



Price Control & Commodities Management Department

FOOD IN FOCUS

Market Analysis Report

December
2025





Price Control & Commodities Management Department



The Department of Price Control and Commodities Management is pleased to present the fourteenth edition of its monthly market bulletin, "**Food in Focus: Market Analysis Report.**" This report delivers a comprehensive review of the supply and price dynamics of essential food commodities, with detailed insights into domestic production trends, consumption patterns, import–export flows and developments in global markets.

In addition, this edition provides strategic policy recommendations for the District Administration, PAMRA Authority and Agriculture Department, emphasizing the need for vigilant monitoring of essential commodity supplies and the adoption of proactive measures to ensure their availability at affordable prices. The report further underscores the persistent insufficiency of domestic production in meeting national consumption needs, thereby highlighting the critical reliance on imports to bridge supply gaps.

We are confident that the analytical insights and policy guidance presented in this report will enable stakeholders to make informed decisions and capitalize on emerging opportunities in today's dynamic food market. It remains our aspiration for "Food in Focus" to continue serving as a reliable reference and strategic resource for all stakeholders across the food sector.



ABSTRACT

This report has been compiled using data attained from multiple reputable sources, including the FAO, World Bank, Pakistan Bureau of Statistics (PBS), Agriculture Statistics of Pakistan 2023–24, Economic Survey of Pakistan 2024–25, Federal Board of Revenue (FBR), Global Pulses Confederation (GPC), Crop Reporting Service Punjab and Market Committees across Punjab. It examines production levels, supply patterns, price movements, trade dynamics, international market developments and local market conditions, offering comprehensive insights into the prevailing situation and anticipated future trends. A concise overview of the current supply and price conditions of key vegetables and pulses is presented below:

- **Tomato** supply is mainly arriving from Sindh due to start of production season over there. As, tomato supply from Sindh is gradually increasing, resultantly tomato prices are exhibiting declining trend in local markets. Tomato supply from Sindh will reach its full swing till mid December, 2025, afterwards tomato price is expected to remain on lower side.
- **Onion** supply is arriving from Sindh and Balochistan. Production season of onion in Balochistan is about to end and in Sindh has just commenced. Due to start of production season in Sindh, onion supply is improving, resultantly its prices are exhibiting slightly decreasing trend in local markets. During December 2025, onion supply from Sindh will be available in sufficient quantum, which may lead its prices to further decrease in local markets.
- As regards **Potato**, its local production season in Khushab (Soon valley), Sialkot, Gujranwala, Kasur & Lahore has been commenced and supply of potato fresh is gradually increasing, therefore prices of potato fresh have declined in local markets. During December-2025, fresh potato crop will be available from core producing areas Okara, Pakpattan & Sahiwal in sufficient quantity, afterwards its price are expected to decline further in local markets.
- The local supply of **Garlic** is about to end, however its supply will be available from KP & Balochistan. Moreover, import of garlic from China is smoothly in progress. Resultantly, its supply & price situation is stable in local markets. Next local crop will be available during March-2026, thereafter garlic prices are expected to decline in local markets. As regards **Ginger**, its consumption requirement is entirely met through import from Thailand and China. Production season in China & Thailand has just commenced, resultantly local prices of ginger are expected to decline during December-2025. In case of **Green Chilies**, production season of Sindh is in progress, supply situation of green chilies is stable and its price is declining.
- In case of **Pulses**, due to their less domestic productions, import of pulses is imperative to meet consumption requirements. International prices of pulses are on lower side therefore import is steady. Resultantly, supply & price situation of pulses are showing stable trend in local markets.

Advisory Measures:

- PAMRA Authority in coordination with EADAs and Secretaries Market Committee, should maintain vigilant oversight of the supply and price situation of essential commodities. Commission agents may also be engaged to implement proactive measures aimed at ensuring stability in the availability and prices of essential agricultural commodities items across local markets.
- The prevailing low international prices present a favorable opportunity to maximize pulse imports, particularly for the Faisalabad Division, where most pulse importers are concentrated. Accordingly, the Commissioner Faisalabad Division may engage local importers to ensure maximum import volumes, keeping in view provincial consumption requirements, especially for Ramzan-2026.
- As the sowing season of garlic and gram is in progress, the Agriculture Department is advised to intensify efforts to expand the cultivated area of these crops to better align domestic production with consumption needs.



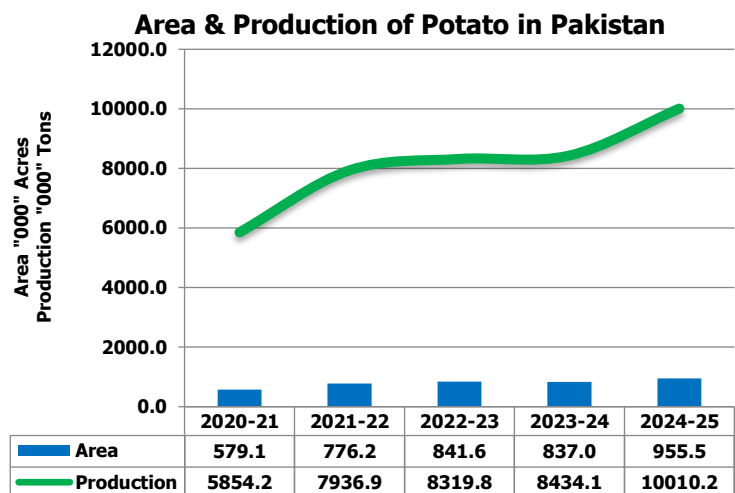
1. Potato



NATIONAL OVERVIEW

Domestic Area & Production:

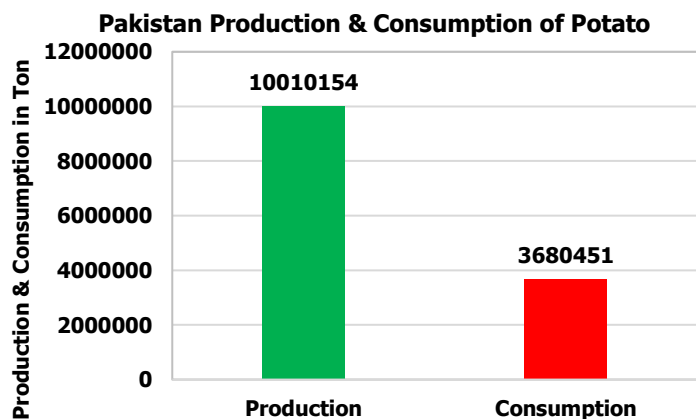
- Pakistan has attained self-sufficiency in fulfilling domestic potato demand, owing to substantial domestic production. Data from the Agricultural Statistics of Pakistan and the Economic Survey of Pakistan 2024–25 indicates that potato production reached 10.01 million tons during the year 2024-25, representing a record high and an increase of 18.68 percent over the preceding year.
- The trend in potato production demonstrates a sustained upward trajectory. Correspondingly, the area under cultivation has expanded, recording a 14.15% increase over the previous year.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics

Production & Consumption:

- The Household Integrated Economic Survey 2018-19, undertaken by the Pakistan Bureau of Statistics and reported in the Agricultural Statistics of Pakistan, estimates the country's annual potato consumption requirement at 3,680,451 tons.
- The domestic potato consumption requirement of 3,680,451 tons is considerably lower than the domestic production, which reached 10.01 million tons in year 2024-25, resulting in a surplus of 6.32 million tons.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)



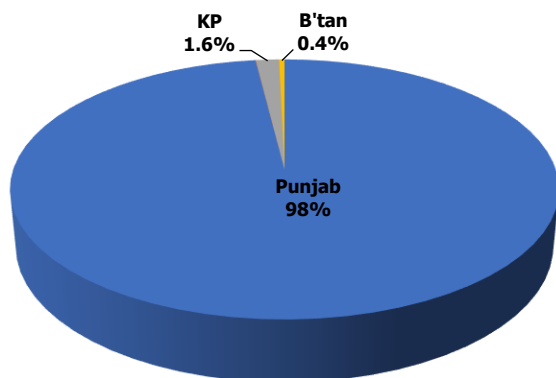
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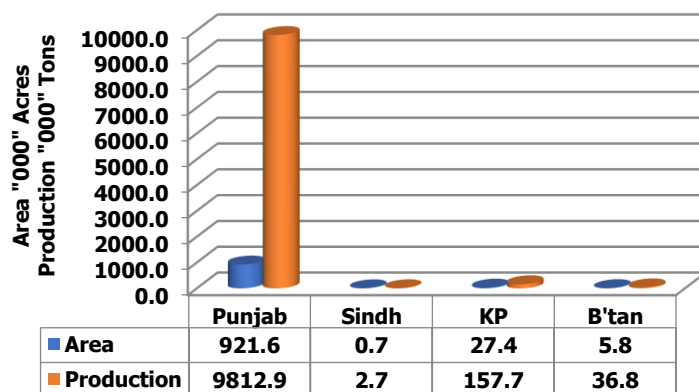
Province wise Area & production:

- Punjab remains the leading province in potato production, contributing a dominant share of 98% to the country's total production. The province's potato crop not only fulfills its own domestic demand but also ensures availability of potato to other provinces. The remaining provinces account for only a minimal share of national potato production.
- In year 2024-25, Punjab produced 9.812 million tons of potato from a cultivated area of 921,600 acres. Khyber Pakhtunkhwa recorded a production of 157,700 tons, while Balochistan and Sindh contributed 36,800 tons and 2,700 tons, respectively.

Province Wise Production Share of Potato 2024-25



Province Wise Area & Production of Potato 2024-25

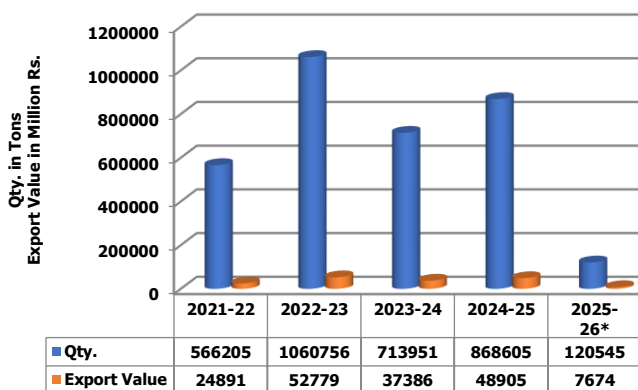


Source: Pakistan Bureau of Statistics (PBS)

Export Insights:

- On account of surplus potato production, Pakistan has solidified its position as a key participant in the global export market. In the fiscal year 2024-25, the country exported 8,68,605 tons, accruing export revenues of Rs. 48,905 million. During the year 2025-26 (July-October), export volumes reached 1,20,545 tons, generating Rs. 7,674 million in export earnings. The principal export destinations encompass the U.A.E., Sri Lanka, Afghanistan, Qatar, Oman, Malaysia, and Kuwait.

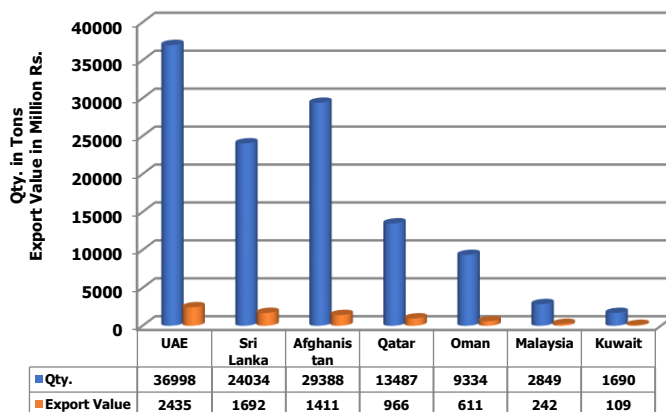
Export of Potato



*=Export during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Country Wise Export of Potato 2025-26



*=Export during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

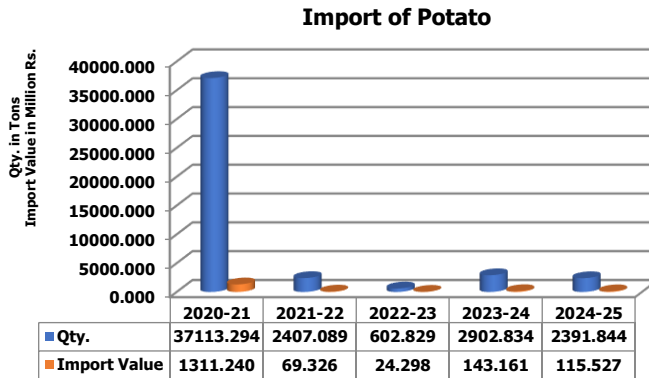


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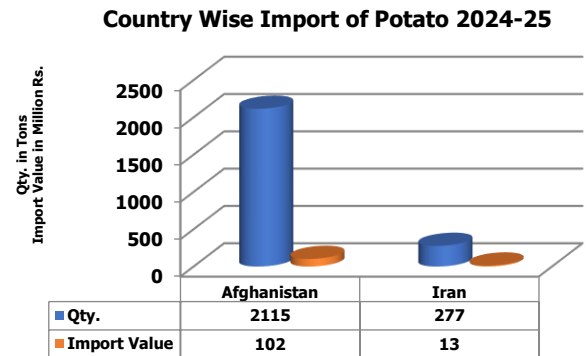


Import Insights:

- Consequently, Pakistan does not require potato imports to meet domestic demand; however, a small quantity is imported solely for seed purposes. In year 2024-25, imports amounted to 2,392 tons, whereas no imports were recorded during year 2025-26 (July-October). The country primarily sources potato seeds from Afghanistan and Iran.



Source: PBS & Pakistan Single Window

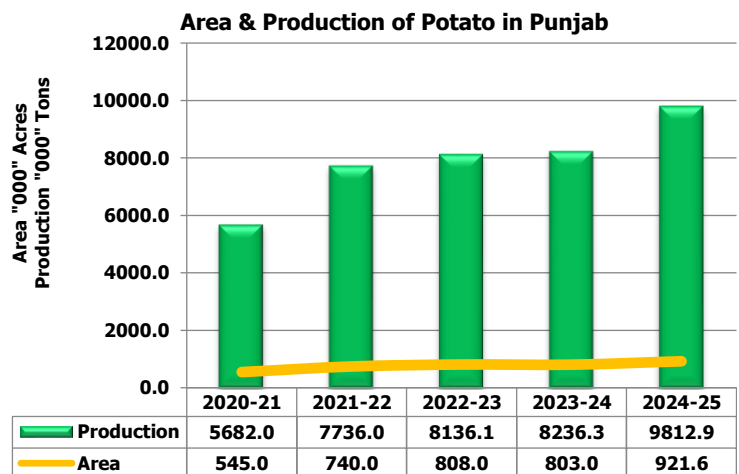


Source: Pakistan Single Window

PROVINCIAL OVERVIEW

Area & Production:

- Contributing nearly 98% of Pakistan's total potato production, Punjab occupies a dominant position in the national potato production.
- Over the past five years, Punjab's potato production has witnessed sustained and remarkable growth, with production reaching 9.813 million tons in year 2024-25, which indicates 19.14% increase over the previous year and 72.7% increase than production level recorded during year 2020-21. The cultivated area concurrently expanded to 9,21,600 acres, reflecting a 14.7% rise over the previous year and a 69.1% increase compared to year 2020-21.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

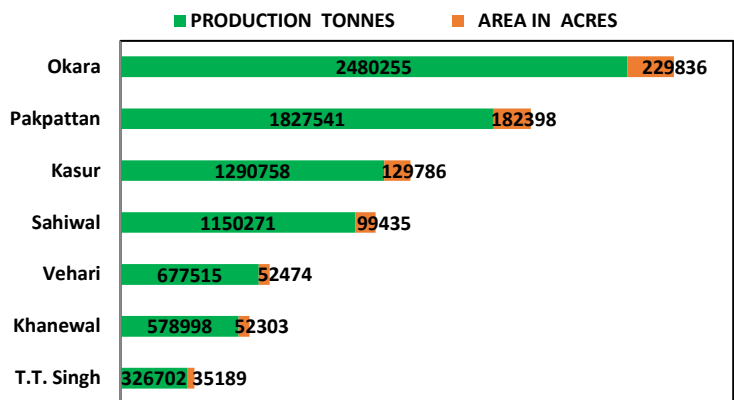


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- Okara appears to be leading potato producing district in the Punjab, attaining production of 2.480 million tons. Other major potato producing districts are Pakpattan, Kasur, Sahiwal, Vehari, Khanewal and Toba Tek Singh.

District Wise Area & Production of Potato in Punjab 2024-25



Source: Crop Reporting Service Punjab

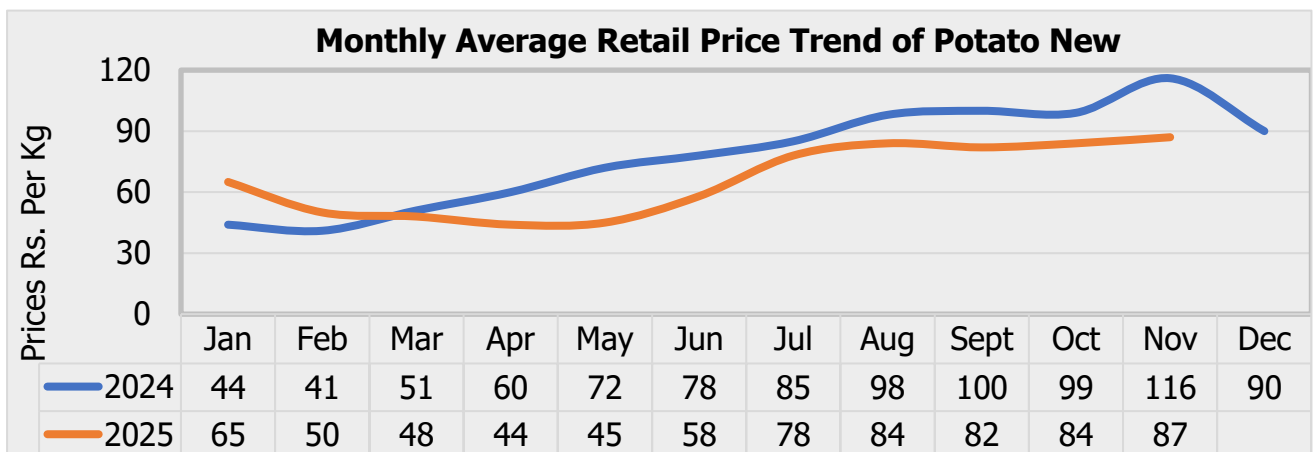
Supply Cycle:

- Seasonal variations generate distinct potato production cycles across all provinces of the country. The major potato-producing districts in each province, along with their respective production seasons, are presented below:

Province	Top Production Districts	Availability of Potato Crop in Markets
Punjab	Okara, Pakpattan, Kasur, Sahiwal, Vehari, Khanewal & T.T. Singh etc.	November – June
Sindh	Khairpur, N. Feroze, Dadu, Sukkur, Ghotki etc.	December – January
KP	Chitral, Mansehra, Nowshera, Bajour & Kurram etc.	June – November
Balochistan	Musa Khail, Kalat, Pishin, K. Abdullah & Sibi etc.	15 August – October

Retail Market Prices:

- Local production season of potato has been commenced in Khushab (Soon Valley), Sialkot & Gujranwala, Kasur & Lahore, which resulted in improvement in supply of potato fresh. During December 2025, supply of fresh potato will be available in sufficient quantum from core producing areas. Thereafter, price of fresh potato is likely to decline in local markets. During month of November average retail price of potato fresh remained at Rs.87/Kg in local markets.





SUPPLY MANAGEMENT ADVISORY



Assessment

Fresh potato crop has started to arrive in Agricultural Produce Markets from Khushab (soon Valley), Sialkot & Gujranwala, Kasur & Lahore. Due to start of local production season, supply of potato fresh is increasing, resultantly its price is showing declining trend in local markets.

Forecast

During December, production season of potato will reach its full swing and supply will be available from major producing areas i.e. Okara, Pakpattan & Sahiwal, etc which will improve supply situation of fresh potato in local markets and subsequently price of potato fresh is expected to further decline in local markets.



Advisory



- The EADAs & Secretaries Market Committee should ensure implementation of transparent and fair auction process of potato in Agricultural Produce Markets, so that benefit of decline in price may be transmitted to the consumers.
- The District Administration with the help of Price Control Magistrates should control over profiteering by the retailers.

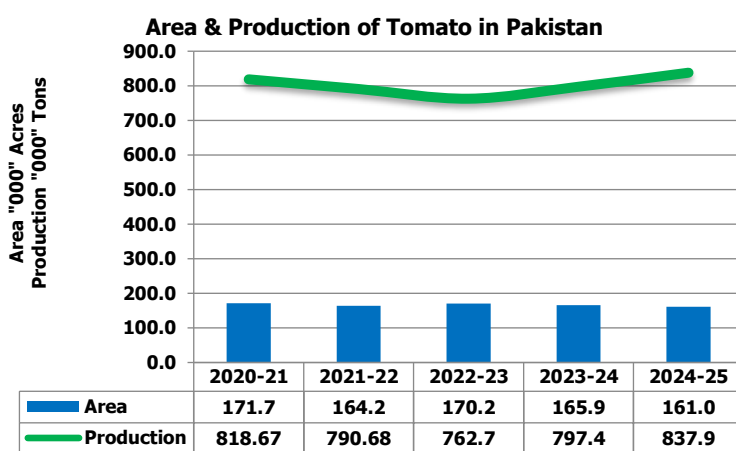
2. TOMATO



NATIONAL OVERVIEW

Domestic Area & Production:

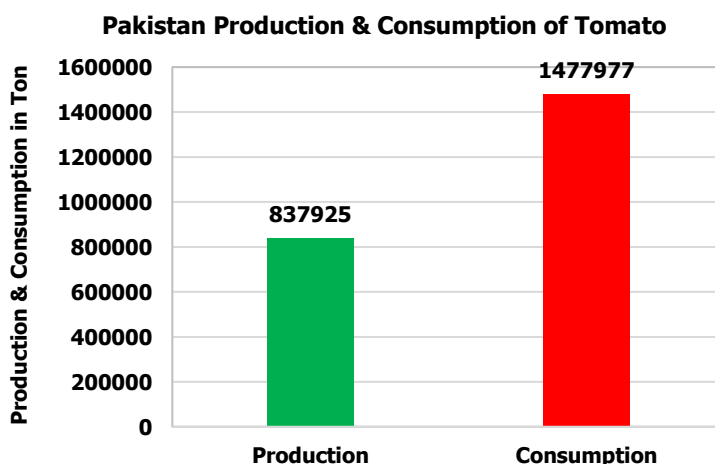
- Over the past three years, domestic tomato production has exhibited a steady upward trend, despite a slight contraction in the cultivated area.
- In year 2024-25, national tomato production reached 837,900 tons, reflecting a 5.07% increase over the previous year, while the area under cultivation declined to 161,000 acres, registering a 3.95% decrease compared to the preceding year.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Production & Consumption:

- Domestic production of tomato is exhibiting increasing trend, even then it is far less in contrast with domestic consumption requirements. Domestic demand is estimated at 1,477,977 tons and production limited to 837,925 tons, the resulting annual supply deficit of 640,052 tons, thus country's dependence on imports is imperative to ensure tomato supply in the markets.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

- In terms of provincial contribution, Balochistan stands as the leading tomato-producing province, accounting for 43% of the national output, followed by Punjab at 24%, Sindh at 20%, and Khyber Pakhtunkhwa with 13%.

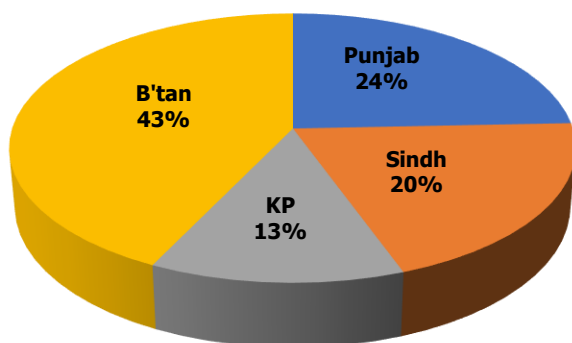


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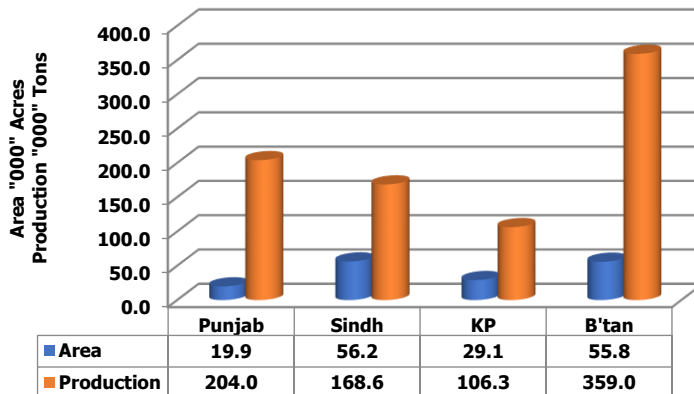


- During year 2024-25, Balochistan recorded the highest tomato production i.e. 359,000 tons from a cultivated area of 55,800 acres. Punjab ranked second with an output of 204,000 tons from 19,900 acres. Sindh followed with 168,600 tons produced over 56,200 acres, while Khyber Pakhtunkhwa reported the lowest provincial production, registering 106,300 tons from 29,100 acres.

Province Wise Production Share of Tomato 2024-25



Province Wise Area & Production of Tomato 2024-25

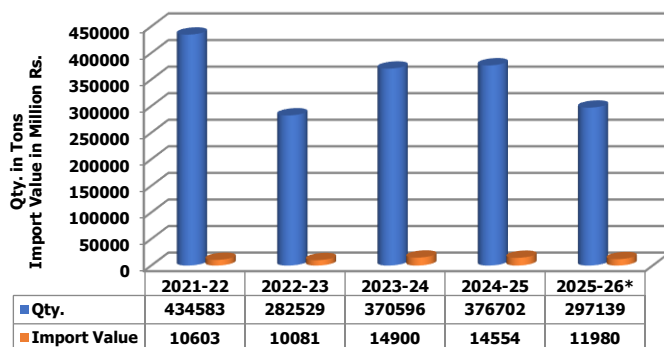


Source: Agricultural Statistics of Pakistan

Import Insights:

- Pakistan imported 376,702 tons of tomato at cost of Rs. 14,554 million during year 2024-25, indicating a modest rise in import volumes but a slight reduction in value relative to the previous year. In year 2025-26 (July-October), import arrivals have been recorded at 297,139 tons at expense of Rs. 11,980 million.
- Afghanistan and Iran are dominant suppliers of tomato to the Pakistan. During year 2025-26 (July-October), imports from Afghanistan reached 224,930 tons at a cost of Rs. 8,455 million, while Iran contributed 72,209 tons valued at Rs. 3,525 million.

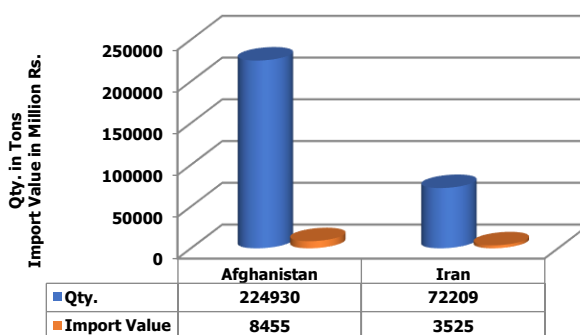
Import of Tomato



*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Country Wise Import of Tomato 2025-26



*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Export Insight:

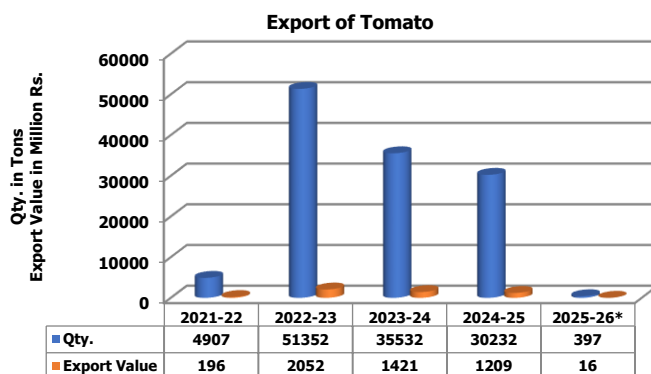
- Notably, despite considerable reliance on imports to meet domestic demand, Pakistan still takes part in tomato exports to contribute into foreign exchange earnings.
- During year 2024-25, Pakistan exported 30,232 tons of tomato, generating export revenue of Rs. 1,209 million, indicating slight reduction in both export volume and value compared with the preceding year. During year 2025-26 (July-October), tomato



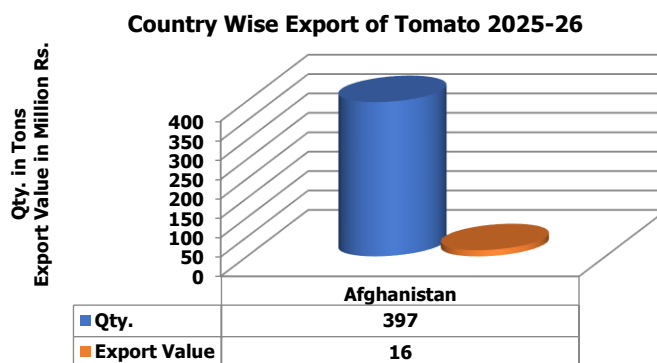
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exports recorded at 397 tons, making export earning of Rs. 16 million. Afghanistan continued to serve as the primary destination for Pakistan's tomato exports.



*=Export during July 2025 to October 2025
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

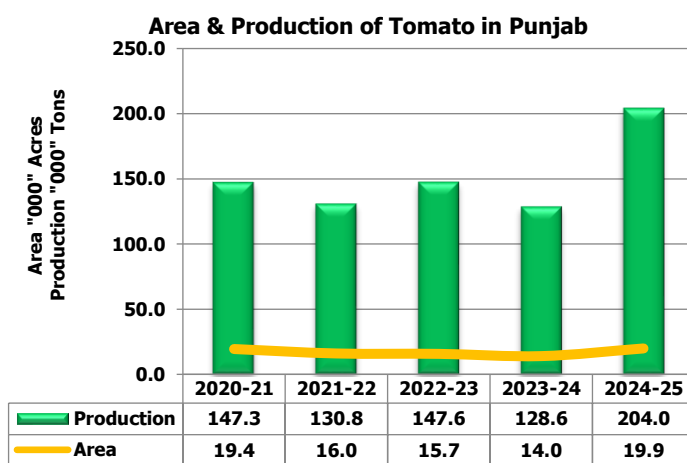


*=Export during July 2025 to October 2025
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

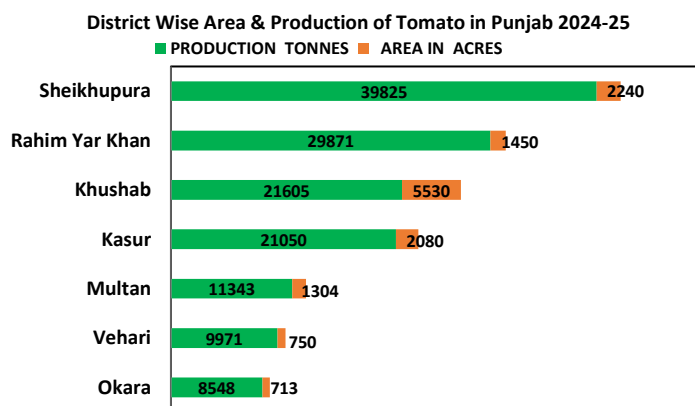
PROVINCIAL OVERVIEW

Area & Production:

- Tomato production in Punjab has demonstrated pronounced fluctuations over the past five years. Likewise, the area under tomato cultivation has also shown an inconsistent pattern during this period.
- In year 2024-25, tomato production in Punjab rose sharply to 204,000 tons, marking a significant 58.6% increase over the previous year. Correspondingly, the cultivated area expanded to 19,900 acres, reflecting a 42.14% increase compared with the preceding year.
- Major tomato producing districts in Punjab are Sheikhpura, Rahim Yar Khan, Khushab, Kasur, Multan, Vehari and Okara.
- District Sheikhpura secured 1st rank with a production of 39,825 tons, Rahim Yar Khan stood at 2nd with 29,871 tons and Khushab ranked third with 21,605 tons.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab



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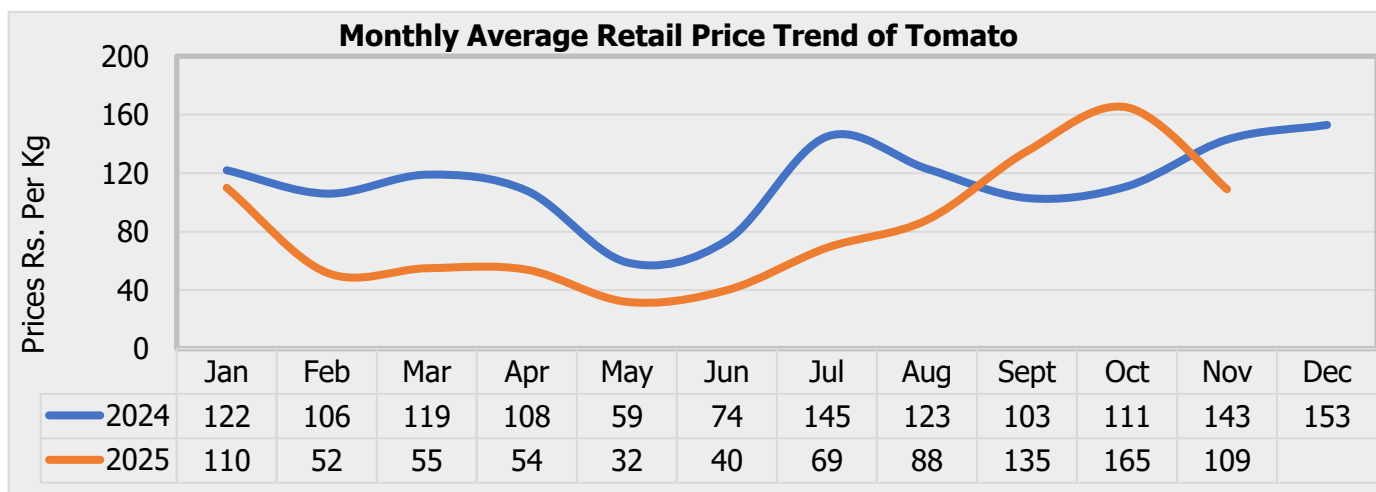
Supply Cycle:

- Owing to seasonal dynamics, the supply of tomato from various provinces fluctuates round the year. The key tomato-producing districts in each province, along with their respective production seasons, are presented below:

Province	Top Production Districts	Availability of Tomato Crop in Markets
Punjab	Sheikhupura, Rahim Yar Khan, Khushab, Kasur, Multan, Vehari & Okara etc.	April – June
Sindh	Thatta, Badin, Mirpurkhas, Matiari & T.M.Khan etc.	December – April
KP	Swat, Malakand, Kurram, Muhmand & Charsada etc.	June – November
Balochistan	Lasbela, Barkhan, Nasirabad, Khuzdar, Jaffarabad & Killa Saifullah etc.	End June – Mid November

Retail Market Price:

- Due to start of production season of tomato in Sindh, tomato supply situation is improving in local markets and its price has started to decline in local markets. Monthly average retail price of tomato in Punjab is Rs.109 per Kg during month of November, 2025.



SUPPLY MANAGEMENT ADVISORY



Assessment

Production season of tomato in Sindh has commenced, from where major supply of tomato is arriving in local markets. Due to improvement in tomato supply, its prices have declined in local markets.



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Forecast

With the passage of time, tomato supply from Sindh is increasing and will reach its peak during December, 2025. Afterwards, supply situation of tomato is expected to improve further and its price is anticipated to remain on lower side in local markets.



Advisory



- The EADAs and Secretaries Market Committee should ensure maximum supply of tomato from core production areas of Sindh with the help of commission agents to increase supply in local markets.
- Further, auction monitoring mechanisms may also be strengthened to ensure implementation of fair and transparent price fixation system in Agricultural Produce Markets.
- District Administration may expedite performance of Price Control Magistrates by ensuring strict actions against retailers involved in profiteering and overcharging.

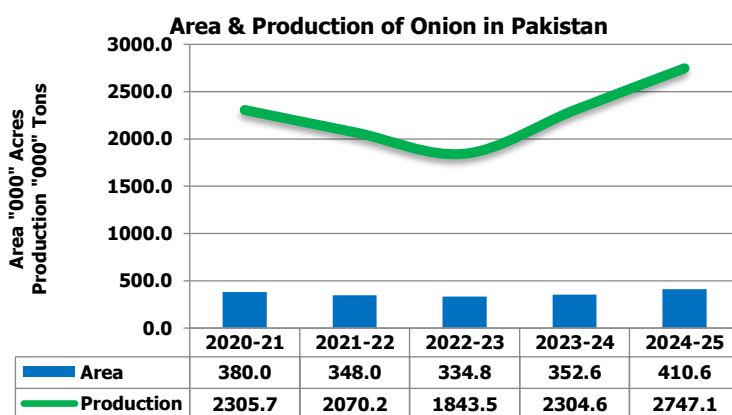
3. ONION



NATIONAL OVERVIEW

Domestic Area & Production:

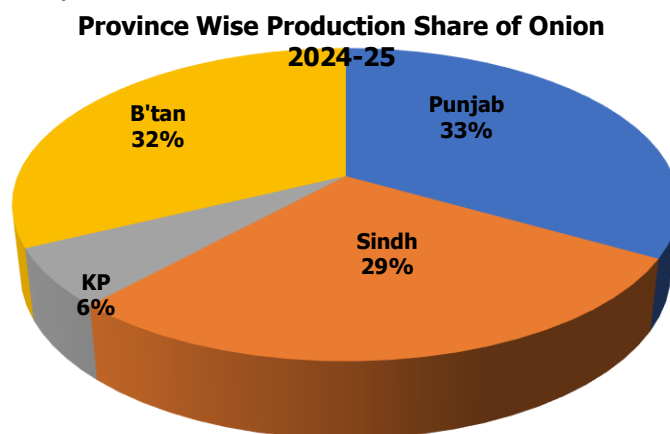
- The domestic production and the cultivated area in Pakistan are exhibiting consistent increasing trend over the preceding three years.
- The domestic onion production increased to 2.747 million tons during year 2024-25, representing a 19.2% rise in contrast with the previous year. Likewise, cultivated area expanded to 410,600 acres, reflecting a 16.44% increase over last year.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

- During year 2024-25, Punjab appeared as highest onion producing province in the country with its 33% share in domestic production. Whereas, Balochistan, Sindh and KP have attained share of 32%, 29% and 6%, respectively.
- During year 2024-25, Balochistan was leading province with reference to onion production, Sindh ranked 2nd and Punjab was at 3rd rank. However, during year 2024-25 Punjab became highest producing province of onion by surpassing Balochistan & Sindh.



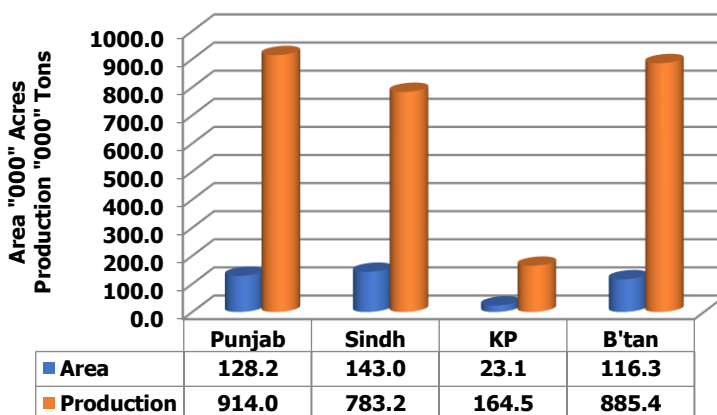


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- During year 2024-25, onion production of 9,14,000 tons has been recorded in Punjab province. In Balochistan onion production recorded at 8,85,400 tons.
- Sindh province attained 4,83,200 tons and Khyber Pakhtunkhwa (KP) recorded onion production of 1,64,500 tons.

Province Wise Area & Production of Onion 2024-25

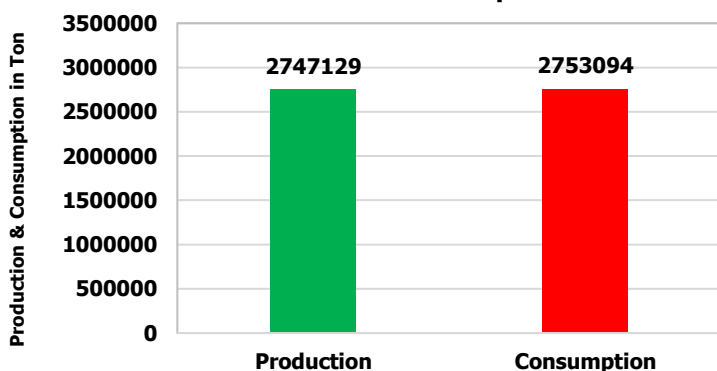


Source: Agricultural Statistics of Pakistan

Production and Consumption:

- During year 2024-25, domestic production of onion has been recorded at 27,47,129 tons, compared to consumption requirement of 2,753,094 tons, resulting in a supply deficit of 5,965 tons. This gap is met through some import from Afghanistan & Iran.

Pakistan Production & Consumption of Onion

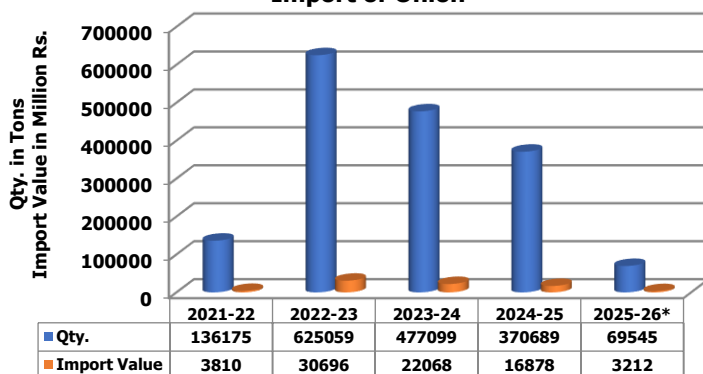


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights:

- On the import side, Pakistan imported 370,699 tons of onion at a cost of Rs. 16,878 million during year 2024-25, which appeared less in terms of volume and value as compared to the last year.
- However, during year 2025-26 (July-October), imports stood at 69,545 tons at an expense of Rs. 1791 million. Pakistan arranges onion imports primarily from Afghanistan & Iran. However, currently trade with Afghanistan is halted due to intense border situation at Pak-Afghan border.

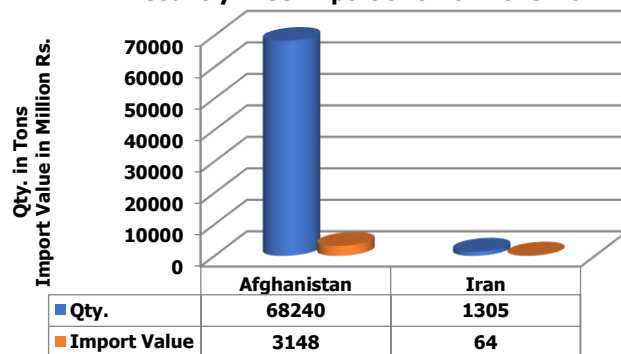
Import of Onion



*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Country Wise Import of Onion 2025-26



*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

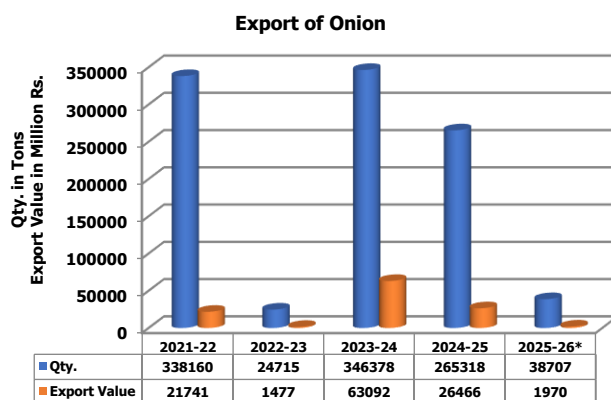


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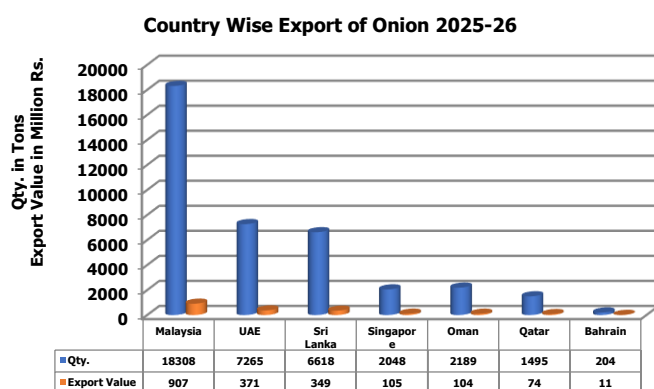
Export Insights:

- On one side Pakistan imports onion to meet domestic consumption requirement, whereas on other side Pakistan exports onions to high end international markets to contribute in foreign exchange reserves.
- Onion exports during the fiscal year 2024-25 totaled at 265,318 tons, generating Rs. 26,466 million in revenue, marking a decline in both volume and value compared to the previous year. In year 2025-26 (July-October), onion export reached 38,707 tons, earning Rs. 1,970 million.
- Malaysia, the United Arab Emirates (UAE), Sri Lanka, Singapore, Oman, and Bahrain emerged as the key export destinations. Exports to Malaysia, the UAE and Sri Lanka are considerably higher as compared to other countries.



*=Export during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



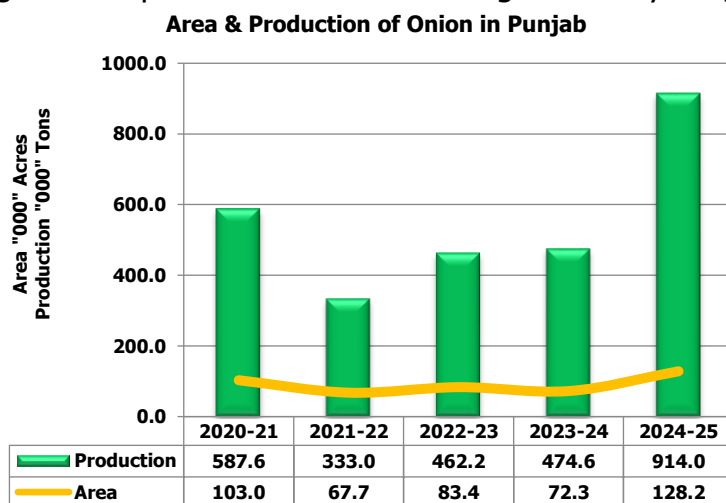
*=Export during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production:

- Punjab has experienced increasing trend in production of onion during last four years, whereas cultivated area has depicted instable trend.
- During the fiscal year 2024-25, onion production surged to 914,000 tons, marking a remarkable 92.5% increase over the previous year. Concurrently, the area under cultivation expanded to 128,200 acres, reflecting a substantial 77.3% rise compared with the preceding year.



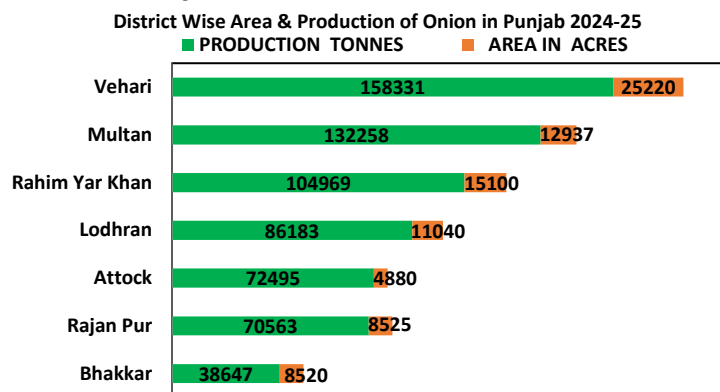
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



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- The principal onion-producing districts in Punjab include Vehari, Multan, Rahim Yar Khan, Lodhran, Attock, Rajanpur, and Bhakkar.
- Vehari stood first with an onion production of 158,331 tons. Multan ranked second with 132,258 tons, while Rahim Yar Khan held the third position with production of 104,969 tons.



Source: Crop Reporting Service Punjab

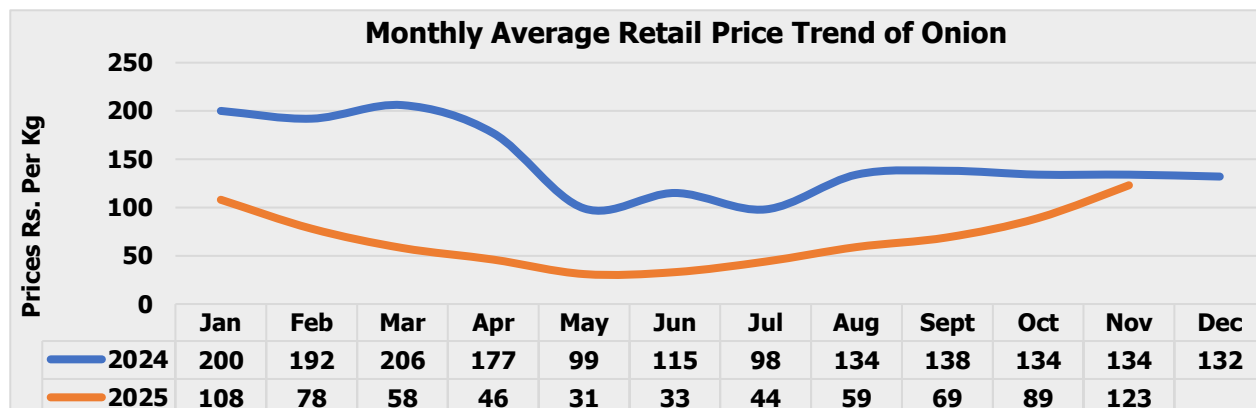
Supply Cycle:

- Onion supply across the country is subject to seasonal fluctuations, with supply shifting among provinces at different times of the year. The key onion-producing districts in each province, along with their respective production seasons, are presented below:

Province	Top Production Districts	Availability of Onion Crop in Markets
Punjab	Vehari, Multan, Rahim Yar Khan, Lodhran, Attock, Rajan Pur & Bhakkar etc.	March to July
Sindh	Mirpurkhas, Sanghar, Jacobabad, Matiari, Shaheed Benazir Abad & N. Feroze etc.	November – April
KP	Swat, Dir Lower, Malakand, Dir Upper, Muhmand, Bajour & Khyber etc.	June – September
Balochistan	Khuzdar, Nasirabad, Washuk, Kharan, Harani, Jaffarabad & Lasbela etc.	June - November

Market Price:

Previously onion supply was entirely dependent on arrival from Balochistan due to closure of Pak-Afghan border, thus its prices went on higher side in local markets. Now, onion production season in Balochistan is close to end. However, production season of onion in Sindh has begun, from where supply is gradually increasing, resultantly its price is showing slightly declining trend in local markets. During December-2025, onion supply from Sindh will be available in bulk, thereafter its price is likely to remain within normal range. The graphical trend of monthly average retail price of onion in Punjab is given as under:





SUPPLY MANAGEMENT ADVISORY



Assessment

Production season of onion in Sindh has begun, from where onion supply is increasing over the time. Moreover, supply from Balochistan is also available but in limited quantity due to closing of production season over there. With passage of time, onion supply from Sindh will increase, resultantly price will come in normal range.

Forecast

Production season of onion in Balochistan will reach to end during December. However, production season in Sindh will reach its full swing till mid-December, 2025. Afterwards, price of onion is likely to decline in local markets.



Advisory



- The EADAs and Secretaries of Market Committee should:
 - Encourage local commission agents to arrange sufficient supply of onion from core producing areas of Sindh to keep its price within normal range.
 - Ensure regular monitoring of auction proceedings in Agricultural Produce Markets along with strict implementation of a transparent & fair price determination process.
- The District Administration through Price Control Magistrates may:
 - Intensify market surveillance for strict implementation of notified rates in open markets.
 - Take strict action against retailers involved in overcharging.

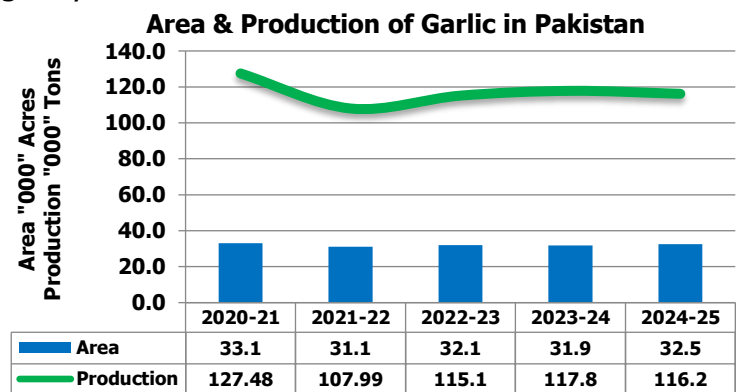
4. GARLIC



NATIONAL OVERVIEW

Domestic Area & Production

- Domestic production of garlic and its cultivated acreage have remained largely stable over the past three years, exhibiting only minor fluctuations.
- During year 2024-25, garlic production in the country has been recorded at 116,200 tons, reflecting a marginal 1.35% decline compared with the previous year.
- The cultivated area under garlic reached 32,500 acres in year 2024-25, marking a 1.88% increase over last year.

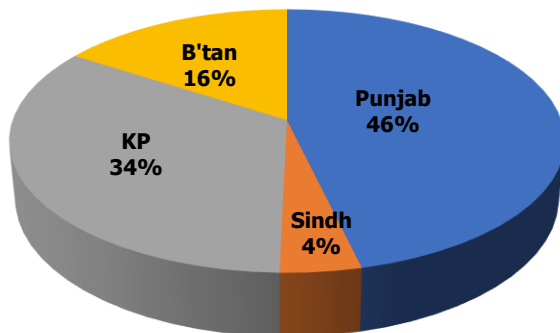


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

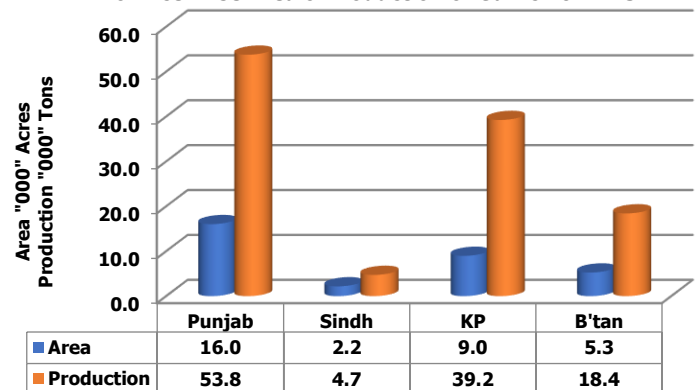
Province wise Area & Production:

- Punjab remains the leading contributor to national garlic production, accounting for 46% share in the total output, followed by Khyber Pakhtunkhwa (34%), Balochistan (16%), and Sindh (4%).
- In year 2024-25, Punjab recorded a garlic production of 53,800 tons cultivated over 16,000 acres, whereas Khyber Pakhtunkhwa produced 39,200 tons across 9,000 acres. Balochistan generated 18,400 tons from 5,300 acres, while Sindh registered the lowest output at 4,700 tons harvested from 2,200 acres.

Province Wise Production Share of Garlic 2024-25



Province Wise Area & Production of Garlic 2024-25



Source: Agricultural Statistics of Pakistan



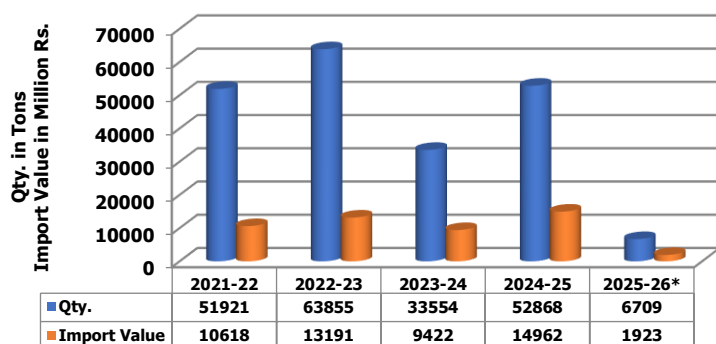
Price Control & Commodities Management Department



Import Insights:

- To meet domestic consumption requirements, Pakistan continues to rely on garlic imports from China.
- During the year 2024-25, Pakistan imported 52,868 tons of garlic, incurring an expenditure of Rs. 14,962 million. In year 2025-26 (July-October), imports from China amounted to 6709 tons, with associated costs rising to Rs. 1,923 million.

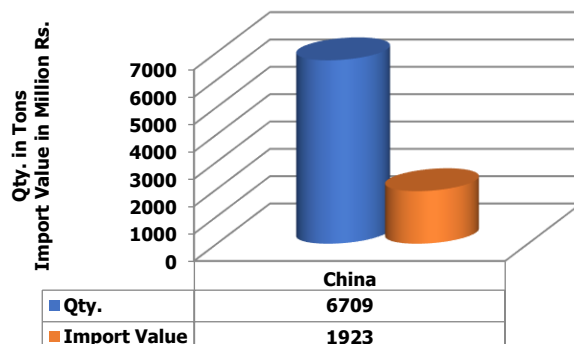
Import of Garlic



*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Country Wise Import of Garlic 2025-26



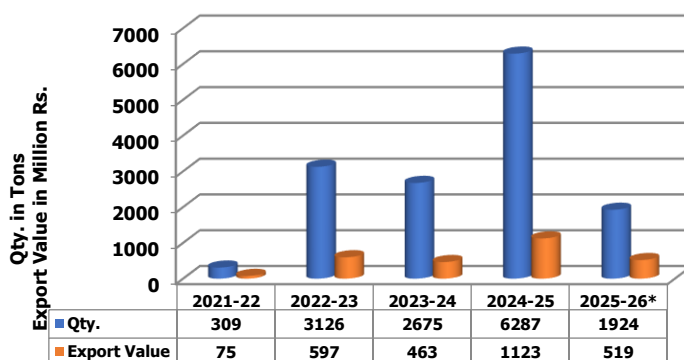
*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics

Export Insights:

- On the export front, Pakistan exported 6287 tons of garlic, generating earning of Rs. 1123 million during the year 2024-25. However, during the year 2025-26 (July-October), exports has been recorded at 1924 tons, contributing Rs. 519 million to export earnings.
- The principal export destinations for Pakistani garlic include the United States, Afghanistan, Vietnam, Kazakhstan, Tajikistan, Uzbekistan and Mauritius.
- A substantial portion of Pakistan's garlic exports is directed to Afghanistan and USA, which represents the largest share of total export volume, while export to other countries remain comparatively limited. However, in value terms, export to the United States yields significantly higher earnings than export to Afghanistan.

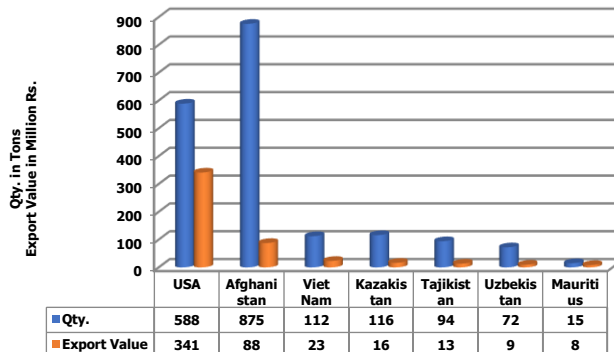
Export of Garlic



*=Export during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Country Wise Export of Garlic 2024-25



*=Export during July 2025 to October 2025

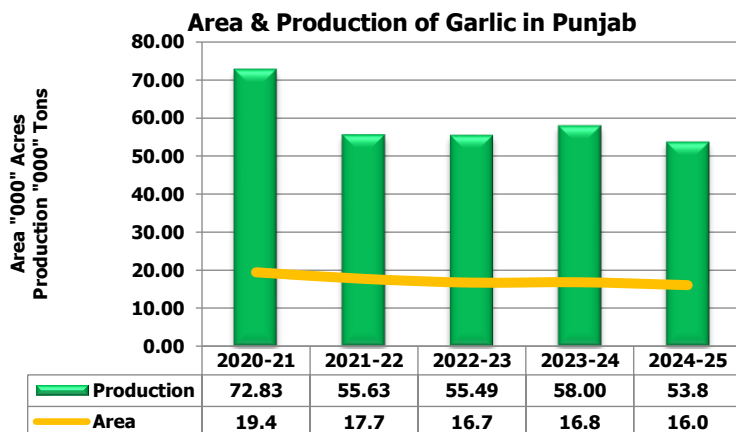
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



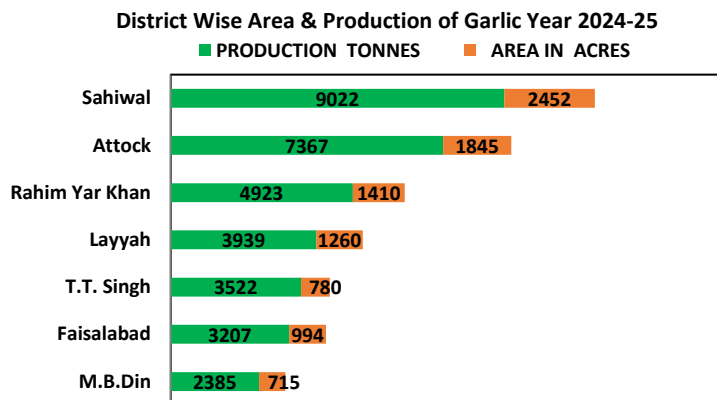
PROVINCIAL OVERVIEW

Area & Production:

- Punjab has witnessed almost stable trend in production as well as acreage of garlic during last four years.
- Garlic production in Punjab has been recorded at 53,800 tons during year 2024-25, exhibiting 7.2% decline in contrast with last year and a 26.1% decrease relative to the production level in year 2020-21. The cultivated area recorded at 16,100 acres, marking a year-on-year reduction of 4.7% and a 17.52% decrease compared to the acreage recorded in year 2020-21.
- The leading garlic-producing districts in Punjab are Sahiwal, Attock, Rahim Yar Khan, Layyah, Toba Tek Singh, Faisalabad and Mandi Bahauddin. Sahiwal appears to be biggest garlic-producing district, achieving an output of 9,022 tons from a cultivated area of 2,452 acres.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

Supply Cycle:

- Province wise major producing districts of garlic along with production season are outlined as under:

Province	Top Production Districts	Availability of Garlic Crop in Markets
Punjab	Sahiwal, Attock, Layyah, T.T. Singh, Faisalabad, M.B.Din & Wazirabad	March-May
Sindh	Thatta, T.M. Khan, Matiari, Sanghar, Larkana & Tando Allahyar	March-April
KP	Swabi, Nowshera, Kohat, Mardan, Peshawar & Swat	May-June
Balochistan	Harnai, Loralai, Musa Khail, Khuzdar Sherani, Jaffarabad	May-June

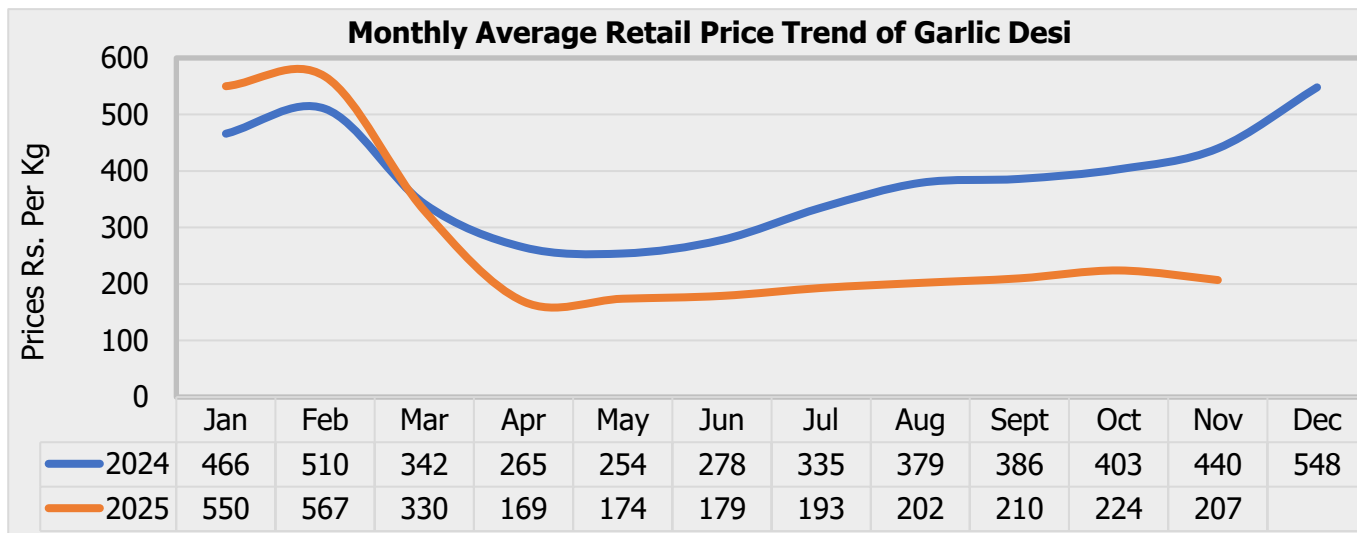


Price Control & Commodities Management Department



Market Prices:

- Local prices of garlic are on higher side as local supply is about to end, however current prices are still far less as compared to prices of corresponding period of last year. Monthly average retail price of garlic in Punjab is Rs.212/Kg during month of November.



SUPPLY MANAGEMENT ADVISORY



Assessment

As local supply of garlic is reaching to end, thus reliance on arrival from other provinces Balochistan & KP along with import from China is increasing. Therefore, supply & price situation of garlic is normal in local markets.

Forecast

With the conclusion of the local production cycle, garlic prices are anticipated to rise in local markets. Import of garlic from China is in progress and some supply from Khyber Pakhtunkhwa (KP) and Balochistan will also be available to cater for consumption requirement. Next production season of local garlic crop is expected to begin during the first week of March 2026, till then upward pressure on garlic prices is likely to persist in local markets.





Price Control & Commodities Management Department



Advisory



- The EADAs & Secretaries of Market Committees should:
 - Ensure continuous import of garlic from China with help of commission agents for maintaining stable supply of garlic in the local markets.
 - Further, sufficient supply of garlic from Khyber Pakhtunkhwa and Balochistan may also be arranged to meet consumption requirements.
 - Monitor auction proceedings in Agricultural Produce Markets on regular basis and ensure strict implementation of a fair and transparent price fixation process.
- Processing of garlic into paste may be helpful to maintain stability in supply & prices of garlic throughout the year.
- The District Administration with the help of Price Control Magistrates should expedite inspections of retailers to curb malpractices of overcharging and over profiteering.
- As sowing season of garlic is in progress, therefore Agriculture Department should strive hard to enhance local cultivation & production of garlic, in order to reduce dependency on import.

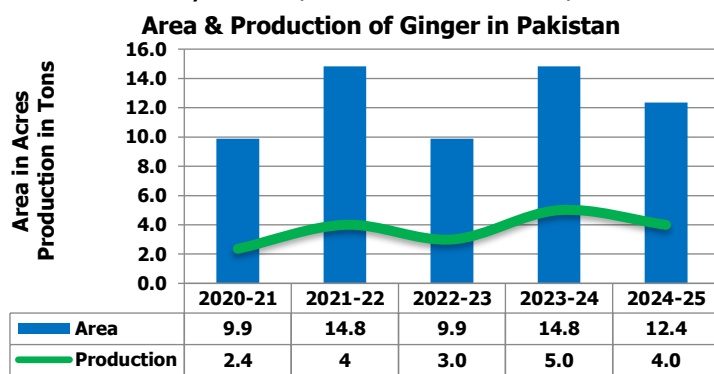
5. GINGER



NATIONAL OVERVIEW

Domestic Area & Production

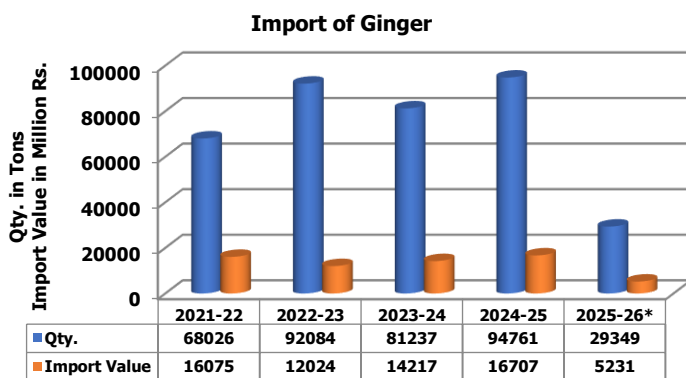
- Pakistan's domestic ginger production remains extremely limited, leaving the country heavily dependent on imports to fulfill almost whole domestic consumption needs.
- Domestic production of ginger recorded at merely 4 tons, cultivated over 12,400 acres. In sharp contrast, the national consumption requirement reached 81,231 tons, highlighting a massive supply gap and underscoring Pakistan's almost complete reliance on imported ginger to satisfy domestic demand.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

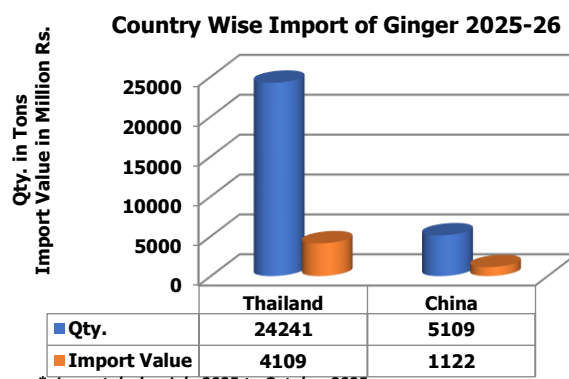
Import Insights

- For the fiscal year 2024–25, Pakistan's ginger imports totaled at 94,761 tons, amounting to an expenditure of Rs. 16,707 million. In year 202526 (July-October), import volumes reached 29,349 tons, costing Rs. 5,231 million. Pakistan's ginger supply is predominantly sourced from Thailand and China.
- During year 2025-26 (July-October), the country imported 24,241 tons of ginger from Thailand, valued at Rs. 4,109 million, while an additional 5,109 tons were imported from China, costing Rs. 1,122 million.



*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics

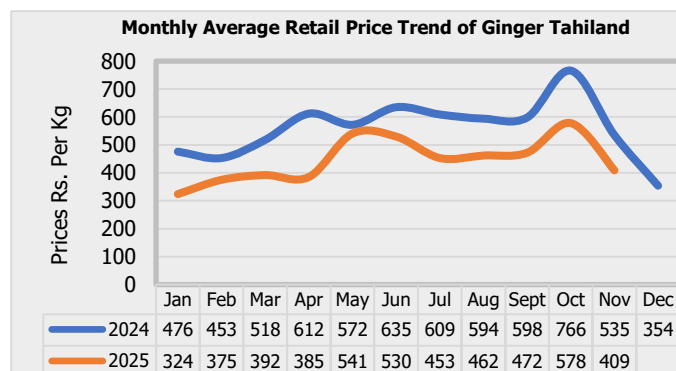


Price Control & Commodities Management Department



Market Prices

- Ginger supply in Pakistan remains consistently dependent on imports, predominantly from Thailand and China. In November, the average monthly retail price of Thai ginger is recorded at Rs. 409 per kilogram, while Chinese ginger stood at Rs. 400 per kilogram. Trend lines for monthly average retail prices of Ginger Thai & Ginger China are given as under:



SUPPLY MANAGEMENT ADVISORY



Assessment

Domestic production of ginger is nil which results in heavy reliance on import of ginger from Thailand and China to ensure its availability in local markets. Production season of ginger in Thailand & China has started, therefore price of ginger has started to show slightly declining trend in local markets.

Forecast

Production season of ginger in Thailand & China is in progress and import situation is smooth. Resultantly, supply situation of ginger is improving and subsequently its price is expected to further decline during December-2025.



Advisory



- EADAs and Secretaries Market Committees should persuade local importers and commission agents to ensure smooth import of ginger from Thailand & China for maintaining its stable supply in local markets.
- Processing of ginger into paste may be helpful to maintain stability in supply & prices of ginger throughout the year.
- The Agriculture Department should introduce such seed varieties of ginger which are feasible for local environment, so that dependency on import could be reduced.

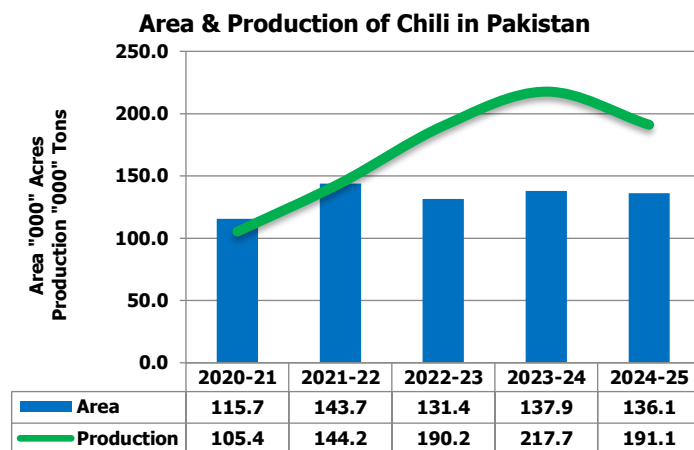
6. CHILLIES



NATIONAL OVERVIEW

Domestic Area & Production

- The production of chili in Pakistan has shown an increasing trend during period from year 2020-21 to year 2023-24, afterwards slight decrease in production has been recorded during year 2024-25, whereas cultivated area remained instable showing slight variations year on year basis.
- Domestic production of chili has been recorded at 191,100 tons during year 2024-25, which appeared 12.21% less as compared to the preceding year. The cultivated area recorded at 136,100 acres, which reflected relatively stable trend over the same period.

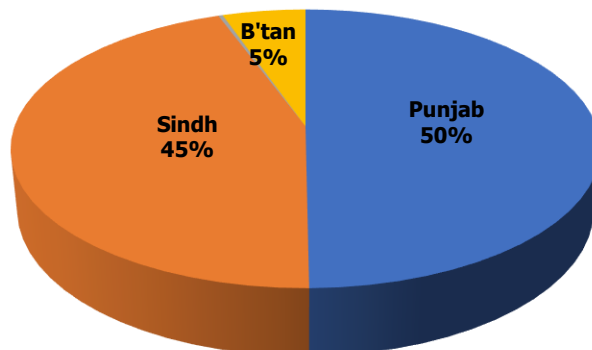


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production

- Provincial analysis indicates that Punjab is major chili producing province, contributing 50% share in domestic production. Sindh ranks 2nd with a 45% share, while Balochistan holds 3rd ranks accounting for the remaining 5%. Whereas in Khyber Pakhtunkhwa (KP) chili production has been recorded as nil.

Province Wise Production Share of Chilli 2024-25



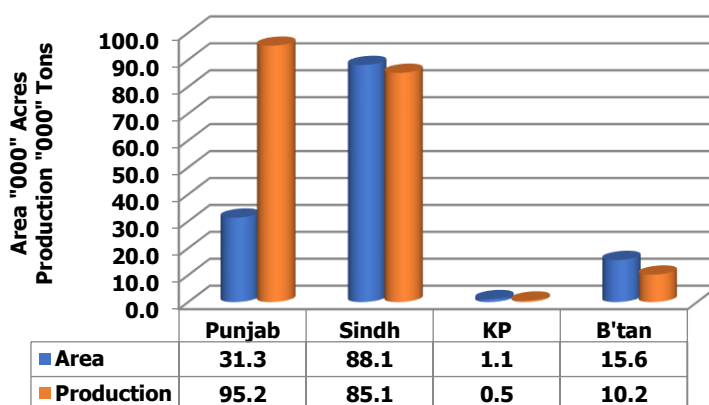


Price Control & Commodities Management Department



- Punjab retained its position as the leading chili-producing province in year 2024-25, achieving 95,200 tons from a cultivated area of 31,300 acres. Sindh ranked second, producing 85,100 tons across 88,100 acres.
- In contrast, chili production in Balochistan and Khyber Pakhtunkhwa (KP) remained minimal, registering only 10,200 tons and 500 tons, respectively

Province Wise Area & Production of Chili 2024-25

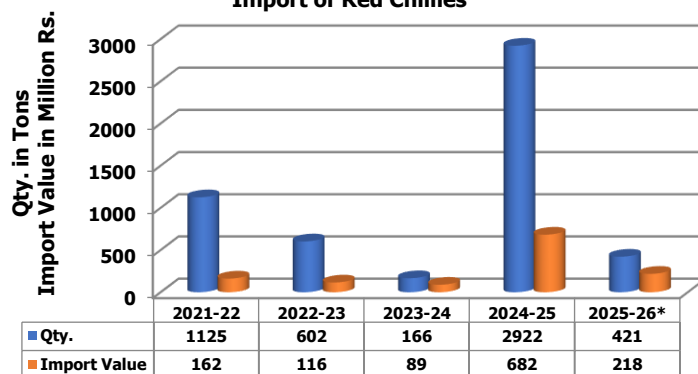


Source: Agricultural Statistics of Pakistan

Import Insights

- During the fiscal year 2024-25, Pakistan imported 2,922 tons of red chilies at a total cost of Rs. 682 million, representing a notable increase in both volume and value compared with the previous year. In year 2025-26 (July-October), red chili imports recorded at 421 tons, with an associated expenditure of Rs. 218 million.
- Red chilies are predominantly imported from China. During year 2025-26 (July-October), imports from China amounted to 415 tons, incurring expense of Rs. 217 million, while imports from Afghanistan recorded minimal, totaling 7 tons at a cost of Rs. 1 million.

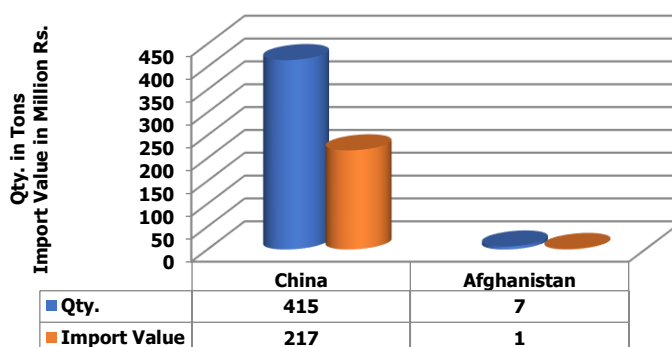
Import of Red Chillies



*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Country Wise Import of Red Chillies 2025-26



*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Export Insights

- Pakistan's red chili exports have consistently exceeded imports in both volume and value. In the fiscal year 2024-25, the country exported 3,051 tons, generating Rs. 1,574 million in revenue. During year 2025-26 (July-October), export volumes reached 2,304 tons, generating export earning of Rs. 1,082 million.

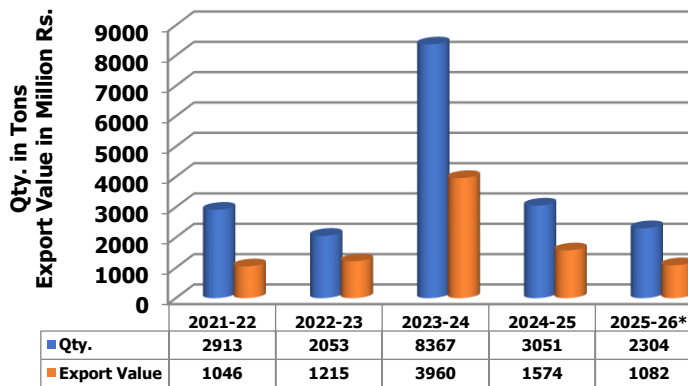


Price Control & Commodities Management Department



- Major export destinations for Pakistani red chillies include China, the United Arab Emirates, Saudi Arabia, Iraq, Qatar, and Canada.

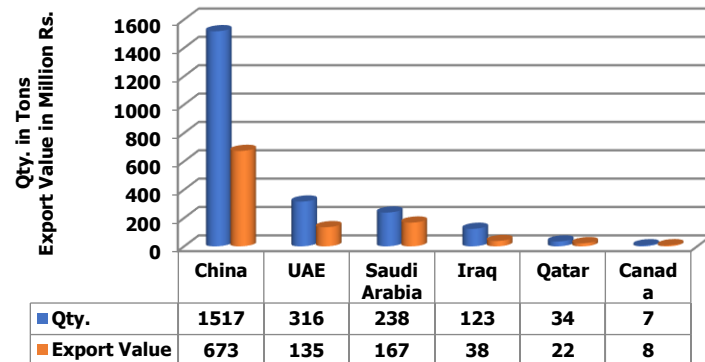
Export of Red Chillies



*=Export during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Country Wise Export of Red Chilli 2025-26



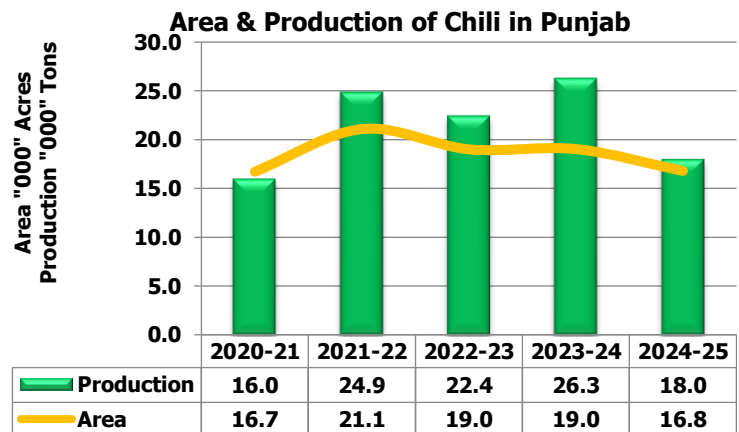
*=Export during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production

- Chili cultivation and production in Punjab have exhibited fluctuations over the last five years. During year 2024-25, provincial chili production has been registered at 18,000 tons, which appeared to be 31.48% less in contrast with preceding year.
- The acreage under chili cultivation recorded at 16,800 acres during year 2024-25, indicating 11.75% decrease as compared to cultivated area recorded during last year.



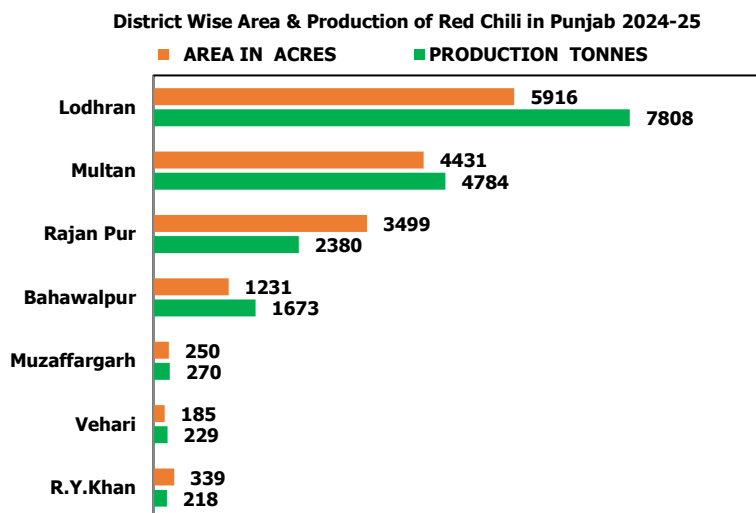
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Price Control & Commodities Management Department



- In Punjab, leading chili-producing districts are Lodhran, Multan, Rajanpur, Bahawalpur, Muzaffargarh, Vehari and Rahim Yar Khan.
- Among these, Lodhran led with the highest production of 7,808 tons from 5916 acres. Multan followed with 4,784 tons, while Rajanpur ranked third, producing 2,380 tons.



Source: Crop Reporting Service Punjab

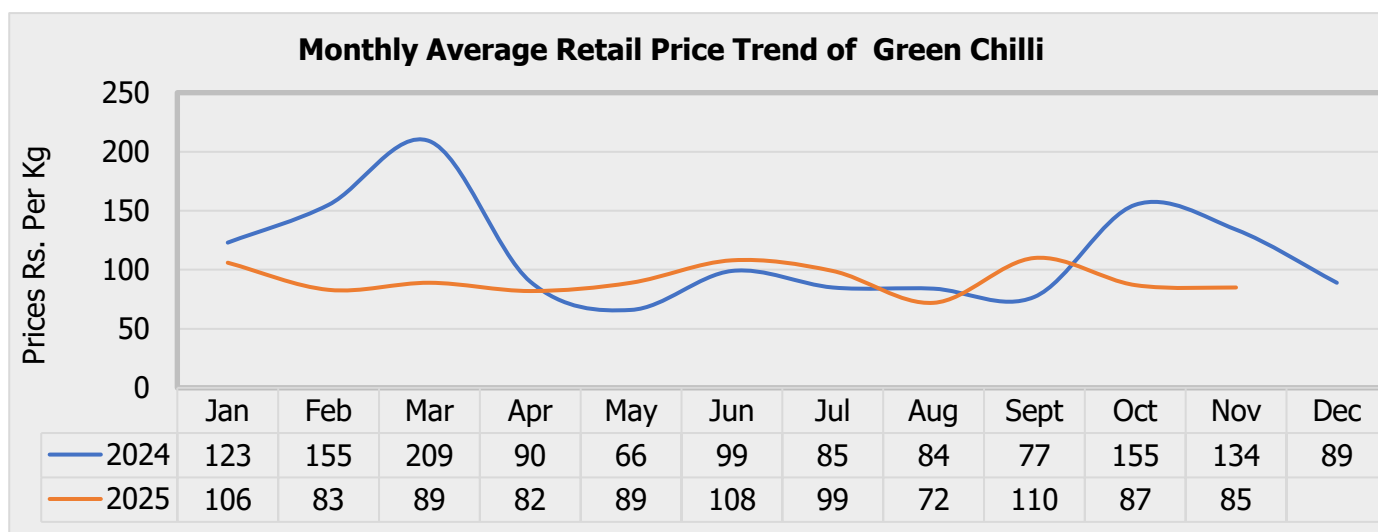
Supply Cycle

- The major chili-producing districts in each province, along with their respective production seasons, are outlined below:

Province	Top Production Districts	Availability of Chilies Crop in Markets
Punjab	Lodhran, Multan, Rajanpur, Bahawalpur, Muzaffargarh, D.G. Khan & Vehari	July (Main crop) Oct-Nov (Minor crop)
Sindh	Badin, Umarkot, Thatta, Tharparkar, Jamshoro, Matiari & Sanghar	October (Main crop) March-April (Minor crop)
Balochistan	Barkhan, Loralai, Musa Khail, Lasbela, Qilla Saifullah, Awaran & Dera Bughti	July-September

Market Prices

- Price of green chilies are showing declining trend due to availability of main crop from Sindh. Monthly average retail price of red chili in Punjab is recorded at Rs. 82 per kilogram during November. The graphical trend of monthly average retail prices of red chilies in Punjab is illustrated below:





SUPPLY MANAGEMENT ADVISORY



Assessment

The supply of green chili is mainly arriving from Sindh in addition to some arrival of local minor crop. Due to improvement in supply situation, price of chili is exhibiting decreasing trend in local markets.

Forecast

Production season of chili in Sindh is in progress. As Sindh has 45% share in domestic production, thus supply situation is expected to remain stable during month of December, 2025 and accordingly its prices is anticipated to be in normal range.



Advisory



- The EADAs and Secretaries Market Committee, should ensure sufficient supply of chilies from Punjab & Sindh through close coordination with commission agents in order to maintain stability in supply & price situation of chilies.
- Local production of chilies may be enhanced through promotion of kitchen gardening.
- The Agriculture Department should underscore high-yielding, climate-resistant and off-season seed varieties for the purpose to gain self-sufficiency and reduce dependence on other provinces.

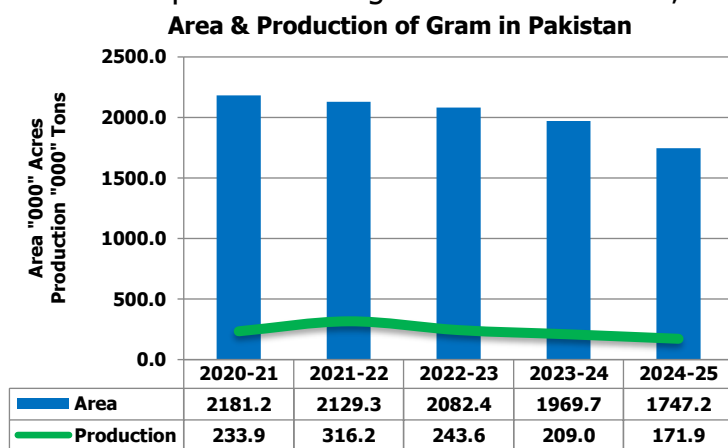
7. GRAM (Chickpea)



NATIONAL OVERVIEW

Domestic Area & Production:

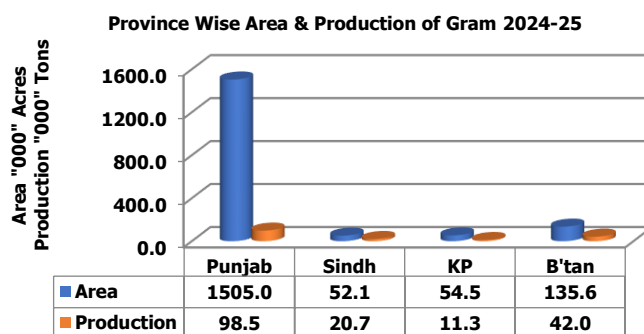
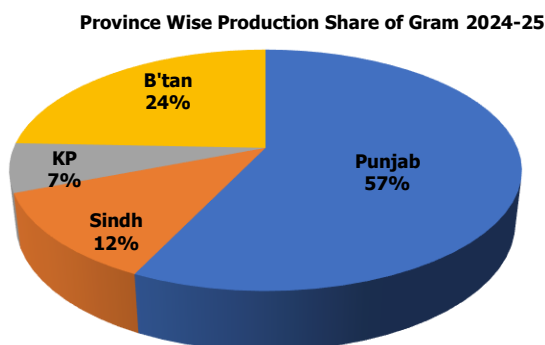
- The domestic production of gram in the country is not appreciable, which requires smooth import to meet domestic consumption requirements.
- During the year 2024-25, Pakistan's domestic production of gram recorded at 171,941 tons, which reflected 17.7% decrease in contrast with production level of previous year.
- Concurrently, acreage of gram in the country has been recorded at 17,47,200 acres during year 2024-25, which indicated 11.2% decrease as compared to acreage recorded during last year.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

- Punjab is leading gram producing province having 57% share in the total domestic production of gram. Balochistan accounts for 24% share, Sindh has 12% share and Khyber Pakhtunkhwa (KP) remains with 7% share only.
- During the year 2024-25, gram production in Punjab was recorded at 98,500 tons, which was harvested from area of 15,05,000 acres. While, gram production in Balochistan, Sindh and Khyber Pakhtunkhwa was recorded at 42,000 tons, 20,700 tons, and 11,300 tons, respectively.



Source: Agricultural Statistics of Pakistan

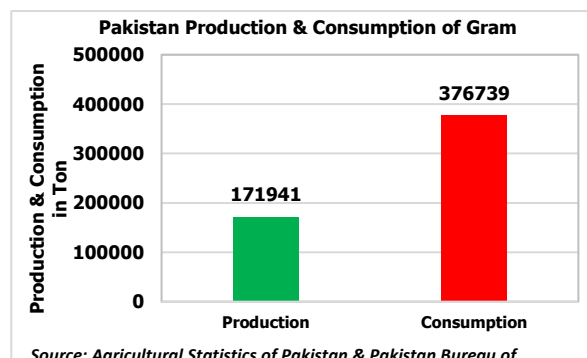


Price Control & Commodities Management Department



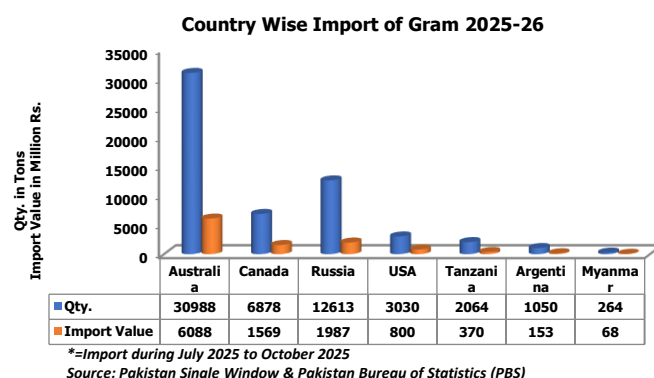
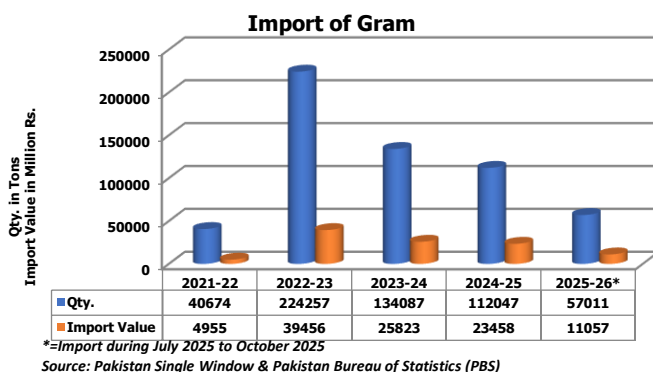
Production and Consumption:

- Due to insufficient domestic output, Pakistan continues to rely on gram imports to meet its local consumption requirements. During year 2024-25, domestic production stood at 171,941 tons, whereas the consumption requirement is 376,739 tons, resulting in a significant supply deficit of 201,798 tons.



Import Insights:

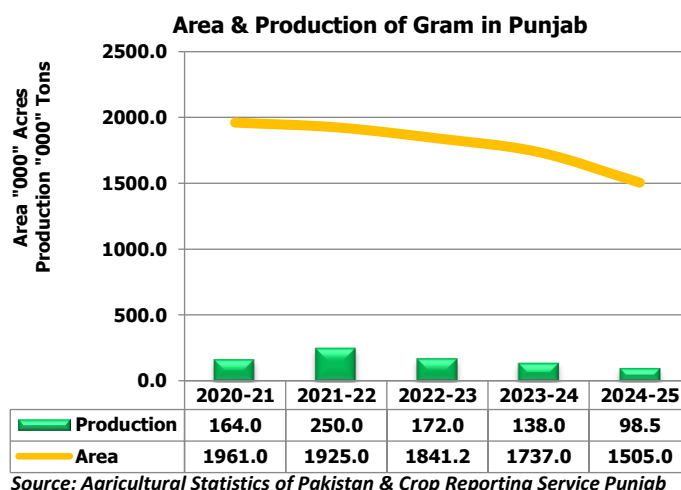
- Pakistan undertook import of 112,047 tons of gram during the year 2024-25 at an expense of Rs. 23,458 million. However, during year 2025-26 (July-October), gram import has been recorded at 5701 tons incurring cost of Rs. 11057 million. Pakistan primarily imports gram from Australia, Canada, Russia, USA, Tanzania, Argentina & Myanmar.



PROVINCIAL OVERVIEW

Area & Production:

- The production of gram in Punjab is exhibiting decreasing trend over the years and same is case with its cultivated area.
- During the year 2024-25, gram production in Punjab was recorded at 98,500 tons, which appeared to be 28.6% less than production recorded in last year. Likewise, acreage of gram also reduced to 1,505,000 acres, showing 13.35% decrease in contrast with last year. Due to gradual decline in local production of gram, its import is imperative to match consumption requirements.



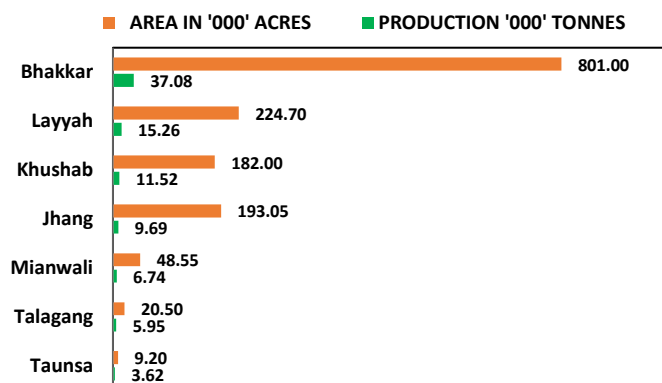


Price Control & Commodities Management Department



- Major gram producing districts in Punjab are Bhakkar, Layyah, Khushab, Jhang, Mianwali, Talagang & Taunsa. Bhakkar ranks as highest producer of gram with the production of 37,100 tons harvested from an area of 8,01,000 acres.

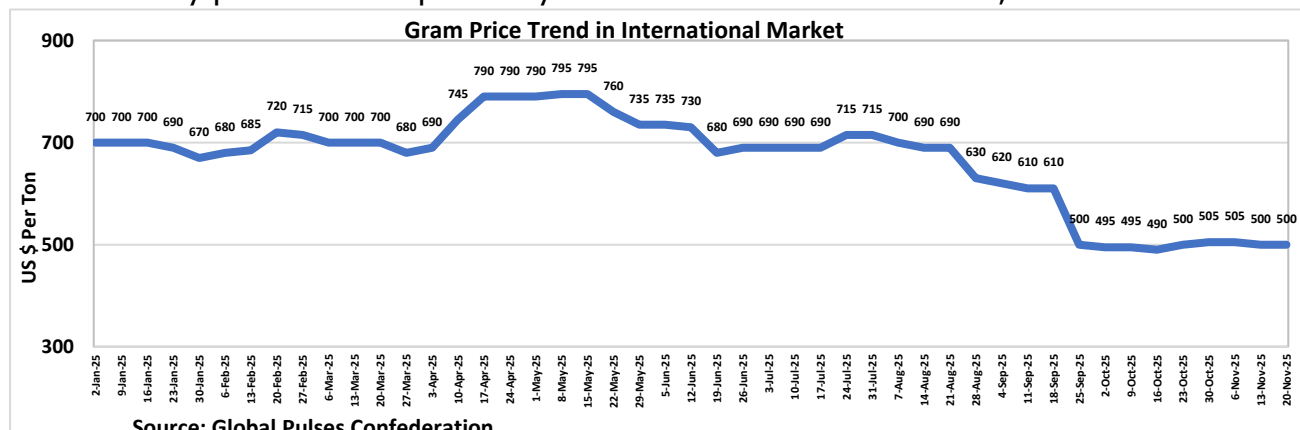
District Wise Area & Production of Gram in Punjab 2024-25



Source: Crop Reporting Service Punjab

International Market Trends

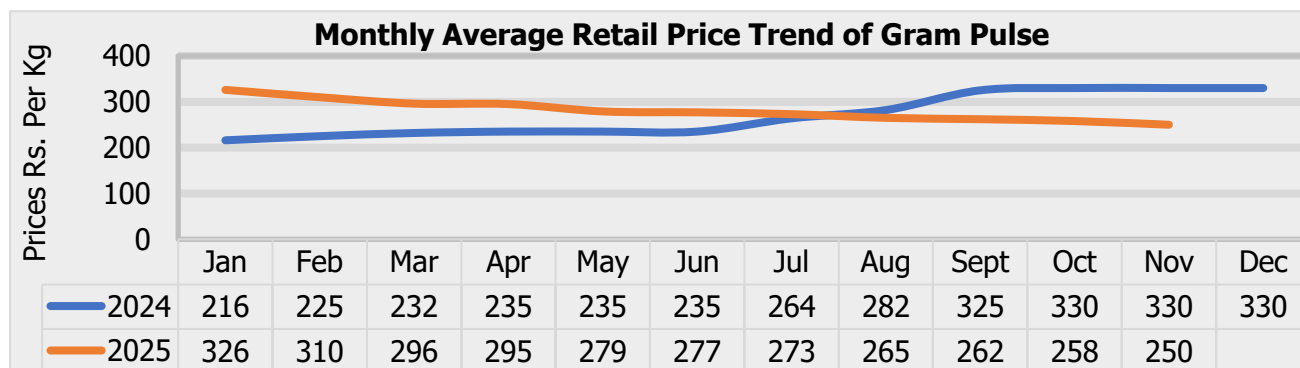
- International prices of gram are on lower side as a result of availability of gram crop from Australia & Canada. Current international price of gram is USD 500/ton. The weekly price trends reported by the Global Pulse Confederation, is outlined below:



Source: Global Pulses Confederation

Local Market Price:

- In line with prevailing low international prices, modest decline in local gram prices has also been observed and current price is comparatively less than last year. In Punjab, the average monthly retail price of gram pulse in November stood at Rs. 251/Kg.





SUPPLY MANAGEMENT ADVISORY



Assessment

As a result of availability of gram crop from Australia & Canada, their international prices are on lower side, resultantly import situation of gram is smooth. Therefore, supply & price situation of gram is stable in local markets.

Forecast

International market of gram is expected to remain stable due to arrival of gram from Australia & Canada. Therefore, import situation is likely to remain smooth and subsequently supply & price situation is anticipated to remain stable in local markets.



Advisory



- The Deputy Commissioners of Faisalabad and Sargodha should engage commission agents/importers/dealers of gram to undertake maximum import keeping in view low international prices as well as demand of Ramzan-2026.
- The District Administration with the help of concerned EADAs (E&M) & Secretaries Market Committee should maintain close liaison with commission agents/ imports /dealers to maintain sufficient stocks as per current consumption requirements and also make arrangements to ensure smooth supply during Ramzan-2026. Moreover, stock position report also be updated regularly.
- The District Administration with the help of Price Control Magistrates should ensure strict implementation of retail notified prices in local markets.



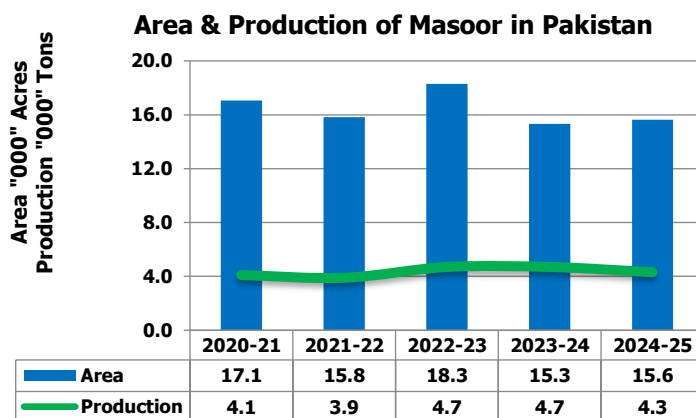
8. LENTIL (MASOOR)



NATIONAL OVERVIEW

Domestic Area & Production:

- The domestic production of masoor (lentil) is almost negligible, resulting in heavy reliance on import from other countries to cater for domestic consumption needs.
- The graphical analysis depicts that domestic production & acreage of masoor have been so low and remained instable during last five years. During year 2024-25, masoor production has been recorded at 4,300 tons, reflecting an 8.5% decline from the preceding year. The cultivated area recorded at 15,600 acres, which appeared to be 1.96% higher over the previous year but 8.77% lesser as compared to year 2020-21.

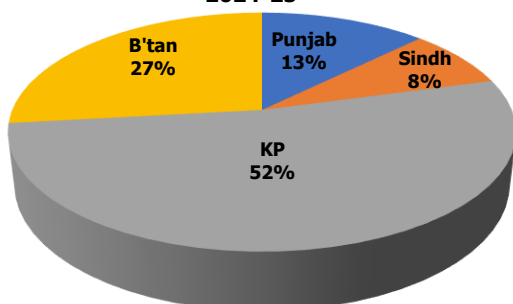


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

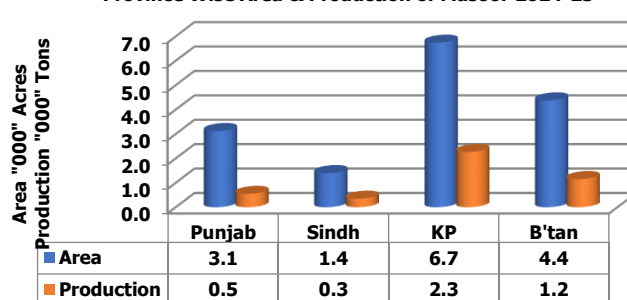
Province wise Area & Production:

- A provincial comparison highlights that Khyber Pakhtunkhwa (KP) is leading masoor producing province with its 52% share in domestic production, which is followed by Balochistan with 27%, Punjab with 13%, and Sindh accounts for the remaining 8% share. During the year 2024-25, production of masoor in Khyber Pakhtunkhwa (KP) has been recorded at 2,300 tons harvested from an area of 6,700 acres. Balochistan ranked second with production of 1,200 tons, followed by Punjab producing 500 tons and Sindh recording 300 tons.

Province Wise Production Share of Masoor 2024-25



Province Wise Area & Production of Masoor 2024-25



Source: Agricultural Statistics of Pakistan

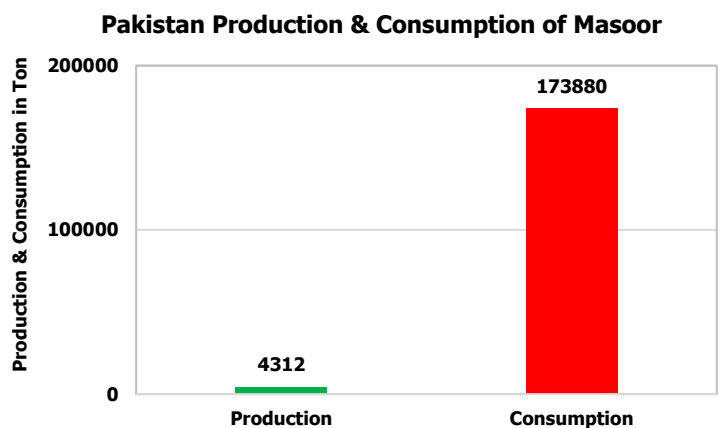


Price Control & Commodities Management Department



Domestic Production & Domestic Consumption

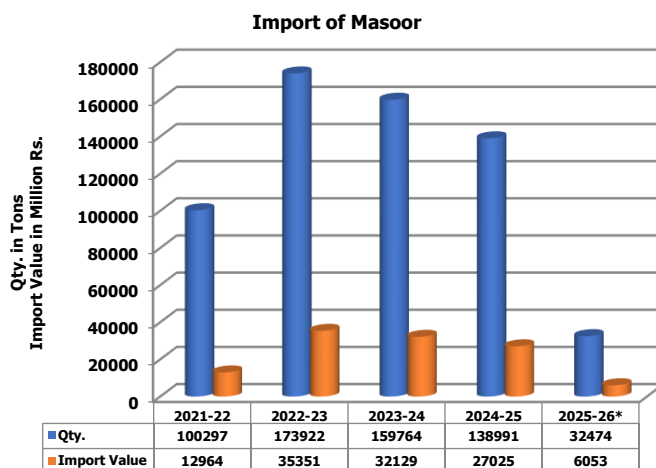
- During year 2024-25, Pakistan's domestic masoor production has been recorded at 4,312 tons, whereas national consumption requirements is estimated at 173,880 tons. This wide gap generated a pronounced supply deficit of 169,568 tons.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

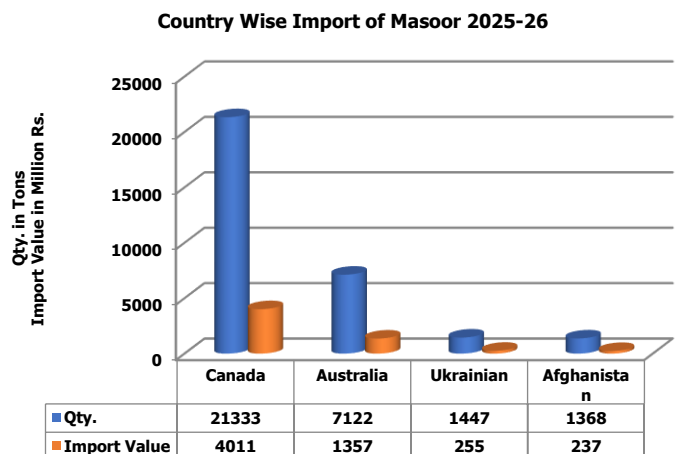
Import Insights

- In order to meet domestic consumption requirement, Pakistan undertook import of 138,991 tons of masoor at cost of Rs. 27,025 million during year 2024-25, which appeared to be less as compared to last year in terms of volume and value. However, during year 2025-26 (July-October), masoor imports recorded at 32,474 tons, costing Rs. 6053 million.
- Major countries from where Pakistan primarily sources its masoor imports are Canada, Australia, Ukraine and Afghanistan, with the bulk of supplies arriving from Canada and Australia, while imports from Ukraine and Afghanistan remain relatively minor.
- During year 2025-26 (July-October), Pakistan imported 21,333 tons of masoor from Canada incurring cost of Rs. 4011 million and 7122 tons from Australia at an expense of Rs. 1,357 million.



*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



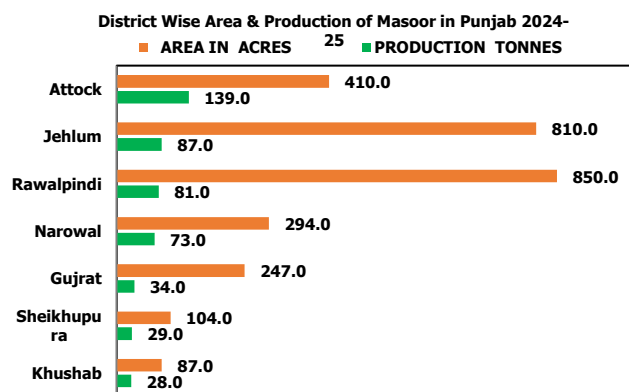
Price Control & Commodities Management Department



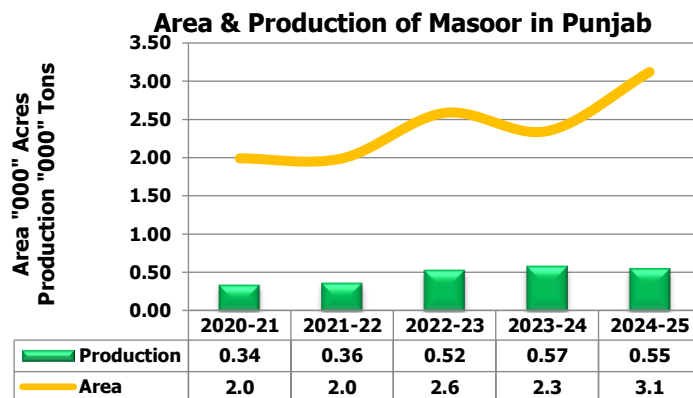
PROVINCIAL OVERVIEW

Area & Production:

- At Punjab level, production of masoor is also insignificant despite showing gradual increase in production and acreage of masoor during last five years. Therefore, production remains far less than provincial consumption requirement.
- The production of masoor in Punjab has been documented as 546 tons during year 2024-25, which appeared 3.5% less as compared to last year, while acreage of masoor has been recorded at 3100 acres showing 34.7% increase in contrast with last year.
- The leading masoor producing districts in Punjab are Attock, Jhelum, Rawalpindi, Narowal, Gujrat, Sheikhupura and Khushab. Attock district ranks as highest producer of masoor, with production of 139 tons harvested from 410 acres of cultivated land.



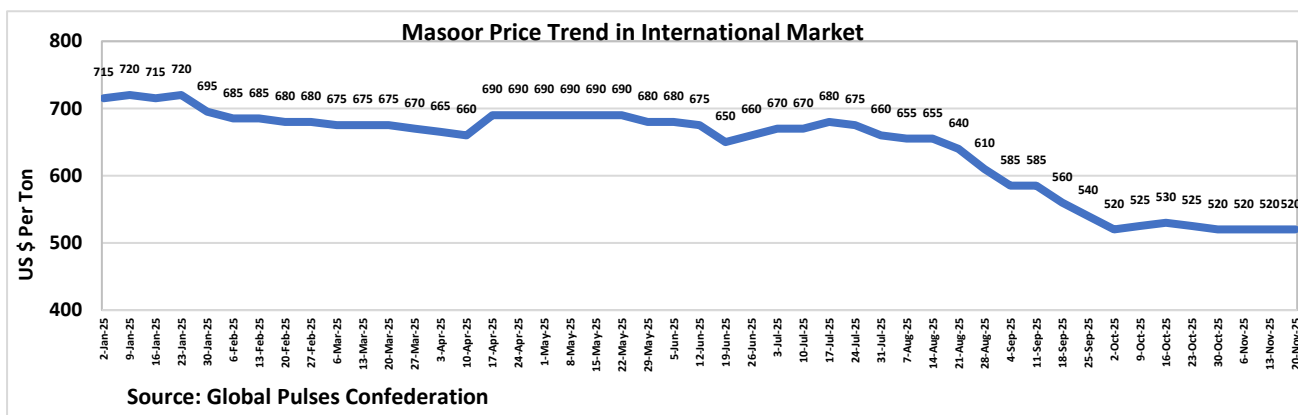
Source: Crop Reporting Service Punjab



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

International Market Trend:

- International prices of masoor are on lower side due to arrival of masoor crops from Australia and Canada. Current, international prices of masoor are USD 520/ton. The weekly trend in global masoor prices, as reported by the Global Pulse Confederation, is illustrated below:



Source: Global Pulses Confederation

Local Market Price:

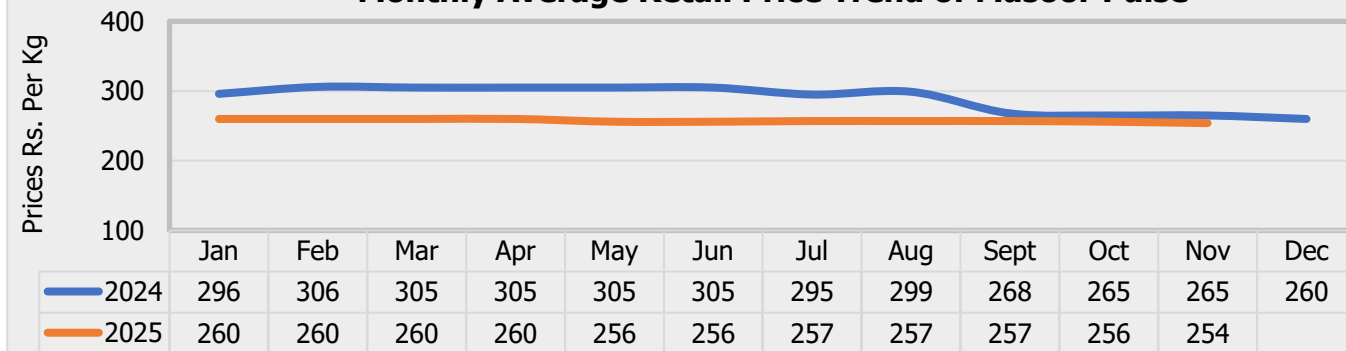
- As a result of low international prices of masoor, its import situation is smooth and resultant supply & price situation of masoor is showing stable trend in local markets. In Punjab, the average monthly retail price for November was recorded at Rs. 254 per kilogram, reflecting a consistent stability in prices over recent months.



Price Control & Commodities Management Department



Monthly Average Retail Price Trend of Masoor Pulse



SUPPLY MANAGEMENT ADVISORY

Assessment



Given the negligible domestic production, Pakistan remains heavily dependent on imports to meet its masoor consumption needs. The availability of masoor supply from Canada and Australia has contributed to a decline in international prices and resulted in uninterrupted import into the country. Consequently, the local supply and price situation for masoor is exhibiting a stable and steady trend in local markets.

Forecast

Due to stability in international market of masoor, it is expected that import situation is likely to remain steady and resultantly supply & price situation of masoor is expected to remain stable in local markets.



Advisory



- The Deputy Commissioners of Faisalabad and Sargodha should engage commission agents/importers/dealers of masoor to undertake maximum import keeping in view low international prices as well as demand of Ramzan-2026.
- The District Administration, in coordination with the concerned EADAs (E&M) and Secretaries Market Committee, should maintain close liaison with commission agents, importers, and dealers to ensure adequate stock in line with prevailing consumption requirements. Additionally, proactive arrangements must be made to ensure uninterrupted supply during Ramzan 2026. Stock position of pulses should also be updated on regular basis.
- The District Administration should expedite inspections of retailers by Price Control Magistrates to ensure true implementation of notified rates.



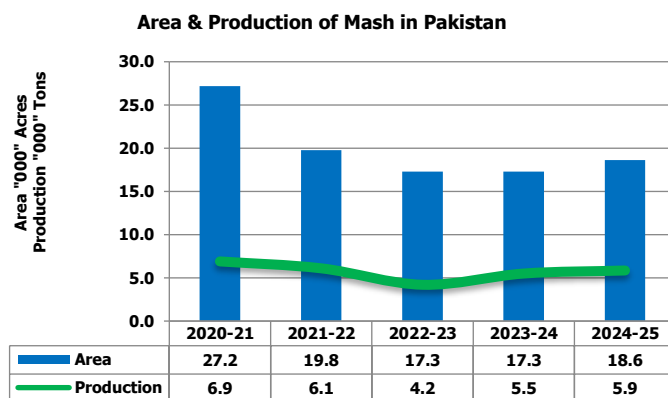
9. MASH



NATIONAL OVERVIEW

Domestic Area & Production:

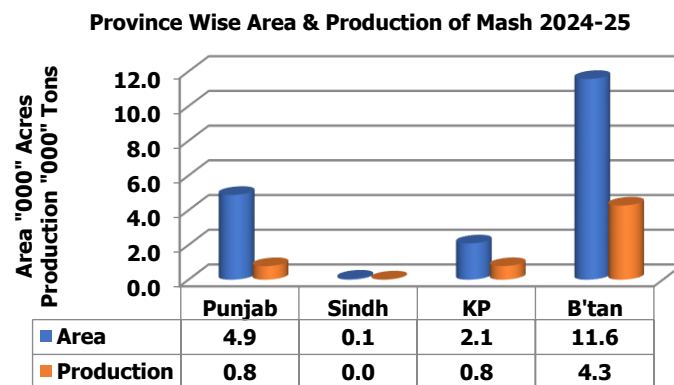
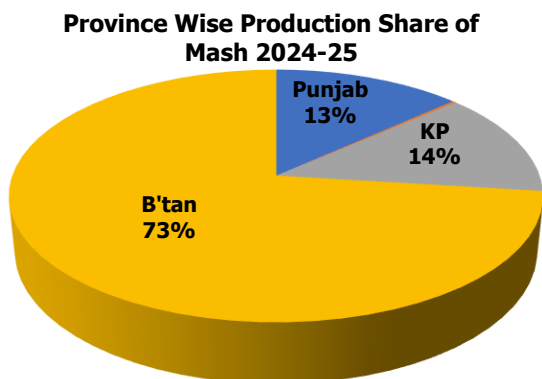
- Domestic production of mash remains insignificantly low, compelling the country to rely on imports to meet approximately 92% of its national consumption requirements.
- The domestic cultivated area and production of mash have shown a modest upward trend over the past three years. In year 2024–25, national mash production reached 5,850 tons, reflecting a 6.36% increase compared to the previous year's output of 5,500 tons. Similarly, the cultivated area expanded to 18,600 acres, marking a 7.51% rise over the preceding year.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

- At the national level, Balochistan emerges as the leading producer of mash, accounting for 73% share in domestic production of mash. Khyber Pakhtunkhwa ranks second with 14% share and Punjab ranks third with 13% share, whereas Sindh has not any share in domestic production of mash.
- During year 2024-25, Balochistan produced 4300 tons of mash and KP attained mash production at 800 tons. Production of mash in Punjab recorded at 780 tons and Sindh appeared with nil production of mash.



Source: Agricultural Statistics of Pakistan

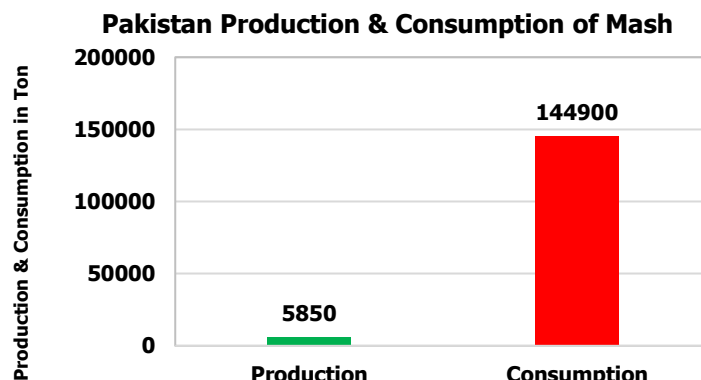


Price Control & Commodities Management Department



Domestic Production & Domestic Consumption:

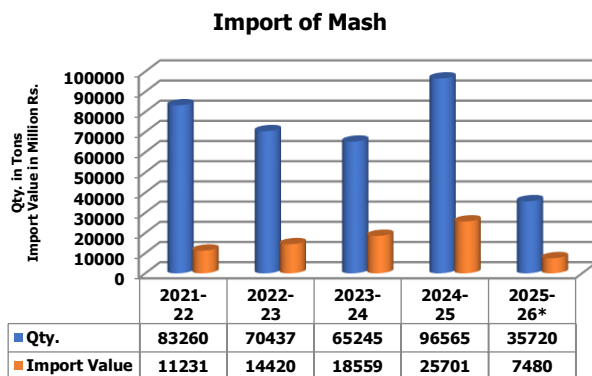
- In year 2024-25, domestic production of mash was registered at only 5850 tons, against a national requirement of 144,900 tons, leaving a massive supply deficit of 139,050 tons



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

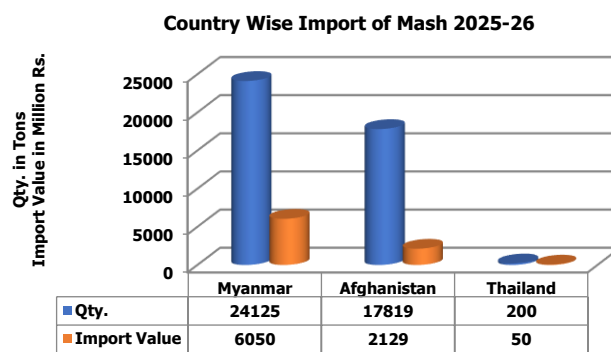
Import Insights:

- Given the constrained domestic output, Pakistan remains heavily dependent on mash imports to satisfy national consumption requirements. During year 2024-25, mash imports totaled at 96,565 tons, incurring an expenditure of Rs. 25,701 million. During year 2025-26 (July-October), imports stood at 35,720 tons, amounting to Rs. 7480 million.
- The bulk of these imports is sourced from Myanmar, Afghanistan, and Thailand, with Myanmar and Afghanistan functioning as the primary suppliers. During year 2025-26 (July-October), Pakistan imported 24,125 tons of mash from Myanmar and 17,802 tons from Afghanistan, while imports from Thailand remained minimal at 200 tons.



*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production:

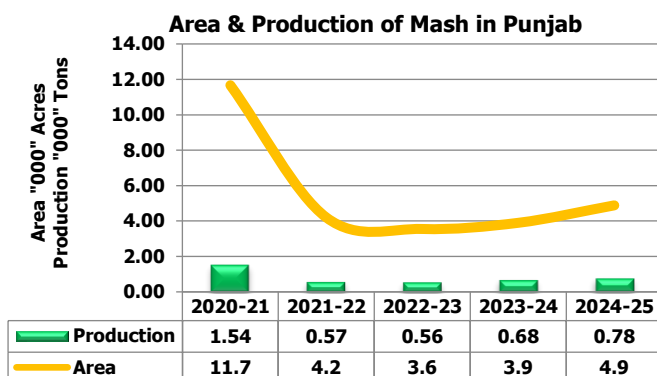
- The cultivated area and production of mash in Punjab have been showing slightly increasing trend for last three years.
- During year 2024-25, mash production in Punjab has been recorded at 780 tons showing 14.7% increase over the last year, whereas cultivated area recorded at 4900 acres depicting 25.6% increase as compared to last year.



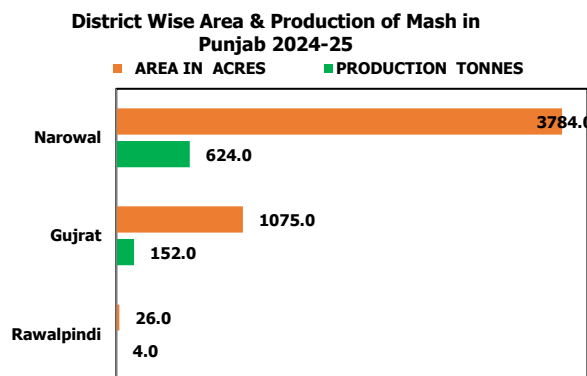
Price Control & Commodities Management Department



- In Punjab, mash cultivation is concentrated primarily in the districts Narowal, Gujrat and Rawalpindi. Narowal emerged as the leading producer of mash with its production of 624 tons, harvested from 3,784 acres of agricultural land.



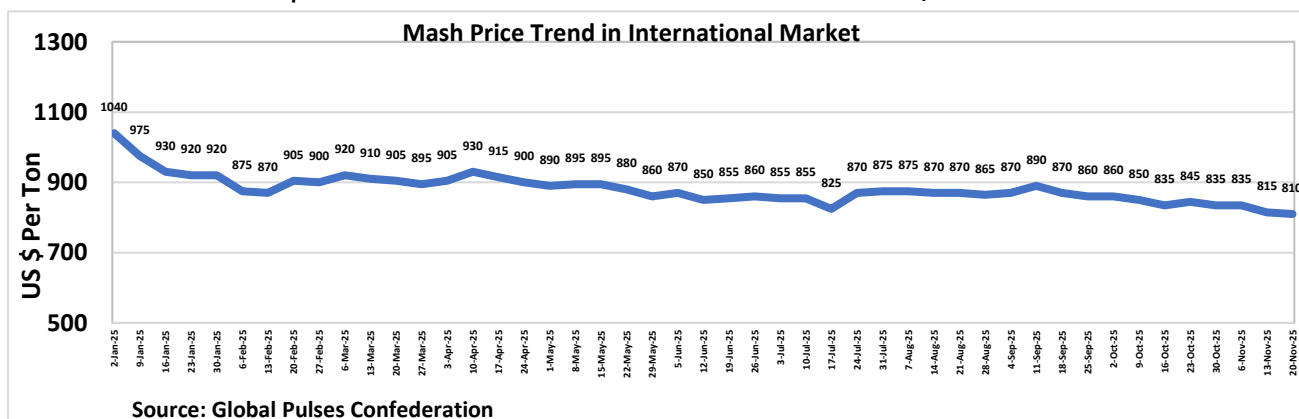
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

International Market Trend:

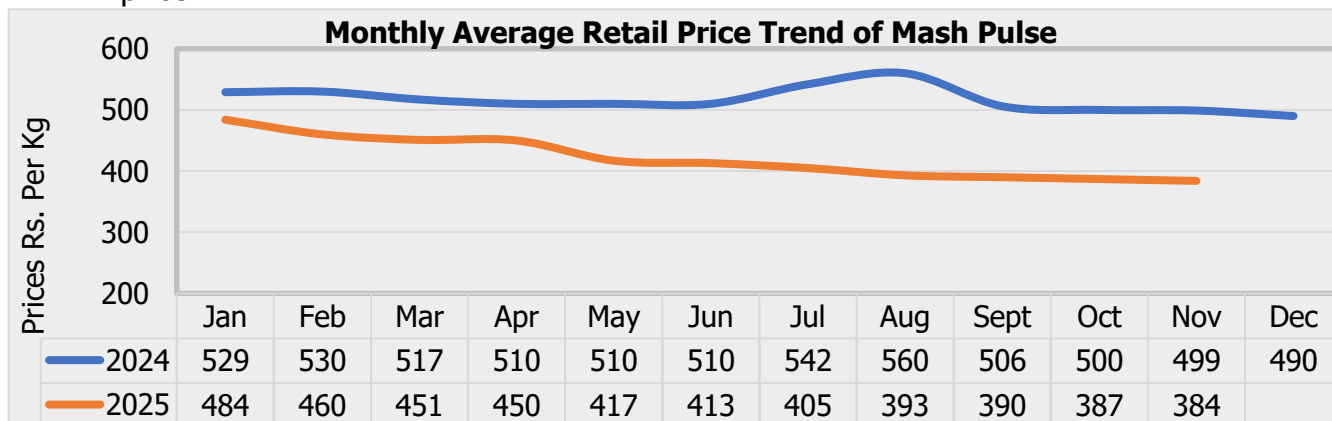
The weekly trend of international prices of mash sourced from the Global Pulses Confederation, depicted international prices of Mash are on lower side. Current, international price of Mash has been recorded at USD 810/ton.



Source: Global Pulses Confederation

Local Market Price:

Due to low international prices of mash, its local prices are also exhibiting slightly declining trend. Monthly average retail price of mash in Punjab is recorded at Rs. 384/kg during month of November, 2025, which is considerably low than last year's price.





SUPPLY MANAGEMENT ADVISORY



Assessment

Mash production in Pakistan remains minimal, making the country heavily dependent on imports to meet domestic consumption needs. However, with the gradual decline in international prices, import of mash is smooth leading to modest decline in its local prices as well. Prevailing local prices of mash are Rs.384/Kg far lower in contrast with prices of last year.

Forecast

Import of mash is expected to remain smooth due to its low international prices. Resultantly, supply & price situation of mash is likely to remain stable in local markets.



Advisory



- The Deputy Commissioners of Faisalabad and Sargodha should engage with local traders and importers to facilitate uninterrupted import of mash to maintain its stable supply in market. Additionally, consumption needs for Ramzan 2026 may also be considered while importing mash from other countries.
- The District Administration may maintain close liaison with traders/importers to ensure smooth supply of mash as per consumption requirements and necessary measures may also be taken to meet demand of Ramzan-2026.
- Price Control Magistrates (PCMs) should ensure strict implementation of retail notified prices through frequent inspections of retailers.

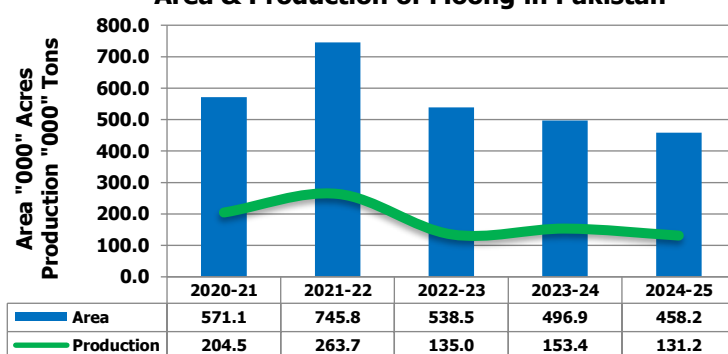
10. MOONG



Domestic Area & Production

- During the past five years, domestic moong production has displayed an unstable even declining trend, while the cultivated area has kept on reducing over time.
- Domestic production of moong has been recorded at 131,200 tons during year 2024-25, showing a 14.47% decrease in contrast with last year.
- Similarly, the cultivated area registered at 458,200 acres, indicating 7.78% decrease as compared area recorded during last year.

Area & Production of Moong in Pakistan

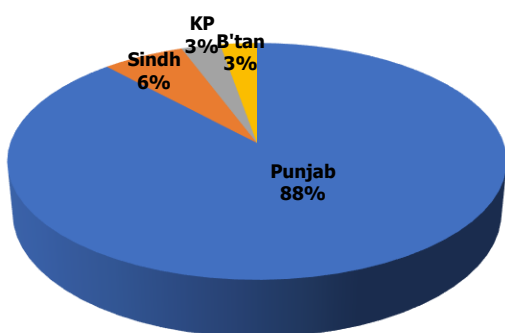


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

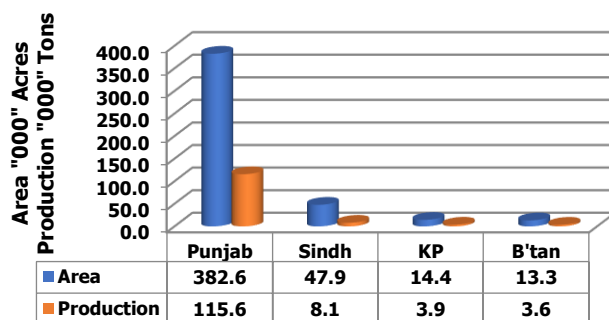
Province wise Area & Production:

- During year 2024-25, Punjab remained the dominant contributor of moong amongst the provinces, representing 88% share of total production, followed by Sindh with 6% share, while Balochistan and Khyber Pakhtunkhwa each accounted for 3% share.
- Punjab emerged the foremost producer of moong with its production of 1,15,600 tons obtained from an area of 3,82,600 acres. Sindh stood second with 8,100 tons, whereas Khyber Pakhtunkhwa ranked third with 3,900 tons. Balochistan reported the lowest share, contributing 3,600 tons.

Province Wise Production Share of Moong 2024-25



Province Wise Area & Production of Moong 2024-25



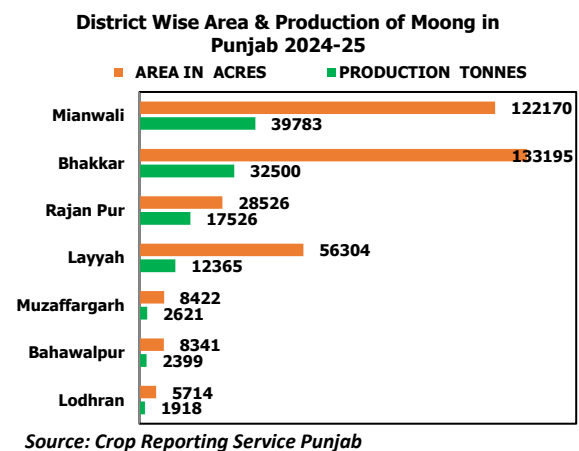
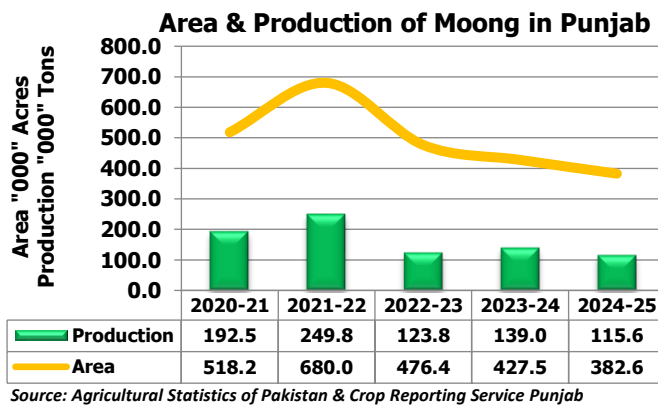
Source: Agricultural Statistics of Pakistan



PROVINCIAL OVERVIEW

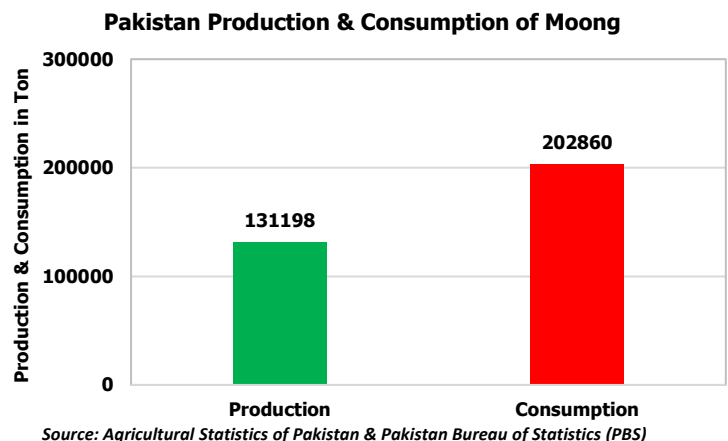
Area & Production:

- In Punjab, production of moong has remained inconsistent over the years, while cultivated area under moong has shown a steady decline over the past three years,
- During year 2024-25, Punjab's moong production stood at 115,600 tons, reflecting a 16.8% decrease from the previous year. Similarly, the cultivated area contracted to 382,600 acres, indicating a 10.5% reduction from the preceding year.
- The leading moong-producing districts in Punjab are Mianwali, Bhakkar, Rajanpur, Layyah, Muzaffargarh, Bahawalpur and Lodhran.



Domestic Production & Domestic Consumption:

- In year 2024-25, domestic moong production was recorded at 131,198 tons, which appeared to be significantly lower than the national consumption requirement of 202,860 tons. This gap has resulted in a supply deficit of 71,662 tons.



Import Insights:

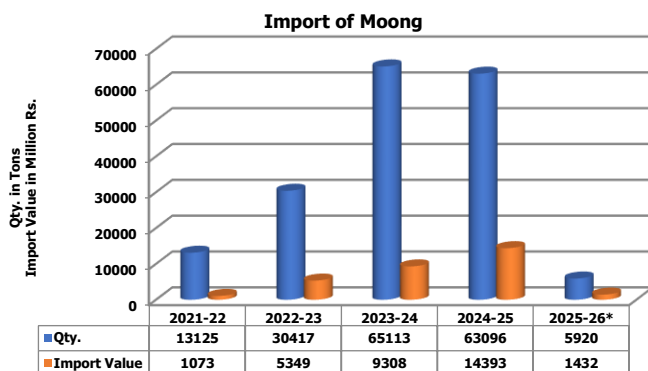
- As a result of short supply, Pakistan remains dependent on imports to meet its domestic consumption requirements.
- In year 2024-25, Pakistan imported 63,096 tons of moong at a cost of Rs. 14,393 million. However, during year 2025-26 (July-October), imports stood at 5,920 tons, at an expense of Rs. 612 million.



Price Control & Commodities Management Department

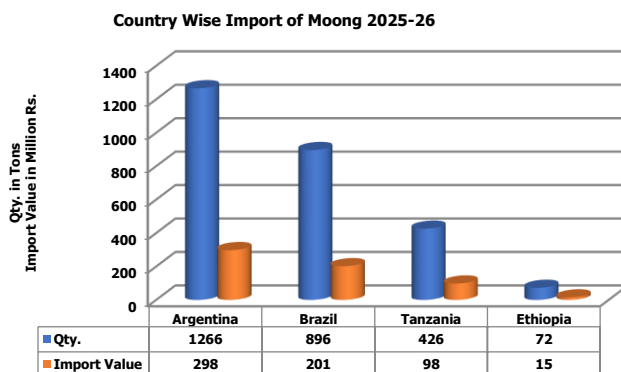


- Pakistan primarily sources moong imports from Argentina, Brazil, Tanzania, and Ethiopia.



*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

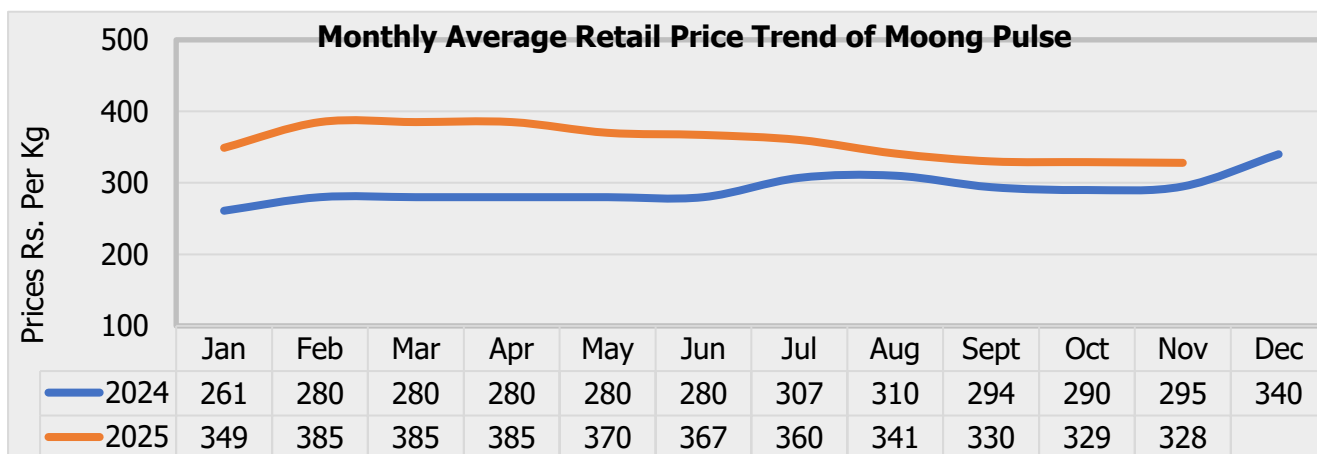


*=Import during July 2025 to October 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Market Prices

- On account of availability of local crop, supply situation of moong is stable and resultantly moong prices showing slightly decreasing trend in local markets. The monthly average retail price of moong in Punjab during November 2025 is recorded at Rs. 328 per kilogram.



SUPPLY MANAGEMENT ADVISORY



Assessment

Due to availability of local crop, prices of moong are depicting slightly downward trend in local markets. However, local production of moong is not substantial, therefore its price is yet on higher side as compared to last year.



Price Control & Commodities Management Department



Forecast

As production of moong is not appreciable, therefore its price is expected to remain on higher side in local markets. Moreover, import of moong may be required to meet its local consumption requirements.



Advisory



- The EADAs & Secretaries Market Committees should maintain close liaison with commission agents ensure sufficient supply of moong as per consumption requirements. Further, necessary measures for import of moong may also be taken to deal with less local production as well as demand of Ramzan-2026.
- The Price Control Magistrates should actively perform inspections of retailers to curb to curb malpractices of overcharging and profiteering by retailers.

----- **The End** -----