at Lahore in Central Punjab, and  $-1.1^{\circ}\text{C}$  at Tandojam in Sindh. Whereas the rest of Punjab (Selected locations) observed nearly normal temperatures. Moreover, above-normal temperature was observed with a departure of  $1.0^{\circ}\text{C}$  at Quetta Valley and  $3.5^{\circ}\text{C}$  at Skardu in Gilgit Baltistan. Mean monthly temperature (at selected locations) ranged between 18 to  $21^{\circ}\text{C}$  in Khyber Pakhtunkhwa, 17 to  $20^{\circ}\text{C}$  in Potohar plateau, 20 to  $23^{\circ}\text{C}$  in remaining parts of Punjab, 23 to  $24^{\circ}\text{C}$  in agricultural plains of Sindh, 9 to  $13^{\circ}\text{C}$  in Gilgit-Baltistan region and it was observed  $11.4^{\circ}\text{C}$  in the high elevated agricultural plains of Balochistan represented by Quetta valley.

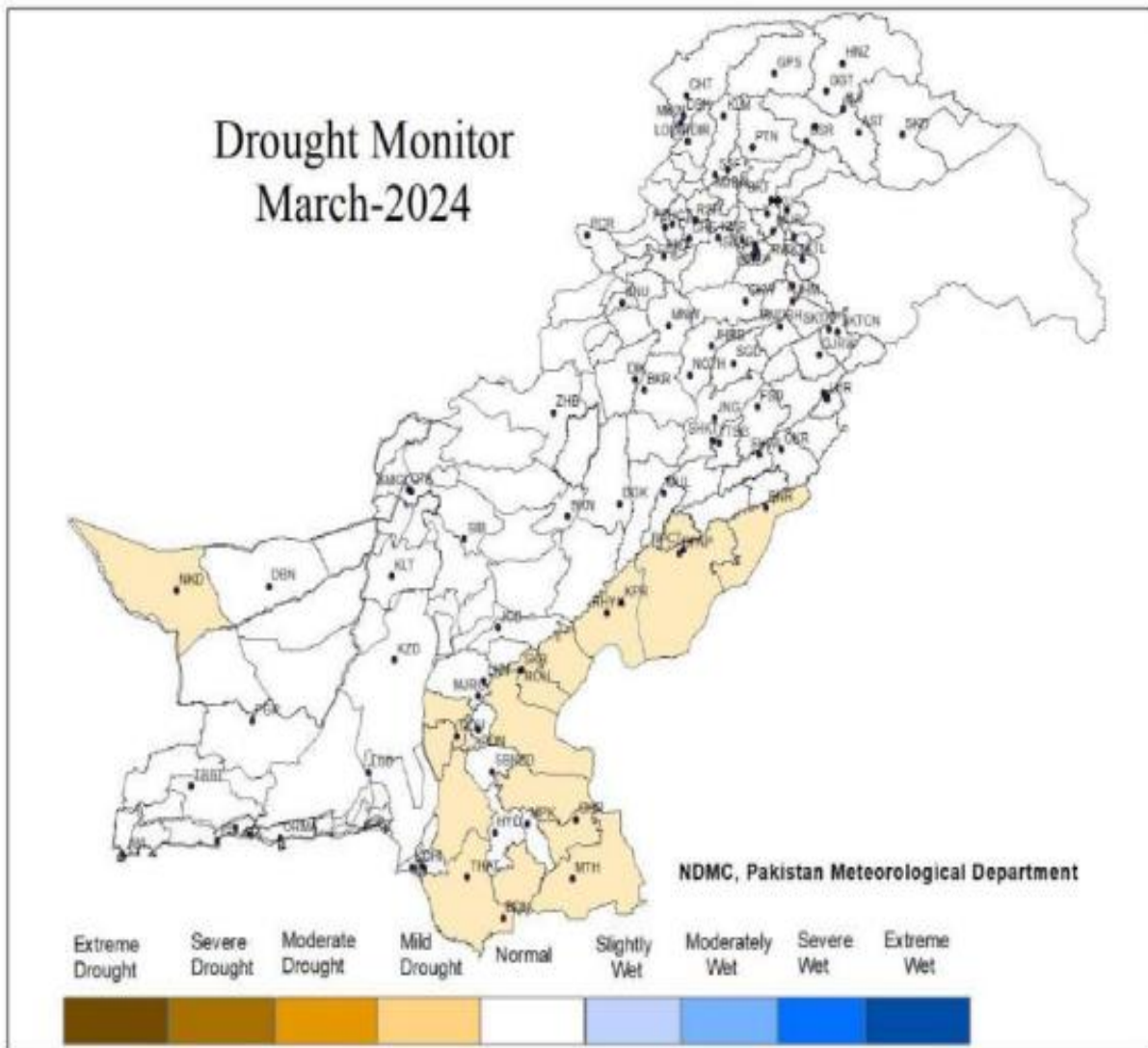
## **Weather Prediction during April 2024**

During April 2024, normal to above normal precipitation is likely over most parts of the country, particularly in Khyber Pakhtunkhwa, Azad Kashmir and Potohar region. During the months of April 2024, slightly above-normal mean temperature is likely over most of the upper parts of the country particularly northern belt of Khyber Pakhtunkhwa, Gilgit-Baltistan and Azad Kashmir. However, nearly normal mean temperatures are expected over the central and lower half of the country.

## **4. DROUGHT SITUATION**

The spatial drought monitor map based on the output results from different drought monitoring indices and Pakistan Meteorological Department ground station data across Pakistan is represented in Figure. 8. Mild Drought conditions may be observed in Nokkundi in Balochistan, some areas of Sindh and Cholistan in Punjab. Keeping in view the weather forecast for the month of April 2024.



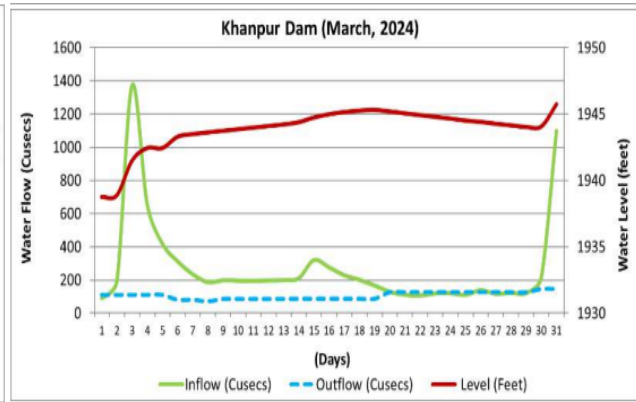
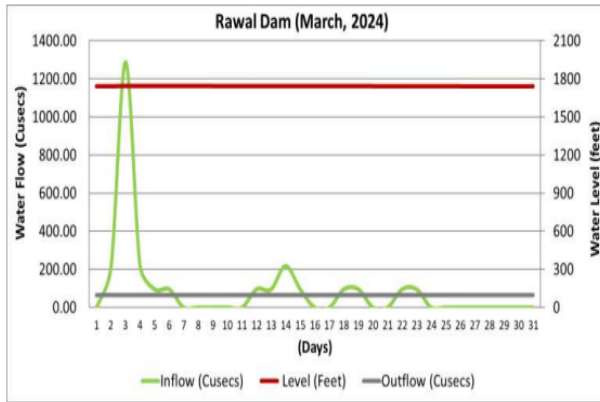


Keeping in view the forecast for April 2024, drought-affected areas of Sindh, Balochistan and southern Punjab may not get enough relief as compared to the previous month.

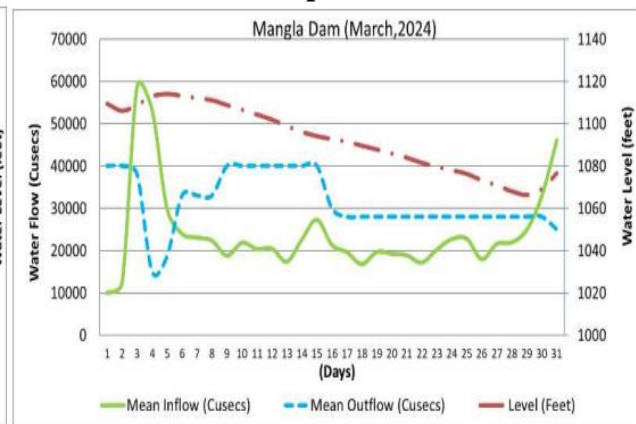
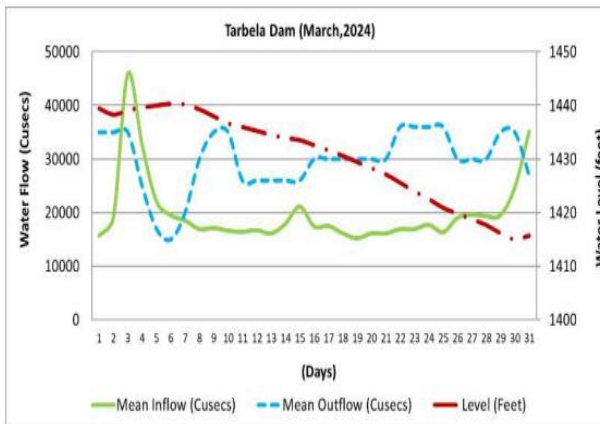
Source: <http://www.ndmc.pmd.gov.pk/>

### 5. WATER AVAILABILITY/DAMS FLOW DATA

The water inflow, outflow and levels of the Rawal, Khanpur, Tarbela and Mangla dams for the month of March 2024 are shown below. The level at Tarbela and Mangla reservoirs has dropped. It has increased at Khanpur reservoir, while no change has been observed at Rawal reservoir.



### Water inflow, outflow and level of Rawal and Khanpur Dams



### Water inflow, outflow and level of Tarbela and Mangla Dams

## 6. AVERAGE PRICES OF AGRI. COMMODITIES

- i. CPI inflation General, increased to 20.7% on year-on-year basis in March 2024 as compared to an increase of 23.1% in the previous month and 35.4% in March 2023. On month-on-month basis, it increased to 1.7% in March 2024 as compared to no change observed in the previous month and an increase of 3.7% in March 2023.
- ii. CPI inflation Urban, increased to 21.9% on year-on-year basis in March 2024 as compared to an increase of 24.9% in the previous month and 33.0% in March 2023. On month-on-month basis, it increased to 1.4% in March 2024 as compared to an increase of 0.2% in the previous month and an increase of 3.9% in March 2023.
- iii. CPI inflation Rural, increased to 19.0% on year-on-year basis in March 2024 as compared to an increase of 20.5% in the previous month and 38.9% in March 2023. On month-on-month basis, it increased to 2.1% in March 2024 as compared to a decrease of 0.3% in the previous month and an increase of 3.5% in March 2023.





Detail are given below in table:

S. No.	Description	Unit	Average Prices			%change Mar 24 over	
			Mar 24	Feb 24	Mar 23	Feb 24	Mar 23
1	Wheat Flour Bag	20 Kg	2726.53	2800.77	2064.43	-2.65	32.07
2	Rice Basmati Broken (Average Qualit	1 Kg	224.23	224.33	184.51	-0.04	21.53
3	Rice IRRI-6/9 (Sindh/Punjab)	1 Kg	170.02	169.51	135.21	0.30	25.75
4	Bread plain (Small Size)	Each	114.79	115.71	101.11	-0.80	13.53
5	Beef with Bone (Average Quality)	1 Kg	878.08	847.68	710.40	3.59	23.60
6	Mutton (Average Quality)	1 Kg	1802.71	1754.01	1489.14	2.78	21.06
7	Chicken Farm Broiler (Live)	1 Kg	432.18	459.42	395.45	-5.93	9.29
8	Milk fresh (Un-boiled)	1 Ltr	185.55	185.51	159.55	0.02	16.30
9	Curd (Dahi) Loose	1 Kg	217.50	216.40	185.21	0.51	17.43
10	Powdered Milk NIDO 390 gm Polyba	Each	824.06	823.47	681.70	0.07	20.88
11	Eggs Hen (Farm)	1 dozen	272.83	306.68	245.10	-11.04	11.31
12	Mustard Oil (Average Quality)	1 Kg	501.09	500.03	589.72	0.21	-15.03
13	Cooking Oil DALDA or Other Similar	Each	2652.88	2727.71	3313.57	-2.74	-19.94
14	Vegetable Ghee DALDA/HABIB 2.5 k	Each	1289.52	1305.17	1549.22	-1.20	-16.76
15	Vegetable Ghee DALDA/HABIB or Ot	Each	497.90	500.53	614.95	-0.53	-19.03
16	Bananas (Kela) Local	1 dozen	177.87	129.63	200.92	37.21	-11.47
17	Pulse Masoor (Washed)	1 Kg	333.59	336.83	279.90	-0.96	19.18
18	Pulse Moong (Washed)	1 Kg	311.92	309.41	282.91	0.81	10.25
19	Pulse Mash (Washed)	1 Kg	540.03	547.13	419.23	-1.30	28.81
20	Pulse Gram	1 Kg	259.56	260.39	255.62	-0.32	1.54
21	Potatoes	1 Kg	68.35	55.27	52.48	23.67	30.24
22	Onions	1 Kg	221.59	193.82	134.16	14.33	65.17
23	Tomatoes	1 Kg	122.11	114.53	64.76	6.62	88.56
24	Sugar Refined	1 Kg	144.36	145.03	104.21	-0.46	38.53
25	Gur (Average Quality)	1 Kg	206.06	209.28	145.55	-1.54	41.57
26	Salt Powdered (NATIONAL/SHAN) 80	Each	69.23	69.23	51.05	0.00	35.61
27	Chilies Powder NATIONAL 200 gm Pa	Each	400.00	400.00	218.04	0.00	83.45
28	Garlic (Lehsun)	1 Kg	598.91	594.60	394.95	0.72	51.64
29	Tea Lipton Yellow Label 190 gm Pack	Each	544.71	551.28	464.81	-1.19	17.19

Increase in Prices



Decrease in price

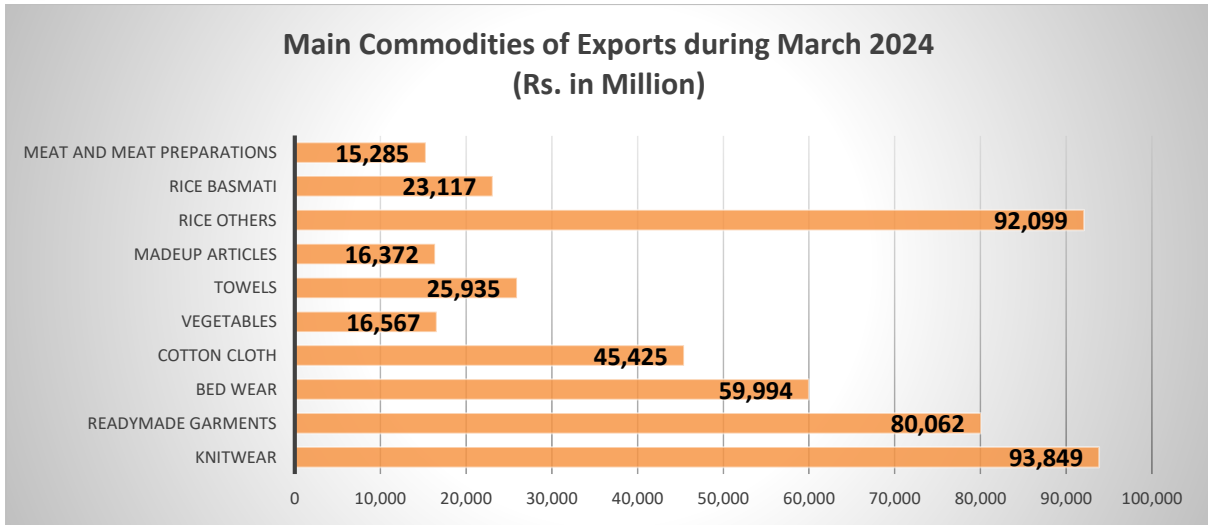


Source: Pakistan Bureau of Statistics.

## 7. TRADE SITUATION

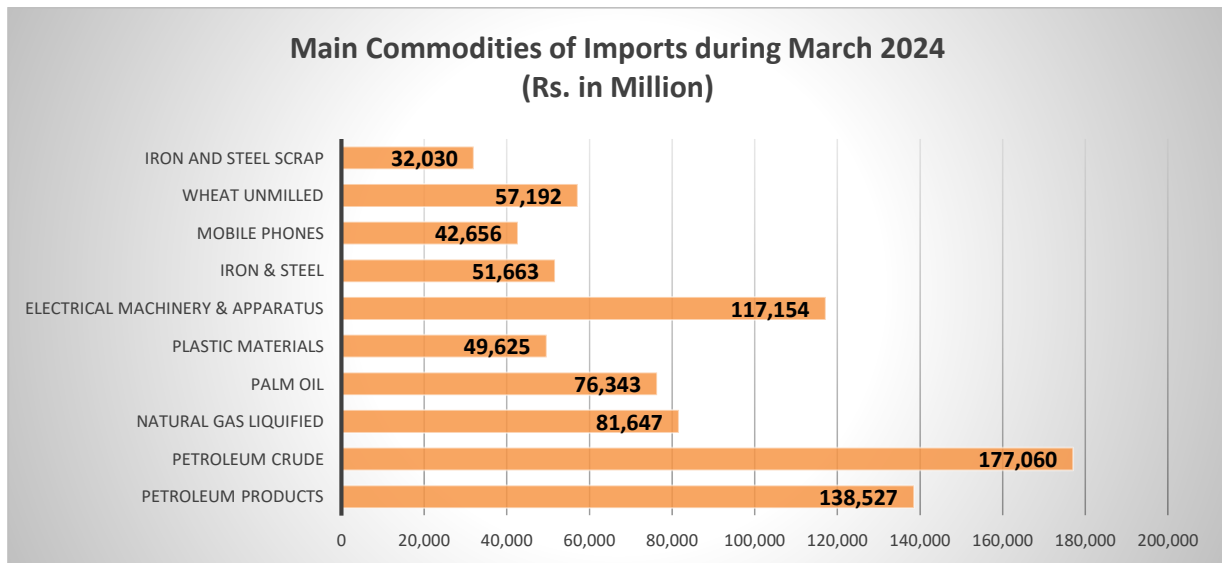
### Exports

- i. According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during March, 2024 amounted to Rs.716.711 million (provisional) as against Rs. 721,064 million in February, 2024 and Rs. 663,128 million during March, 2023 showing a decrease of 0.60% over February, 2024 but increased by 8.08% over March, 2023.
- ii. In terms of US dollars the exports in March, 2024 were \$ 2,572 million (provisional) as compared to \$ 2,582 million in February, 2024 showing a decrease of 0.39% over February, 2024 but increased by 8.71% as compared to \$ 2,366 million in March, 2023.



## Imports

- i. Imports into Pakistan during March, 2024 amounted to Rs. 1,358,072 million (provisional) as against Rs. 1,202,117 million in February, 2024 and Rs. 1,052,285 million during March, 2023 showing an increase of 12.97% over February, 2024 and increased by 29.06% over March, 2023.
- ii. In terms of US dollars the imports in March, 2024 were \$ 4,873 million (provisional) as compared to \$ 4,306 million in February, 2024 showing an increase of 13.17% over February, 2024 and increased by 29.77% as compared to \$ 3,755 million in March, 2023.



Source: Pakistan Bureau of Statistics

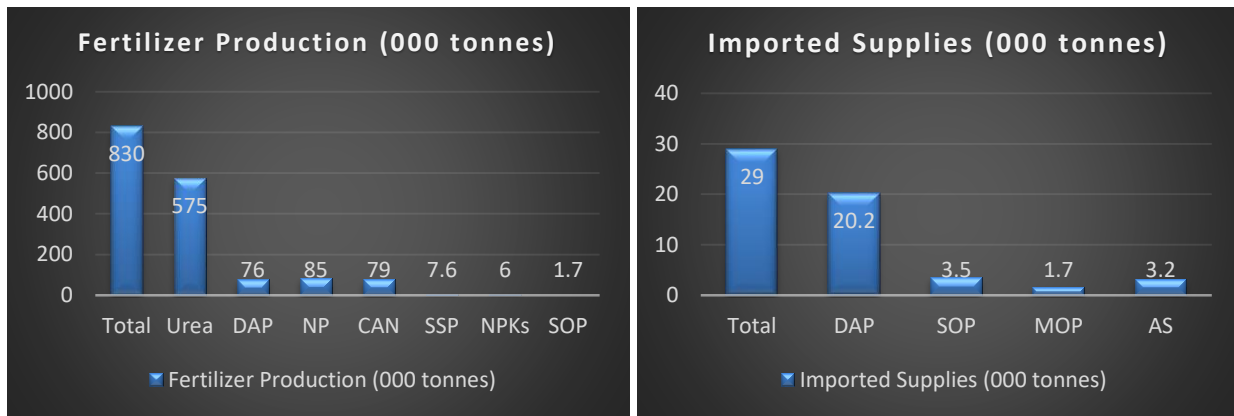


## 8. FERTILIZER OFFTAKE SITUATION

- Total nutrient offtake during March 2024 was 436 thousand tonnes, reflecting an increase of 44.9 per cent over March 2023.
- In nutrient terms, nitrogen and phosphate offtake increased by 40.5 and 84.4 per cent, respectively while potash offtake decreased by 9.2 per cent over March 2023.
- Urea offtake during March 2024 was 671 thousand tonnes, which increased by 37.1 per cent over March 2023.
- DAP offtake was 107 thousand tonnes, 108 percent more than March last year.

### Fertilizer Production and Imported Supplies

Total domestic fertilizer production during March 2024 was 830 thousand tonnes. Urea and DAP production was 575 and 76 thousand tonnes, respectively. Production of other products i.e. NP, CAN, SSP, NPKs and SOP was 85, 79, 7.6, 6 and 1.7 thousand tonnes, respectively. Total imported supplies were 29 thousand tonnes comprising 20.2, 3.5, 3.2 and 1.7 thousand tonnes of DAP, SOP, AS and MOP, respectively.



Source: National Fertilizer Development Centre

## 9. NEWS TRENDS

- During a recent meeting chaired by the Chief Minister of Punjab, several significant decisions were made to bolster agricultural reforms in the province. A notable initiative approved during the session was the launch of the "Muhammad Nawaz Sharif Kissan Card" project, aimed at providing subsidized farm inputs to farmers. Under this project, agricultural loans worth Rs 150 billion will be allocated to 0.5 million small farmers, with each farmer receiving Rs 30,000 per acre for the purchase of quality seeds, fertilizers, and pesticides. Additionally, the establishment of Model Agriculture Centers (MAC) in collaboration with the private sector



was endorsed, with plans to set up one center in each district initially. These centers will offer modern machinery, training facilities, and demonstration plots to enhance agricultural productivity. Other key decisions included compiling comprehensive data on crop production and demand, setting up state-of-the-art research centers for cotton, wheat, and rice crops, and introducing amendments to legislation to prevent the sale of counterfeit agricultural products. Furthermore, plans were made to restructure agricultural institutions, enact legislation to protect agricultural land from residential use, and modernize the Agricultural Extension Wing. The meeting was attended by senior provincial ministers, the information minister, agriculture minister, former senators, chief secretary, secretaries of agriculture and finance, president of the Bank of Punjab, and other senior officers concerned.

- Pakistan has sought a transfer of agricultural technology from the Netherlands, as the economy seeks to boost its agriculture sector and exports. The development was part of the meeting between Henny de Vries, Ambassador of the Kingdom of the Netherlands to Pakistan, and Muhammad Aurangzeb, Minister for Finance and Revenue, to discuss matters of mutual interest and strengthen the existing ties between Pakistan and the Netherlands. As per a statement released by the Finance Division, Mr. Aurangzeb warmly welcomed the Ambassador and expressed appreciation for the longstanding friendship and cooperation between Pakistan and the Netherlands. He highlighted the importance of the bilateral relationship, rooted in shared values and a history of collaboration. The discussion also touched upon the structural reforms being implemented by the government of Pakistan for promoting economic growth and ensuring fiscal sustainability. Mr. Aurangzeb highlighted that Pakistan is interested in technology transfer and leveraging the expertise of Netherlands in agriculture, dairy, and farm production that would lead to increased production and exports, contributing significantly to Pakistan's economy. Earlier, the World Bank, in its latest report, noted that amid a recovery from the 2022 floods in FY23, agricultural output is expected to grow rapidly by 3% in FY24, largely supported by a higher estimated output of major crops, particularly of cotton and rice. According to the World Bank, the agriculture sector is expected to grow at an average rate of 2.5% over FY25–26. Ambassador de Vries reciprocated the sentiment, emphasizing the Netherlands' commitment to furthering cooperation with Pakistan across various sectors. She also appreciated the government's efforts being taken towards reforms in major economic and financial sectors of the economy. The envoy also informed about the pilot projects being run by the Netherlands in Pakistan, including fish production,



ensuring labor safety and environmental standards in textile industries, and projects on water management in agriculture.

- The World Bank has projected Pakistan’s GDP growth at 1.8 percent against the budgetary estimates of 3.5 percent for the ongoing fiscal year while seeing no reduction in poverty over the medium term owing to weak growth and persistently high inflation. The bank in its latest report, “Pakistan Development Update: Fiscal Impact of Federal State-Owned Enterprises”, stated Pakistan’s economy has been stabilizing and is showing early signs of a recovery, however, the current recovery is neither sustainable nor sufficient to reduce poverty. The bank stated that in the absence of an ambitious and credible economic reform plan, confidence and investment are likely to remain muted, with real GDP projected to grow at 1.8 per cent in fiscal year 2024.

**Sources:** *Business Recorder*

## زرعی سفارشات برائے کسان

### گندم

☆ ان دنوں گندم کی فصل آخری مراحل میں داخل ہو چکی ہے۔ لہذا فصل کی بروقت سنبھال کے لئے کٹائی و گہائی سے پہلے لیبر و تقریباً 10-15 ٹریکٹر تھرپال یا پلاسٹک چادروں کو کھانسن ہارویٹر کا انتظام کر لیں۔

☆ کٹائی کے بعد پھریاں قدرے چھوٹی باندھیں اور سٹوں کا رخ ایک ہی طرف اور کھلوٹے چھوٹے رکھیں۔ اور اونچے کھیتوں میں کھلیاں لگائیں۔

☆ اگلے سال کے فصل کیلئے بھیج موجودہ فصل کی برداشت سے کر لیں۔ برداشت سے پہلے جڑی بوٹیاں مثلاً کانگیاہاری اور غیر اقسام کے پودے نکال کر صاف کر لیں۔

### کپاس

☆ کاشت کیلئے سفارش کردہ اقسام کا تندرست، خالص اور اچھے اگاؤ والا 8 کلوگرام فی ایکڑ سفارش کردہ پھوندی کش زہر لگا کر استعمال کریں۔

☆ کپاس کی کاشت ترجیحاً پٹوں پر کرے۔ مشینی طریقہ اختیار کرے۔ اگر کاشت بذریعہ ڈرل کرنی ہو تو قطاروں کا درمیانی فاصلہ 1.5 میٹر رکھیں اور جب فصل کا قد 1.5 میٹر سے دو ٹھ ہو جائے تو پودوں کی لائن چھوڑ کر دوسری لائن پر مٹی چڑھا کر پٹوں بنادیں۔

☆ ڈرل سے کاشت کیلئے پہلی آبپاشی پوائی کے 30 سے 35 دن بعد اور بقیہ 12 سے 15 دن کے وقفے سے کریں جبکہ پٹوں پر کاشت کیلئے پوائی کے بعد پہلا پانی 3 سے 4 دن بعد دوسرا، تیسرا اور چوتھا پانی 6 سے 9 دن کے وقفے سے اور بقیہ پانی 12 دن سے ضرورت کے مطابق لگائیں۔

### بھاریہ کیٹی اور کماڈ

☆ فصل کو حسب ضرورت مناسب وقفے سے پاشی کریں۔ پورے پانی کی کمی نہ کریں اور پورے پانی پر کھیت کو ہمیشہ تروت کی حالت میں رکھیں تاکہ دانہ بننے میں مدد ملے لیکن پانی کھڑا نہ ہونا چاہیے۔

☆ بھاریہ کماڈ کی کاشت کی صورت میں نائٹروجنی کھاد کی پہلی قسط اپریل میں ڈالیں اور کھاد ڈالنے کے بعد آبپاشی کریں۔

### سبزیاں و باغات

☆ موسمی سبزیوں کی کاشت مارچ کے مہینے میں مکمل نہ ہو سکی ہو تو اپریل کے مہینے میں جھنڈی، توری ٹینڈا، ہلدی اور کرلی کی کاشت جاری رکھیں۔

☆ زمری کے ذریعہ لگائی جانے والی سبزیات جامی یا مکمل چھوٹی ٹٹل بنا کر کاشت کریں تاکہ چھوٹے پودوں کو پرندوں، کیڑوں اور بیماریوں سے محفوظ رکھا جاسکے۔

☆ تراشواہ پھلوں کے پودوں میں نائٹروجنی کھاد کی دوسری قسط ڈالیں۔ نائٹروجنی کھاد ڈالنے کے لئے 10 سال سے زائد عمر والے پودوں کے لئے یوریا بحساب 1 کلوگرام یا امونیم سلفیٹ 25 کلوگرام یا امونیم نائٹریٹ 2 کلوگرام فی پودا ڈالیں۔

☆ حالیہ بارشوں کی وجہ سے باغات میں جڑی بوٹیوں کی بھرمار ہے۔ لہذا جڑی بوٹیوں کے تدارک کے لئے ہل چلائیں جھکڑ زراعت کے مقامی ماہرین کے مشورہ سے سفارش کردہ جڑی بوٹی مارزہروں کا سپرے کریں۔

☆ امرود کے باغ میں نائٹروجنی کھاد کی دوسری قسط ڈالنے کے لئے 10 سال سے زائد پودوں کو یوریا بحساب 2 کلوگرام یا امونیم سلفیٹ بحساب 4.5 کلوگرام یا امونیم نائٹریٹ بحساب 3.5 کلوگرام فی پودا ڈالیں۔

Source: Zarat Nama, Directorate of Agricultural Information

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