

AGRICULTURE OUTLOOK

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

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1. EXECUTIVE SUMMARY

The current crop situation in Pakistan varies by region and crop type. In the Potohar region of Punjab, 70% of the wheat crop is satisfactory, though high temperatures and lack of rainfall have caused early maturity, with some rust attacks reported. Cotton land preparation has begun in Punjab and Sindh, with early sowing already underway in some areas. The sugarcane crop is in good condition, with harvesting ongoing in Punjab, Sindh, and KP, unaffected by rising temperatures. Land preparation for spring sunflower has started, while canola and sarsoon are at the flowering stage in Punjab and ripening in KP.

During the month of January 2025, light to moderate rainfall was received across Khyber Pakhtunkhwa (KP), northeast Punjab, northwest Baluchistan, Kashmir and Gilgit Baltistan (GB). During the month of January 2025, mean monthly temperatures were recorded 1°C to 2°C above-normal across the country except Gilgit where temperature was recorded below normal. Overall, a slight tendency for slightly below-normal rainfall is anticipated in Northern KP, Northern Punjab, and Kashmir during February 2025. During February mean temperatures are expected to remain above normal nationwide.

As mentioned by Pakistan Bureau of Statistics (PBS), during the month of January 2025 prices of Chicken (35.26%), Pulse Moong (5.43%), Fresh Fruits (5.01%), Cooking Oil (3.92%), Sugar (3.90%), Vegetable Ghee (2.61%), Butter (1.32%), Milk Fresh (0.98%), Readymade Food (0.64%), Beans (0.63%), Fish (0.62%), Meat (0.29%), Wheat Flour (0.24%) and Rice (0.22%) were increased over December 2024.

As reported by Pakistan Bureau of Statistics (PBS), exports during July – January, 2024 - 2025 totaled Rs. 5,448,181 million (provisional) as against Rs.5,081,403 million during the corresponding period of last year showing an increase of 7.22%. Imports during July – January, 2024 - 2025 totaled Rs. 9,202,815 million (provisional) as against Rs. 8,829,214 million during the corresponding period of last year showing an increase of 4.23%.

As published by the National Fertilizer Development Centre (NFDC), total nutrient offtake during January 2025 was 290 thousand tonnes. Total domestic fertilizer production during January 2025 was 748 thousand tonnes. Total imported supplies were 74 thousand tonnes.



2. CURRENT CROP SITUATION

2.1 *Wheat Crop*

In the Potohar region of Punjab province, 70% of the wheat crop is reported to be in satisfactory condition. However, a rise in temperature and lack of rainfall have caused the crop to transition directly from the vegetative stage to the fruiting stage, bypassing crucial growth phases such as early maturity and spike formation. Additionally, rust attacks on wheat crops have been observed in some districts of Punjab. Farmers are advised to perform light irrigation and apply nitrogen fertilizer along with micronutrients.

2.2 *Cotton Crop*

In Punjab and Sindh provinces, cotton fallow lands are being prepared for early cotton sowing. Early cotton has already been planted in some districts of both provinces. Farmers are advised to use certified seeds for better yield and crop protection.

2.3 *Sugarcane Crop*

In Punjab province, the condition of the sugarcane crop is reported to be satisfactory, and harvesting is currently underway. In Sindh province, a good crop has been reported, and harvesting is also in progress. In Khyber Pakhtunkhwa (KP), harvesting is ongoing, and the crop condition remains satisfactory. No negative impact of rising temperatures has been reported on the sugarcane crop.

2.4 *Oilseeds and Lentils*

- Land preparation for the spring sunflower crop has begun in Punjab and Sindh.
- Canola and sarsoon (mustard) are at the flowering stage in Punjab.
- In KP, canola is at the ripening stage.
- In Punjab, the growth of pulses is reported to be satisfactory, though some impact due to moisture stress has been observed in rainfed areas. In Sindh, pulses are also growing satisfactorily.
- The sesame and gram crops in Punjab are reported to be in satisfactory condition.



2.5 Horticulture

- In KP, the sowing of winter vegetables is in progress, and the general condition of vegetables is satisfactory across most parts of the province. The condition of orchards, including oranges, is also satisfactory.
- In Punjab, the growth of winter vegetables is progressing; however, moisture stress is affecting crops in rainfed areas.
- In Sindh, the growth of seasonal vegetables, including spinach, tomatoes, chilies, and onions, is reported to be satisfactory.
- In Balochistan, seasonal orchards are reported to be in good condition.
- In Gilgit-Baltistan (GB), the potato crop is growing well.

Source:

- *Monthly Bulletin, National Agromet Centre, Pakistan Meteorological Department*
- *Directorate of Agricultural information Punjab, Sindh, KP*
- *Department of Agricultural Extension Balochistan*
- *Agriculture Bulletins, Pakistan Metrological Department*

2. WEATHER SITUATION

Rainfall/Precipitation

During the month of January 2025, light to moderate rainfall was received across Khyber Pakhtunkhwa (KP), northeast Punjab, northwest Baluchistan, Kashmir and Gilgit Baltistan (GB). Chief amounts of rainfall were recorded across upper KP. Below normal rainfall was recorded across the country except Chitral, Gupis and Dalbandin. During January, southern Sindh and Baluchistan experienced the mean maximum temperature up to 18°C.

Chief amount of rainfall recorded across Pakistan during the month of January, 2025					
Sr.#	Station	Rainfall(mm)	Sr.#	Station	Rainfall(mm)
1	Chitral	146.9	11	Kalat	26.0
2	Mirkhani	98.5	12	Balakot	25.0
3	Dir	92.5	13	Kakul	25.0
4	Kalam	88.8	14	G.Dopatta	20.7
5	Drosh	85.6	15	Narowal	18.9
6	Pattan	58.0	16	Quetta (Sh Manda)	18.8



7	Malamjabba	42.3	17	Gupis	16.2
8	Dalbandin	42.0	18	Saidu Sharif	13.9
9	Astore	39.5	19	Jiwani	13.0
10	Muzaffarabad Airport	26.7	20	Bagrote	12.2

Relative Humidity

The mean daily Relative Humidity (RH) remained below normal over most parts (Selected locations) of the country particularly in lower Khyber Pakhtunkhwa and Central Punjab. Maximum value of mean RH observed as 61% at Lahore, Faisalabad, Khanpur and 56% at D.I Khan. Maximum number of days with mean RH greater than or equal to 80% observed at Lahore for 07 days.

Temperature Regime during January, 2025

Temperature plays a vital role in the growth and development of crops. Thermal regime particularly the night time temperatures remained normal to above normal in most parts of the country mainly the northwest Baluchistan, Khyber Pakhtunkhwa, Punjab and Sindh. However, below normal temperatures were observed over some south/western parts of Baluchistan. The lowest temperatures were observed over the northeastern parts of the country including Gilgit Baltistan and Kashmir. The night time temperature remained above normal (at selected locations) with maximum departure of 3.8°C in Parachinar (Khyber Pakhtunkhwa), 2.3°C in Turbat (Balochistan), 0.9°C in Shaheed Benazirabad (Sindh), 1.4°C in Murree (Punjab), 2.1°C in Skardu (Gilgit Baltistan). Mean monthly temperature (at selected locations) ranged between 13 to 15°C in Khyber Pakhtunkhwa, 12 to 13°C in Potohar plateau, 13 to 15°C in remaining parts of Punjab, 15 to 16°C in agricultural plains of Sindh, -01 to 05°C in Gilgit-Baltistan region and it was observed 6.2°C in the high elevated agricultural plains of Baluchistan represented by Quetta valley.

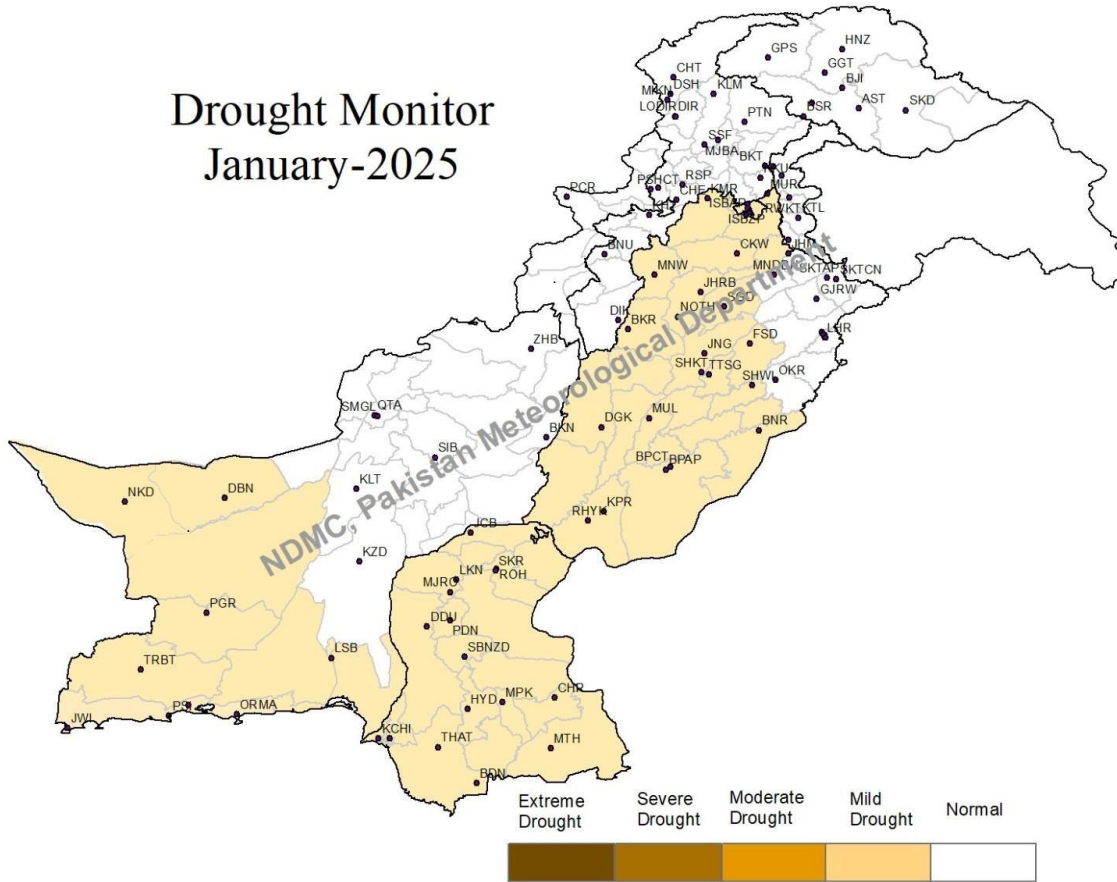
Weather Prediction for February 2025

During February 2025, below normal precipitation is likely over most parts of the country particularly Potohar region, northeast Punjab and upper Khyber Pakhtunkhwa. Central and western regions also have slightly below normal rainfall expected. Near to normal rainfall is expected in South Punjab and Sindh. In February 2025, above normal mean temperatures are expected in most parts of the country, particularly in the northern areas. The central and western regions are predicted to experience slightly above normal, while southern Punjab is likely to remain normal mean temperatures.



3. DROUGHT SITUATION

Based on different drought monitoring indices and ground station data observed by the Pakistan Meteorological Department Network across the country, the spatial drought monitor map is represented below:



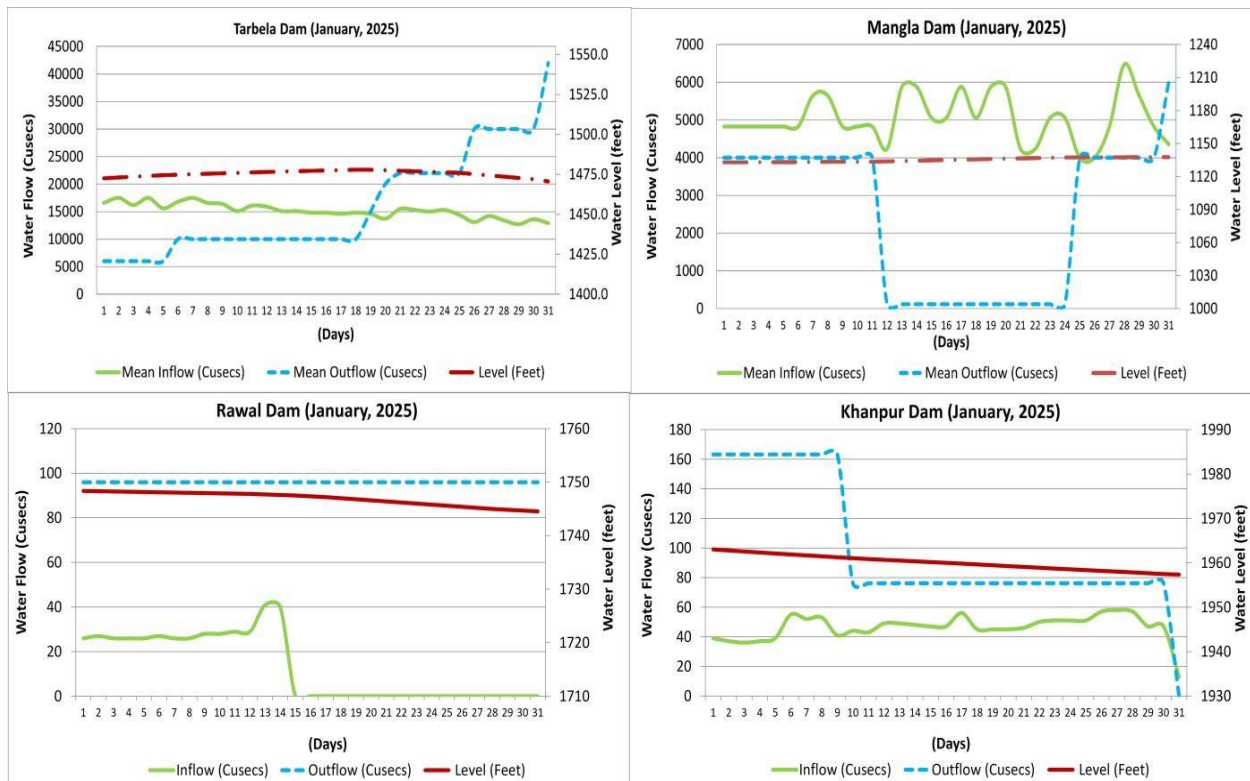
Keeping in view the forecast for February 2025, slightly below normal rainfall is expected which will further decrease the soil moisture in the drought prone areas (western Balochistan, Thal desert of Sindh and Thal desert, Potohar region) of the country. Mild drought like conditions have developed in Sindh, Punjab and western Baluchistan, which may deepen due to deficient rainfall.

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

4. WATER AVAILABILITY/DAMS FLOW DATA



During the month of January 2025, water inflow, outflow and levels of the Rawal, Khanpur, Tarbela, and Mangla dams are shown below. The water level at Mangla, Tarbela, Rawal and Khanpur reservoirs has started to decrease due to less amount of rainfall received during the month and excess amount of released water due to prolonged dry spell.



Water inflow, outflow and level of Rawal, Khanpur, Tarbela and Mangla Dams

5. AVERAGE PRICES OF AGRI. COMMODITIES

- i. CPI inflation General, decreased to 2.4% on year-on-year basis in January 2025 as compared to 4.1% in the previous month and 28.3% in January 2024. On month-on-month basis, it increased by 0.2% in January 2025 as compared to 0.1% in the previous month and an increase of 1.8% in January 2024.
- ii. CPI inflation Urban, decreased to 2.7% on year-on-year basis in January 2025 as compared to 4.4% in the previous month and 30.2% in January 2024. On month-on-month basis, it increased to 0.2% in January 2025 as compared to a negative change of 0.1% in the previous month and an increase of 1.8% in January 2024.
- iii. CPI inflation Rural, decreased to 1.9% on year-on-year basis in January 2025 as compared to



3.6% in the previous month and 25.7% in January 2024. On month-on-month basis, it increased by 0.2% in January 2025 as compared to 0.3% in the previous month and an increase of 1.9% in January 2024.

Details are given below in table:

S. No.	Description	Unit	Average Prices			%change Jan 25 over	
			Jan25	Dec 24	Jan 24	Dec 24	Jan 24
1	Wheat Flour Bag	20 Kg	1792.62	1806.35	2812.28	-0.76	-36.26
2	Rice Basmati Broken (Average Qualit	1 Kg	203.87	203.90	222.89	-0.01	-8.53
3	Rice IRRI-6/9 (Sindh/Punjab)	1 Kg	158.66	159.95	167.66	-0.81	-5.37
4	Bread plain (Small Size)	Each	109.32	108.84	115.79	0.44	-5.59
5	Beef with Bone (Average Quality)	1 Kg	1030.14	1022.15	835.65	0.78	23.27
6	Mutton (Average Quality)	1 Kg	1965.46	1960.51	1731.66	0.25	13.50
7	Chicken Farm Broiler (Live)	1 Kg	447.27	348.37	437.65	28.39	2.20
8	Milk fresh (Un-boiled)	1 Ltr	197.75	197.04	185.33	0.36	6.70
9	Curd (Dahi) Loose	1 Kg	231.06	231.06	215.53	0.00	7.21
10	Powdered Milk NIDO 390 gm Polyba	Each	1035.92	1034.92	823.87	0.10	25.74
11	Eggs Hen (Farm)	1 dozen	287.58	344.53	416.69	-16.53	-30.98
12	Mustard Oil (Average Quality)	1 Kg	572.15	566.63	503.18	0.97	13.71
13	Cooking Oil DALDA or Other Similar	Each	2900.60	2805.73	2755.81	3.38	5.25
14	Vegetable Ghee DALDA/HABIB 2.5 k	Each	1489.96	1440.21	1311.13	3.45	13.64
15	Vegetable Ghee DALDA/HABIB or Ot	Each	582.60	568.08	502.79	2.56	15.87
16	Bananas (Kela) Local	1 dozen	125.67	119.42	119.85	5.23	4.86
17	Pulse Masoor (Washed)	1 Kg	301.03	300.18	339.50	0.28	-11.33
18	Pulse Moong (Washed)	1 Kg	402.44	387.27	302.54	3.92	33.02
19	Pulse Mash (Washed)	1 Kg	494.66	506.52	539.94	-2.34	-8.39
20	Pulse Gram	1 Kg	361.46	378.97	257.78	-4.62	40.22
21	Potatoes	1 Kg	87.40	116.85	59.24	-25.20	47.54
22	Onions	1 Kg	118.07	141.85	214.14	-16.76	-44.86
23	Tomatoes	1 Kg	119.02	178.45	138.21	-33.30	-13.88
24	Sugar Refined	1 Kg	143.19	134.84	145.46	6.19	-1.56
25	Gur (Average Quality)	1 Kg	209.41	207.28	207.62	1.03	0.86
26	Salt Powdered (NATIONAL/SHAN) 80	Each	71.46	71.47	68.85	-0.01	3.79
27	Chilies Powder NATIONAL 200 gm Pa	Each	320.00	320.00	400.00	0.00	-20.00
28	Garlic (Lehsun)	1 Kg	688.18	686.75	588.63	0.21	16.91

Increase in Prices



Decrease in price



Source: Pakistan Bureau of Statistics.

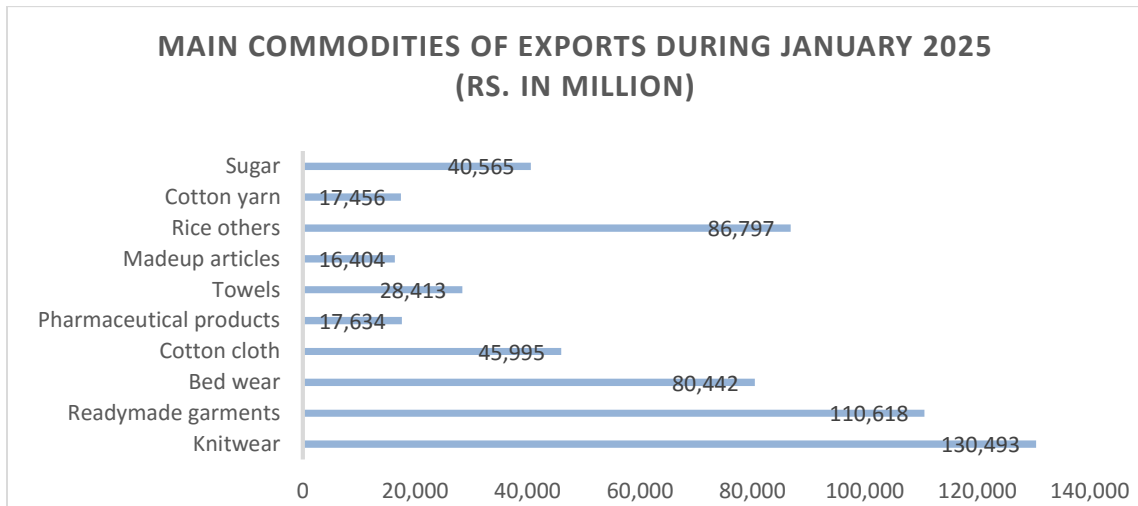
6. TRADE SITUATION

Exports

- According to the provisional figures compiled by the Pakistan Bureau of Statistics, exports from Pakistan during January, 2025 amounted to Rs.822,732 million (provisional) as against Rs. 809,554 million in December, 2024 and Rs. 782,642 million during January, 2024 showing an increase of 1.63% over December, 2024 and of 5.12% over January, 2024.
- In terms of US dollars, the exports in January, 2025 totaled \$ 2,953 million (provisional) as compared to \$ 2,911 million in December, 2024 showing an increase of 1.44% over

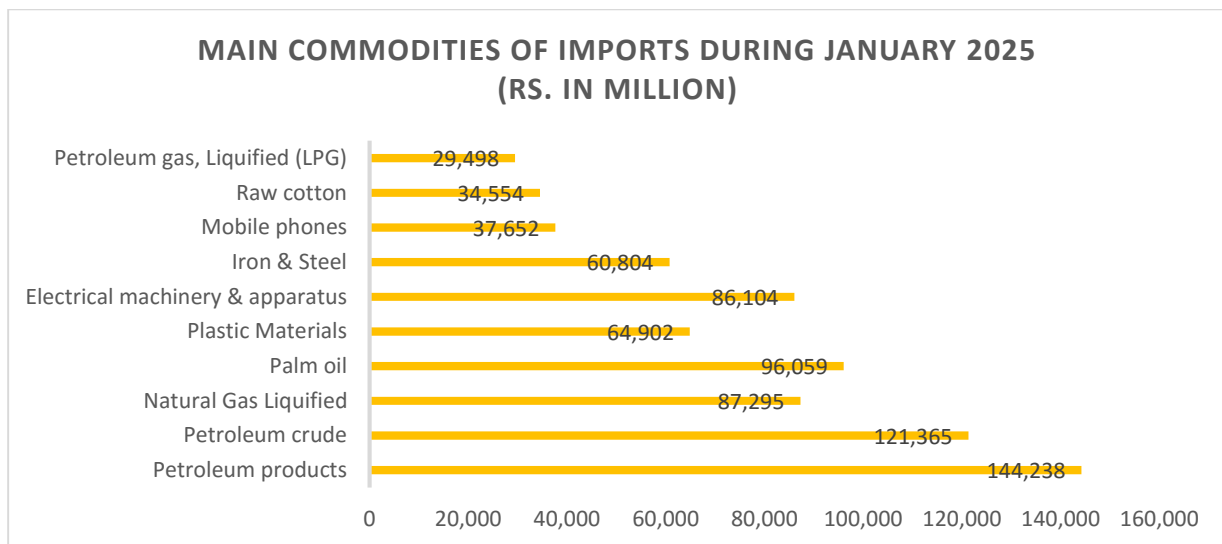


December, 2024 and of 5.77% as compared to \$ 2,792 million in January, 2024.



Imports

- Imports into Pakistan during January, 2025 amounted to Rs. 1,469,202 million (provisional) as against Rs. 1,490,150 million in December, 2024 and Rs. 1,333,136 million during January, 2024 showing a decrease of 1.41% over December, 2024 but an increase of 10.21% over January, 2024.
- In terms of US dollars, the imports in January, 2025 totaled \$ 5,273 million (provisional) as compared to \$ 5,358 million in December, 2024 showing a decrease of 1.59% over December, 2024 but an increase of 10.87% as compared to \$ 4,756 million in January, 2024.



Source: Pakistan Bureau of Statistics

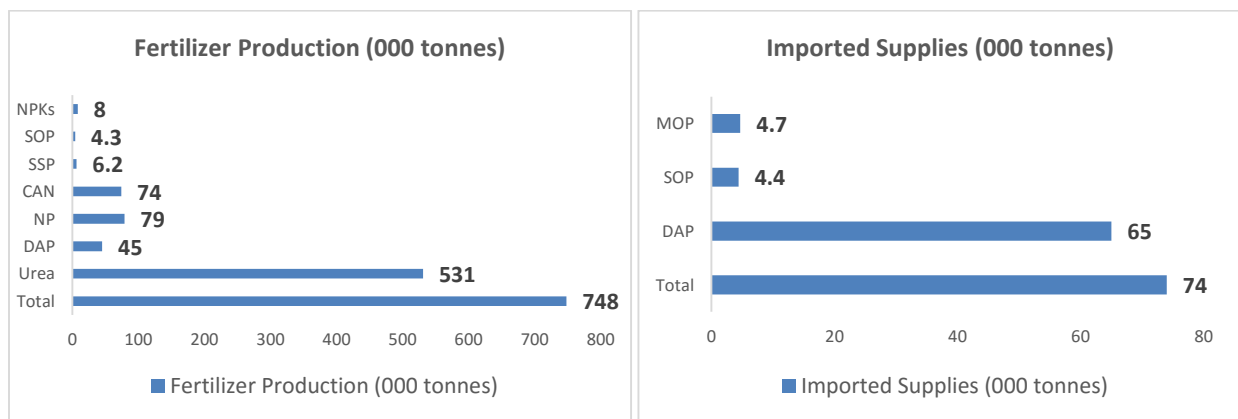


7. FERTILIZER OFFTAKE SITUATION

- Total nutrient offtake during January 2025 was 290 thousand tonnes, reflecting a decrease of 23.2 percent over January 2024.
- In nutrient terms, nitrogen and phosphate offtake decreased by 24.9 and 16.2 percent, respectively.
- Potash offtake has increased by 26 percent.
- In products term, Urea and DAP offtake was 446 and 61 thousand tonnes which decreased by 27.2 and 8 percent, respectively over January 2024.

Fertilizer Production and Imported Supplies

Total domestic fertilizer production during January 2025 was 748 thousand tonnes. Urea and DAP production was 531 and 45 thousand tonnes, respectively. Production of other products i.e., NP, CAN, SSP, NPKs and SOP was 79, 74, 6.2, 8 and 4.3 thousand tonnes, respectively. Total imported supplies were 74 thousand tonnes comprising 65, 4.4 and 4.7 thousand tonnes of DAP, SOP and MOP, respectively.



Source: National Fertilizer Development Centre

8. NEWS TRENDS

- **Sindh Approves Agricultural Income Tax Bill 2025:** The Sindh cabinet has approved the Agricultural Income Tax Bill 2025, set to take effect on January 1, 2025. This legislation exempts annual agricultural incomes up to Rs 600,000 from taxation, while incomes exceeding Rs 5.6 million will be taxed at a maximum rate of 45%. Notably, the livestock sector is excluded from



this tax. The Sindh Revenue Board (SRB) will be responsible for collecting and enforcing this tax, replacing the previous role of the Board of Revenue (BOR).

- **Pakistan and Türkiye Enhance Agricultural Collaboration:** Pakistan and Türkiye have agreed to strengthen their collaboration in agriculture and livestock sectors. Officials from both countries discussed establishing joint ventures in areas such as agricultural mechanization, aquaculture breeding, and advanced irrigation systems. Türkiye expressed interest in Pakistan's high-quality agricultural products, aiming to enhance economic ties in these sectors.
- **Government Plans Deregulation of Wheat Sector:** The Government of Pakistan has announced plans to deregulate the wheat sector starting in fiscal year 2025-26, as part of its commitments under the International Monetary Fund (IMF) program. A national workshop was organized to develop a comprehensive strategy for this transition, which includes discontinuing the practice of announcing support prices and government procurement. The focus will be on ensuring strategic reserves and food security in a deregulated market.
- **State Bank of Pakistan Promotes Climate-Resilient Agricultural Financing:** The State Bank of Pakistan (SBP) held the Agricultural Credit Advisory Committee (ACAC) meeting in Multan wherein Governor SBP Mr. Jameel Ahmad urged banks to enhance climate-resilient and technology-based agricultural financing. This initiative aims to support sustainable growth in the agriculture sector by encouraging financial institutions to adopt practices that address climate change challenges and promote technological advancements in farming.
- **Strategies to Increase Cotton Production:** Agricultural experts have emphasized the importance of early cotton cultivation as a strategy to boost production. Early sowing can optimize the growing season, ensure better utilization of water resources, and reduce the crop's vulnerability to heat and pests. For the 2025 season, early cotton sowing is planned across key regions, including 380,000 acres in Multan and 215,000 acres in Dera Ghazi Khan. In Sindh, farmers in major cotton-growing districts such as Sanghar, Badin, and Mirpur Khas are also showing enthusiasm for early sowing.

Sources: *Business Recorder*

9. AGRO ADVISORY SERVICES FOR FARMERS

زرعی سفارشات

گندم

- ☆ اسی کاشت فصل کو دوسرا پانی 80 سے 90 دن اور تیسری کاشت کو فصل کو دوسرا پانی 70 سے 80 دن برائی کے بعد کو بھری حالت جبکہ تیسرا پانی اگلی کاشت گندم کو 125 سے 130 دن اور تیسری کاشت گندم کو 110 سے 115 دن برائی کے بعد دانے کی دودھیا حالت پر دیں۔

کما

- ☆ فصل کی کاشت کا سوزوں ترین وقت فروری کے پہلے ہفتے سے مارچ کے وسط تک ہے۔ اور اچھی پیداوار کے حصول کے لیے کاشت اچھے نکاس والی ہماری میرا زمین کا انتخاب کریں۔
- ☆ ہمیشہ صحت مند بیاریوں اور کیڑوں سے پاک مندرجہ ذیل سبب استعمال کریں۔
- ☆ بھرتی دادہ اقسام سی پی ایف 400-77 سی پی ایف 237 ایف ایس ایف 240 اور سب ایف ایف۔
- ☆ بھرتی اقسام ایف پی ایف 213، ایف پی ایف 234، سی پی ایف 246، سی پی ایف 247، سی پی ایف 248 اور سی پی ایف 249۔
- ☆ بروقت کاشت اور دیگر سوزوں حالات میں فی ایکڑ دو آنکھوں والے 30 ہزار سے ڈالنے چاہیں۔
- ☆ کاشت کھیلوں میں کرنے کے لیے ہموار زمین کو گہرا اہل چلا کر مناسب تیاری کے بعد سہا گرویں اور پھر رجر کے ذریعے 10 تا 12 انچ گہری کھلیاں 4 فٹ کے فاصلے پر بنائیں۔
- ☆ کنورژ زمین میں 3 بوری ڈی اے پی اور 2 بوری ایس او پی یا پونے 2 بوری ایم او پی درمیانی زمین میں 2.5 بوری ڈی اے پی اور 2 بوری ایس او پی یا پونے 2 بوری ایم او پی اور زرخیز زمین میں 2 بوری ڈی اے پی اور 2 بوری ایس او پی یا پونے دو بوری ایم او پی یا پونے ایکڑ استعمال کریں۔

سبکی

- ☆ بہاری سبکی کی کاشت تمام میدانی علاقوں میں فروری کے آخر تک مکمل کر لیں۔ سوزوں ترین وقت فروری کے آخری دن ہے۔
- ☆ بہاری سبکی کے لیے قطاروں کا درمیانی فاصلہ اڑھائی فٹ رکھیں۔ ڈرل کاشت کی صورت میں شرح سبکی 12 تا 15 کلوگرام فی ایکڑ استعمال کریں۔ ڈٹوں پر کاشت کیلئے 8 سے 10 کلوگرام سبکی فی ایکڑ استعمال کریں۔
- ☆ دوپٹی اقسام کے لیے کنورژ زمینوں میں 3 بوری ڈی اے پی + 2 ایس او پی درمیانی زمینوں میں پونی بوری یوریا، اڑھائی بوری ڈی اے پی + ڈیڑھ بوری ایس او پی اور زرخیز زمینوں کے لیے 2 بوری ڈی اے پی اور 1 بوری ایس او پی یا پونے ایکڑ استعمال کریں۔

سورج بکھی

- ☆ شمالی اور وسط پنجاب میں سورج بکھی کی کاشت کا وقت فروری کے آخر تک ہے۔ جبکہ جنوبی پنجاب میں 10 فروری تک کاشت مکمل کر لیں۔
- ☆ ترقی دادہ اقسام میں سی پی ایف 33، پی 140318، گورا 14، اے سی ایس یو این 5264، یو ایس 666 کاشت کریں۔
- ☆ کاشت بذریعہ پلانٹر، ٹریکٹور، پوریا کیرا کے ذریعہ بھی کاشت کی جاسکتی ہیں۔
- ☆ اچھے اگاؤ کے لیے 2 کلوگرام سبکی فی ایکڑ استعمال کریں۔ فصل قطاروں میں کاشت کریں۔ قطاروں کا درمیانی فاصلہ سوا فٹ رکھیں اور پودوں کا درمیانی فاصلہ پانچ سوا فٹ علاقوں میں 9 انچ اور بارانی علاقوں میں ایک فٹ رکھیں۔

سبزیات و باغات

- ☆ موسم گرما میں اگائی جانے والی سبزیوں میں کرلی، گھیا کدو، توری، بھنڈی، توری، بھین، ٹماٹر، ہبڑ، مرچ، شلہ، تر اور کھیرا کی کاشت کا وقت فروری تا مارچ ہے۔
- ☆ ٹماٹر اور مرچ کی کاشت بذریعہ بھینری کریں۔ جب بھینری کی عمر 30 تا 35 دن ہو جائے تو اس بھینری کو پتوں پر سفارش کردہ فاصلے کے مطابق منتقل کریں۔
- ☆ آم کے پودوں میں ٹائٹروجن، فاسفورس، پوٹاش اور جیسم کی مکھاڈا ایس اور بعد میں آہاشی کریں۔

Source: Zarat Nama, Directorate of Agricultural Information

پلاننگ اینڈ ریسرچ ڈیپارٹمنٹ

زرعی ترقیاتی بینک لمیٹڈ

ہیڈ آفس، اسلام آباد



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