







**NATIONAL STATISTICS BUREAU
ROYAL GOVERNMENT OF BHUTAN**



THIRD QUARTERLY INTEGRATED AGRICULTURE AND LIVESTOCK SURVEY 2025

Q3 IALS 2025 KEY FINDINGS

SURVEY OVERVIEW

Reference period	Sample size	Response rate	Total holdings
 July - September	 10,957 holders	 96.8 %	 69,997

MAJOR CROP PRODUCTION

CEREALS (MT)

Maize Irrigated paddy Wheat Buckwheat


18,608


454


243


110

VEGETABLES (MT)

Chilli


3,281

Cabbage


1,420

Beans


801

Cucumber


851

SPICES & POTATO (MT)

Cardamom


627

Ginger


1,204

Potato


23,976

FRUITS AND NUTS (MT)

Apple


1,576

Areca-nut


472

Banana


1,428

Pear


445

LIVESTOCK PRODUCTION



Milk
15,015 MT



Butter
571 MT



Cheese
859 MT



Beef
356 MT



Chicken
443 MT



Pork
861 MT



Egg
19.2 Million



Honey
25 MT

INTRODUCTION

The National Statistics Bureau (NSB) conducted the Third Quarterly Integrated Agriculture and Livestock Survey (Q3 IALS) in October 2025 for the period from July - September 2025. The QIALS generates key data on crop area and production, as well as livestock output, serving as a crucial input for evidence-based policy and planning.

Sampling Methodology and Sample size

To ensure representativeness, the quarterly survey is designed to be statistically representative at both the national and Dzongkhag levels. The survey represents an estimated 69,978 agricultural holders, comprising both the household and the non-household sector. The non-household sector includes Milk Processing Units (MPUs), agro-groups, government farms / SoEs and cooperatives. However, Schools and Tshethar groups are excluded from the sampling frame.

A uni-stage stratified sampling design is applied, whereby holders are classified as small, medium, or large at the gewog level, based on production distribution from the Integrated Agriculture and Livestock Census 2025 frame. All non-household sectors, and households classified as commercial are enumerated every quarter.

The survey is designed to cover all the 205 gewogs. For Q3 IALS, 10,957 holders were sampled, of which 10,602 responded, resulting in a response rate of 96.8%.

Agricultural Holding Scale Distribution

Agricultural holdings from the IALC 2025 are categorized into different scales based on specific criteria.

Commercial Scale:

Holders are classified as commercial scale if they:

- Own more than 20 cattle, yak, zo-zom, buffalo, sheep, or goats
- Raise more than 50 pigs
- Keep more than 1,000 poultry
- Maintain more than 20 beehives
- Operate fish ponds with an area greater than 5 acres
- Cultivate irrigated paddy fields exceeding 5 acres.

Additionally, MPUs, groups, and cooperatives are also categorized as commercial scale.

For further classification, commercial-scale holdings were excluded from the frame. The remaining holdings were ranked according to their Tropical Livestock Unit (TLU) and total cultivated area. Based on percentile distribution, they were further classified as:

Small scale: Below the 50th percentile

Medium scale: 50th to 75th percentile

Large scale: 75th to 100th percentile

Field Data Collection

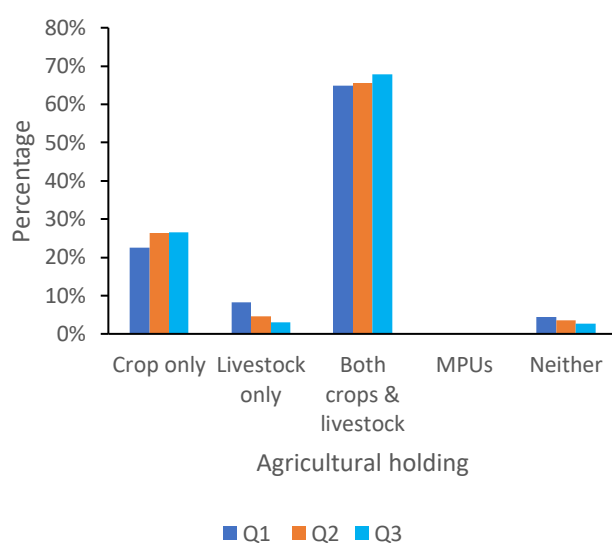
Field data collection for Q3 IALS was carried out across all 20 dzongkhags in October 2025. To ensure efficient data collection, trained Tshogpas were engaged as enumerators, and in areas where they were unavailable, Tshogpa Ngotsabs were recruited, trained and supervised by the respective Dzongkhag Statistical Officer(s).

SURVEY FINDINGS

1. Agricultural Holders engaged in crop production and livestock production

During the third quarter of 2025, 67.7% of the total holders (households and non-households) surveyed were engaged in 'both crop production and livestock raising' activities. 26.6% holders were involved exclusively in 'crop production', while 3 % were engaged solely in 'livestock production'. Meanwhile, about 2.6 % of the total holdings reported 'no engagement' in either crop or livestock production during the quarter.

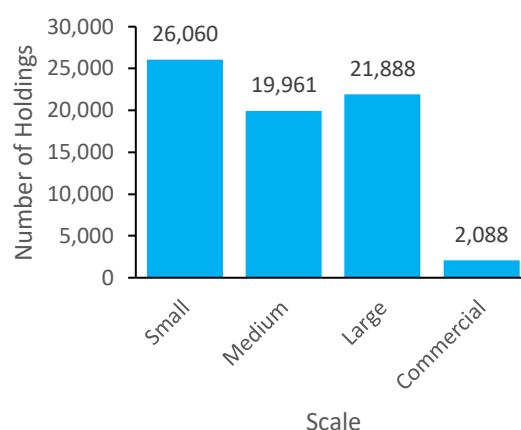
Chart 1: Proportion of agricultural holder(s) engaged in crop and livestock related activities during the 1st, 2nd and 3rd Quarter 2025



2. Agricultural Holding Scale Distribution

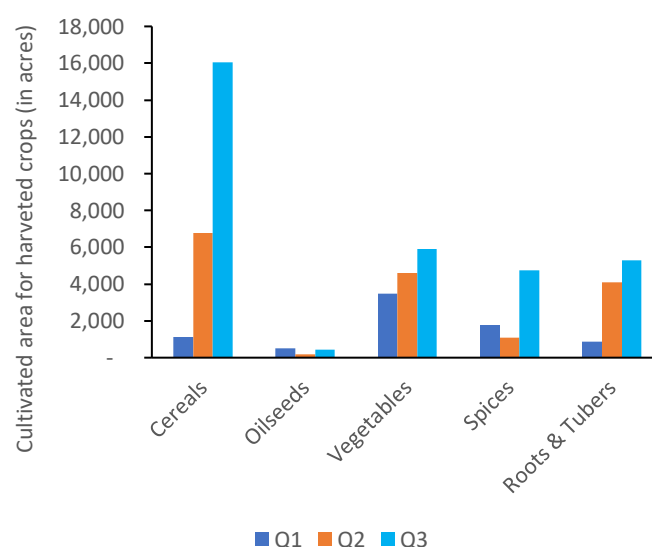
The third quarter distribution shows 26,060 small, 19,961 medium, 21,888 large and 2,088 commercial holdings as shown in chart 2.

Chart 2: Total agricultural holding distribution by category, 3rd Quarter 2025



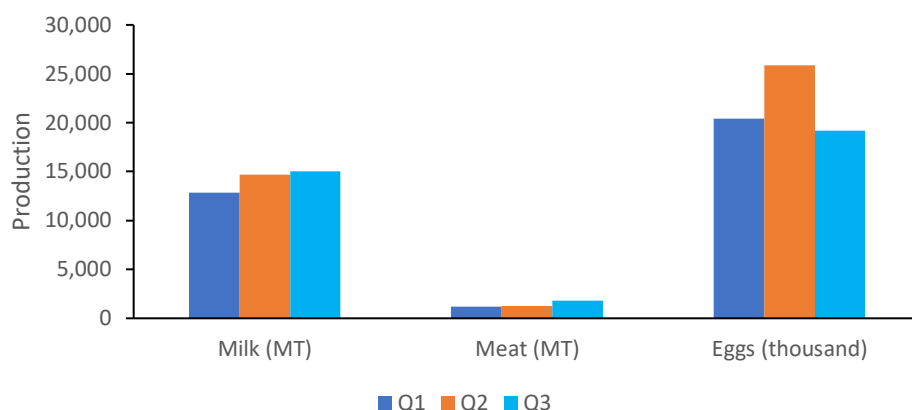
3. Cultivated Areas by broad category of harvested crops during the 1st, 2nd, and 3rd Quarter 2025

Chart 3: Total cultivated area by broad category of harvested crops, 1st, 2nd and 3rd Quarter 2025



4.Total Livestock Production (selected products) during 1st, 2nd and 3rd Quarter

Chart 4: Total livestock production (selected products), 1st, 2nd and 3rd Quarter 2025



5. Cereals

During the third quarter of 2025, 18,608 metric tons (MT) of maize were harvested from 12,302 acres. This was followed by 454 MT of irrigated paddy, 243 MT of wheat, 63 MT of barley, 94 MT of millet and 110 MT of buckwheat.

Table 1: Cereal growers, area and production by type, 1st, 2nd and 3rd Quarter 2025

Type	Growers (Number)			Sown Area (Acre)			Harvested Area (Acre)			Production (MT)		
	Q1	Q2	Q3	Q1	Q2	Q3	Q1	Q2	Q3	Q1	Q2	Q3
Irrigated Paddy	-	-	520	-	-	267	-	-	232	-	-	454
Maize	370	11,561	27,888	92	4,116	14,604	80	3,245	12,302	76	4,103	18,608
Wheat	778	2,078	959	254	890	524	184	723	483	60	288	243
Barley	1,252	1,197	310	442	508	144	360	446	137	143	177	63
Millet	454	607	773	99	143	228	89	129	207	30	47	94
Buckwheat	960	2,129	586	213	1,094	285	188	931	249	66	352	110
Quinoa	367	57	-	35	6	-	30	6	-	10	2	-

Table 2: Cereal Production by Dzongkhag and by Type, 3rd Quarter 2025

Dzongkhag	Irrigated paddy (Kg)	Maize (Kg)	Wheat (Kg)	Barley (Kg)	Millet (Kg)	Buckwheat (Kg)
Bumthang	-	62	77,018	51,371	-	45,617
Chhukha	54,977	718,606	8,103	-	10,256	9,899
Dagana	11,498	1,283,162	-	-	2,921	-
Gasa	-	830	14,985	6,748	-	-
Haa	-	170,044	91,488	1,476	811	36,199
Lhuentse	51,099	1,061,228	-	-	18,507	-
Monggar	18,008	4,368,145	-	-	-	2,403
Paro	-	15,610	34,201	2,997	-	13,583
Pema Gatshel	-	883,891	-	-	-	-
Punakha	10,528	117,071	-	-	-	-
Samdrup Jongkhar	-	1,187,141	-	-	4,808	-
Samtse	-	810,665	-	-	42,433	-
Sarpang	-	796,933	-	-	-	-
Thimphu	-	7,748	17,327	-	-	-
Trashigang	-	3,614,967	-	-	419	2,573
Trashie Yangtse	138,661	1,297,486	-	-	3,710	-
Trongsa	-	290,665	-	-	-	-
Tsirang	-	1,455,487	-	-	-	-
Wangdue Phodrang	169,578	71,302	-	185	3,255	-
Zhemgang	-	456,939	-	-	6,565	-
Total	454,349	18,607,982	243,122	62,777	93,685	110,274

6. Oilseeds

During the third quarter of 2025, production was highest for groundnut at 142 MT, followed by soybean with 27 MT, while mustard contributed 12 MT; sunflower and perilla produced only 3 MT and 2 MT respectively.

Table 3: Oilseeds growers, area and production by Type, 3rd Quarter 2025

Type	Growers (Number)	Sown Area (Acre)	Harvested Area (Acre)	Production (MT)
Mustard	120	41	41	12
Sunflower	155	11	9	3
Soybean	846	91	83	27
Groundnut	2,107	286	240	142
Perilla	41	7	7	2

7. Vegetables

During the third quarter of 2025, about 10,880 MT of vegetables were produced. Among the vegetables, chilli had the highest production at 3,281 MT, followed by cabbage at 1,420 MT and cucumber at 851 MT.

Table 4: Vegetable Growers, Area Sown, Area Harvested and Production, 3rd Quarter 2025

Type	Growers (Number)	Sown Area (Acre)	Harvested Area (Acre)	Production (MT)
Asparagus	369	10	8	8
Beans	24,149	904	830	801
Egg plant	8,713	156	146	146
Broccoli	4,547	201	188	203
Blub Onion	854	16	16	19
Bunching Onion	1,233	27	26	26
Cabbages	8,164	879	770	1,420
Carrot	2,526	342	321	575
Cauliflower	2,436	249	210	328
Chilli	42,244	2,355	1,760	3,281
Green leaves ¹	19,624	-	-	520
Pumpkin, squash, gourds ¹	35,863	-	-	2,121
Peas	706	56	55	54
Radish	7,504	324	289	440
Tomato	2,771	45	42	49
Turnip	221	3	3	4
Beetroot	222	14	14	34
Cucumber	18,931	308	299	851

¹ Area sown and harvested is not collected for these vegetables.

8. Spices

In the third quarter of 2025, cardamom and ginger remained the most widely cultivated spices, with 7,903 growers producing 627 MT of cardamom; while 4,345 growers harvested 1,204 MT of ginger. Production of other spices included garlic bulb at 20 MT, garlic leaves at 3 MT and coriander at 34 MT.

Table 5: Spices Growers, Area Sown, Area Harvested and Production by type, 3rd Quarter, 2025

Type	Growers (Number)	Sown Area (Acre)	Harvested Area (Acre)	Production (MT)
Cardamom	7,903	3,860	3,392	627
Ginger	4,345	827	801	1,204
Garlic Bulb	975	19	18	20
Garlic leaves	260	5	4	3
Coriander	2,368	50	49	34

Table 6 : Production of Spices by Type and Dzongkhag, 3rd Quarter 2025

Dzongkhag	Cardamom (Kg)	Ginger (Kg)	Garlic Bulb (Kg)	Garlic Leaves (Kg)	Coriander (Kg)
Bumthang	-	-	7,560	561	618
Chhukha	74,724	457,823	-	-	2,583
Dagana	100,743	22,838	-	-	75
Gasa	-	-	-	-	705
Haa	43,506	-	3,181	-	83
Lhuentse	6,992	-	-	-	228
Monggar	33,786	401	-	1,393	4,544
Paro	847	-	-	-	380
Pema Gatshel	22,557	-	-	-	509
Punakha	-	-	-	-	867
Samdrup Jongkhar	21,087	258,556	-	-	1,450
Samtse	151,804	274,353	-	-	220
Sarpang	19,224	12,922	-	-	481
Thimphu	-	-	7,606	1,476	13,804
Trashigang	13,984	3,021	-	-	1,590
Trashy Yangtse	1,026	-	-	-	266
Trongsa	6,839	-	1,895	-	2,156
Tsirang	85,664	59,913	-	-	2,472
Wangdue Phodrang	-	-	-	-	1,261
Zhemgang	44,094	114,192	-	-	122
Total	626,877	1,204,019	20,242	3,430	34,414

9. Roots and tubers

Potato was the only root and tuber crop harvested during the third quarter of 2025, with 12,022 growers producing a total of 23,976 MT harvested from 4,942 acres of land.

Chart 5: Potato Growers, Area Sown, Area harvested and Production, 1st, 2nd and 3rd Quarter 2025

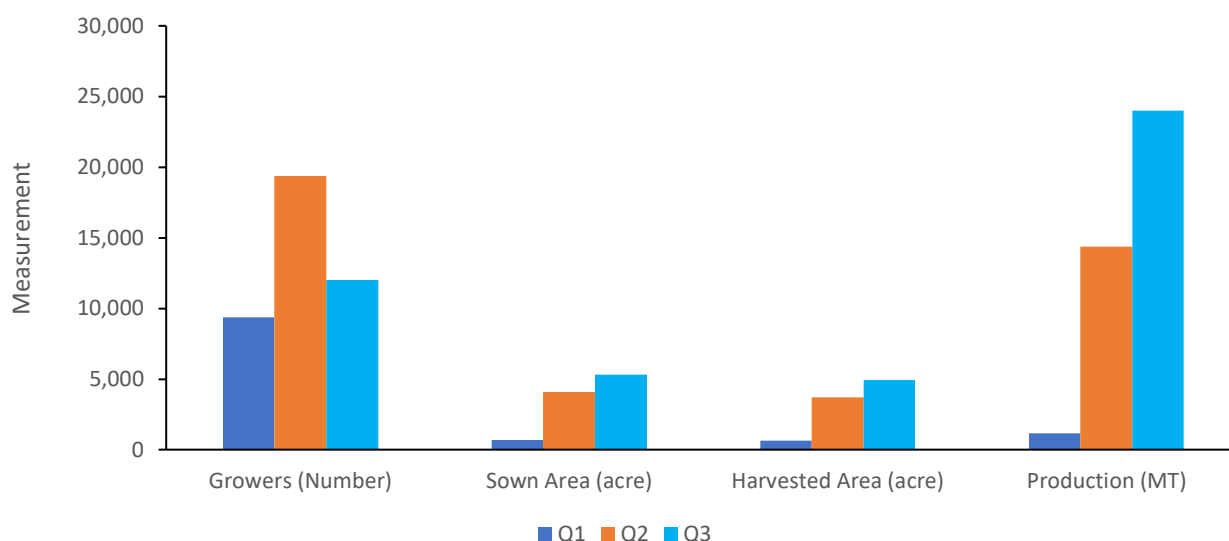
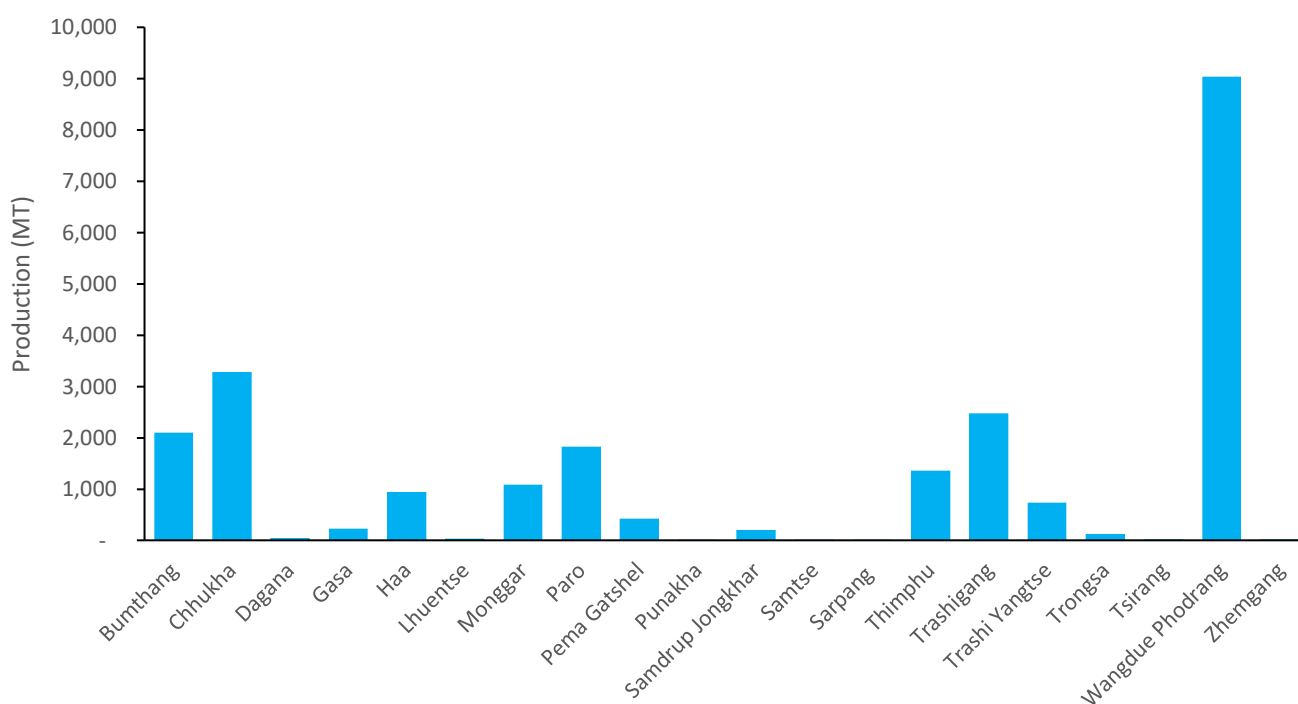


Chart 6: Potato Production by Dzongkhag, 3rd Quarter 2025



10. Fruits and Nuts

In the third quarter of 2025, apple stood out as the leading fruit and nut crop, yielding 1,576 MT from around 88 thousand bearing trees managed by 5,693 growers. Among other fruits, the top five in terms of production were banana (1,428 MT), pear (445 MT), areca-nut(472 MT), guava (326 MT), and mango (267 MT).

Table 7: Fruit Growers, Number of trees (total and bearing), and Production, 3rd Quarter 2025

Type	Growers (Number)	Total Trees (Number)	Bearing Trees (Number)	Production (MT)
Apple	5,693	136,545	88,042	1,576
Apricot	1,201	3,597	511	6
Areca-nut	8,766	4,302,356	98,849	472
Avocado	17,636	174,855	17,699	181
Dragon Fruit ¹	3,471	22,148	4,641	18
Guava	15,198	52,490	31,687	326
Hazelnut	1,546	253,150	21,681	10
Jackfruit	3,853	8,549	2,789	208
Lemons and Limes	12,594	105,739	24,099	110
Litchi	7,787	34,909	5,447	71
Mango	14,342	103,403	25,001	267
Papaya	4,263	16,117	8,000	72
Peach	11,557	28,242	12,180	194
Pear	10,755	36,516	19,916	445
Persimmon	3,785	9,202	3,935	71
Plum	5,169	10,553	4,192	100
Pomegranate	3,957	11,229	3,914	27
Tree Tomato	8,638	26,030	17,969	107
Walnut	6,757	27,619	6,663	95
Almond	994	3,251	178	1
Chestnut	336	3,459	375	2
Cherry	115	269	42	0.1
Banana ³	20,402	-	-	1,428
Kiwi ³	515	-	-	4
Passion Fruits ³	1,572	-	-	27
Pineapple ²	2,943	144.67	129.29	91
Watermelon ²	214	8.6	8.55	9
Strawberry ²	97	0.91	0.91	0.6
Grape ²	88	0.62	0.61	1

¹ For dragon fruit, “trees” refer to “plants.”

² For pineapple, watermelon, strawberry and grape, “total trees” and “bearing trees” refer to “sown area in acre” and “harvested area in acre,” respectively.

³ Number of trees is not collected for this fruit

11.Dairy

Approximately 15,015 MT of milk, 571 MT of butter, 859 MT of cheese, 48 MT of chugo, 73 MT of zety, and 3 MT of phelu were produced during the third quarter of 2025, as shown in Table 8. Trashigang recorded the highest milk, butter and cheese production with 2,232 MT, 101 MT and 89 MT respectively. Compared to the second quarter, milk production was 2.3% more, butter 1.06% more, and cheese 0.8% less.

Table 8: Production of Dairy Products by Type, 1st, 2nd, and 3rd Quarter 2025

Dairy Products	Production (MT)		
	Q1	Q2	Q3
Milk	12,858	14,675	15,015
Butter	485	565	571
Cheese	823	866	859
Chugo	5	16	48
Zety	13	50	73
Phelu	0.2	0.5	3

12.Meat

During the third quarter of 2025, a total of 356 MT of beef, 24 MT of yak meat, 861 MT of pork, 4 MT of buff, 70 MT of chevon, 10 MT of mutton, 443 MT of chicken, and 14 MT of fish were produced, as shown in Table 9. Among the dzongkhags, Samtse recorded the highest beef production at 67 MT, Tsirang recorded highest pork production at 297 MT, while chicken production was highest in Dagana with 107 MT.

Table 9: Production of Meat by Type, 1st, 2nd and 3rd Quarter 2025

Meat	Production (MT)		
	Q1	Q2	Q3
Beef	388	364	356
Yak Meat	46	27	24
Buff	0	2	4
Pork	352	389	861
Chevon	73	59	70
Mutton	6	6	10
Chicken	338	399	443
Fish	13	8	14

13.Other Livestock products

During the third quarter of 2025, approximately 19.2 million eggs, 5 MT of wool, and 25 MT of honey were produced, as shown in Table 10. The highest egg production was reported in Tsirang with 3.9 million eggs, followed by Sarpang with 3.5 million eggs and Samtse with 2.7 million eggs. Compared to the first quarter, egg production was 26% less, wool 2% more, and honey 55% more.

Table 10: Production of other livestock products by Type, 1st, 2nd and 3rd Quarter 2025

Other livestock products	Production		
	Q1	Q2	Q3
Eggs (million)	20.4	25.8	19.20
Wool (MT)	2.7	5.1	5
Honey (MT)	10.8	16.1	25

Annex tables

Table A1. Proportion of agricultural holder(s) engaged in crop and livestock related activities during the 1st, 2nd and 3rd Quarter 2025

Type	Q1	Q2	Q3
Crop only	23%	26%	27%
Livestock only	8%	5%	3%
Both crops & livestock	65%	66%	68%
MPUs	0%	0%	0%
Neither	4%	4%	3%

Table A2. Total cultivated area by broad category of harvested crops, 1st, 2nd and 3rd Quarter 2025 (in acres)

Crop Category	Q1	Q2	Q3
Cereals	1,136	6,757	16,052
Oilseeds	519	176	437
Vegetables	3,474	4,615	5,888
Spices	1,792	1,081	4,761
Roots & Tubers	869	4,103	5,305

Table A3. Total livestock production (selected products), 1st, 2nd and 3rd Quarter

Product type	Q1	Q2	Q3
Milk (MT)	12,858	14,675	15,015
Meat (MT)	1,216	1,254	1,782
Eggs (thousand)	20,397	25,835	19,189

Table A4. Potato Growers, Area harvested, Area Sown and Production, 1st, 2nd and 3rd Quarter 2025

	Q1	Q2	Q3
Growers (Number)	9,374	19,385	12,022
Sown Area (acre)	692	4,103	5,305
Harvested Area (acre)	614	3,707	4,942
Production (MT)	1,153	14,359	23,976