



FOOD IN FOCUS



January 2026



Food Safety and Consumer Protection Department



Food Safety and Consumer Protection Department

PREFACE

The Food Safety and Consumer Protection Department is pleased to present the fifteenth 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, Agriculture Department and Market Committees, 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 prepared using data sourced from multiple reputable institutions, 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 reviews production patterns, supply dynamics, price trends, trade flows, developments in the international market and prevailing domestic market conditions. In addition, it provides comprehensive insights into the current situation and expected future outlook. A concise summary of the existing supply and price scenario of key vegetables and pulses is presented below:

- **Tomato** supply is arriving in bulk from Sindh, therefore its supply situation is stable and price is lying on lower side in local markets. Due to better tomato crop in Sindh, its supply & price situation is expected to remain stable in future.
- **Onion** supply is mainly arriving from Sindh which is supplemented with onion arrival from areas of South Punjab (D.G. Khan, Rajanpur & Rojhan), resultantly supply & price situation of onion is stable and expected to remain stable in future.
- Local production season of **Potato** has commenced. As per Crop Reporting Service (CRS) Punjab, this year expected production of potato is recorded at 12.1 million tons which is 23.4% higher as compared to last year production i.e. 9.8 million tons. Moreover, currently export of potato is halted, therefore surplus potato supply is available in local markets and subsequently its price is on very lower side.
- Supply & price situation of **Garlic** is showing stable trend due to availability of local supply. However, local supply is near to end, however some supply from KP along with import from China is in progress. As dependency will increase on import, garlic price will start to increase. 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 is in progress, resultantly local prices of ginger have sharply declined in local markets. In case of **Green Chilies**, production season of Sindh is ongoing, thus supply & price situation of green chilies is stable in local markets.
- In the case of **pulses**, limited domestic production necessitates reliance on imports to meet domestic consumption needs. As international prices currently remain on lower side, thus pace of imports is stable. Consequently, the supply and price situation of pulses in local markets is exhibiting a steady and stable trend.

Advisory Measures:

- Ministry of National Food Security & Research and Ministry of Commerce, Islamabad may explore new routes and destinations for resumption of potato export to other countries, so that potato growers may earn better return.
- District Administration with the help of EADAs and Secretaries Market Committee, should maintain close liaison with commission agents/ traders for meticulous monitoring of the supply and price situation of essential commodities. Moreover, commission agents may also be persuaded to bring sufficient supplies as per consumption requirements and also to undertake future contracts with their counterparts /growers based in KP & Balochistan for ensuring smooth supplies from these provinces during June, 2026 & onwards.
- Currently, international prices of pulses remain relatively low. Since a majority of pulse importers are based in the Faisalabad Division, therefore Commissioner Faisalabad Division may proactively engage these importers to ensure maximum import volumes in line with provincial consumption requirements, particularly keeping in view the anticipated demand during Ramzan-2026.
- Agriculture Department should introduce off season seed varieties to expand local production season of essential vegetables and also high yielding seed varieties of pulses to reduce burden on import. Moreover, ginger seed varieties feasible to local climate also need to be introduced.

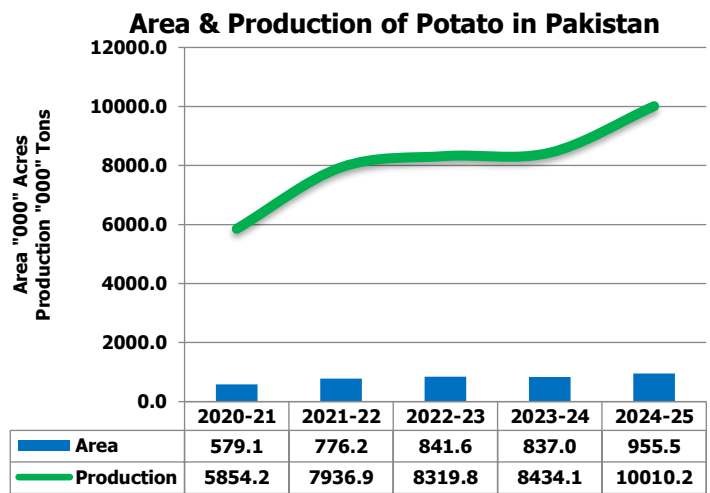
1. Potato



NATIONAL OVERVIEW

Domestic Area & Production:

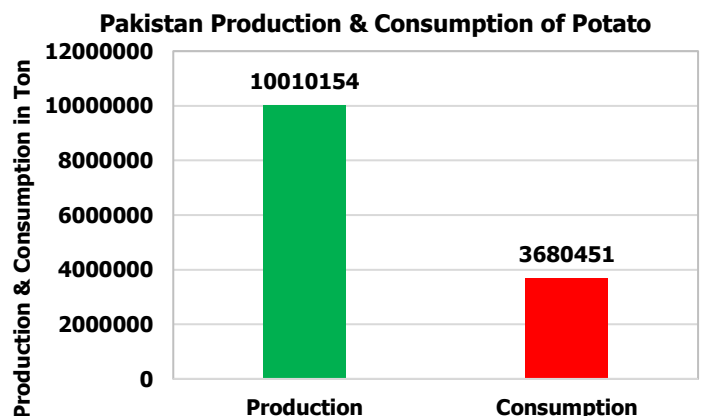
- As a results of robust & surplus domestic production of potato, Pakistan is self-sufficient to cater for domestic annual consumption requirement of potato. Statistics collected from the Agricultural Statistics of Pakistan and Economic Survey of Pakistan 2024-25 underscores significant domestic production of potato i.e. 10.01 million tons attained during the year 2024-25. This production level appeared to be 18.68 percent higher over the last year.
- Graphical presentation indicates that both cultivated area and production of potato are exhibiting gradually increasing trend over the years.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics

Domestic Production & Consumption:

- Pakistan Bureau of Statistics conducted Household Integrated Economic Survey 2018-19, to determine per capita consumption requirements of edible items, which are published in Agricultural Statistics of Pakistan. This information helps in to estimate annual domestic consumption requirement of potato, which is 3,680,451 tons.
- The domestic potato production happened to be 10.01 million tons during year 2024-25, which resulted in surplus production of 6.32 million tons.

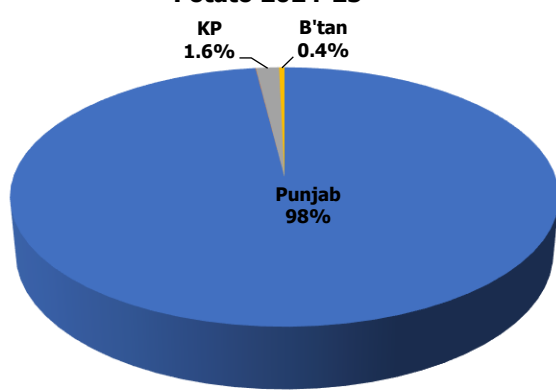


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

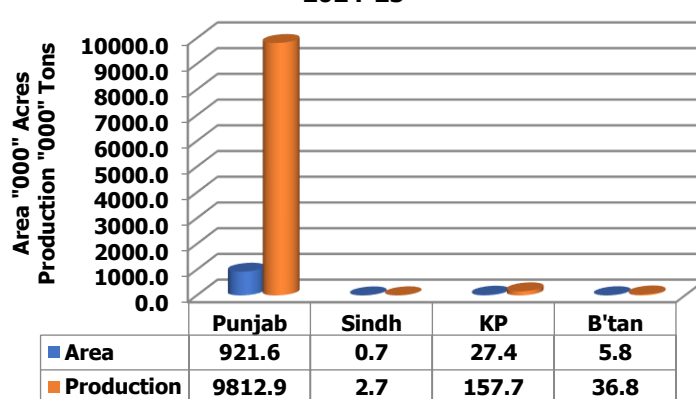
Province wise Area & production:

- Accounting for approximately 98% of national output, Punjab continues to dominate potato production in Pakistan. The province not only meets its own domestic consumption requirements but also supplies potato to other provinces, while the contribution of the remaining provinces to overall national production remains marginal.
- In year 2024-25, Punjab attained potato production of 9.812 million tons from a cultivated area of 921,600 acres. Khyber Pakhtunkhwa achieved a production of 157,700 tons, while Balochistan and Sindh attained production of 36,800 tons and 2,700 tons, respectively.

Province Wise Production Share of Potato 2024-25



Province Wise Area & Production of Potato 2024-25

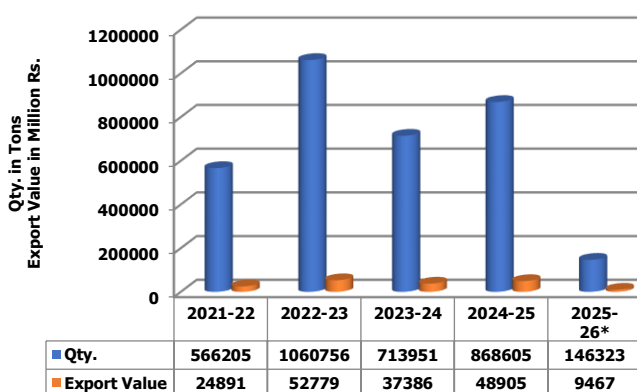


Source: Pakistan Bureau of Statistics (PBS)

Export Insights:

- Driven by surplus domestic production, Pakistan has strengthened its standing in the international potato export market. During the fiscal year 2024-25, potato exports amounted to 868,605 tons, generating export earnings of Rs. 48,905 million. In the year 2025-26 (July-November), export volumes reached 146,323 tons, yielding Rs. 9,467 million in foreign exchange. Major destinations for Pakistani potatoes include the U.A.E., Sri Lanka, Afghanistan, Qatar, Oman, Malaysia and Kuwait.

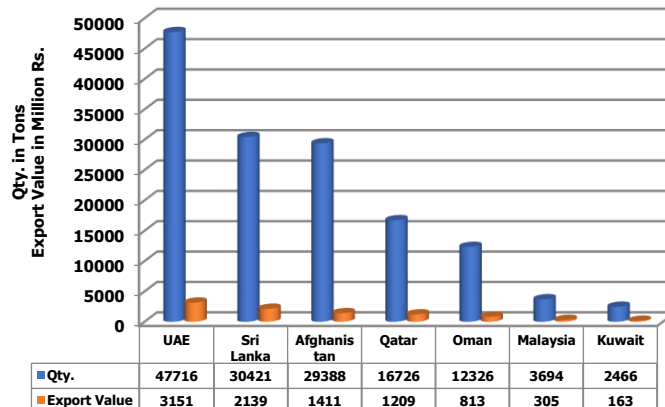
Export of Potato



*=Export during July 2025 to November 2025

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

Country Wise Export of Potato 2025-26

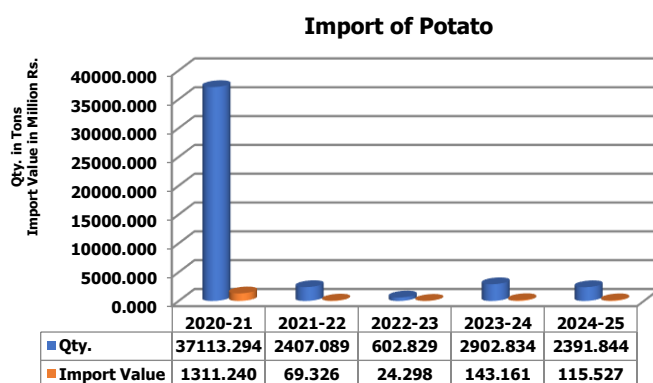


*=Export during July 2025 to November 2025

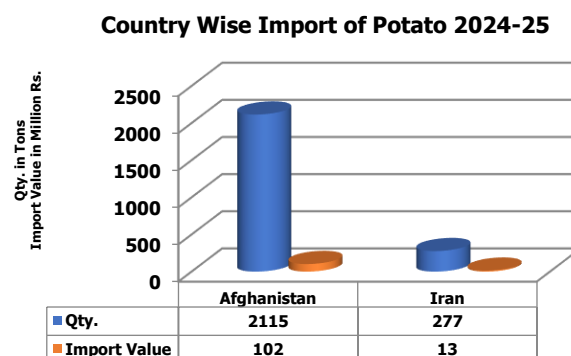
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Import Insights:

- Due to surplus production of potato, Pakistan is not in need of its import, however minute volume is imported only for seed purposes. In year 2024-25, potato import recorded at 2,392 tons, whereas during year 2025-26 (July-November) no import has been recorded. The country mainly arranges potato seeds from Afghanistan and Iran.



Source: PBS & Pakistan Single Window

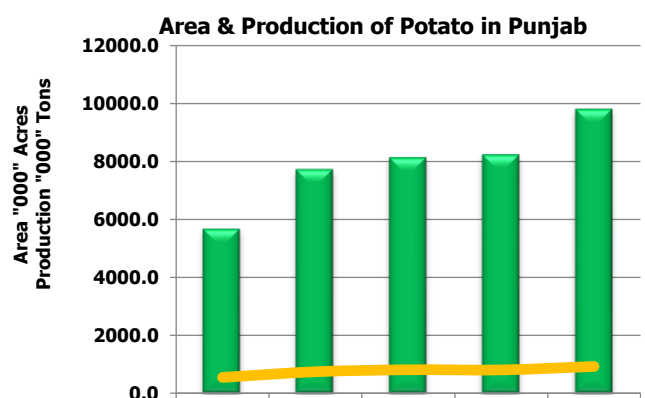


Source: Pakistan Single Window

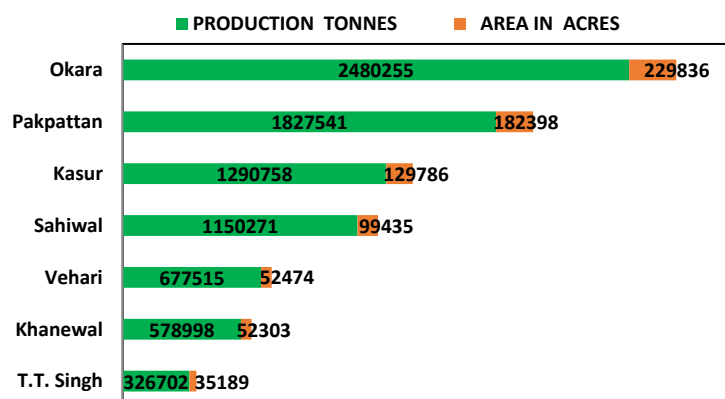
PROVINCIAL OVERVIEW

Area & Production:

- During the past five years, potato production in Punjab has demonstrated sustained growth. In the year 2024-25, potato production reached 9.813 million tons, reflecting a 19.14% increase over the previous year and a substantial 72.7% rise compared to the production level recorded in year 2020-21. Alongside this growth, the cultivated area expanded to 921,600 acres, marking a 14.7% increase over the preceding year and a 69.1% rise relative to year 2020-21.
- Okara has emerged as the foremost potato-producing district in Punjab, achieving a production level of 2.480 million tons. Other prominent potato-producing districts include Pakpattan, Kasur, Sahiwal, Vehari, Khanewal and Toba Tek Singh.



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



Source: Crop Reporting Service Punjab

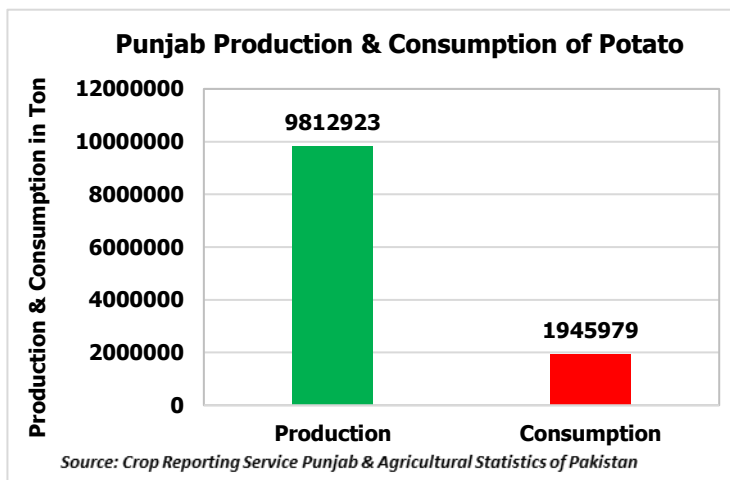


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Provincial Production & Consumption:

- The potato production in Punjab is recorded at 9.812 million tons during year 2024-25, whereas provincial consumption requirement is estimated at 1.945 million. Resultantly, potato supply remained in surplus by 7.86 million tons.



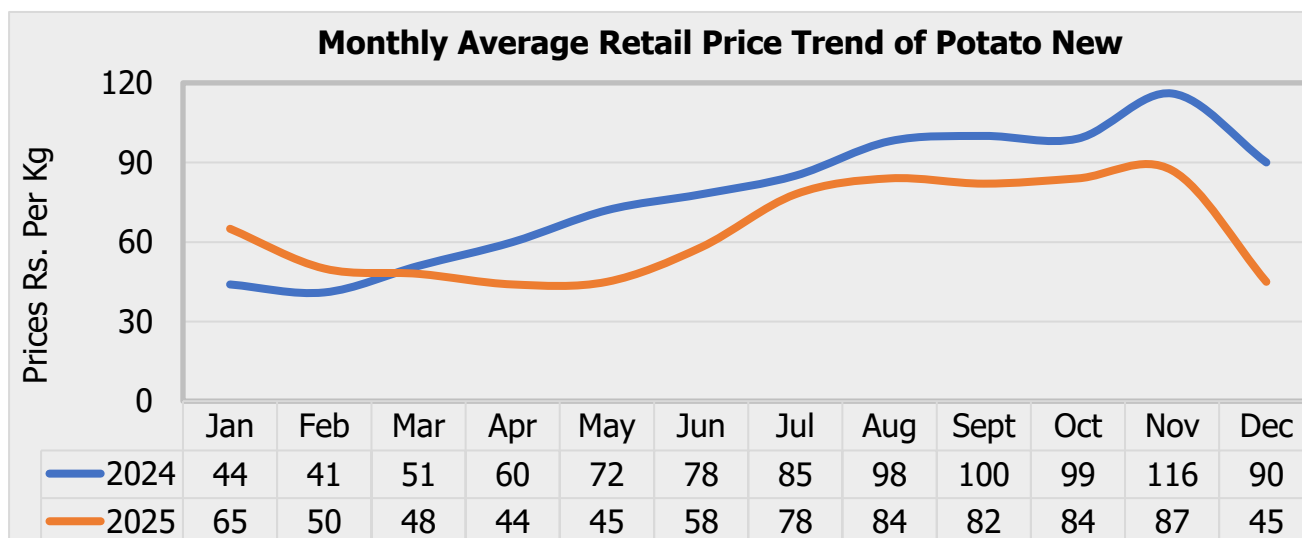
Supply Cycle:

- The major potato-producing districts in each province, along with their respective production seasons, are given 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 started which resulted in improvement in supply of potato fresh from core producing areas i.e. okara, Sahiwal, Kasur, etc. Resultantly, price of fresh potato is exhibiting decreasing trend in local markets. During month of December average retail price of potato fresh remained at Rs.45/Kg in local markets.



SUPPLY MANAGEMENT ADVISORY



Assessment

As per Crop Reporting Service (CRS) Punjab, this year cultivated area of potato has increased to 1.142 million acres showing 24% increase over last year i.e. 0.921 million acres, subsequently estimated production of potato is recorded at 12.1 million tons showing 23.4% increase in contrast with last year production i.e. 9.8 million tons. Moreover, import of potato is also halted. Resultantly, potato supply is in surplus and its price is on very low side in local markets.

Forecast

Given the sufficient availability of fresh crop of potato, its supply & price situation is anticipated to be stable in local markets. In coming days, potato supply will be on full swing from core producing area, afterwards price is expected to decline further in local markets.



Advisory



- Ministry of National Food Security & Research and Ministry of Commerce, Islamabad may explore new routes and destinations to restore export of potato to neighbouring countries as well as Central Asian States, so that potato growers may earn better return.

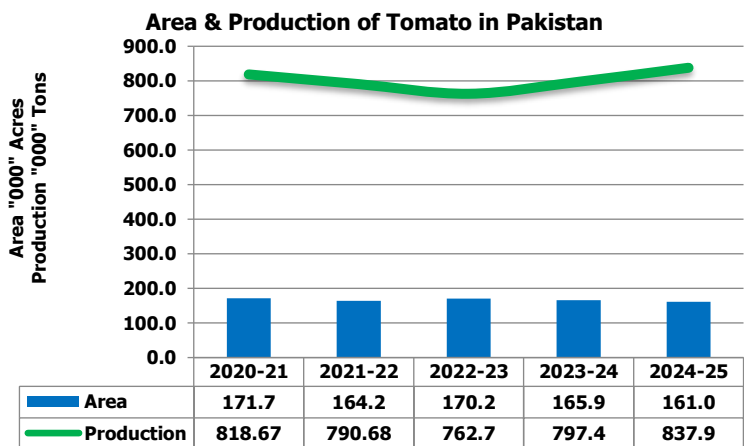
2. TOMATO



NATIONAL OVERVIEW

Domestic Area & Production:

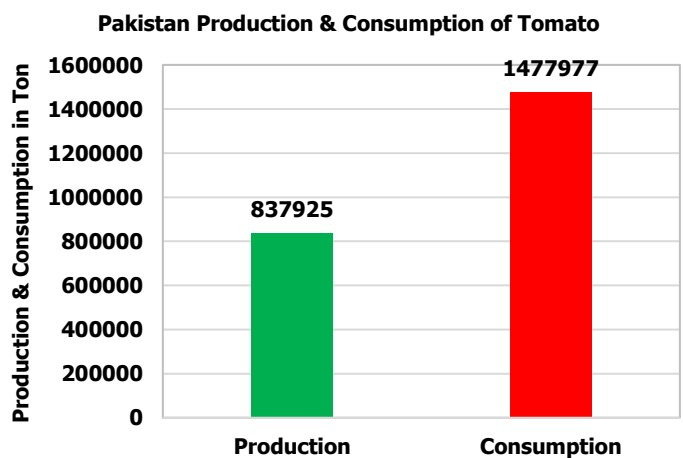
- Despite a marginal reduction in cultivated area, domestic tomato production has maintained a consistent upward trajectory over the past three years.
- In 2024–25, national tomato output increased to 837,925 tons, marking a 5.07% rise compared to the previous year, whereas the cultivated area declined to 161,000 acres, reflecting a 3.95% decrease from the preceding year.



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

Domestic Production & Consumption:

- Despite an upward trend in domestic tomato production, output remains substantially below the national consumption requirements. With domestic demand estimated at 1,477,977 tons against production of only 837,925 tons, the country faces an annual supply deficit of 640,052 tons. Consequently, Pakistan's reliance on tomato imports remains essential to ensure uninterrupted availability in local markets round the year.



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



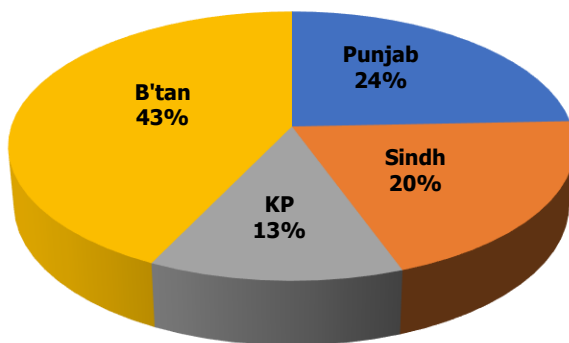
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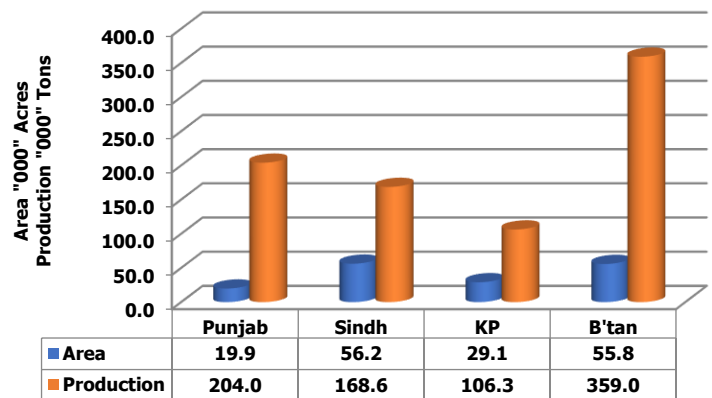
Province wise Area & Production:

- Balochistan appears to be the biggest tomato-producing province, having 43% share in national production. Punjab ranks 2nd with 24% share, following by Sindh with 20%, and Khyber Pakhtunkhwa with 13%.
- During the year 2024–25, Balochistan attained the highest tomato production at 359,000 tons, from cultivated area of 55,800 acres. Punjab secured the second position, producing 204,000 tons from 19,900 acres. Sindh followed with a production of 168,600 tons across 56,200 acres, while Khyber Pakhtunkhwa registered the lowest output, attaining 106,300 tons from a cultivated area of 29,100 acres.

Province Wise Production Share of Tomato 2024-25



Province Wise Area & Production of Tomato 2024-25

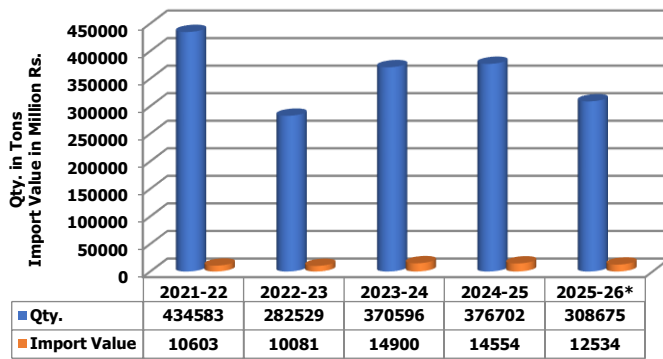


Source: Agricultural Statistics of Pakistan

Import Insights:

- During stress supply period when domestic supply of tomato is less available, major reliance of its consumption requirement shifts on import from Afghanistan & Iran.
- During year 2024-25, tomato import was recorded at 376,702 tons at an expense of Rs. 14,554 million, showing a marginal increase in import volumes but a slight reduction in value as compared to the previous year. During year 2025-26 (July-November), import has been recorded at 3,08,675 tons incurring expense of Rs. 12,534 million.
- Afghanistan and Iran are dominant suppliers of tomato to Pakistan. During year 2025-26 (July-November), tomato import volume from Afghanistan registered at 2,25,677 in lieu Rs. 8,483 million, while import from Iran recorded at 82,999 tons incurring cost of Rs. 4,051 million.
- From November-2025 onwards, tomato import was not further required due to start of production season in Sindh.

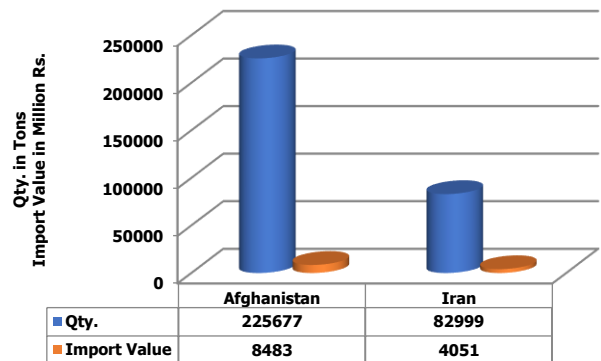
Import of Tomato



*=Import during July 2025 to November 2025

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

Country Wise Import of Tomato 2025-26



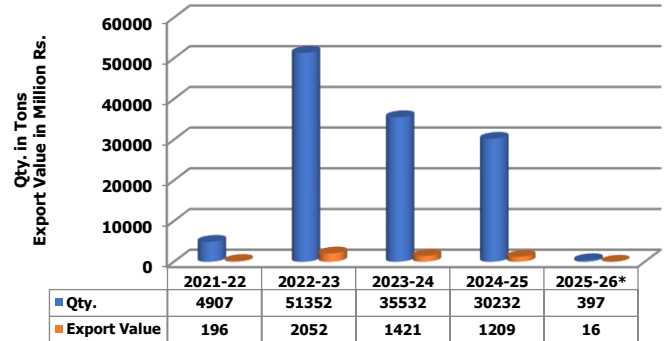
*=Import during July 2025 to November 2025

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

Export Insight:

- Pakistan also takes part in tomato export despite heavy reliance on import to cater for annual consumption requirement. This export volume is far less than import volume, however it helps to contribute into foreign exchange earnings.
- During year 2024-25, tomato export in Pakistan was recorded at 30,232 tons of tomato, generating export revenue of Rs. 1,209 million, showing modest reduction in both export volume and value compared with the preceding year.
- During year 2025-26 (July-November), tomato exports recorded at 397 tons with export earning of Rs. 16 million. Afghanistan continued to serve as the primary destination for Pakistan's tomato exports.
- Normally, tomato export takes place during January to May.

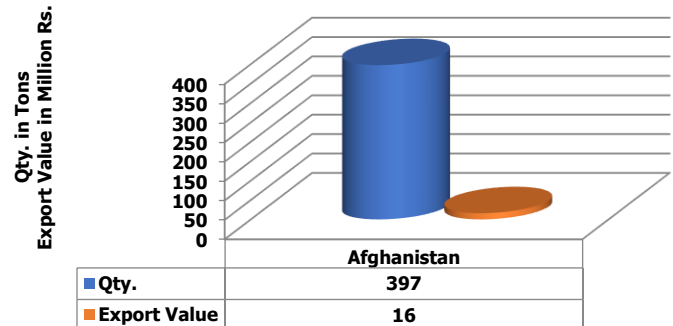
Export of Tomato



*=Export during July 2025 to November 2025

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

Country Wise Export of Tomato 2025-26



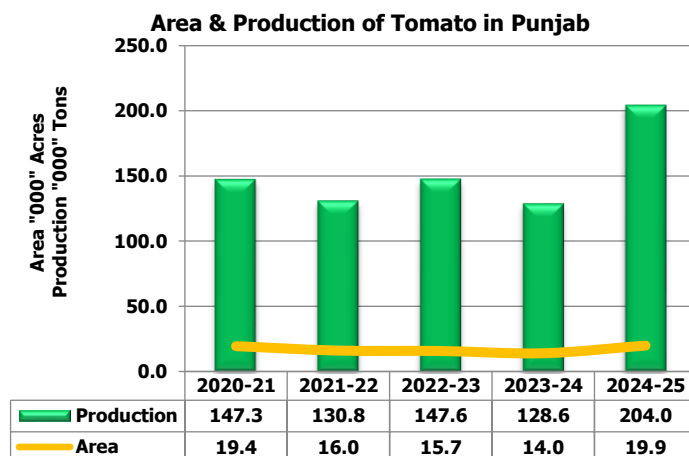
*=Export during July 2025 to November 2025

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

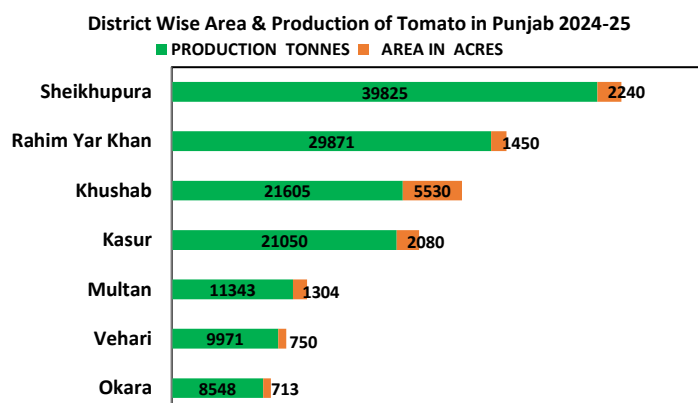
PROVINCIAL OVERVIEW

Area & Production:

- Over the last five years, Punjab's tomato sector has been marked by notable volatility, with both production levels and cultivated area fluctuating considerably. During year 2024-25, area under tomato cultivation in Punjab expanded significantly, reaching 19,900 acres, which reflects a 42.14% rise compared to the preceding year.
- Similarly, tomato production recorded a sharp recovery, as tomato output surged to 2,04,000 tons, representing a substantial 58.6% increase over the previous year.
- Major tomato producing districts in Punjab are Sheikhupura, Rahim Yar Khan, Khushab, Kasur, Multan, Vehari and Okara.
- District Sheikhupura 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.



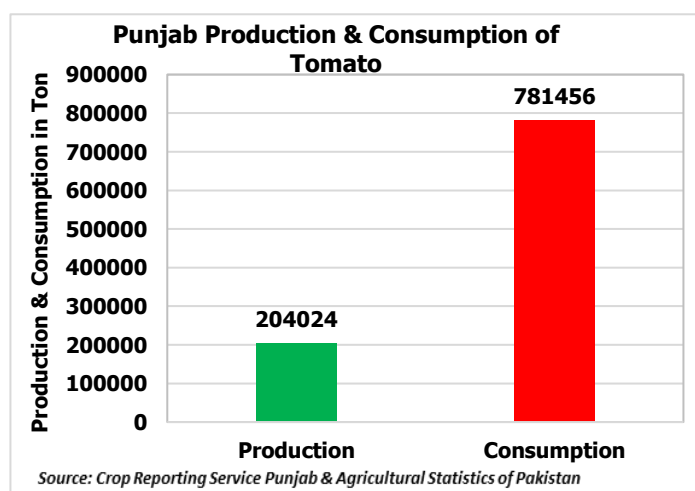
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

- The provincial tomato production has been recorded at 2,04,024 tons during year 2024-25, showing deficit of 5,77,432 tons as compared to provincial consumption requirement i.e. 7,81,456 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

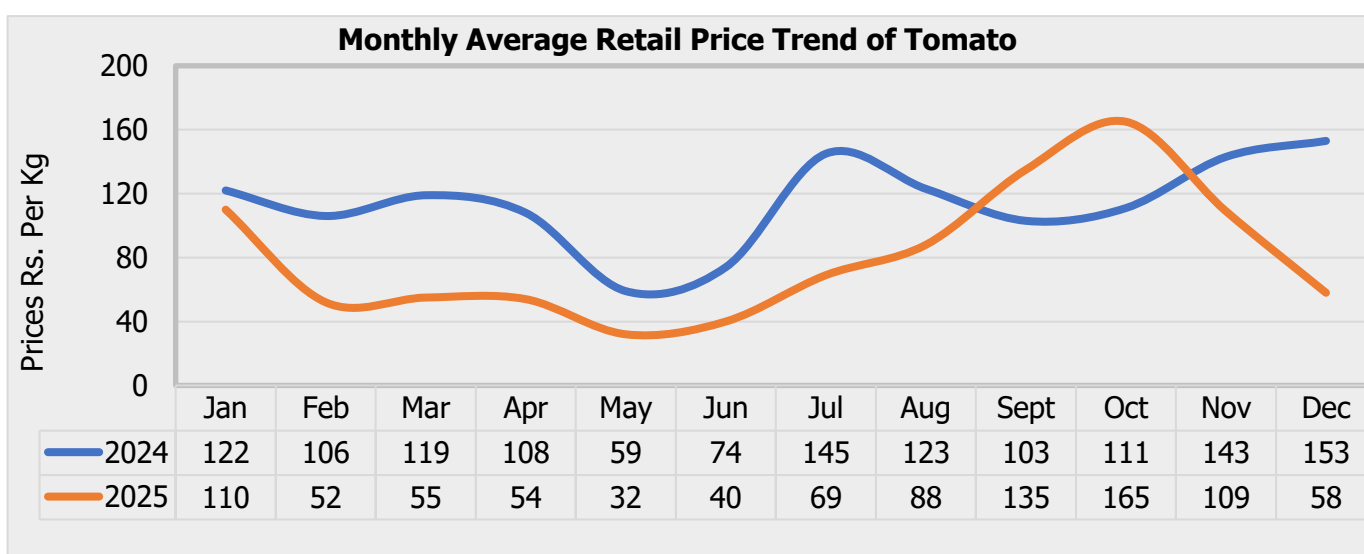
Supply Cycle:

- 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 availability of bulk supply of tomato Sindh, its supply situation has improved and subsequently its price has declined in local markets. Monthly average retail price of tomato in Punjab is Rs.58 per Kg during month of December, 2025.



SUPPLY MANAGEMENT ADVISORY



Assessment

Currently, tomato supply is stable due to its availability of sufficient arrival from Sindh. Resultantly, tomato price is on lower side in local markets.

Forecast

As production season of tomato in Sindh is ongoing, therefore tomato supply & price situation is anticipated to remain in normal range in the markets.



Advisory



- The EADAs and Secretaries Market Committee with the help of commission agents should arrange sufficient supplies of tomato as per consumption requirement from core producing areas of tomato in Sindh. Moreover, future contracts may also be undertaken to ensure smooth supplies from KP & Balochistan during June-July, 2026.
- Regular monitoring of auction proceedings also be ensured along with implementation of fair price fixation mechanism to keep tomato prices within normal range.
- Price Control Magistrates may also closely monitor retailers and take stern actions to make them bound to sell at notified rates and avoid over profiteering.

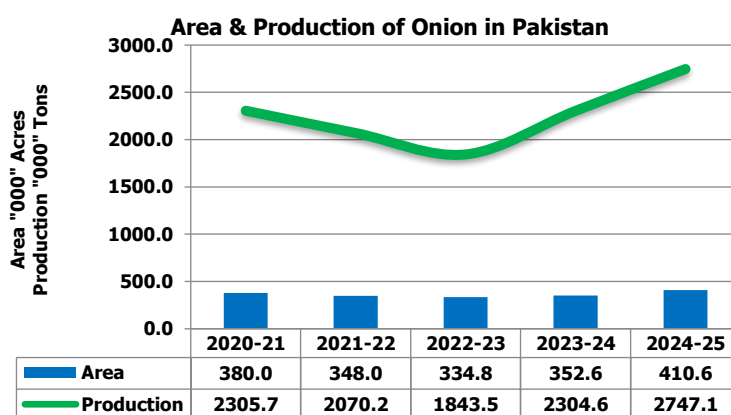
3. ONION



NATIONAL OVERVIEW

Domestic Area & Production:

- Pakistan has recorded a consistent expansion in both onion production and cultivated area over the last three years. During year 2024–25, national onion output rose to 2.747 million tons, reflecting a 19.2% increase compared to the previous year.
- Simultaneously, the area under onion cultivation expanded to 410,600 acres, registering a 16.44% year-on-year growth

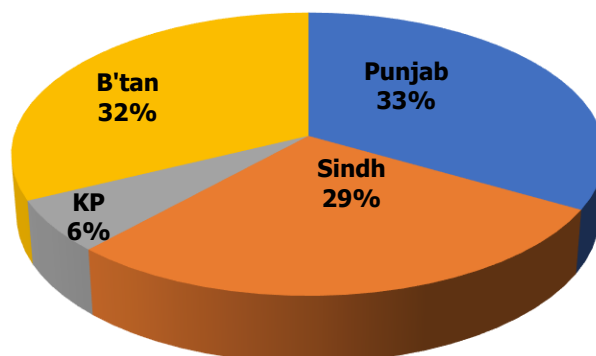


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

- During the year 2024-25, Punjab emerged as the highest onion-producing province, contributing 33% to total national production, followed by Balochistan with 32%, Sindh with 29% and Khyber Pakhtunkhwa accounting for the remaining 6%.
- In the year 2023-24, Balochistan held the leading position in national onion production, followed by Sindh in second place and Punjab ranking third. However, a notable shift occurred in year 2024-25, when Punjab overtook both Balochistan and Sindh to emerge as the country's highest onion-producing province.

Province Wise Production Share of Onion 2024-25



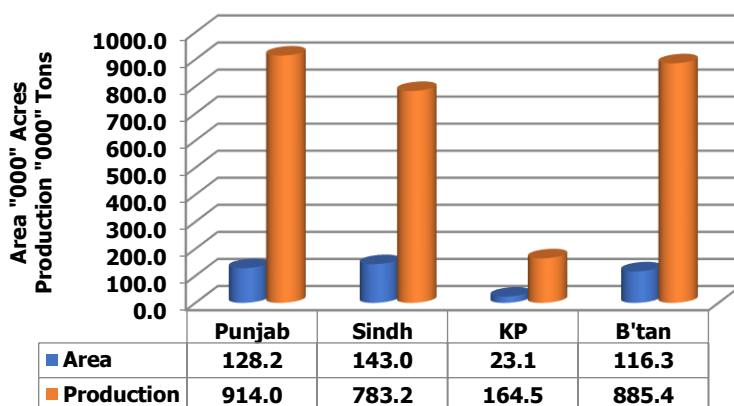


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- Punjab recorded onion production of 914,000 tons during the year 2024-25, emerging as the leading province.
- In comparison, Balochistan produced 885,400 tons, while Sindh's output stood at 483,200 tons. Khyber Pakhtunkhwa (KP) contributed comparatively less, with onion production recorded at 164,500 tons.

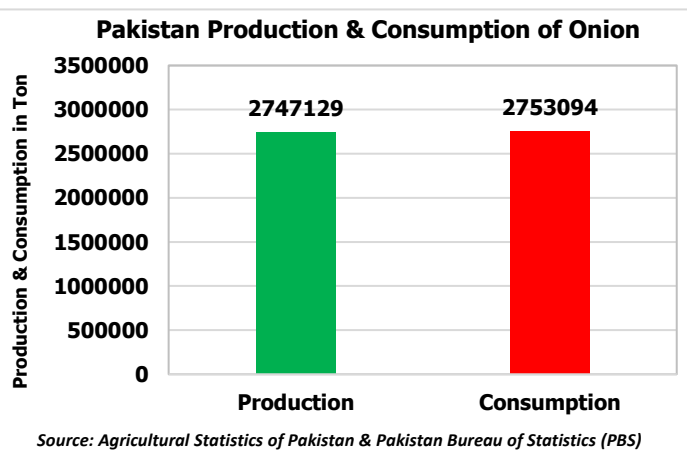
Province Wise Area & Production of Onion 2024-25



Source: Agricultural Statistics of Pakistan

Domestic Production & Consumption:

- In year 2024-25, national onion output stood at 2,747,129 tons against an estimated consumption requirement of 2,753,094 tons, creating a marginal supply shortfall of 5,965 tons, which was compensated through limited imports from Afghanistan and Iran.

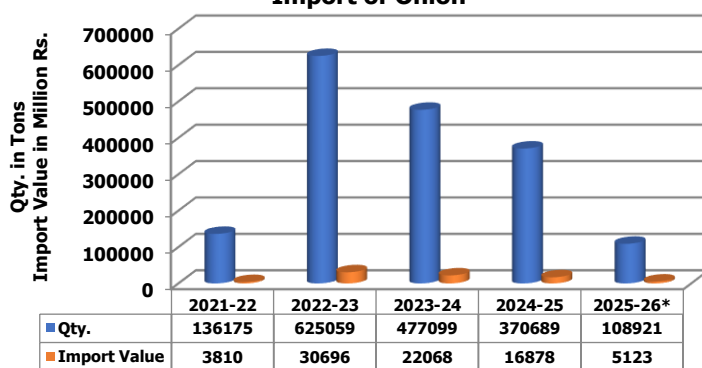


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights:

- During year 2024-25, Pakistan undertook onion import of 370,699 tons, involving an expenditure of Rs. 16,878 million, reflecting a decline in both quantity and value compared to the preceding year.
- In contrast, during year 2025-26 (July–November), import has been recorded at 1,08,921 tons, costing Rs. 5,123 million. Afghanistan and Iran remain the primary sources of onion imports for the country.

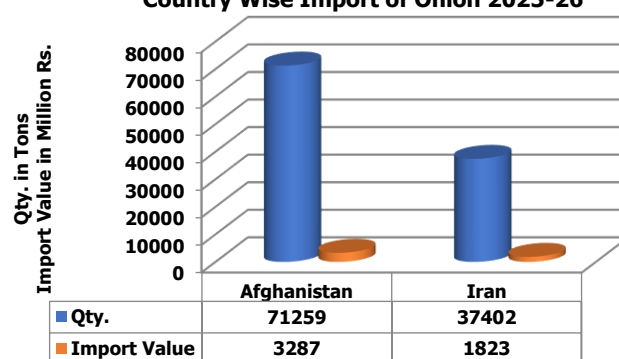
Import of Onion



*=Import during July 2025 to November 2025

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

Country Wise Import of Onion 2025-26



*=Import during July 2025 to November 2025

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

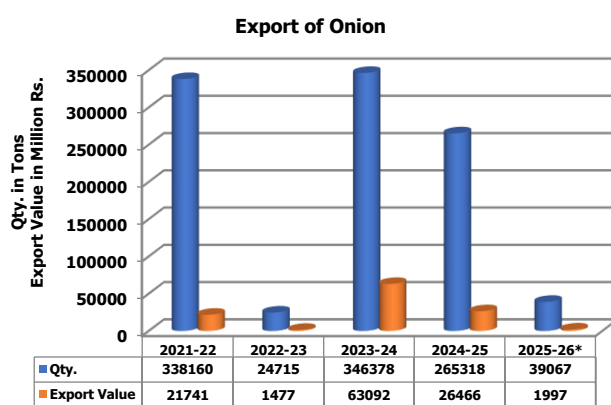


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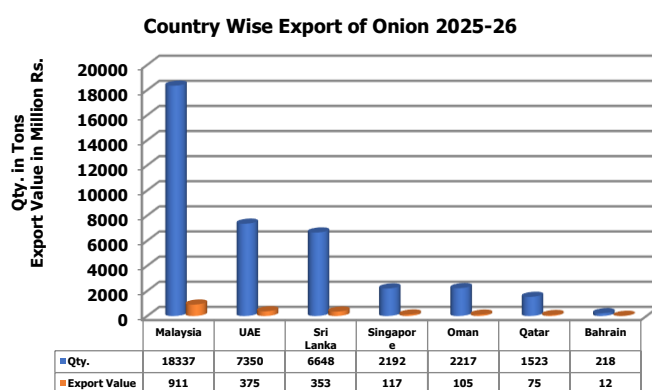
Export Insights:

- While Pakistan imports onion to fulfill domestic consumption requirements, it simultaneously exports onions to other countries, thereby contributing to the country's foreign exchange earnings.
- During the fiscal year 2024-25, onion exports amounted to 265,318 tons, generating revenue of Rs. 26,466 million, however, both export volume and value declined compared to the preceding year. In year 2025-26 (July-November), onion export has reached to 39,067 tons, yielding export earnings of Rs. 1,997 million.
- Key destinations for Pakistan's onion exports include Malaysia, the United Arab Emirates (UAE), Sri Lanka, Singapore, Oman, Qatar and Bahrain, with export volumes to Malaysia, the UAE and Sri Lanka remaining significantly higher than those to other markets.



*=Export during July 2025 to November 2025

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



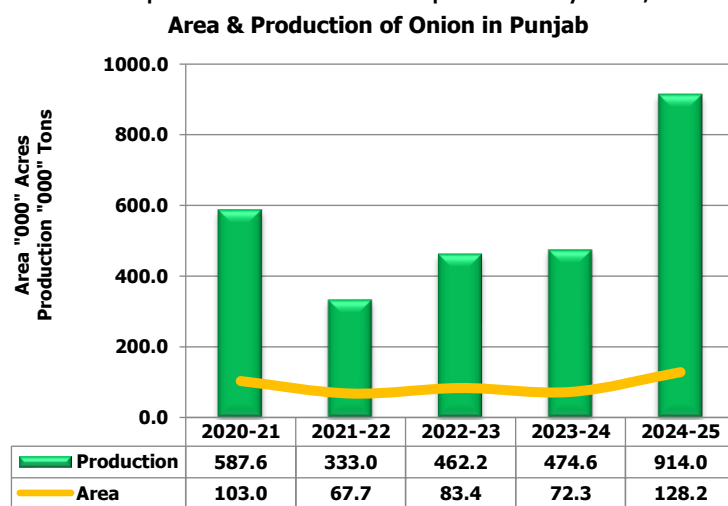
*=Export during July 2025 to November 2025

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

PROVINCIAL OVERVIEW

Area & Production:

- Punjab has recorded a rising trend in onion production over the past four years, while the cultivated area has shown fluctuations.
- During the fiscal year 2024-25, the area under cultivation expanded to 128,200 acres, indicating a substantial increase of 77.3% over the preceding year. Resultantly, onion production increased sharply to 914,000 tons, reflecting a significant 92.5% rise compared to the previous year.



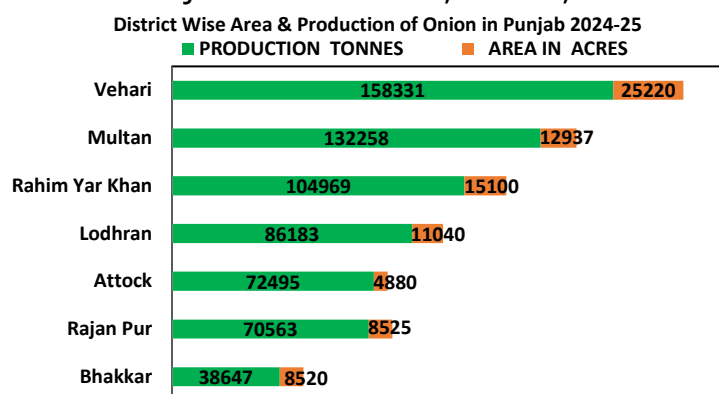
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



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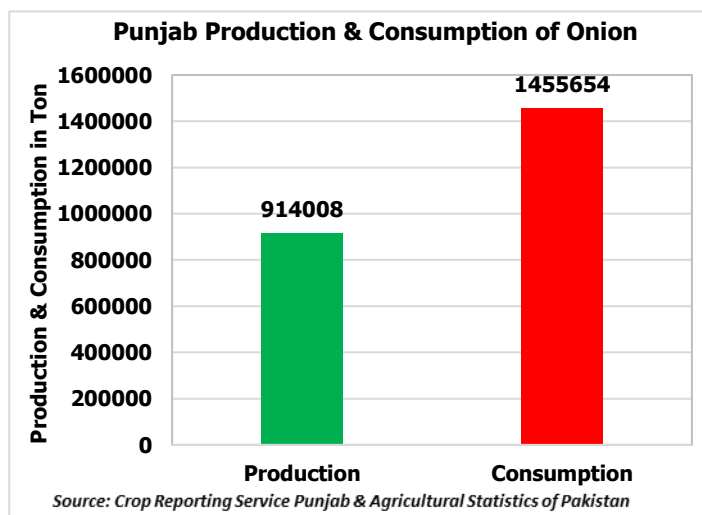
- The principal onion-producing districts in Punjab include Vehari, Multan, Rahim Yar Khan, Lodhran, Attock, Rajanpur and Bhakkar.
- Vehari ranked first with an onion production of 158,331 tons. Multan secured second rank with 132,258 tons, while Rahim Yar Khan stood at third position with production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



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

- The provincial production of onion has been recorded at 9,14,008 tons during year 2024-25, showing deficit of 5,41,646 tons as compared to provincial consumption requirement i.e. 14,55,654 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

Supply Cycle:

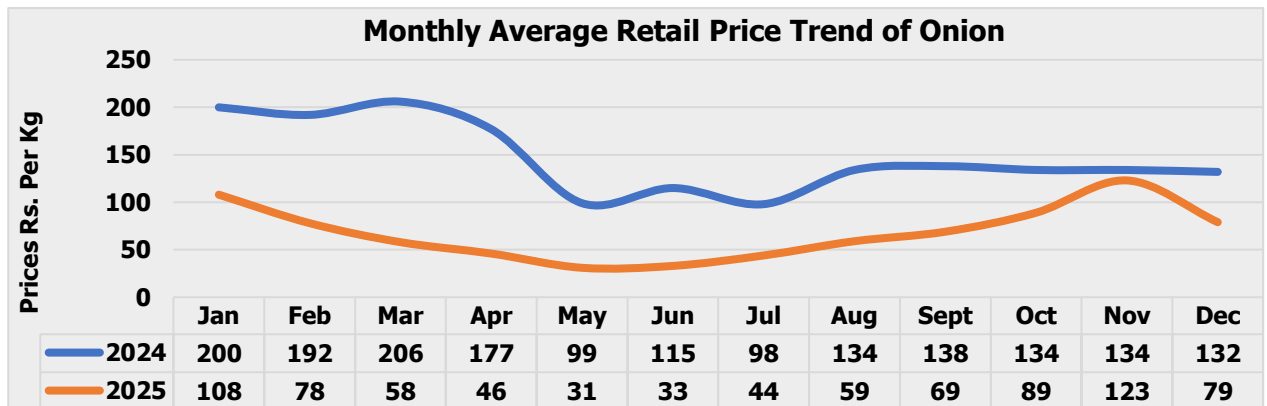
- The key onion-producing districts in each province, along with their respective production seasons, are presented below:

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:

- Currently, production season of onion in Sindh is in progress and supply from South Punjab (D.G. Khan, Rajanpur, Rojhan) has also started to arrive, resultantly supply

situation of onion is improving and its price has declined in local markets. The graphical trend of monthly average retail price of onion in Punjab is given as under:



SUPPLY MANAGEMENT ADVISORY



Assessment

Main supply of onion is arriving from Sindh due to commencement of production season over there, in addition supply from South Punjab (D.G Khan, Rajanpur & Rojhan) is also available. Thus, supply & price situation of onion is showing stable trend in local markets.

Forecast

With the passage of time, onion supply from Sindh is expected to increase. Moreover, main crop of Punjab will start to arrive during March, 2026, which will further improve the supply situation in the Agriculture Produce Markets. Therefore, onion price is expected to remain within normal range in coming months.



Advisory



- The EADAs and Secretaries Market Committee should ensure maximum supply of onion from Sindh and South Punjab to meet consumption requirements. Moreover, future contracts also be undertaken to ensure smooth supply from KP & Balochistan during June-July, 2026.
- Further, auction proceedings in Agricultural Produce Markets must be monitored regularly and transparent & fair mechanism also be implemented while fixation of rates.

- Price Control Magistrates should rigorously monitor retailers and enforce implementation of notified rates by taking strict actions against offenders involved in overpricing and profiteering.

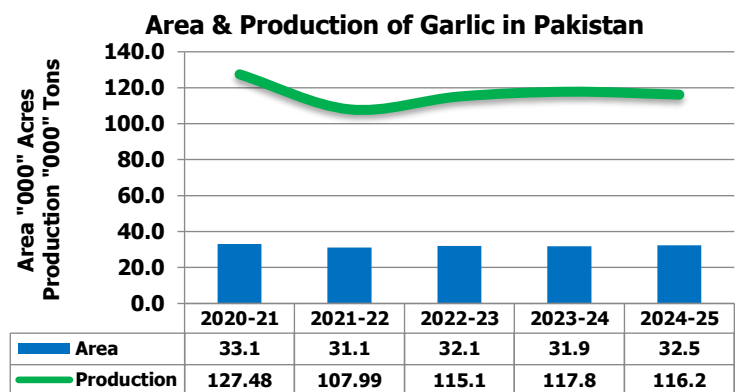
4. GARLIC



NATIONAL OVERVIEW

Domestic Area & Production

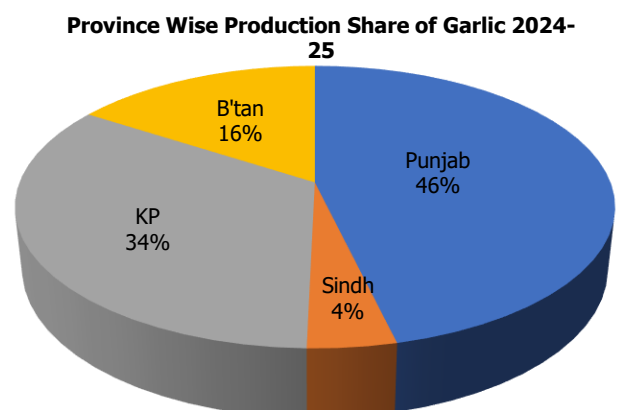
- Over the past three years, domestic garlic production and its cultivated area have exhibited stable trend with minor fluctuations.
- During year 2024-25, garlic production was recorded at 116,200 tons, reflecting a marginal decline of 1.35% compared to the previous year.
- The cultivated area for garlic reached 32,500 acres in year 2024-25, marking a slight increase of 1.88% over the preceding year.



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

Province wise Area & Production:

- Punjab continues to be the dominant contributor to national garlic production, accounting for 46% of the total output, followed by Khyber Pakhtunkhwa (34%), Balochistan (16%) and Sindh (4%).



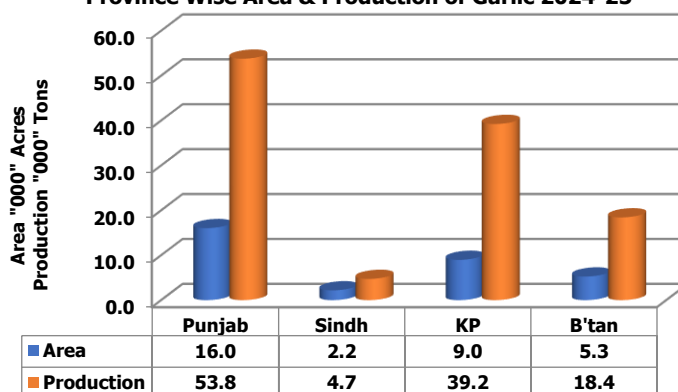


Food Safety and Consumer Protection Department



- In year 2024-25, Punjab produced 53,800 tons of garlic from 16,000 acres, while Khyber Pakhtunkhwa yielded 39,200 tons from 9,000 acres. Balochistan's output reached 18,400 tons from 5,300 acres and Sindh achieved the lowest production at 4,700 tons from 2,200 acres.

Province Wise Area & Production of Garlic 2024-25

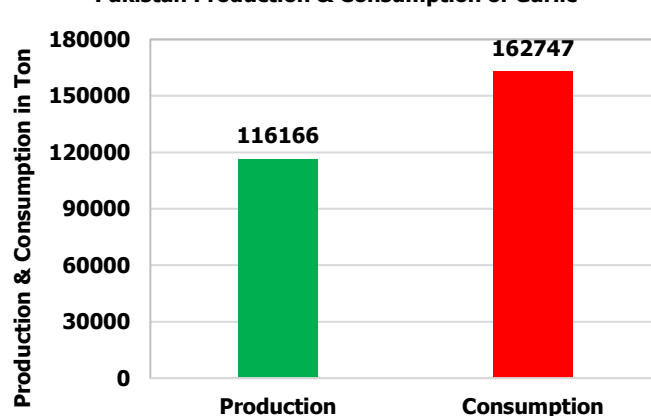


Source: Agricultural Statistics of Pakistan

Domestic Production & Consumption:

- The domestic production of garlic has been recorded at 1,16,166 tons during year 2024-25, showing deficit of 46,581 tons as compared to domestic consumption requirement i.e. 1,62,747 tons

Pakistan Production & Consumption of Garlic

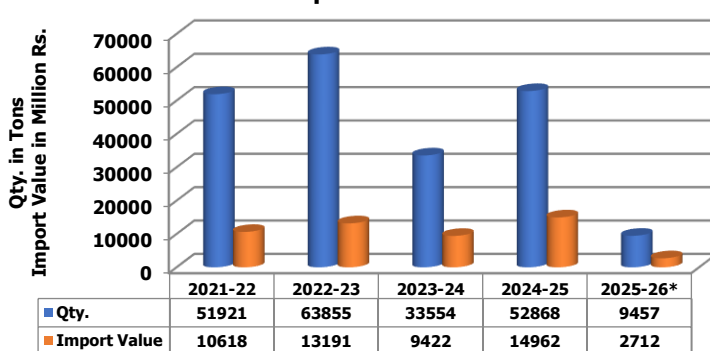


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights:

- To satisfy domestic consumption needs round the year, Pakistan continues to depend on garlic imports from China.
- During year 2024-25, the country imported 52,868 tons of garlic, incurring a cost of Rs. 14,962 million. In year 2025-26 (July-November), imports from China has reached to 9,457 tons, with associated expenditures of Rs. 2,712 million.

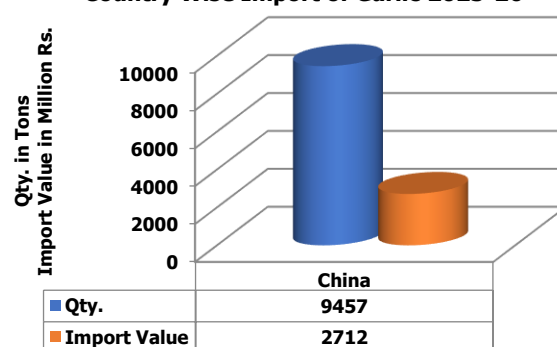
Import of Garlic



*=Import during July 2025 to November 2025

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

Country Wise Import of Garlic 2025-26



*=Import during July 2025 to November 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics

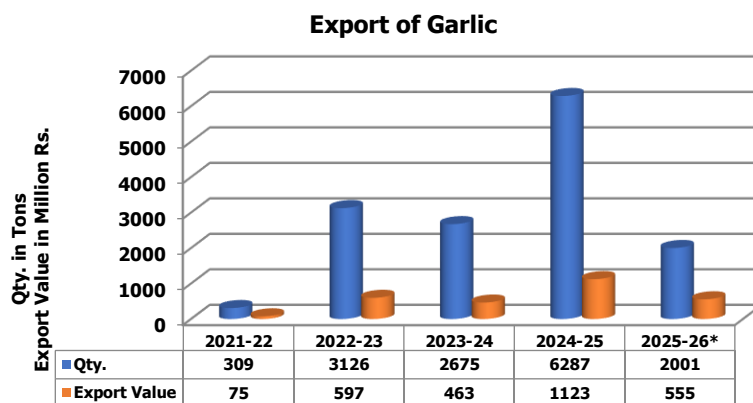


Food Safety and Consumer Protection Department



Export Insights:

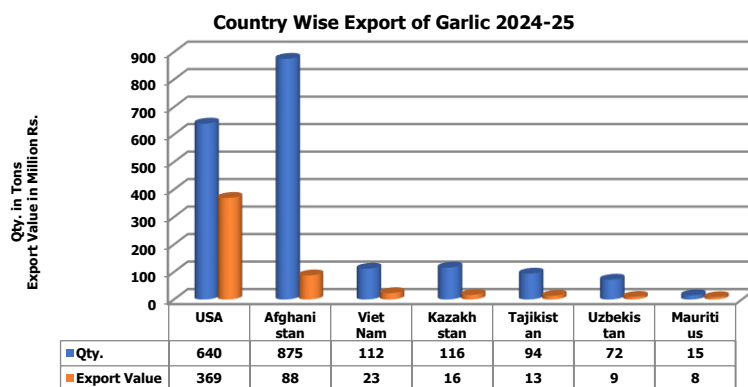
- During year 2024-25, garlic export was recorded at 6287 tons, generating earning of Rs. 1123 million. However, during the year 2025-26 (July-November), exports has been recorded at 2001 tons, contributing Rs. 555 million to export earnings.



*=Export during July 2025 to November 2025

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

- The main destinations for Pakistani garlic exports include the USA, Afghanistan, Vietnam, Kazakhstan, Tajikistan, Uzbekistan and Mauritius.
- A significant share of exports is directed to Afghanistan and the USA, representing the largest portion of total export volumes, while export to other countries remain comparatively limited. In terms of value, exports to the USA yield considerably higher earnings than those to Afghanistan.



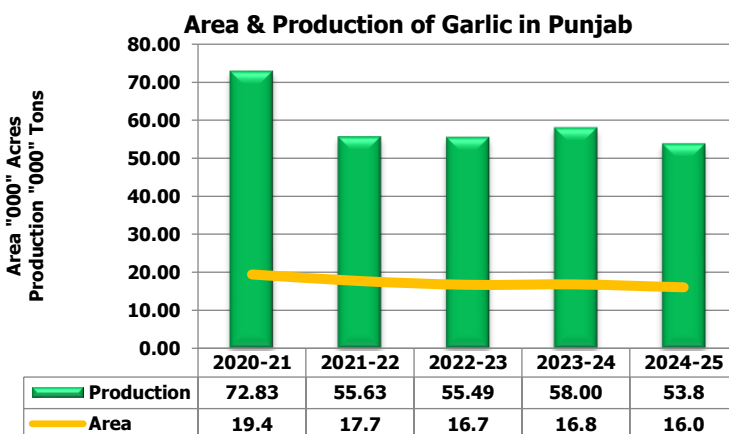
*=Export during July 2025 to November 2025

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

PROVINCIAL OVERVIEW

Area & Production:

- Punjab has shown an almost stable trend in both garlic production and cultivated area over the past four years.
- In year 2024-25, garlic production in Punjab has been recorded at 53,800 tons, representing a 7.2% decline compared with the previous year and a 26.1% decrease relative to the production level recorded in year 2020-21. The cultivated area stood at 16,100 acres, reflecting a year-on-year decline of 4.7% and a 17.52% reduction compared with the acreage reported in year 2020-21.



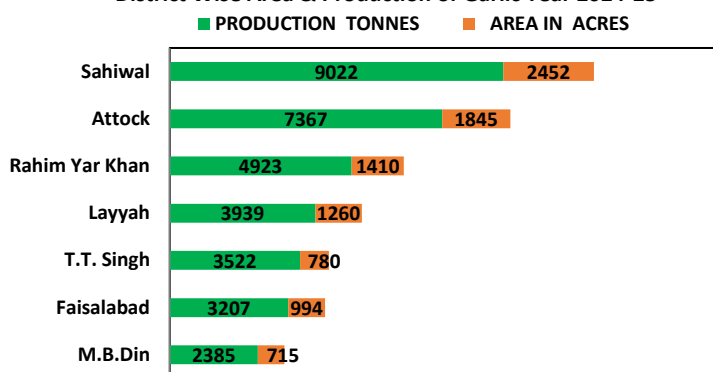
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Food Safety and Consumer Protection Department

- The major 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.

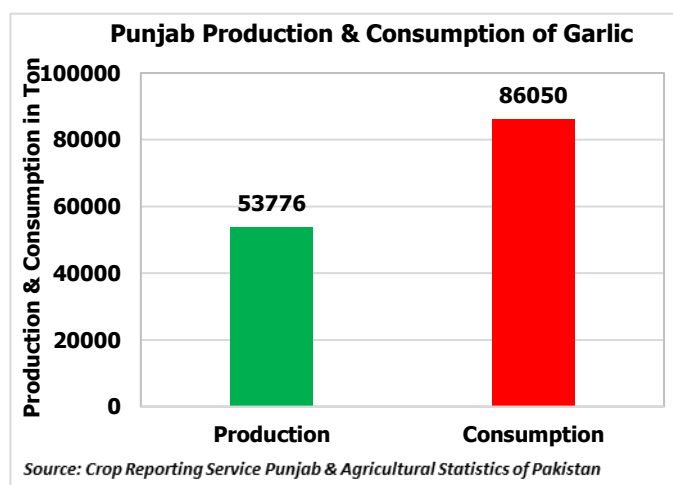
District Wise Area & Production of Garlic Year 2024-25



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

- The provincial production of garlic has been recorded at 53,776 tons during year 2024-25, showing deficit of 32,274 tons as compared to provincial consumption requirement i.e. 86,050 tons



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

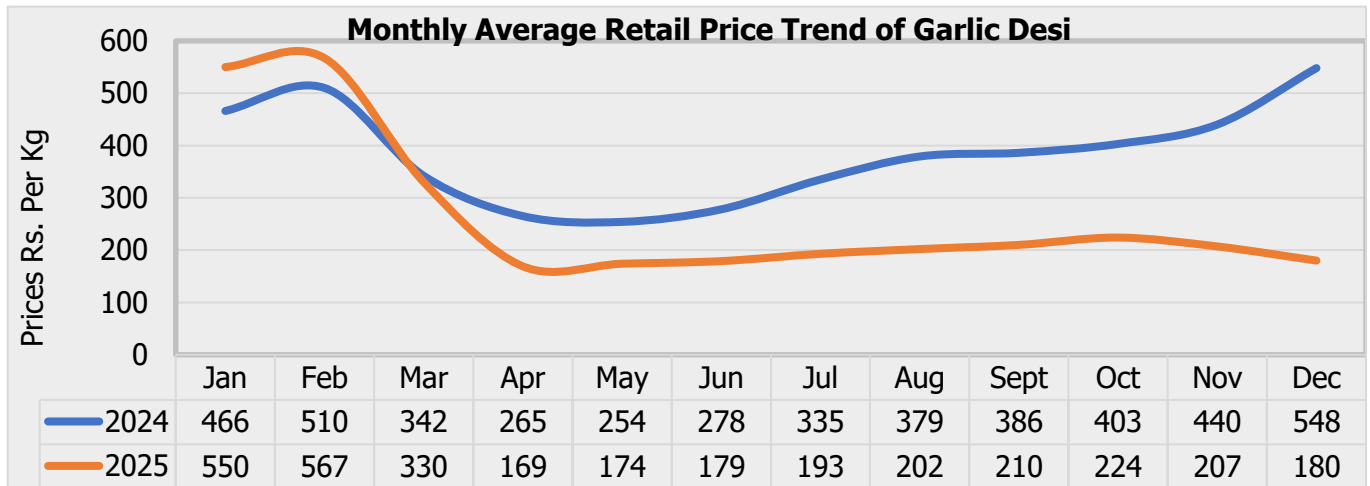
Supply Cycle:

- 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

Market Prices:

- Local prices of garlic are almost stable showing slight variations. Current prices are far less as compared to prices of corresponding period of last year. Monthly average retail price of garlic in Punjab is Rs.180/Kg during month of December. The graph of monthly average retail price of garlic is given as under



SUPPLY MANAGEMENT ADVISORY



Assessment

Due to availability of local supply of garlic, its price is exhibiting stable trend in local markets. However, local supply is reaching to end which may set its price to increase in future.

Forecast

As local supply is near to end, thus supply of garlic will be dependent on some arrival from KP & Balochsitan along with import from China. Due to stress supply, price of garlic is likely to increase in future. Next production season of local garlic crop is expected to begin during the first week of March 2026, till then garlic price is expected to remain on higher side in local markets.



Advisory



- The EADAs & Secretaries Market Committees should take following measures:
 - Coordinate with commission agents to ensure the uninterrupted import of garlic from China so that a steady supply is maintained in local markets.
 - Additionally, adequate supply of garlic from Khyber Pakhtunkhwa and Balochistan should be arranged to satisfy consumption needs.
 - Regularly supervise auction proceedings in Agricultural Produce Markets and ensure the strict enforcement of a fair and transparent price-setting mechanism.

- Garlic processing into paste can help to maintain a consistent supply and stabilize prices throughout the year.
- The District Administration, in coordination with Price Control Magistrates, should intensify inspections of retailers to prevent overcharging and excessive profiteering.

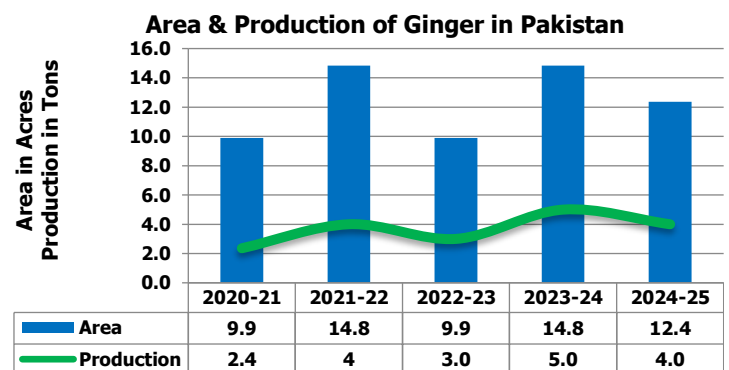
5. GINGER



NATIONAL OVERVIEW

Domestic Area & Production

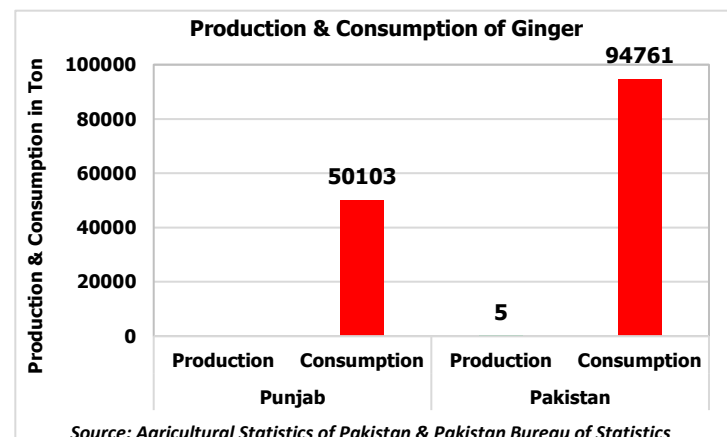
- Pakistan's domestic ginger production is negligible, resulting in a near-total reliance on imports to meet domestic consumption needs.
- During year 2024-25, domestic production stood at only 4 tons from a cultivated area of 12,400 acres. In contrast, national consumption is estimated at 81,231 tons, reflecting a substantial supply deficit and underscoring Pakistan's almost entire dependence on import to cater for domestic consumption requirements of ginger.



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

Domestic Production & Consumption:

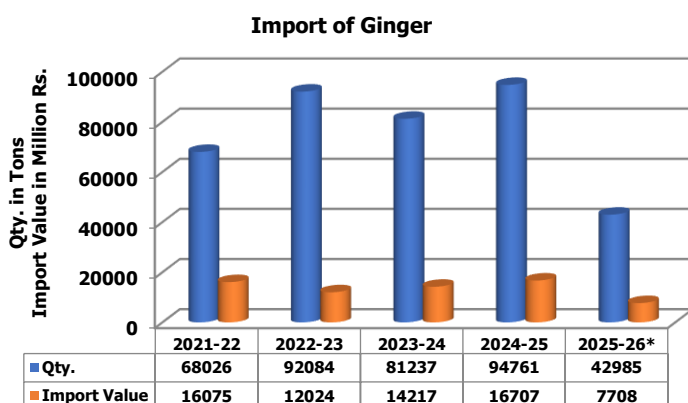
- The domestic production of ginger is recorded at only 5 tons, whereas domestic consumption requirement is estimated at 94,761 tons and consumption requirement of ginger in Punjab is 50,103 tons.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics

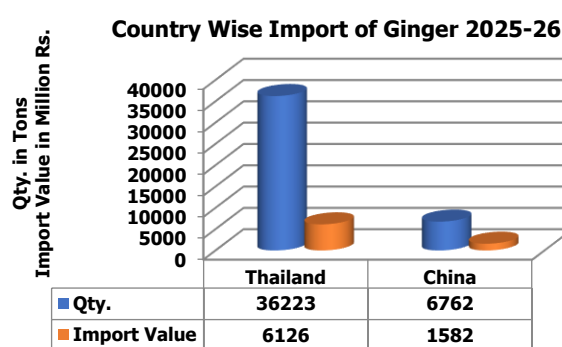
Import Insights

- In fiscal year 2024–25, Pakistan's ginger imports amounted to 94,761 tons at a cost of Rs. 16,707 million. During 2025–26 (July–November), import volumes reached 42,985 tons, with an associated expenditure of Rs. 7,708 million. Pakistan's ginger supply is sourced primarily from Thailand and China.
- During 2025–26 (July–November), Pakistan imported 36,223 tons of ginger from Thailand at a value of Rs. 6,126 million, while an additional 6,762 tons were procured from China at a cost of Rs. 1,582 million.



*=Import during July 2025 to November 2025

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

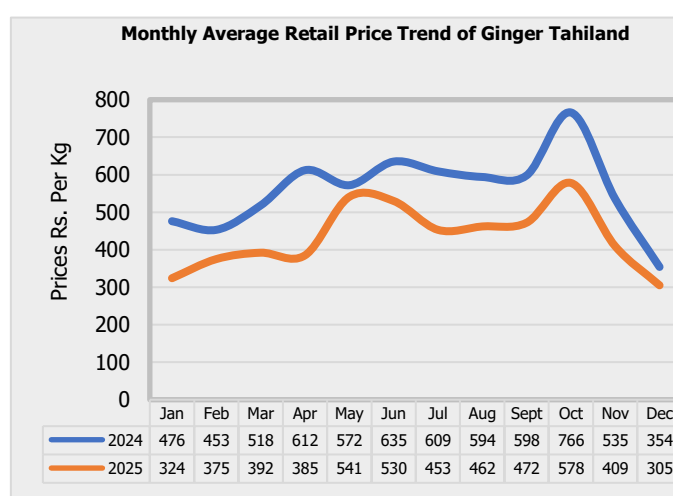
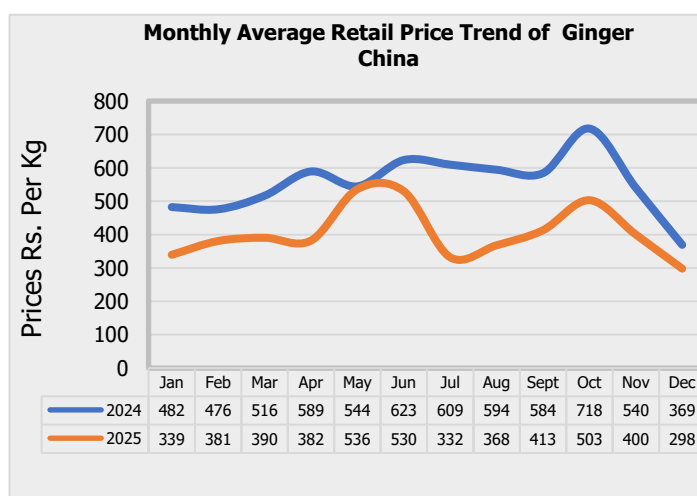


*=Import during July 2025 to November 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics

Market Prices

- Due to smooth import of ginger from Thailand & China, its supply situation is stable and its prices are exhibiting declining trend in local markets. In December, the average monthly retail price of Thai ginger is recorded at Rs. 305 per kilogram, while Chinese ginger stood at Rs. 298 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 non-existent, resulting in fully reliance on imports from Thailand and China to ensure its availability in local markets. As the ginger production season is currently underway in both countries, therefore import is smooth and local prices have come on lower side in local markets.

Forecast

Production season of ginger in Thailand & China is in progress and import situation is smooth. Resultantly, supply & price situation of ginger is anticipated to remain stable in local markets.



Advisory



- EADAs and Secretaries of Market Committees should encourage local importers and commission agents to ensure the uninterrupted import of ginger from Thailand and China, so that a stable supply is maintained in domestic markets.
- Processing ginger into paste may help to stabilize both its supply and prices throughout the year.
- The Agriculture Department should introduce ginger seed varieties that are suitable for local climatic conditions, thereby reducing reliance on imports.

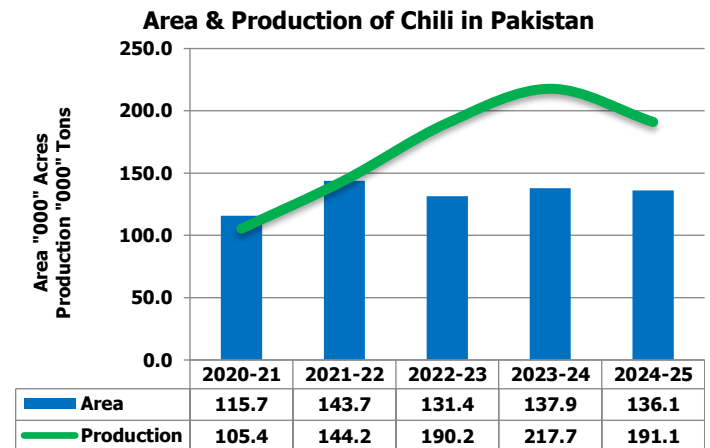
6. CHILLIES



NATIONAL OVERVIEW

Domestic Area & Production

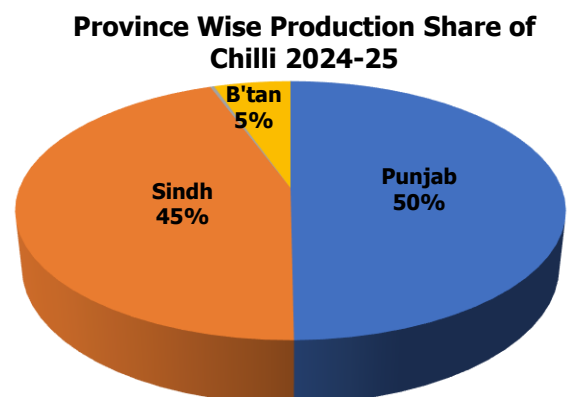
- The cultivated area of chillies in Pakistan is showing almost stable trend over the last three years. However, domestic production of chili demonstrated an upward trend from year 2020-21 to year 2023-24, followed by a slight decline during year 2024-25.
- In year 2024-25, domestic chili production was recorded at 191,100 tons, reflecting a 12.21% decrease compared with the previous year. The cultivated area stood at 136,100 acres, indicating a relatively stable trend over the period.



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

Province wise Area & Production

- Punjab is the leading chili-producing province in the country, contributing 50% to the country's total output. Sindh ranks second with a 45% share, while Balochistan accounts for the remaining 5%. In contrast, chili production in Khyber Pakhtunkhwa (KP) has been recorded as nil.



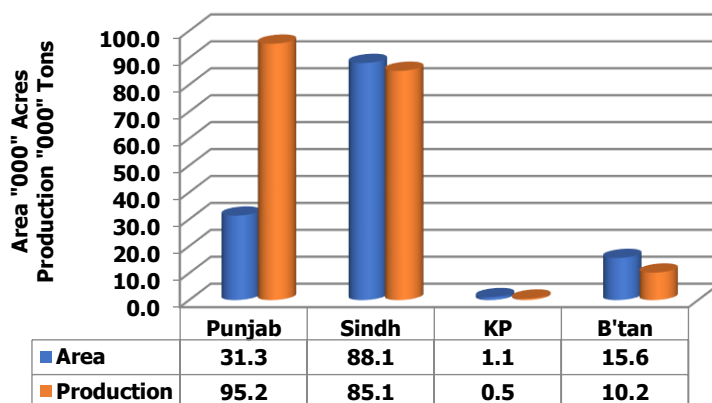


Food Safety and Consumer Protection Department



- Punjab is highest chili-producing province in year 2024-25, with an output of 95,200 tons cultivated over 31,300 acres. Sindh followed as the second-largest producer, recording 85,100 tons grown across 88,100 acres.
- By comparison, chili production in Balochistan and Khyber Pakhtunkhwa (KP) remained very limited, at just 10,200 tons and 500 tons, respectively.

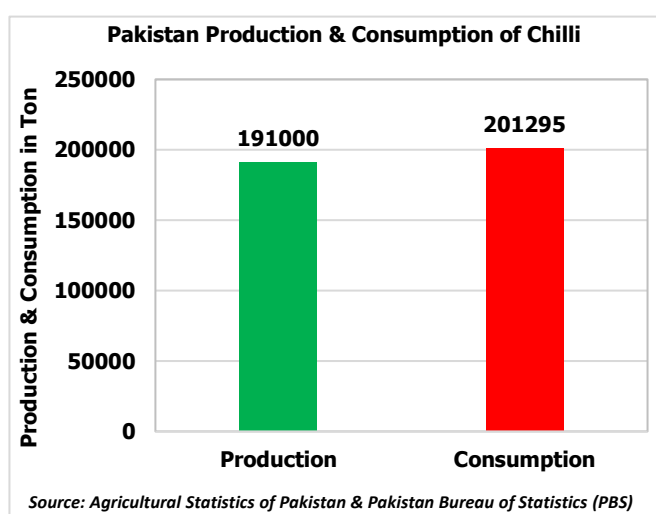
Province Wise Area & Production of Chili 2024-25



Source: Agricultural Statistics of Pakistan

Domestic Production & Consumption:

- The domestic production of chili is registered as 1,91,000 tons during year 2024-25, showing deficit of 10,295 tons as compared to domestic consumption requirement i.e. 2,01,295 tons.

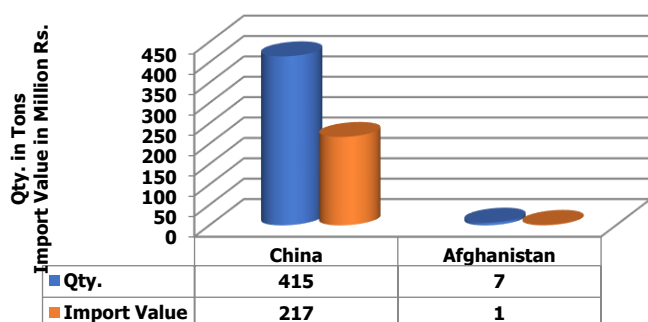


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights

- In the fiscal year 2024-25, Pakistan imported 2,922 tons of red chilies at a total expense of Rs. 682 million, reflecting a clear rise in both quantity and value compared with the previous year. During year 2025-26 (July-November), red chili imports were recorded at 421 tons, with related spending amounting to Rs. 218 million.
- China remains the principal source of Pakistan's red chili imports. For year 2025-26 (July-November), import from China reached to 421 tons at a cost of Rs. 218 million, while only 7 tons were sourced from Afghanistan, costing Rs. 1 million.

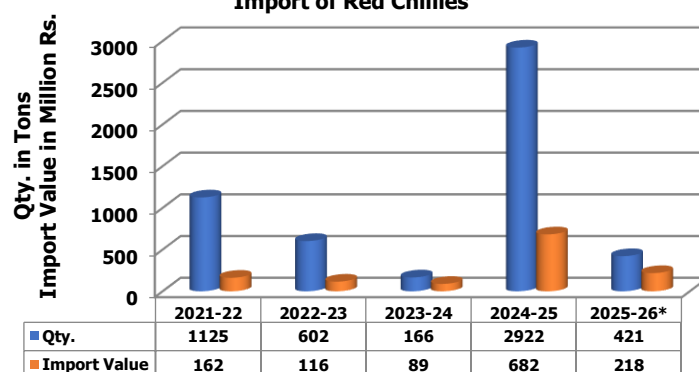
Country Wise Import of Red Chillies 2025-26



*=Import during July 2025 to November 2025

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

Import of Red Chillies



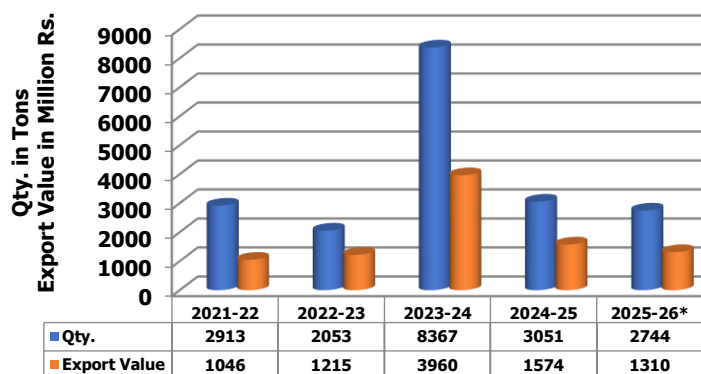
*=Import during July 2025 to November 2025

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

Export Insights

- Over both volume and value, Pakistan's red chili exports have remained consistently higher than its imports. In the fiscal year 2024-25, export quantities stood at 3,051 tons, earning Rs. 1,574 million in revenue. During year 2025-26 (July-November), export volumes reached 2,744 tons, generating export earnings of Rs. 1,310 million.
- Major destinations for Pakistani red chili exports include China, the United Arab Emirates, Saudi Arabia, Iraq, Qatar and Canada.

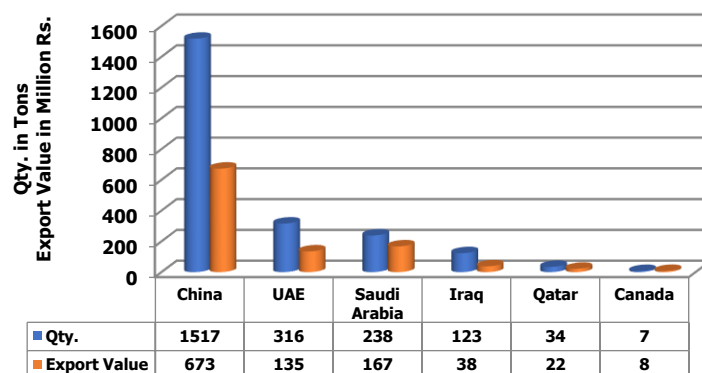
Export of Red Chillies



*=Export during July 2025 to November 2025

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

Country Wise Export of Red Chilli 2025-26



*=Export during July 2025 to November 2025

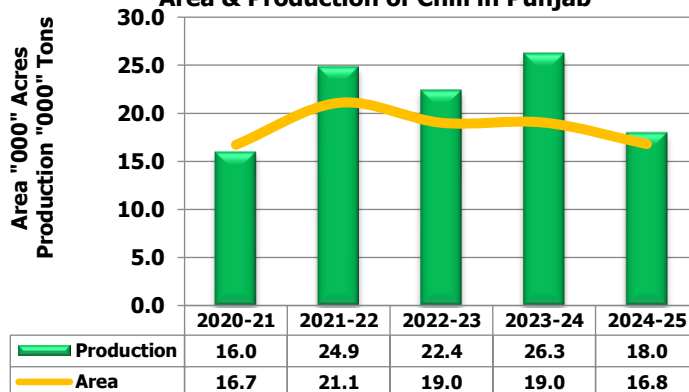
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production

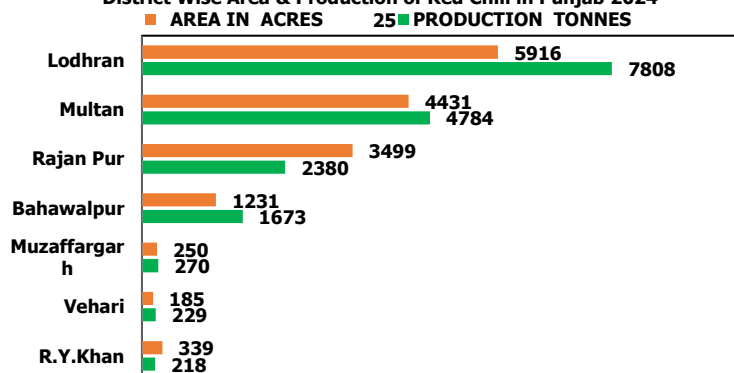
- Over the past five years, chili cultivation and production in Punjab have shown noticeable fluctuations. In year 2024-25, the province recorded chili production of 18,000 tons, reflecting a 31.48% decline compared with the previous year.
- The area under chili cultivation stood at 16,800 acres during year 2024-25, representing an 11.75% reduction relative to the acreage reported in the preceding year.
- The principal chili-producing districts in Punjab include Lodhran, Multan, Rajanpur, Bahawalpur, Muzaffargarh, Vehari and Rahim Yar Khan.

Area & Production of Chili in Punjab



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

District Wise Area & Production of Red Chili in Punjab 2024-



Source: Crop Reporting Service Punjab



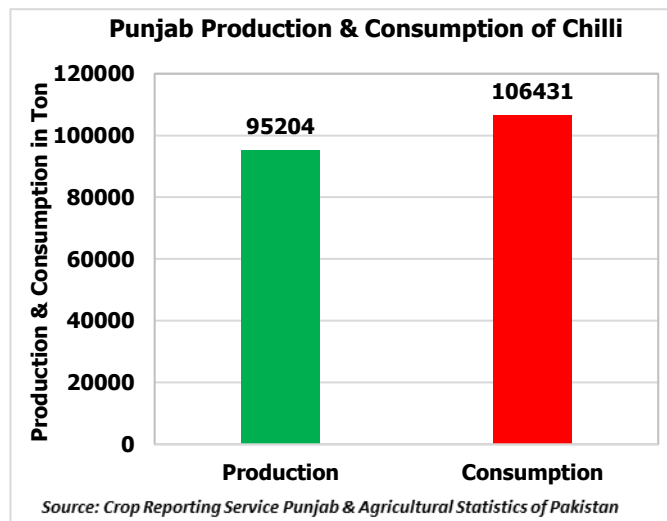
Food Safety and Consumer Protection Department



- Lodhran recorded the highest output at 7,808 tons harvested from 5,916 acres, followed by Multan with 4,784 tons, while Rajanpur ranked third, producing 2,380 tons.

Provincial Production & Consumption:

- The provincial production of chili appeared to be 95,204 tons during year 2024-25, showing deficit of 11,227 tons as compared to provincial consumption requirement i.e. 1,06,431 tons



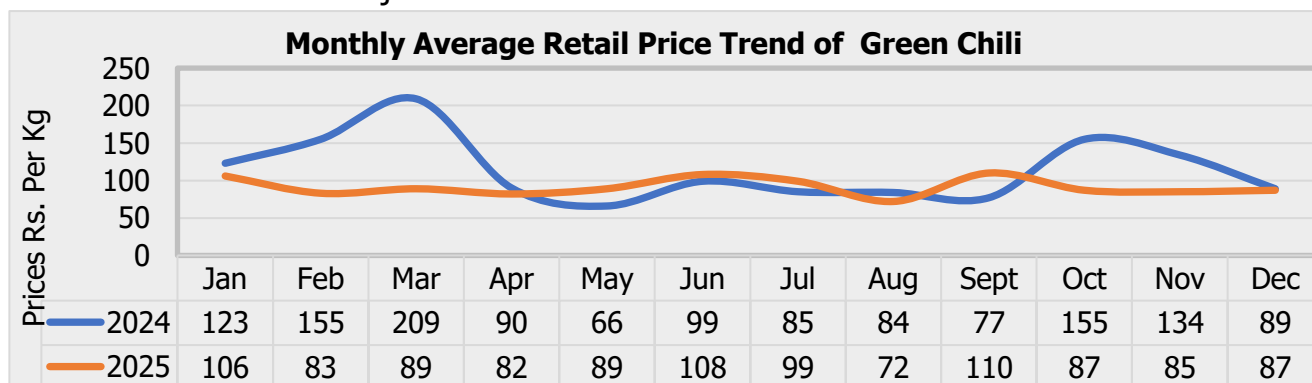
Supply Cycle

- 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 almost stable trend due to stable supply of chilies from Sindh. Monthly average retail price of green chili in Punjab is recorded at Rs. 87 per kilogram during December. 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. Due to stable supply situation, price of green chili is exhibiting almost stable trend in local markets.

Forecast

The chili production season is currently underway in Sindh. With the province contributing 45% of the national output, the supply situation is expected to remain stable.



Advisory



- EADAs and Secretaries Market Committees should coordinate closely with commission agents to ensure adequate chili supply from Sindh, maintaining stability in both supply and prices.
- Promotion of kitchen gardening may help enhance local chili production.
- The Agriculture Department should focus on high-yielding, climate-resilient and off-season seed varieties to achieve self-sufficiency and reduce reliance on other provinces.

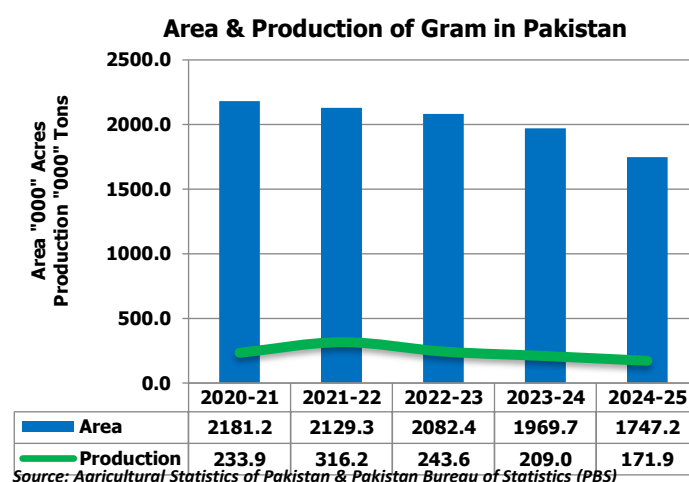
7. GRAM (Chickpea)



NATIONAL OVERVIEW

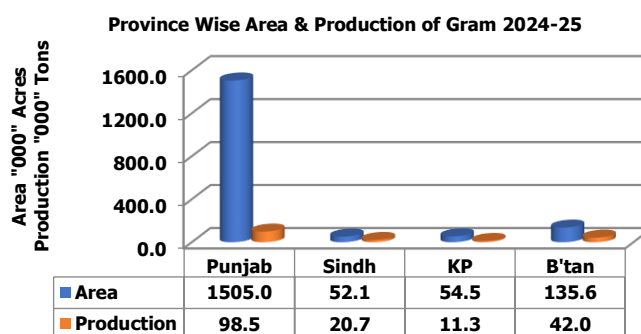
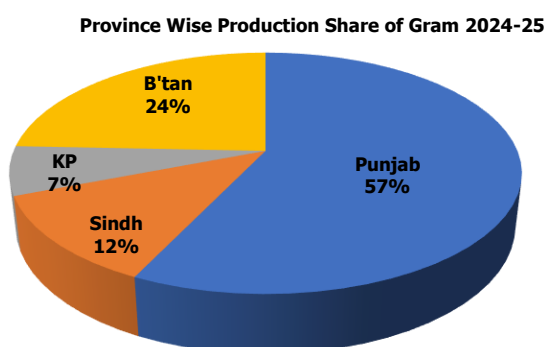
Domestic Area & Production:

- The cultivated area of gram in the country is gradually declining, resultantly its domestic production is also decreasing and appearing to be far less than domestic consumption requirements.
- During the year 2024-25, area under gram cultivation stood at 1,747,200 acres, reflecting an 11.2% reduction relative to the acreage reported last year.
- Likewise, Pakistan's domestic production of gram recorded at 171,941 tons during year 2024-25, which reflected 17.7% decrease in contrast with production level of previous year.



Province wise Area & Production:

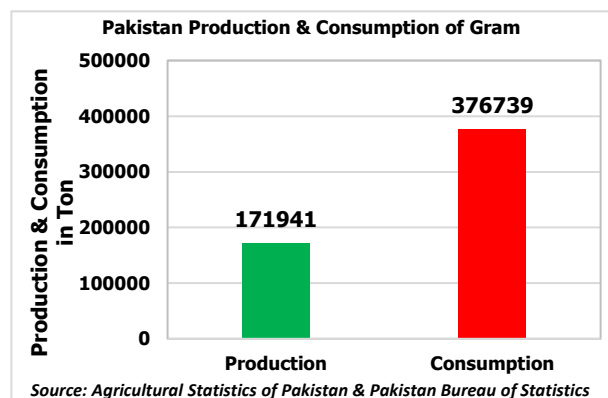
- Punjab remains the leading gram-producing province, contributing 57% to the country's total output, followed by Balochistan with 24%, Sindh with 12% and Khyber Pakhtunkhwa (KP) with 7%.
- In year 2024-25, gram production in Punjab reached 98,500 tons from an area of 1,505,000 acres. Production levels in Balochistan, Sindh and Khyber Pakhtunkhwa recorded at 42,000 tons, 20,700 tons, and 11,300 tons, respectively.



Source: Agricultural Statistics of Pakistan

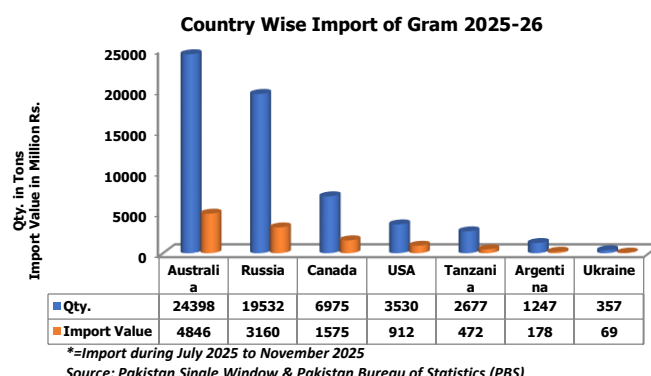
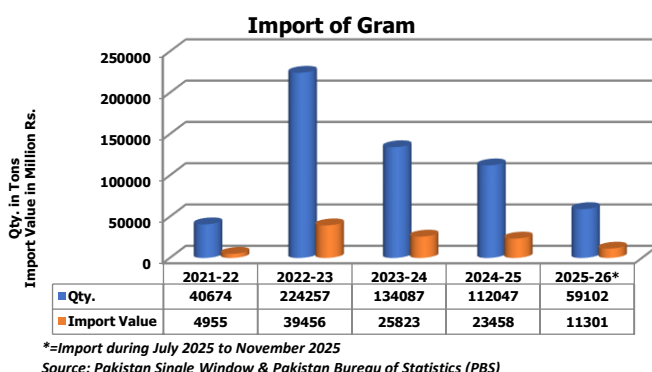
Domestic Production and Consumption:

- Pakistan's limited domestic production of gram requires regular import of gram to fulfill its domestic consumption needs. In year 2024-25, national production amounted to 1,71,941 tons, against an estimated consumption requirement of 3,76,739 tons. This shortfall created a substantial supply deficit of 2,01,798 tons.



Import Insights:

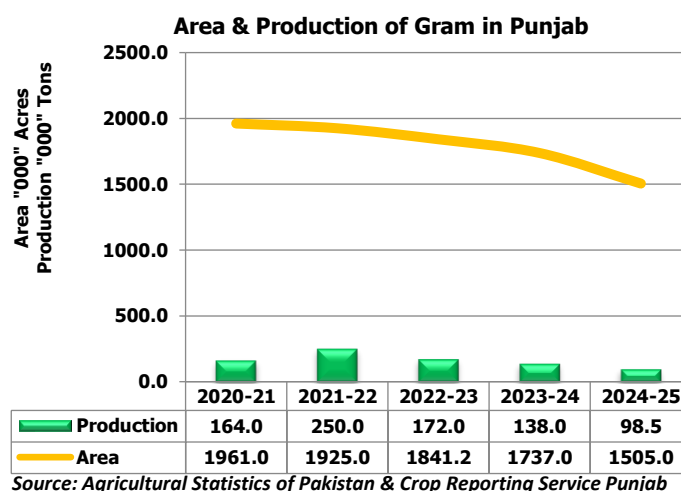
- During year 2024-25, gram import in Pakistan was registered at 112,047 tons at a total cost of Rs. 23,458 million, while during year 2025-26 (July-November) gram import reached 59,102 tons, with an expenditure of Rs. 11,301 million. The major sources of gram imports for Pakistan include Australia, Russia, Canada, the USA, Tanzania, Argentina, and Ukraine.



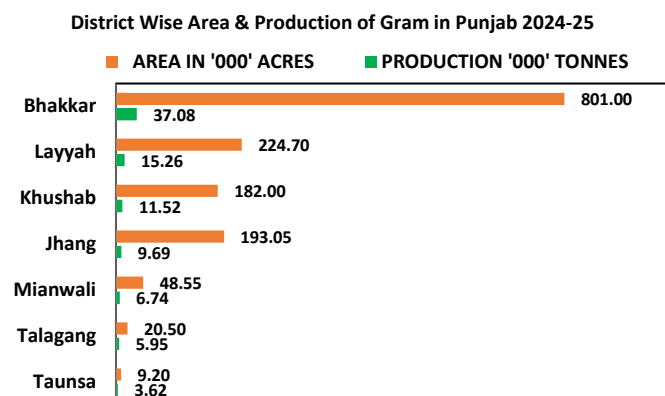
PROVINCIAL OVERVIEW

Area & Production:

- Over the years, gram cultivation and production in Punjab have shown a persistent downward trend.
- In year 2024-25, cultivated area of gram fell to 1,505,000 acres, indicating a 13.35% decrease as compared to last year.
- Gram production in the province stood at 98,500 tons, reflecting a 28.6% decline from the previous year.



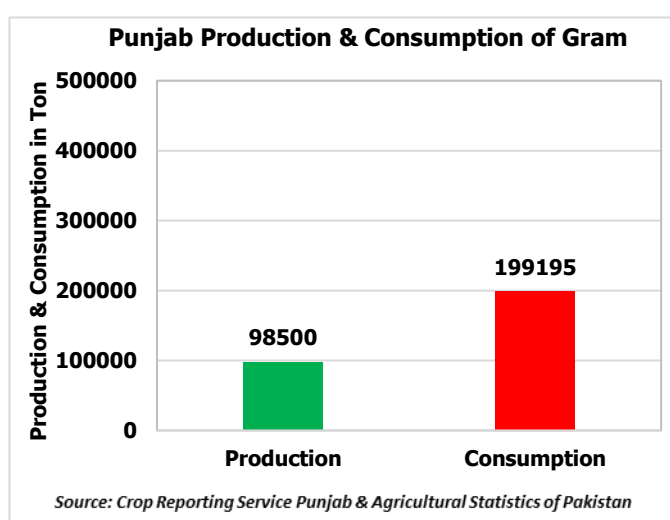
- Leading gram-producing districts in Punjab include Bhakkar, Layyah, Khushab, Jhang, Mianwali, Talagang and Taunsa. Bhakkar emerges as the top producer, with an output of 37,100 tons harvested from 801,000 acres.



Source: Crop Reporting Service Punjab

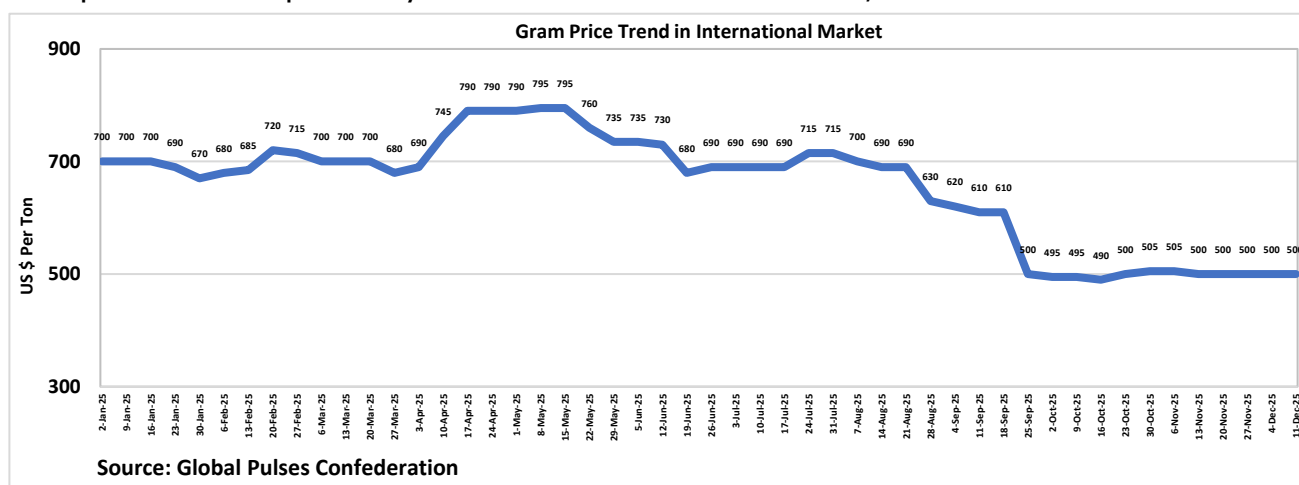
Provincial Production & Consumption:

- The provincial production of gram is recorded at 98,500 tons during year 2024-25, showing deficit of 1,00,695 tons as compared to provincial consumption requirement i.e. 1,99,195 tons.



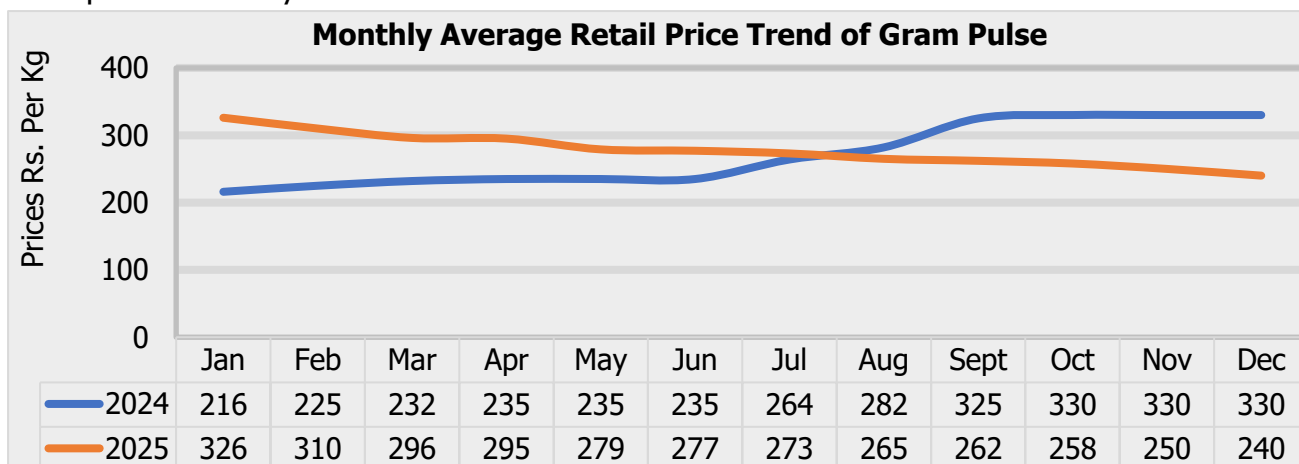
International Market Trends

- International prices of gram are on lower side due to 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:



Local Market Price:

- As a result of low international prices, decline in local prices of gram has also been observed. In Punjab, the average monthly retail price of gram pulse stood at Rs. 240/Kg during December, which is far less than price recorded during corresponding period of last year.



SUPPLY MANAGEMENT ADVISORY



Assessment

Due to availability of gram crop from Australia and Canada, its international price is lying on lower side. Resultantly, import situation of gram is smooth & steady, subsequently gram price is trending downward in local markets.

Forecast

Import situation is likely to remain smooth subject to low international prices. Therefore, supply & price situation of gram is expected to remain stable in local markets.



Advisory



- The Deputy Commissioners Faisalabad and Sargodha should coordinate with commission agents, importers and dealers to arrange maximum gram imports benefiting of low international prices and to meet anticipated demand during Ramzan-2026.
- The District Administration with the assistance of concerned EADAs (E&M) and Secretaries Market

Committees, should maintain close coordination with commission agents and importers to ensure adequate

- stock levels according to current consumption requirements and make arrangements to ensure smooth supply during Ramzan-2026.
- District Administration with the help of Market Committees must also keep stock position report updated to ascertain supply situation of gram in local markets.
- Price Control Magistrates should ensure strict enforcement of retail notified prices in local markets through regular inspections of retailers.

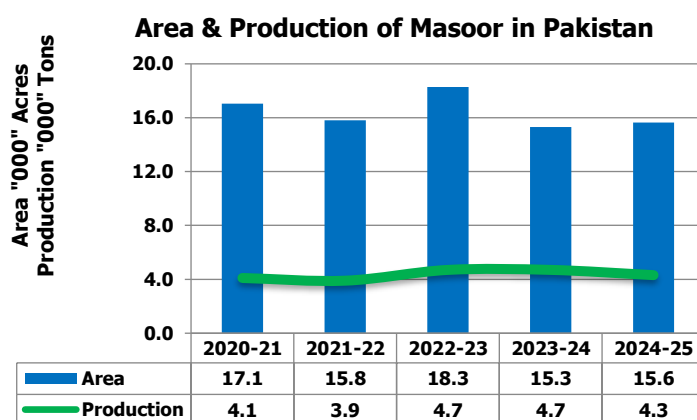
8. LENTIL (MASOOR)



NATIONAL OVERVIEW

Domestic Area & Production:

- Domestic masoor (lentil) production remains almost negligible, making Pakistan heavily dependent on imports to meet local consumption requirements. The graphical analysis shows that both domestic production and cultivated area have been very low and exhibited instability over the past five years.
- In year 2024-25, masoor production was recorded at 4,300 tons, marking an 8.5% decline from the previous year. The cultivated area stood at 15,600 acres, showing a 1.96% increase over the previous year but an 8.77% decrease compared to area recorded during year 2020-21.



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



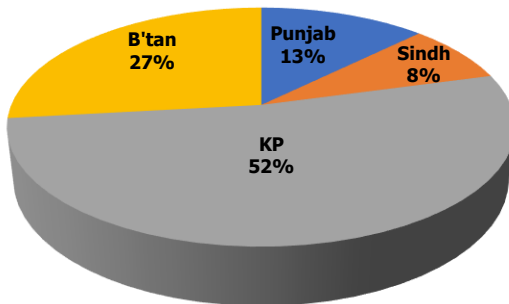
Food Safety and Consumer Protection Department



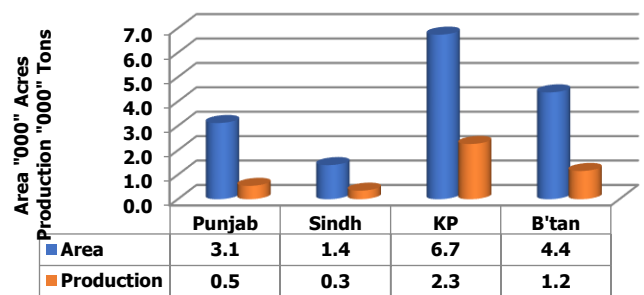
Province wise Area & Production:

- Khyber Pakhtunkhwa (KP) is leading masoor producing province in the country 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

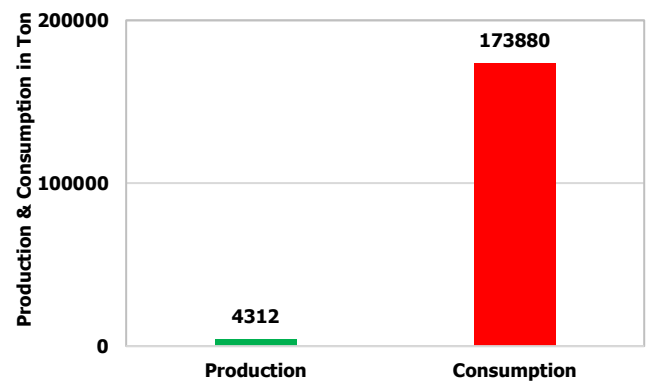


Source: Agricultural Statistics of Pakistan

Domestic Production & Consumption

- In year 2024-25, Pakistan's domestic masoor production was recorded at 4,312 tons, while the national consumption requirement stood at 173,880 tons, resulting in a substantial supply deficit of 169,568 tons.

Pakistan Production & Consumption of Masoor

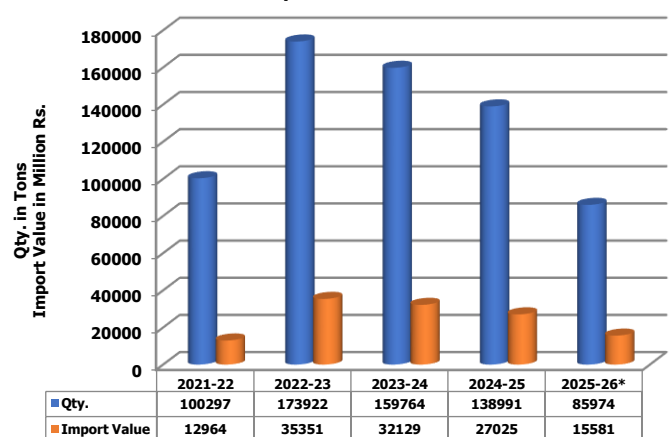


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

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-November), masoor imports recorded at 85,974 tons, costing Rs. 15,581 million.

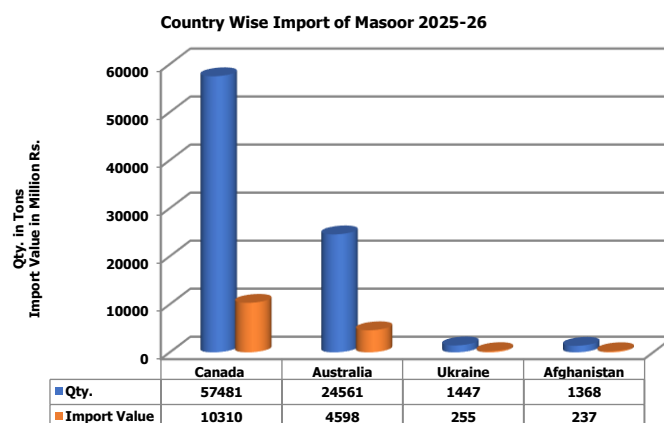
Import of Masoor



*=Import during July 2025 to November 2025

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

- 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-November), Pakistan imported 57,481 tons of masoor from Canada incurring cost of Rs. 10,310 million and 24,561 tons from Australia at an expense of Rs. 4,598 million.



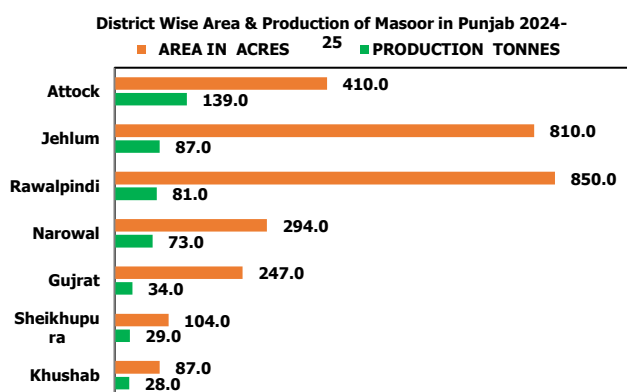
*=Import during July 2025 to November 2025

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

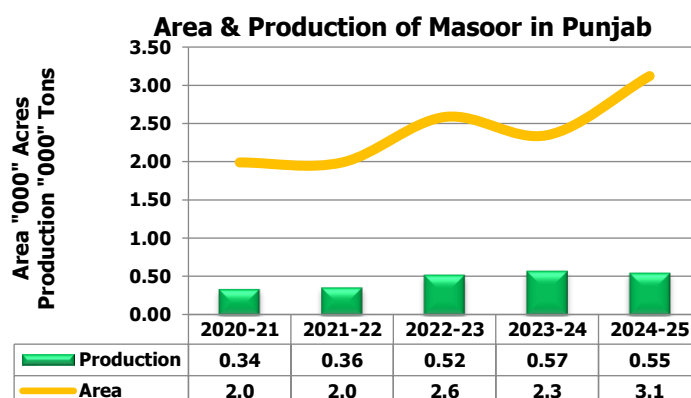
PROVINCIAL OVERVIEW

Area & Production:

- Masoor production in Punjab remains limited, even though both production and acreage have shown a gradual increase over the past five years. Consequently, provincial output falls well short of local consumption requirements.
- During year 2024-25, Punjab produced 546 tons of masoor, reflecting a 3.5% decline compared to the previous year, while the cultivated area increased to 3,100 acres, marking a 34.7% rise over last year.
- The main masoor-producing districts in Punjab include Attock, Jhelum, Rawalpindi, Narowal, Gujrat, Sheikhupura and Khushab. Attock led production with 139 tons harvested from 410 acres of cultivated land.



Source: Crop Reporting Service Punjab



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

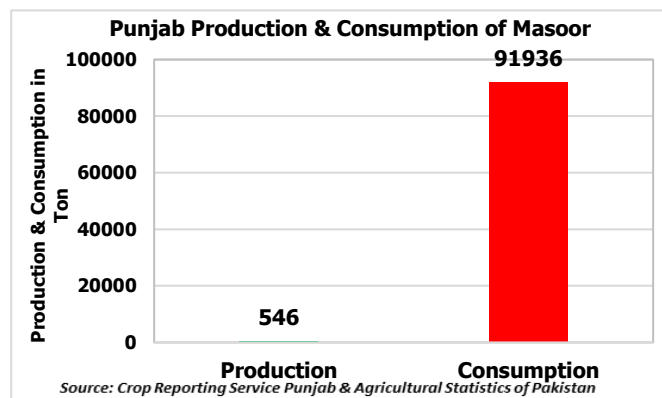


Food Safety and Consumer Protection Department



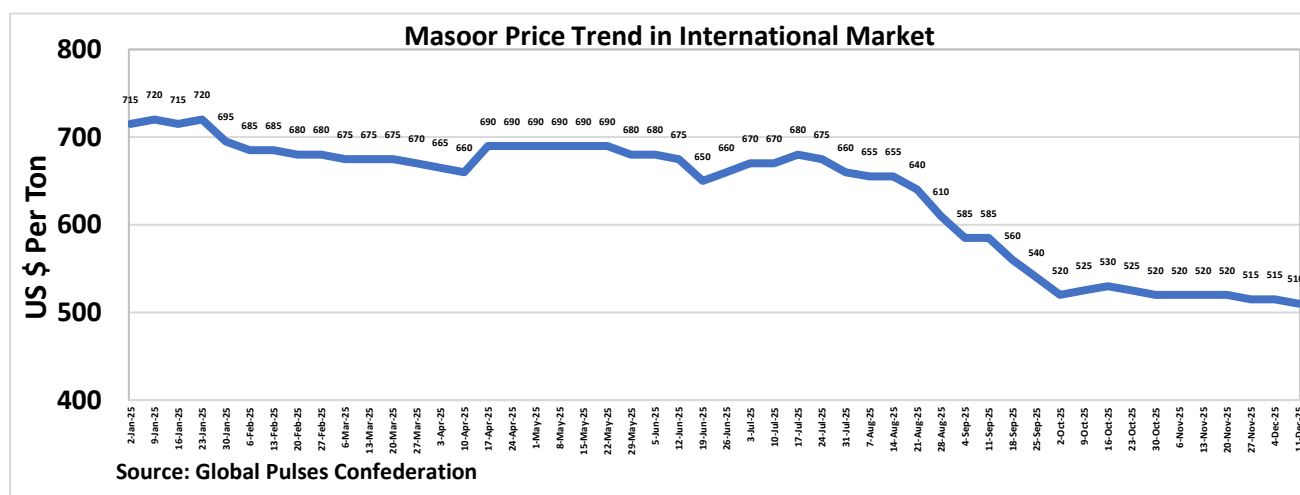
Provincial Production & Consumption:

- During year 2024-25, provincial production of masoor recorded at 546 tons, showing deficit of 91,390 tons as compared to provincial consumption requirement i.e. 91,936 tons



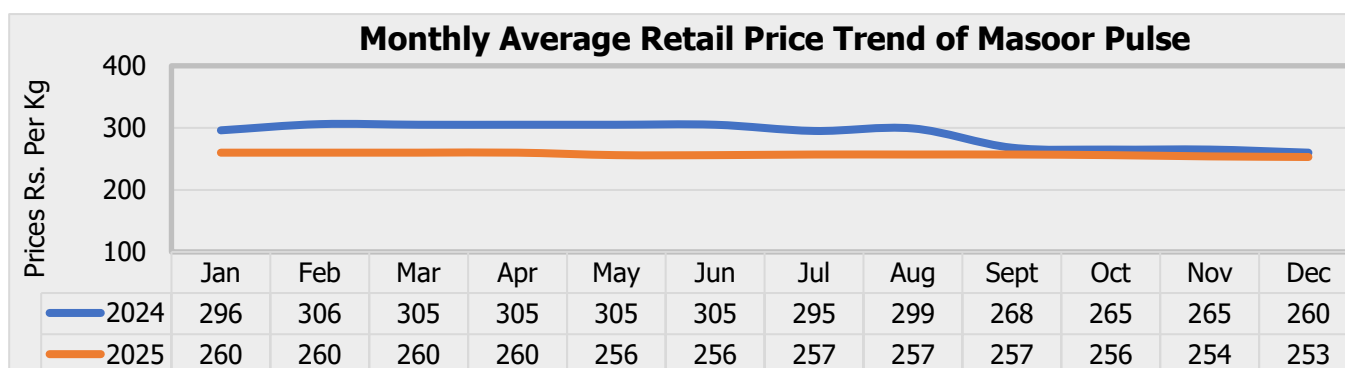
International Market Trend:

- Due to arrival of masoor crops from Australia and Canada, its international prices are on lower side. Current, international prices of masoor are USD 510/ton. The weekly trend in global masoor prices, as reported by the Global Pulse Confederation, is illustrated below:



Local Market Price:

- As a result of low international prices of masoor, its import situation is smooth and resultantly supply & price situation of masoor is showing stable trend in local markets. In Punjab, the average monthly retail price recorded at Rs. 253 per kilogram during December, reflecting a consistent stability in prices over the months.



SUPPLY MANAGEMENT ADVISORY

Assessment



Due to minimal domestic production, Pakistan entirely relies on imports to fulfill its masoor demand. The steady availability of masoor from Canada and Australia has lowered international prices, ensuring uninterrupted imports. As a result, the supply and price situation of masoor in local markets remains stable and consistent.

Forecast

Given the stable conditions in the international masoor market, imports are likely to continue smoothly, therefore supply and price situation of masoor is expected to remain stable in local markets.



Advisory



- The Deputy Commissioners Faisalabad should coordinate with commission agents, importers and dealers to maximize imports of masoor, considering low international prices and anticipated demand during Ramzan 2026.
- The District Administration, with the assistance of concerned EADAs (E&M) and Secretaries Market Committee, should maintain close coordination with commission agents, importers and dealers to ensure sufficient stocks in line with current consumption needs. Proactive measures must also be taken to ensure uninterrupted supply during Ramzan 2026, and stock position reports should be updated regularly.
- Price Control Magistrates should accelerate inspections of retailers to ensure strict compliance with notified prices.

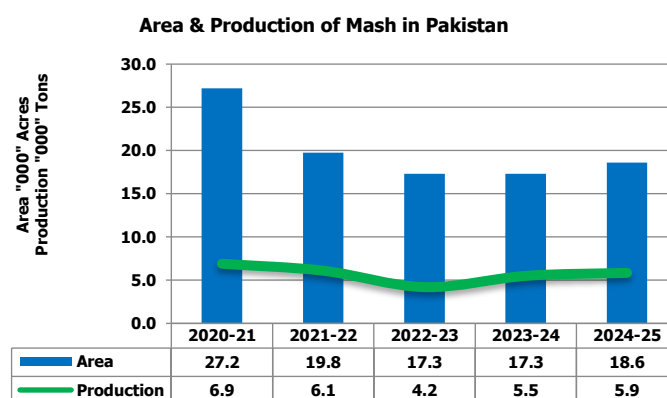
9. MASH



NATIONAL OVERVIEW

Domestic Area & Production:

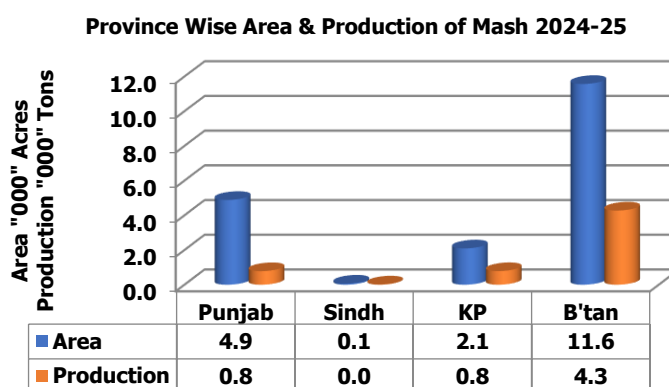
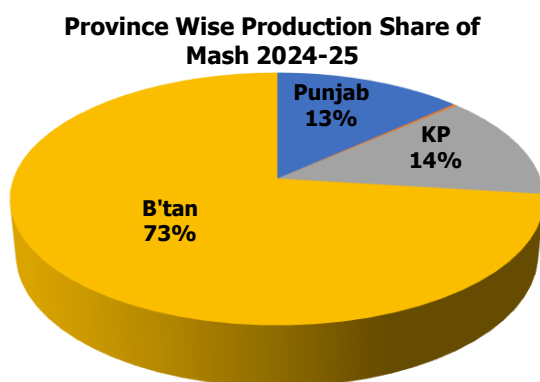
- Domestic production of mash remains extremely low, forcing Pakistan to depend on imports for nearly 94% of its national consumption needs.
- Over the past three years, both the cultivated area and production of mash have shown a gradual upward trend. In year 2024-25, the cultivated area of mash expanded to 18,600 acres, reflecting a 7.51% rise compared with the preceding year.
- Concurrently, national mash production reached 5,850 tons, representing a 6.36% increase over the previous year's 5,500 tons.



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

Province wise Area & Production:

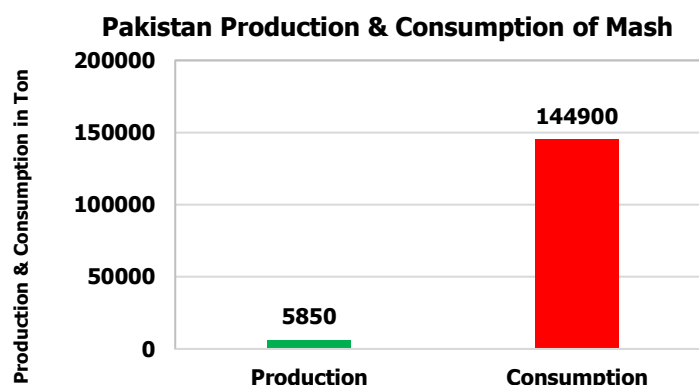
- Balochistan stands out as the highest mash producing province, contributing 73% of the country's total production. Khyber Pakhtunkhwa ranks second with 14% share, Punjab holds third with 13%, while Sindh has no recorded production.
- In year 2024-25, Balochistan produced 4,300 tons of mash, KP generated 800 tons, Punjab recorded 780 tons and Sindh registered zero production.



Source: Agricultural Statistics of Pakistan

Domestic Production & Consumption:

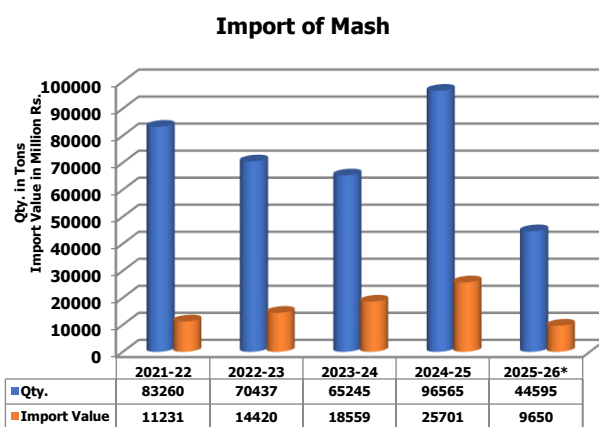
- In year 2024-25, domestic production of mash was registered at only 5850 tons, against a national requirement of 144,900 tons, leaving a massive supply deficit of 139,050 tons



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

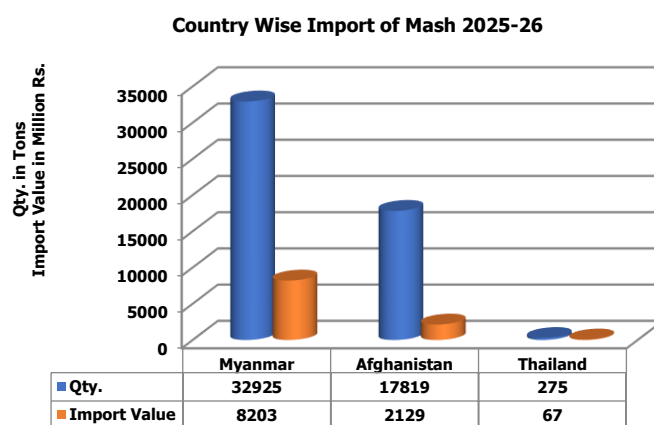
Import Insights:

- 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-November), imports reached 44,595 tons, incurring cost of Rs. 9650 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-November), Pakistan imported 32,925 tons of mash from Myanmar and 17,819 tons from Afghanistan, while imports from Thailand remained minimal at 275 tons.



*=Import during July 2025 to November 2025

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



*=Import during July 2025 to November 2025

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

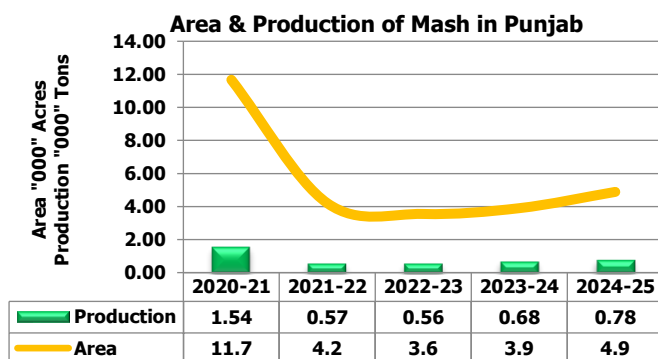
PROVINCIAL OVERVIEW

Area & Production:

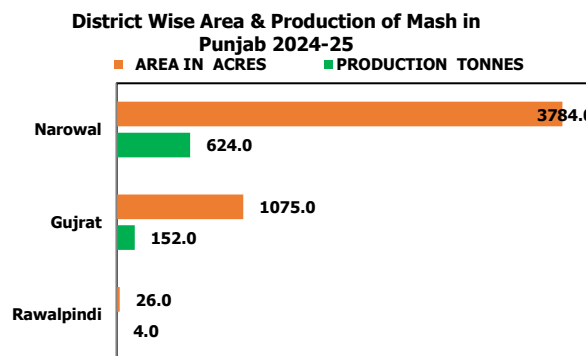
- In Punjab, the area under mash cultivation and its production have shown a modest upward trend over the past three years. During year 2024-25, mash production in the province reached 780 tons, reflecting a 14.7% increase over the previous year, while

Food Safety and Consumer Protection Department

the cultivated area expanded to 4,900 acres, marking a 25.6% rise compared with the last year. Mash production in Punjab is primarily concentrated in the districts Narowal, Gujrat and Rawalpindi, with Narowal leading in production at 624 tons harvested from 3,784 acres.



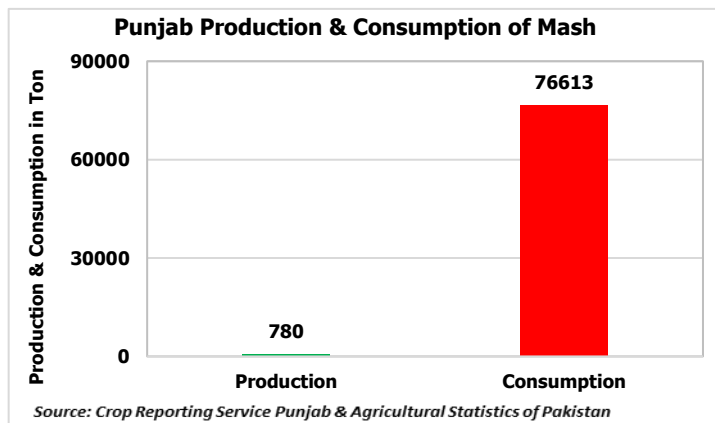
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

Provincial Production and Consumption:

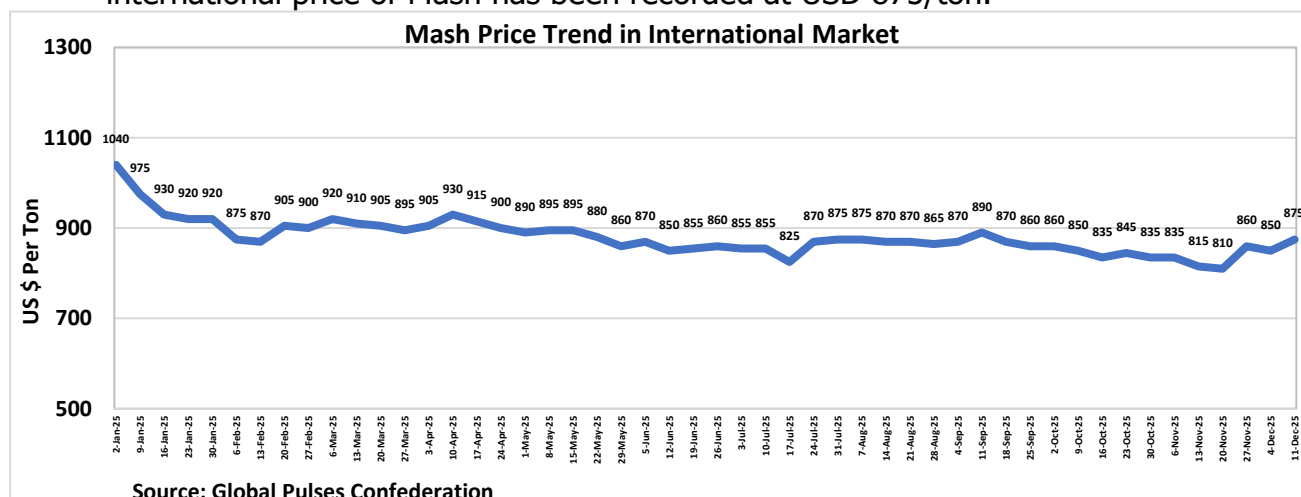
- In year 2024-25, production of mash in Punjab was registered at only 780 tons, against a provincial requirement of 76,613 tons, leaving a massive supply deficit of 75,833 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

International Market Trend:

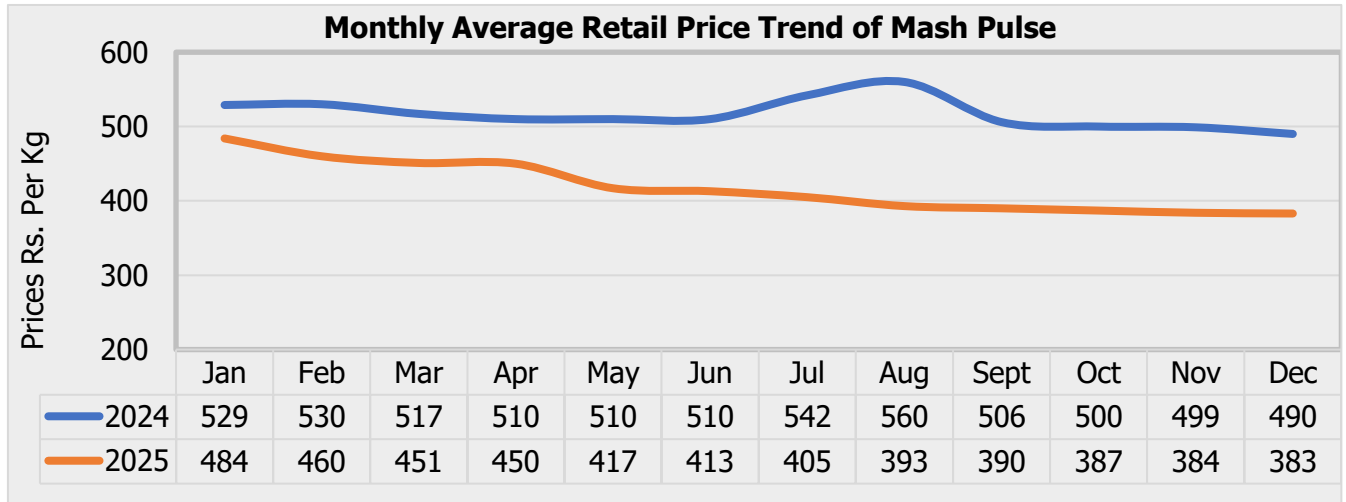
The weekly trend of international prices of mash sourced from the Global Pulses Confederation, depicted international prices of Mash are almost stable. Current, international price of Mash has been recorded at USD 875/ton.



Source: Global Pulses Confederation

Local Market Price:

Due to stable international prices of mash, its local prices almost stable trend. Monthly average retail price of mash in Punjab is recorded at Rs. 383/kg during month of December, 2025, which is far less than last year's price.



SUPPLY MANAGEMENT ADVISORY



Assessment

Mash production in Pakistan remains very low, resulting in heavy reliance on imports to satisfy domestic consumption. The stable international prices have ensured smooth imports, due to which supply & price situation of mash is depicting stable trend in local markets.

Forecast

Imports of mash are anticipated to continue smoothly due to stable international prices. Consequently, the supply and price situation in local markets is expected to remain stable.



Advisory



- The Deputy Commissioners Faisalabad should coordinate with local traders and importers to ensure uninterrupted import of mash, maintaining a stable market supply. Imports should also account for anticipated consumption during Ramzan 2026.
- The District Administration should maintain close coordination with traders and importers to guarantee smooth supply of mash according to consumption

requirements and take necessary measures to meet Ramzan 2026 demand.

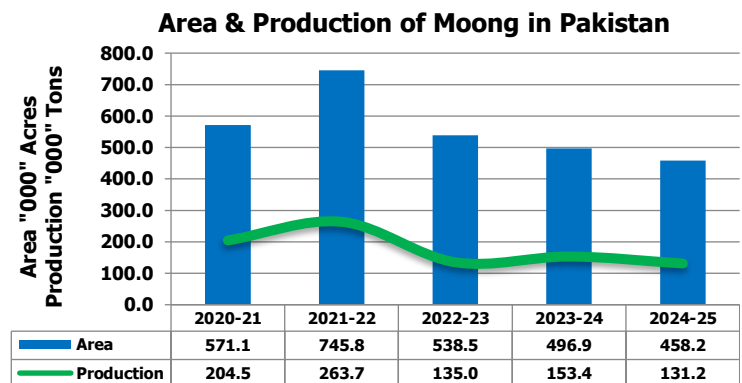
- Price Control Magistrates (PCMs) should conduct regular inspections of retailers to ensure strict compliance with notified retail prices.

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.
- During year 2024-25, the cultivated area of moong registered at 4,58,200 acres, indicating 7.78% decrease as compared area recorded during last year.
- 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.



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

Province wise Area & Production:

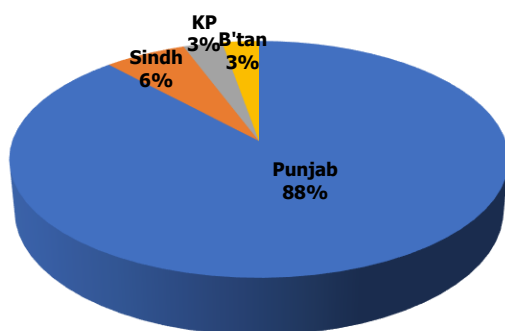
- In year 2024-25, Punjab remained the leading contributor to moong production among the provinces, accounting for 88% of the total output, followed by Sindh with 6%, while Balochistan and Khyber Pakhtunkhwa each held a 3% share.
- Punjab produced 115,600 tons of moong from 382,600 acres, making it the top producer. Sindh followed with 8,100 tons, Khyber Pakhtunkhwa ranked third with 3,900 tons, and Balochistan contributed the least at 3,600 tons.



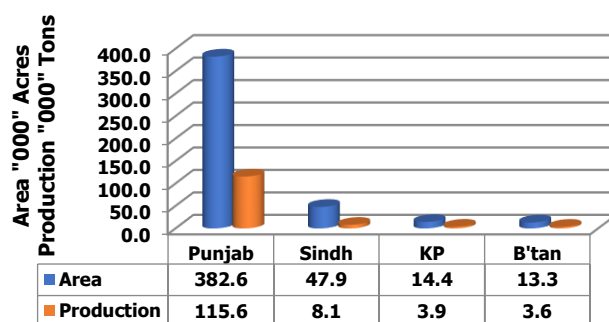
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Province Wise Production Share of Moong 2024-25



Province Wise Area & Production of Moong 2024-25

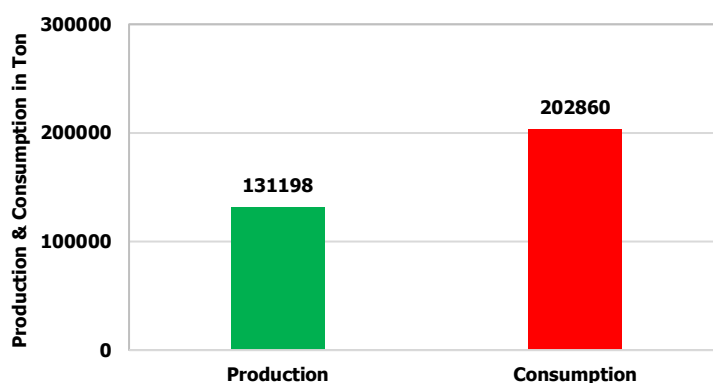


Source: Agricultural Statistics of Pakistan

Domestic Production & Consumption:

- During year 2024-25, Pakistan's domestic moong production reached 131,198 tons, falling short of the national consumption requirement of 202,860 tons and resulting in a supply deficit of 71,662 tons.

Pakistan Production & Consumption of Moong

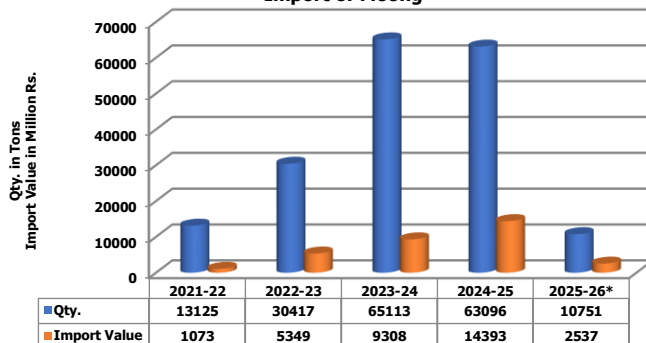


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

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-November), imports reached 10,751 tons, at an expense of Rs. 2537 million.
- Pakistan primarily sources moong imports from Argentina, Tanzania, Brazil, and Uganda.

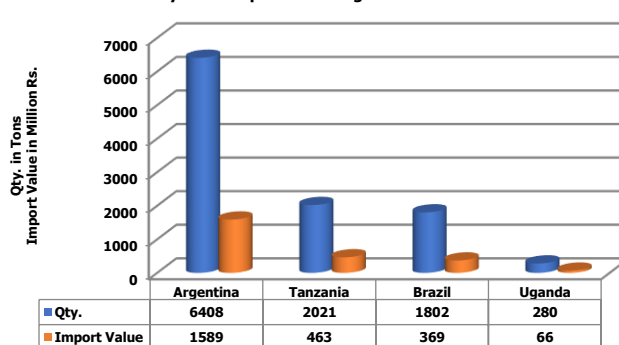
Import of Moong



*=Import during July 2025 to November 2025

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

Country Wise Import of Moong 2025-26



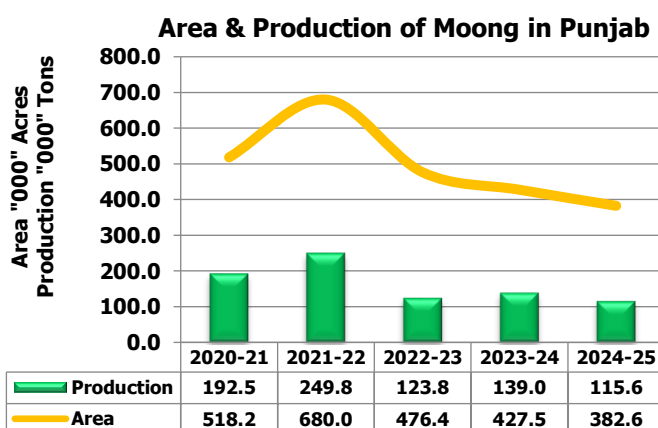
*=Import during July 2025 to November 2025

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

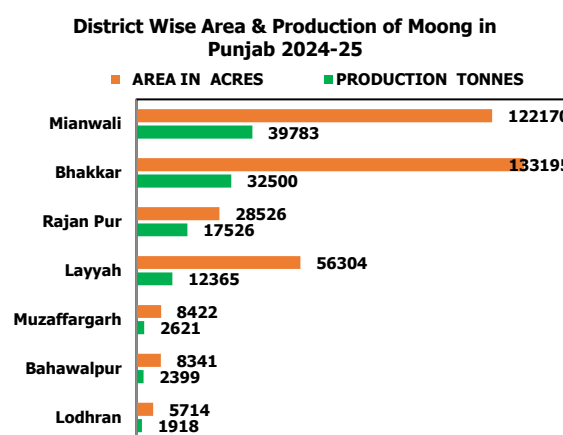
PROVINCIAL OVERVIEW

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.



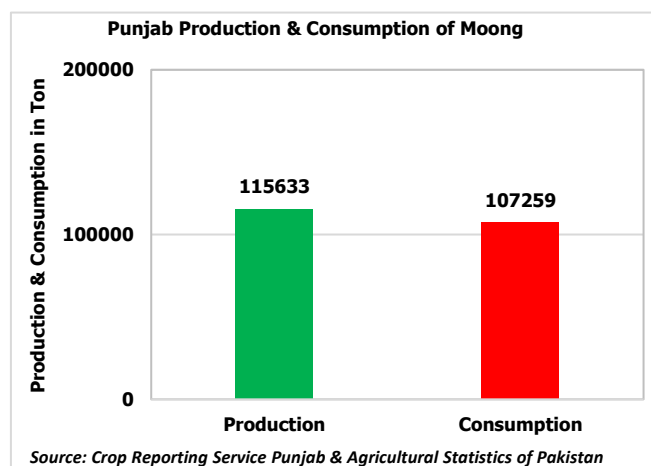
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

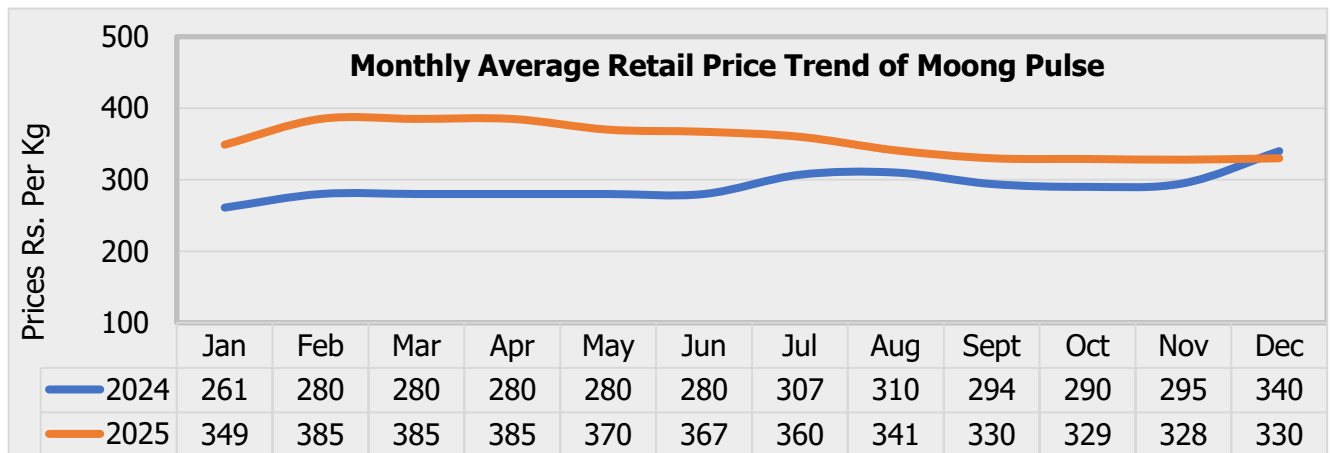
- During year 2024-25, provincial production of moong appeared to be 1,15,633 tons, showing surplus of 8374 tons as compared to provincial consumption requirement i.e. 1,07,259 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

Market Prices

- Due to availability of local crop, supply & price situation of moong is showing stable trend in local markets. Production of local crop does not appear to be good, therefore prices did not decrease considerably. The monthly average retail price of moong in Punjab during December 2025 is recorded at Rs. 330 per kilogram. Trend of monthly average retail price of moong pulse is given as under:



SUPPLY MANAGEMENT ADVISORY



Assessment

Prices of moong are showing almost stable trend in local markets due to the availability of the local crop. However, as local production is less, therefore prices did not decline significantly in local markets.

Forecast

As local production of moong is not good, 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 in future.



Advisory



- District Administration with the help of EADAs and Secretaries Market Committees should coordinate with commission agents to ensure an adequate supply of moong in line with prevailing consumption needs. In addition, import arrangements may be done to address the shortfall in local production and to meet the anticipated demand during Ramzan-2026.
- Regular inspections by Price Control Magistrates are essential to discourage and prevent overcharging and profiteering practices by retailers.

The End