



**NATIONAL STATISTICS BUREAU
ROYAL GOVERNMENT OF BHUTAN**



FOURTH QUARTERLY INTEGRATED AGRICULTURE AND LIVESTOCK SURVEY 2025

Q4 IALS 2025 KEY FINDINGS

SURVEY OVERVIEW

Reference period	Sample size	Response rate	Total holdings
			
October - December	10,958 holders	97.6 %	70,018

MAJOR CROP PRODUCTION

CEREALS (MT)

Irrigated paddy Maize Millet Buckwheat



44,873



9,256



310



317

VEGETABLES (MT)

Chilli Green leaves Turnip Radish



1,863



1,210



1,329



1,220

SPICES & POTATO (MT)

Cardamom Ginger Potato



1,418



2,398



5,264

FRUITS AND NUTS (MT)

Apple Mandarin Banana Guava



667



16,601



1,147



209

LIVESTOCK PRODUCTION



Milk
12,449 MT



Butter
462 MT



Cheese
779 MT



Beef
424 MT



Chicken
325 MT



Pork
827 MT



Egg
19.4 Million



Honey
9.6 MT

INTRODUCTION

The National Statistics Bureau (NSB) conducted the Fourth Quarterly Integrated Agriculture and Livestock Survey (Q4 IALS) in January 2026 for the period from October - December 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 Q4 IALS, 10,958 holders were sampled, of which 10,696 responded, resulting in a response rate of 97.6%.

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

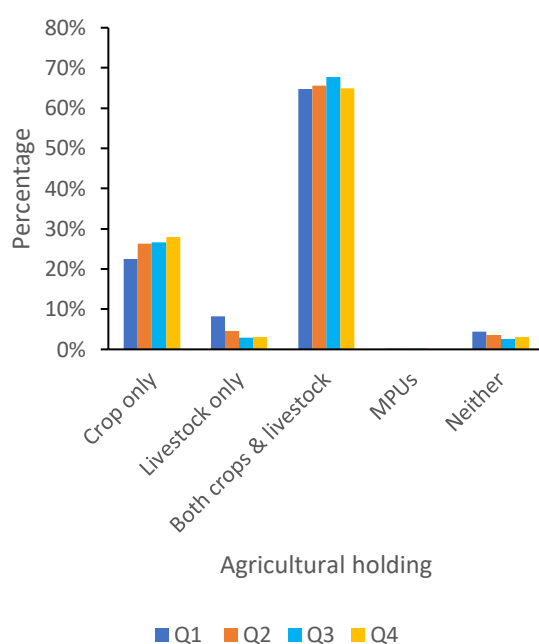
Field data collection for Q4 IALS was carried out across all 20 dzongkhags in January 2026. To ensure efficient data collection, trained Tshogpas were engaged as enumerators, and in areas where they were unavailable, Tshogpa Ngotsabs were recruited, trained and supervised by the respective Dzongkhag Statistical Officer(s).

SURVEY FINDINGS

1. Agricultural Holders engaged in crop production and livestock production

During the fourth quarter of 2025, 65% of the total holders (households and non-households) surveyed were engaged in 'both crop production and livestock raising' activities. 28% holders were involved exclusively in 'crop production', while 3% were engaged solely in 'livestock production'. Meanwhile, about 3% of the total holdings reported 'no engagement' in either crop or livestock production during the quarter.

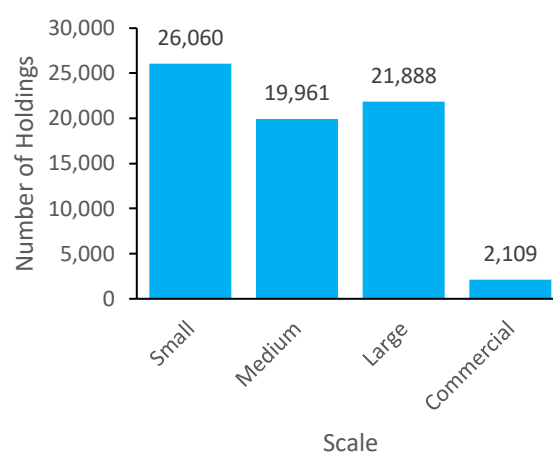
Chart 1: Proportion of agricultural holder(s) engaged in crop and livestock related activities during the 1st, 2nd, 3rd and 4th Quarter 2025



2. Agricultural Holding Scale Distribution

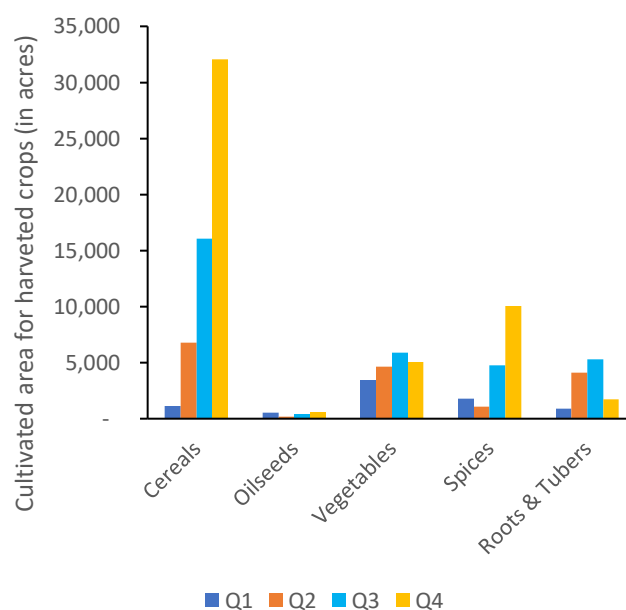
The fourth quarter distribution shows 26,060 small, 19,961 medium, 21,888 large and 2,109 commercial holdings as shown in chart 2.

Chart 2: Total agricultural holding distribution by category, 4th Quarter 2025



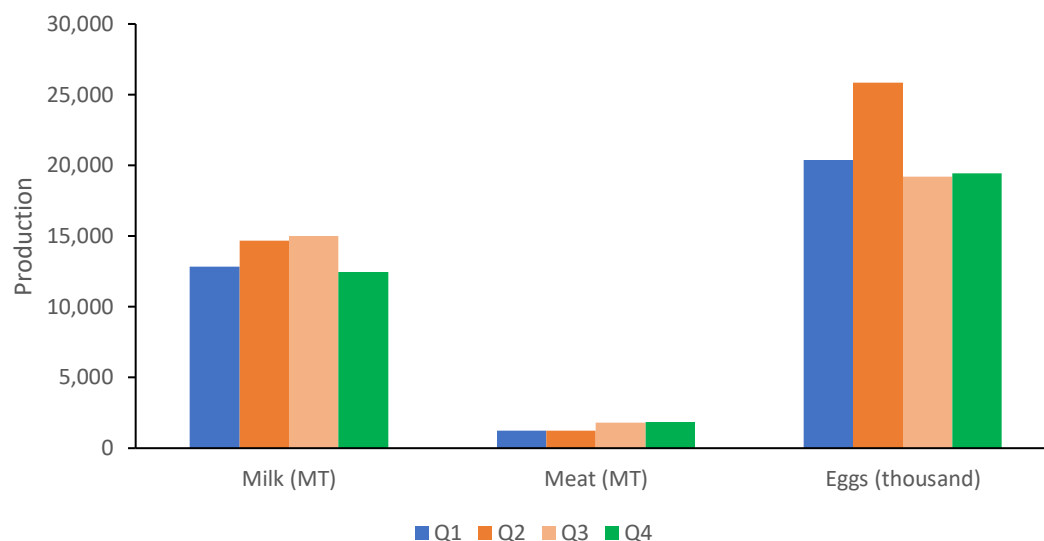
3. Cultivated Areas by broad category of harvested crops during the 1st, 2nd, 3rd and 4th Quarter 2025

Chart 3: Total cultivated area by broad category of harvested crops, 1st, 2nd, 3rd and 4th Quarter 2025



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

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



5. Cereals

During the fourth quarter of 2025, 44,873 metric tons (MT) of irrigated paddy were harvested from 21,152 acres. This was followed by 202 MT of upland paddy, 9,256 MT of maize, 34 MT of wheat, 43 MT of barley, 310 MT of millet, 317 MT of buckwheat and 27 MT of quinoa.

Table 1: Cereal growers, area and production by type, 4th Quarter 2025

Type	Growers (Number)	Sown Area (Acre)	Harvested Area (Acre)	Production (MT)
Irrigated Paddy	20,980	22,181	21,152	44,873
Upland paddy	588	290	245	202
Maize	14,142	7,427	6,278	9,256
Wheat	266	88	75	34
Barley	277	126	109	43
Millet	3,137	909	814	310
Buckwheat	2,887	986	834	317
Quinoa	312	54	50	27

Table 2: Cereal Production (in MT) by Dzongkhag and by Type, 4th Quarter 2025

Dzongkhag	Irrigated Paddy	Upland paddy	Maize	Wheat	Barley	Millet	Buckwheat	Quinoa
Bumthang	158	-	-	-	-	-	50	-
Chhukha	1,197	5	347	13	4	52	24	0.3
Dagana	2,180	23	718	0.5	1	31	21	-
Gasa	135	-	4	2	23	-	-	-
Haa	24	-	55	8	-	5	26	-
Lhuentse	1,910	2	494	0.3	-	1	-	1
Monggar	694	8	2,849	-	9	-	13	1
Paro	7,002	1	1	5	-	0.03	3	-
Pema Gatschel	23	-	737	1	1	3	15	0.3
Punakha	10,183	12	51	-	-	-	-	-
Samdrup Jongkhar	2,041	19	464	1	1	9	69	-
Samtse	3,940	0.2	527	2	-	74	9	-
Sarpang	2,306	12	226	-	-	26	3	-
Thimphu	419	-	6	-	-	-	-	-
Trashigang	1,518	18	852	-	1	4	39	17
Trashy Yangtse	1,401	55	1,035	-	-	79	-	7
Trongsa	1,517	-	13	-	-	-	-	-
Tsirang	1,894	8	214	-	-	20	4	-
Wangdue Phodrang	5,428	16	6	2	3	-	21	0.2
Zhemgang	904	22	656	1	0.2	7	21	0.1
Total	44,873	202	9,256	34	43	310	317	27

6. Oilseeds & Pulses

During the fourth quarter of 2025, production for oilseeds was highest for groundnut at 91 MT, followed by mustard with 68 MT, while soybean contributed 33 MT; sunflower and perilla produced only 1 MT and 6 MT respectively. The production of pulses included rajma beans at 265 MT, followed by mung beans at 105 MT and lentils and adzuki beans at 11 MT and 6 MT respectively.

Table 3: Oilseeds & Pulses growers, area and production by Type, 4th Quarter 2025

Type	Growers (Number)	Sown Area (Acre)	Harvested Area (Acre)	Production (MT)
Mustard	1,073	253	232	68
Sunflower	74	9	6	1
Soybean	1,061	103	99	33
Groundnut	1,243	182	161	91
Perilla	314	24	23	6
Rajma beans	4,276	890	790	265
Mung Beans	2,987	437	369	105
Lentils	147	40	34	11
Adzuki Beans	291	29	21	6

7. Vegetables

During the fourth quarter of 2025, about 11,134 MT of vegetables were produced. Among the vegetables, chilli had the highest production at 1,863 MT, followed by turnip at 1,329 MT and radish at 1,220 MT.

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

Type	Growers (Number)	Sown Area (Acre)	Harvested Area (Acre)	Production (MT)
Beans	20,526	825	769	726
Egg plant	4,357	65	63	70
Broccoli	10,246	428	399	417
Blub Onion	1,829	44	43	38
Bunching Onion	4,500	83	82	76
Cabbages	12,524	485	456	652
Carrot	2,156	223	214	695
Cauliflower	6,597	266	257	309
Chilli	21,064	1217	1125	1,863
Green leaves ¹	36,445	-	-	1,211
Pumpkin, squash, gourds ¹	28,286	-	-	2,256
Peas	1,803	85	76	82
Radish	21,209	768	732	1,220
Tomato	2,638	34	32	33
Turnip	2,660	471	467	1,329
Beetroot	230	18	18	37
Cucumber	3,090	53	51	121

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

8. Spices

In the fourth quarter of 2025, cardamom and ginger remained the most widely cultivated spices, with 10,581 growers producing 1,418 MT of cardamom; while 8,002 growers harvested 2,398 MT of ginger. Production of other spices included garlic bulb at 51 MT, garlic leaves at 77 MT and coriander at 54 MT.

Table 5: Spices Growers, Area Sown, Area Harvested and Production by type, 4th Quarter, 2025

Type	Growers (Number)	Sown Area (Acre)	Harvested Area (Acre)	Production (MT)
Cardamom	10,581	8,631	7,892	1,418
Ginger	8,002	1,121	1,106	2,398
Garlic Bulb	2,325	72	61	51
Garlic leaves	4,211	95	85	77
Coriander	5,083	82	80	54

Table 6 : Production(in MT) of Spices by Type and Dzongkhag, 4th Quarter 2025

Dzongkhag	Cardamom	Ginger	Garlic Bulb	Garlic Leaves	Coriander
Bumthang	-	-	-	1	1
Chhukha	73	1,088	2	1	3
Dagana	355	46	2	1	1
Gasa	-	-	-	0.3	0.2
Haa	77	2	-	1	0.03
Lhuentse	13	0	1	0	2
Monggar	46	15	25	26	6
Paro	-	-	-	-	0.04
Pema Gatshel	48	158	1	3	3
Punakha	1	0.3	1	2	3
Samdrup Jongkhar	40	139	0.2	3	1
Samtse	211	585	0.2	0.4	2
Sarpang	166	53	2	1	1
Thimphu	-	-	6	1	7
Trashigang	52	26	5	15	9
Trashi Yangtse	2	6	4	6	2
Trongsa	43	4	0.07	8	6
Tsirang	212	148	1	2	3
Wangdue Phodrang	0.2	1	1	6	4
Zhemgang	78	126	1	1	1
Total	1,418	2,398	51	77	54

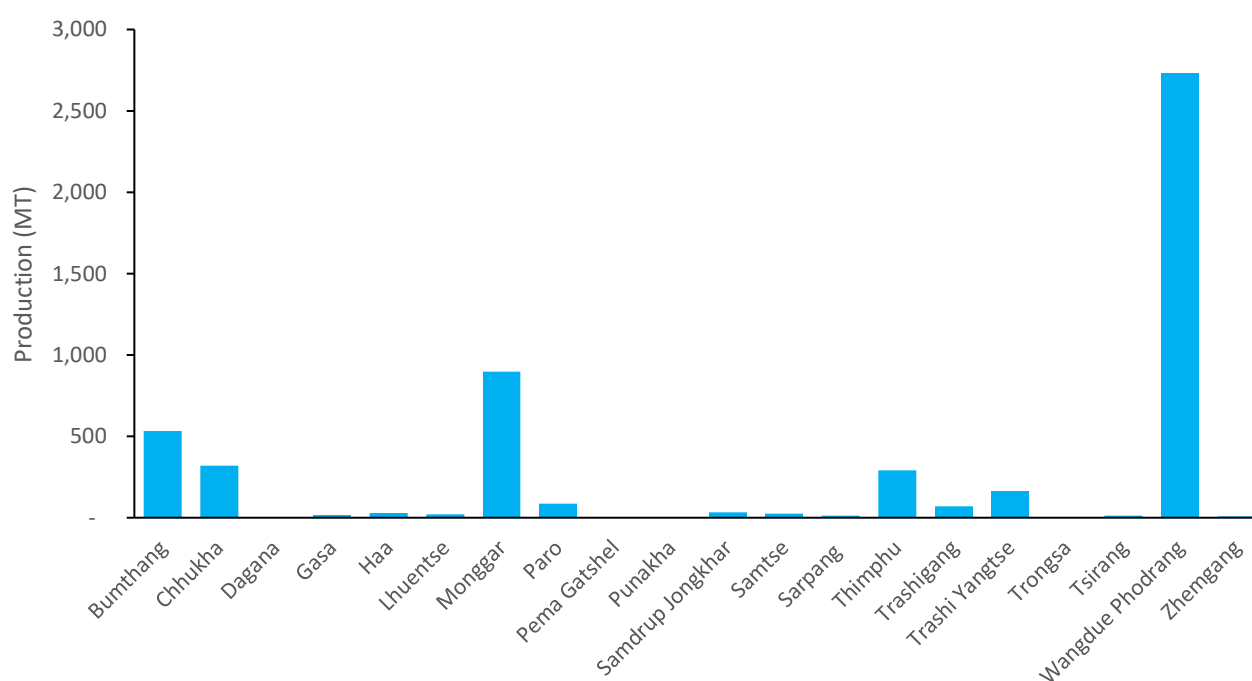
9. Roots and tubers

The production of roots and tubers during the 4th quarter included potato at 5,264 MT followed by cassava at 282 MT and sweet potato at 15MT.

Table 7: Roots and tubers Growers, Area Sown, Area harvested and Production by type, 4th Quarter 2025

Type	Growers (Number)	Sown Area (Acre)	Harvested Area (Acre)	Production (MT)
Potato	5,892	1,507	1,392	5,264
Sweet potato	534	24	23	15
Cassava	3,529	205	174	282

Chart 5: Potato Production by Dzongkhag, 4th Quarter 2025



10. Fruits and Nuts

In the fourth quarter of 2025, mandarin stood out as the leading fruit and nut crop, yielding 16,601 MT from around 692 thousand bearing trees managed by 23,303 growers. Among other fruits, the top five in terms of production were banana (1,147 MT), apple (667 MT), guava (209 MT), avocado (135 MT), and tree tomato (93 MT).

Table 8: Fruit Growers, Number of trees (total and bearing), and Production, 4th Quarter 2025

Type	Growers (Number)	Total Trees (Number)	Bearing Trees (Number)	Production (MT)
Apple	3,964	82,017	47,431	667
Avocado	15,284	137,909	12,780	135
Dragon Fruit ¹	3,326	18,014	949	2
Guava	12,126	40,985	18,270	209
Hazelnut	993	104,559	6,507	1
Lemons and Limes	11,190	83,413	15,055	79
Mandarin	23,303	1,639,486	692,033	16,601
Mango	12,005	82,427	6,050	51
Papaya	3,464	10,706	5,475	73
Persimmon	2,476	6,872	1,626	34
Pomegranate	3,255	8,016	1,324	10
Tree Tomato	7,195	22,661	16,352	93
Walnut	5,176	18,400	2,688	35
Almond	1,070	3,693	12	0.03
Chestnut	325	4,752	60	0.02
Pecanut	358	2,444	63	0.04
Banana ³	17,679	-	-	1,147
Kiwi ³	789	-	-	26
Passion Fruits ³	777	-	-	8
Pineapple ²	1,536	83	79	48
Watermelon ²	41	3	2	2
Strawberry ²	49	5	5	2
Grape ²	52	0.4	0.4	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 12,449 MT of milk, 462 MT of butter, 779 MT of cheese, 18 MT of chugo, 27 MT of zetey, and 0.5 MT of phelu were produced during the fourth quarter of 2025, as shown in Table 9. Trashigang recorded the highest milk, butter and cheese production with 1,601 MT, 66 MT and 78 MT respectively. Compared to the third quarter, milk production was 17% less, butter 19% less, and cheese 9% less.

Table 9: Production of Dairy Products by Type, 1st, 2nd, 3rd and 4th Quarter 2025

Dairy Products	Production (MT)			
	Q1	Q2	Q3	Q4
Milk	12,858	14,675	15,015	12,449
Butter	485	565	571	462
Cheese	823	866	859	779
Chugo	5	16	48	18
Zeytey	13	50	73	27
Phelu	0.2	0.5	3	0.5

12.Meat

During the fourth quarter of 2025, a total of 424 MT of beef, 76 MT of yak meat, 827 MT of pork, 3 MT of buff, 85 MT of chevon, 6 MT of mutton, 325 MT of chicken, and 13 MT of fish were produced, as shown in Table 10. Among the dzongkhags, Sarpang recorded the highest beef production at 86 MT, while Tsirang recorded highest pork and chicken production at 231 MT and 92 MT respectively.

Table 10: Production of Meat by Type, 1st, 2nd, 3rd, and 4th Quarter 2025

Meat	Production (MT)			
	Q1	Q2	Q3	Q4
Beef	388	364	356	424
Yak Meat	46	27	24	76
Buff	0	2	4	3
Pork	352	389	861	827
Chevon	73	59	70	85
Mutton	6	6	10	6
Chicken	338	399	443	325
Fish	13	8	14	13

13.Other Livestock products

During the fourth quarter of 2025, approximately 19.4 million eggs, 3.2 MT of wool, and 9.6 MT of honey were produced, as shown in Table 11. The highest egg production was reported in Tsirang with 5.1 million eggs, followed by Sarpang with 4.9 million eggs and Samtse with 2.5 million eggs. Compared to the third quarter, egg production was 1% more, wool 36% less, and honey 62% less.

Table 11: Production of other livestock products by Type, 1st, 2nd and 3rd Quarter 2025

Other livestock products	Production			
	Q1	Q2	Q3	Q4
Eggs (million)	20.4	25.8	19.20	19.4
Wool (MT)	2.7	5.1	5	3.2
Honey (MT)	10.8	16.1	25	9.6

Annex tables

Table A1. Proportion of agricultural holder(s) engaged in crop and livestock related activities during the 1st, 2nd, 3rd and 4th Quarter 2025

Type	Q1	Q2	Q3	Q4
Crop only	23%	26%	27%	28%
Livestock only	8%	5%	3%	3%
Both crops & livestock	65%	66%	68%	65%
MPUs	0%	0%	0%	0%
Neither	4%	4%	3%	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	Q4
Cereals	1,136	6,757	16,052	32,062
Oilseeds	519	176	437	571
Vegetables	3,474	4,615	5,888	5,065
Spices	1,792	1,081	4,761	10,026
Roots & Tubers	869	4,103	5,305	1,736

Table A3. Total livestock production (selected products), 1st, 2nd, 3rd and 4th Quarter

Product type	Q1	Q2	Q3	Q4
Milk (MT)	12,858	14,675	15,015	12,449
Meat (MT)	1,216	1,254	1,782	1,851
Eggs (thousand)	20,397	25,835	19,189	19,432