



Price Control and Commodities
Management Department

NOVEMBER
2025

FOOD IN FOCUS

Market Analysis Report





PREFACE

The Department of Price Control and Commodities Management is pleased to present the thirteenth 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.



Price Control & Commodities Management Department

ABSTRACT

This report is based on data gathered from various 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 focuses on production levels, supply trends, price behavior, trade dynamics, international developments and local market conditions, providing comprehensive insights into the current situation and expected future trends. A brief summary of the existing supply and price scenario of key vegetables and pulses, is presented below:

- **Tomato** is experiencing stress supply situation due to local off production season, decreasing supply from other provinces i.e. KP & Balochistan and halt supply situation from Afghanistan due to intense border situation. Resultantly, tomato prices went on higher side in local markets. However, tomato import from Iran is improving gradually along with start of some supply from Sindh, which has provided cushion to supply situation and now prices have started to decrease in local markets.
- **Onion** supply is entirely dependent on arrival from Balochistan as supply from Afghanistan is not progressing smoothly. Due to entire dependence on arrival of onion from Balochistan, supply situation is under stress and resultantly, onion price has started to show slightly increasing trend in local markets. Onion crop from Sindh will be available during mid-November, afterwards supply & price situation of onion is likely to be normal.
- As regards **Potato**, its supply & price situation is exhibiting stable trend due to sufficient availability of potato from local cold storages. However, potato fresh is available from Khyber Pakhtunkhwa but in minute quantum, therefore its price is comparatively on higher side.
- The local supply of **Garlic** is available, however its production is less than last year and import, thus import from China is also in progress, resultantly its prices are showing slightly increasing trend. As regards **Ginger**, its supply is entirely dependent on import from Thailand and China. Production season in China & Thailand has just commenced, resultantly local prices of ginger are expected to decline during November-2025. In case of **Green Chilies**, production season of Sindh has begun which may lead to smooth supply of green chilies with decrease in its prices.
- In case of **Pulses**, their local production stands far less as compared to their consumption requirements. Thus, import is imperative to meet domestic consumption requirements. Due to availability of fresh gram and masoor crops from Australia & Canada, their international prices have significantly dropped, which helped to maintain smooth import and stability in prices of pulses in local markets. As regards Moong, its local production is available but its production is not appreciable, thus stress supply situation in moong is expected to prevail in local markets and import will be required for smooth its supply. In case of Mash, due to availability of fresh crop from Afghanistan and declining international prices, its supply & price situation is expected to remain stable in local markets.

Advisory Measures:

- PAMRA Authority with the help of EADAs and Secretaries Market Committees should closely monitor supplies & prices of essential items and commission agents may also be engaged to take proactive measures to maintain stability of essential edible commodities within local markets. Future supplies may be ensured by undertaking future contracts through commission agents/traders well in time.
- Decline in international prices, is a good market signal for undertaking maximum import of pulses especially for Faisalabad Division whereby pulses importers are located. Thus, Commissioner Faisalabad Division may engage importers to undertake maximum import of pulses as per provincial consumption requirements.
- Production season of Garlic and Gram has begun, Agriculture Department may pay special efforts to enhance area under production of these crops to match the consumption requirements.

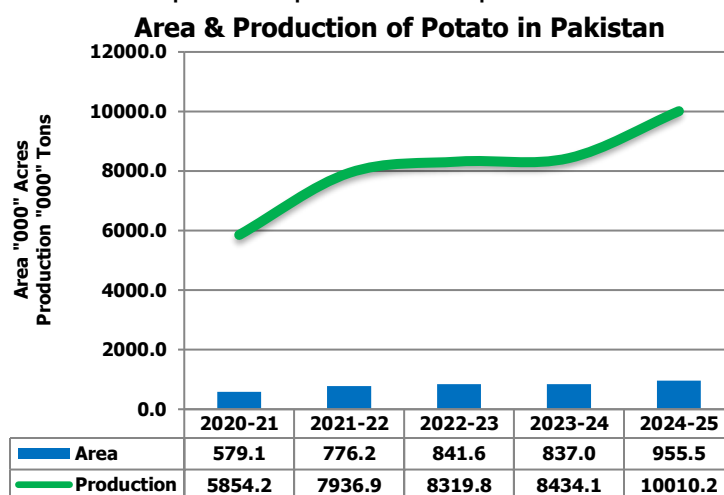
1. Potato



NATINAL OVERVIEW

Domestic Area & Production:

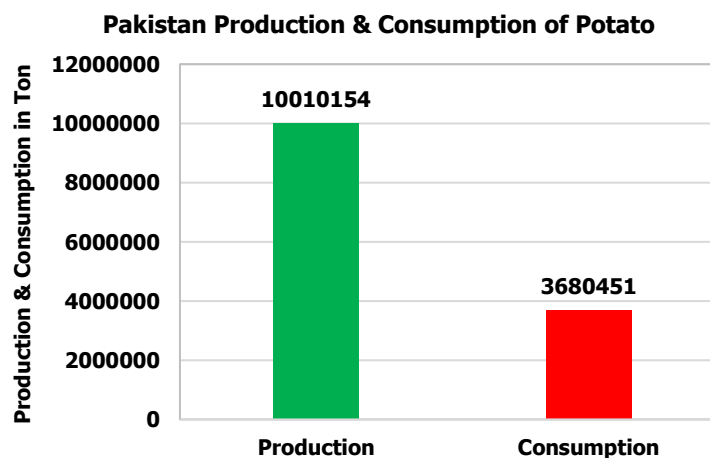
- Pakistan is self sufficient to meet domestic consumption requirement of potato due to its significant domestic production. The review of Agricultural Statistics of Pakistan and Economic Survey of Pakistan 2024-25 underscores that domestic production of potato has been achieved up to 10.01 million tons during year 2024-25, which appeared to be highest production showing 18.68% increase over the previous year.
- The trend line of potato production is exhibiting gradually increasing trend. Similarly cultivated area is also on surge showing 14.15% increase over the last year.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics

Production & Consumption:

- According to the Household Integrated Economic Survey 2018-19 conducted by the Pakistan Bureau of Statistics and published in the Agricultural Statistics of Pakistan, domestic consumption requirement of potato is estimated at 3,680,451 tons.
- This domestic consumption requirement is far less than domestic production of potato i.e. 10.01 million tons during year 2024-25., which generates surplus production of 6.32 million tons.



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



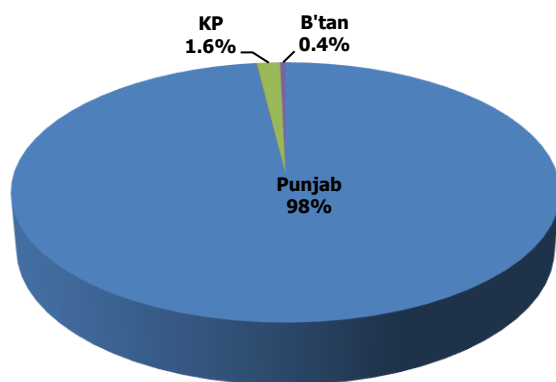
Price Control & Commodities Management Department



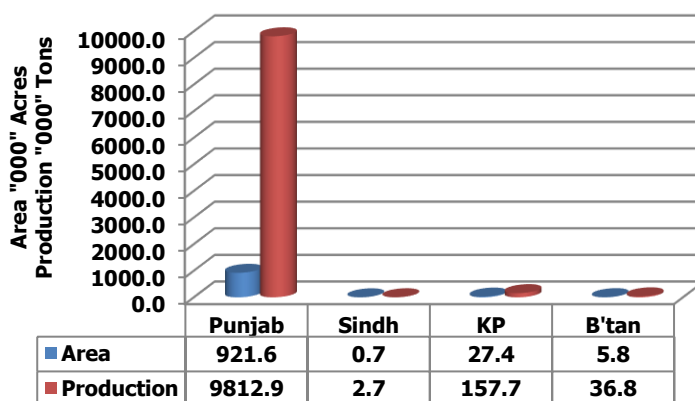
Province wise Area & production:

- Punjab is pioneer in potato production having its major share 98% in the domestic production of potato. Potato crop of Punjab is available to meet provincial demand of Punjab as well as other provinces. Rest of provinces have minimal shares in total domestic production.
- During year 2024–25, potato production in Punjab recorded at 9.812 million tons through cultivated area of 9,21,600 acres. Khyber Pakhtunkhwa attained prodction of 1,57,700 tons, whereas Balochistan & Sindh achieved production of 36800 tons & 2700 tons, repectively.

Province Wise Production Share of Potato 2024-25



Province Wise Area & Production of Potato 2024-25

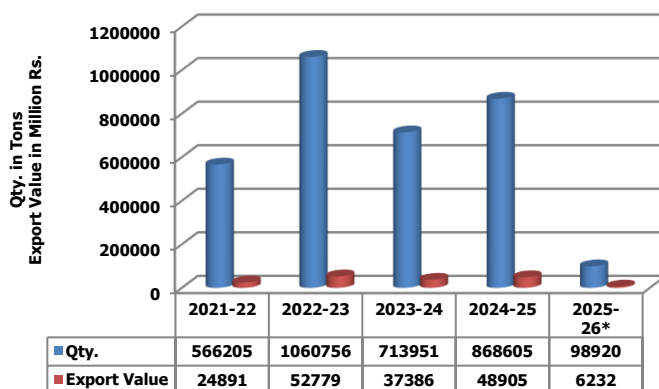


Source: Pakistan Bureau of Statistics (PBS)

Export Insights:

- Leveraging its surplus production, Pakistan has established itself as a significant player in the global potato export market. During the fiscal year 2024–25, the country exported 868,605 tons, yielding export earnings of Rs. 48,905 million. In the subsequent period of 2025–26 (July–September), export volumes reached 98,920 tons, generating Rs. 6,232 million in revenue. Major export destinations encompass the U.A.E., Sri Lanka, Afghanistan, Qatar, Oman, Malaysia, and Kuwait.

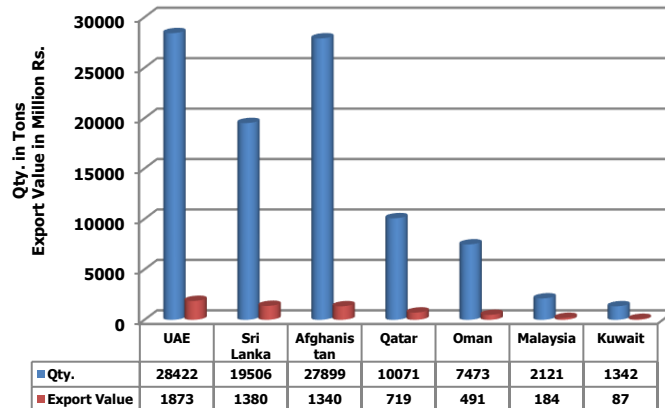
Export of Potato



*=Export during July 2025 to September 2025

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

Country Wise Export of Potato 2025-26



*=Export during July 2025 to September 2025

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

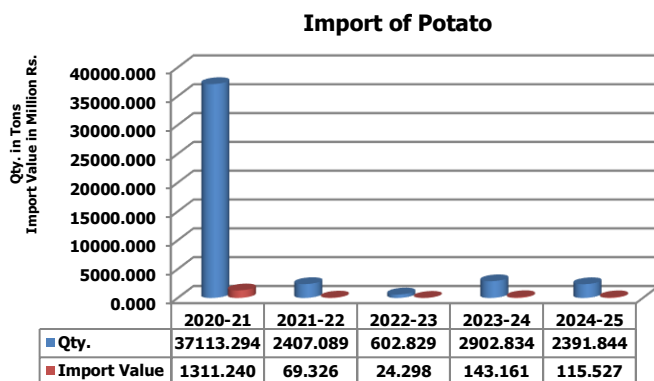


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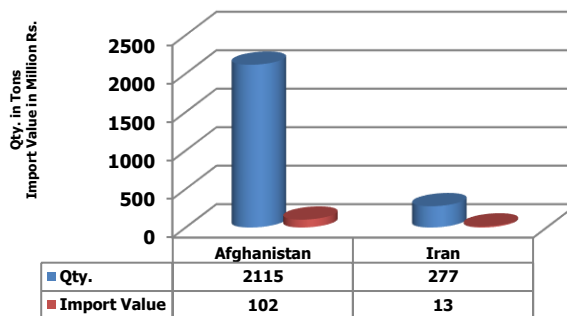
Import Insights:

- As such Pakistan is not in need of potato import from other countries, nevertheless, a small quantity is imported only for arrangement of seeds. During year 2024-25, imports were recorded at 2,392 tons, while no imports were reported during year 2025-26 (July to September). Pakistan mainly imports potato seeds from Afghanistan and Iran.



Source: PBS & Pakistan Single Window

Country Wise Import of Potato 2024-25

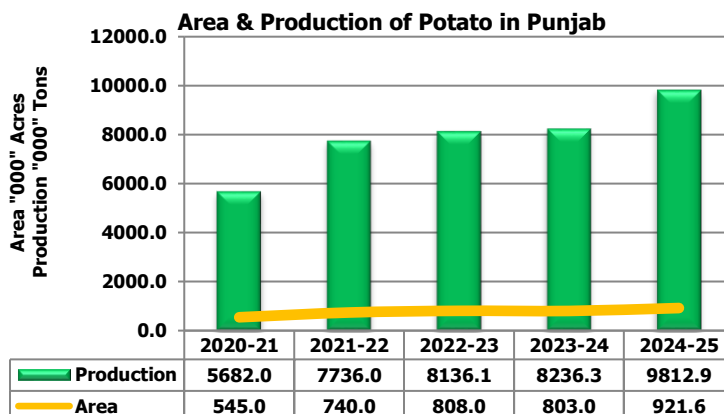


Source: Pakistan Single Window

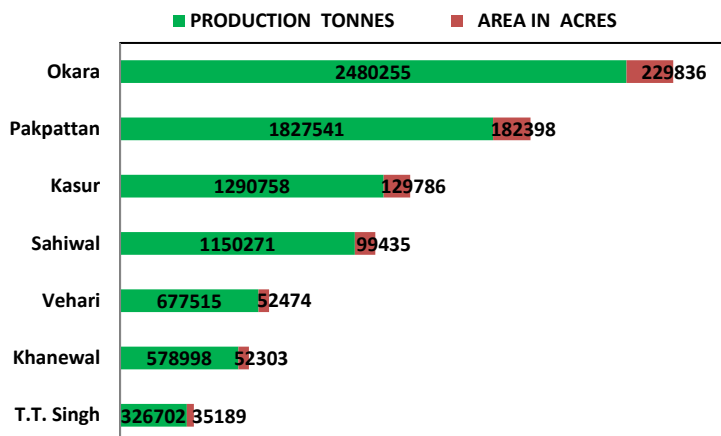
PROVINCIAL OVERVIEW

Area & Production:

- Accounting for nearly 98% of Pakistan's total potato output, Punjab holds a commanding position in the country's potato production landscape. The province not only fulfills its own consumption requirements but also sustains the national demand.
- Over the past five years, Punjab's potato production has exhibited remarkable and consistent expansion. During year 2024-25, potato production has been recorded at 9.813 million tons which is 19.14% higher over last year and 72.7% higher in contrast with production attained during year 2020-21. Likewise cultivated area has been registered as 921600 acres, which is 14.7% higher than previous year and 69.1% higher than acreage recorded during year 2020-21.



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



Source: Crop Reporting Service Punjab



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- Within Punjab province, Okara district stands out as the principal hub of potato production, achieving an output of 2.480 million tons. Following Okara, the districts of Pakpattan, Kasur, Sahiwal, Vehari, Khanewal and Toba Tek Singh also make significant contributions to the province's overall potato production.

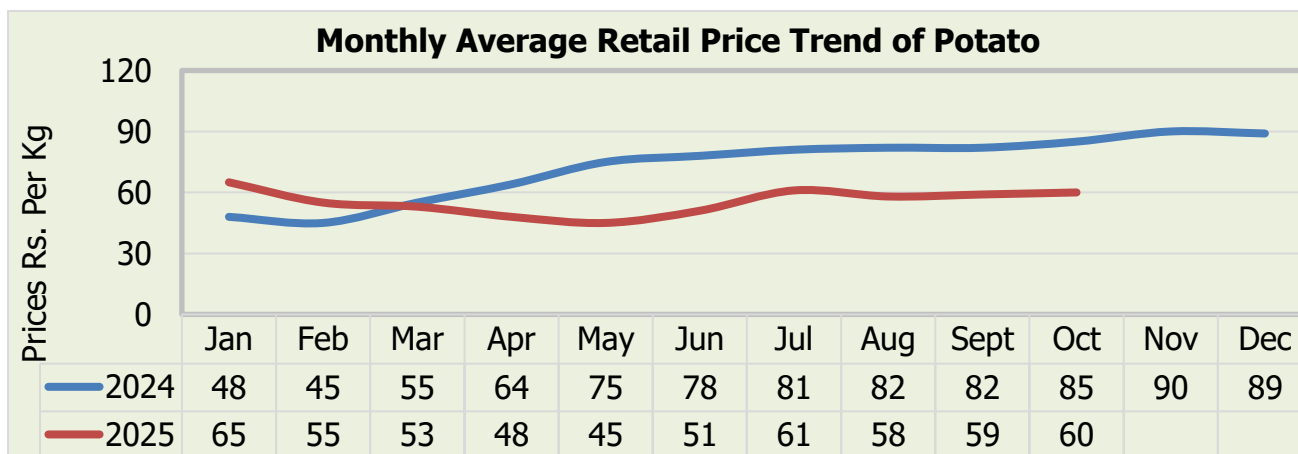
Supply Cycle:

- 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:

- Supply & price situation of potato store is stable due to its significant production and smooth arrival from local cold storages. The retail prices are stable and less as compared to the prices during corresponding period of last year. Moreover, supply of fresh potato is arriving from KP but in very less quantum, therefore price of fresh potato is comparatively higher. Average monthly retail price of potato store during month of October is Rs.60/Kg in local markets.





SUPPLY MANAGEMENT ADVISORY



Assessment

The highest production of potato i.e. 9.813 million tons achieved during year 2024-25 has led to sustained supply & price situation of potato in local markets. In contrast with last year, current retail prices of potato store are prevailing on lower side. However, potato fresh prices are on higher side due to its limited supply from Khyber Pakhtunkhwa.

Forecast

As a result of sufficient supply of potato from local cold storages its prices are expected to remain stable till November-2025, afterwards next local production season of potato will begin and fresh crop will be available from Khushab, soon Valley, Sialkot & Gujranwala. Resultantly, potato prices are anticipated to decrease in local markets during November-2025.



Advisory



- PAMRA Authority with the help of EADAs & Secretaries Market Committee should ensure:
 - strict auction monitoring of auction proceeding of potato in Agricultural Produce Markets
 - Implementation of transparent & fair price fixation mechanism.
- The District Administration with the help of concerned EADAs & Secretary Market Committee may ascertain stocks position of potato in cold storages.
- Price Control Magistrates should ensure regular inspections of retailers for the strict implementation of notified retail rates in open markets.

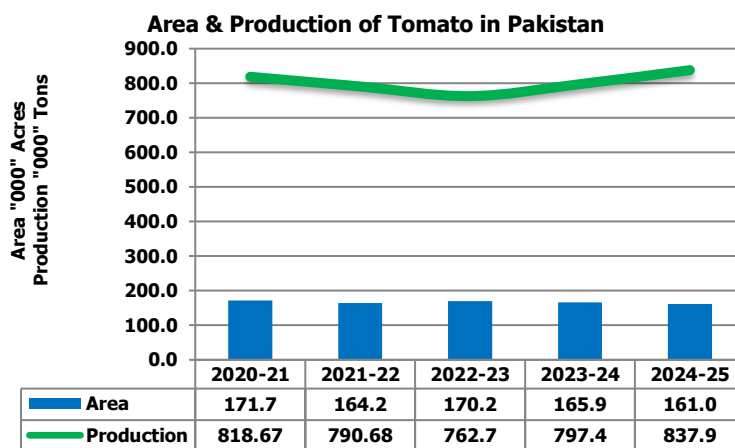
2. TOMATO



NATIONAL OVERVIEW

Domestic Area & Production:

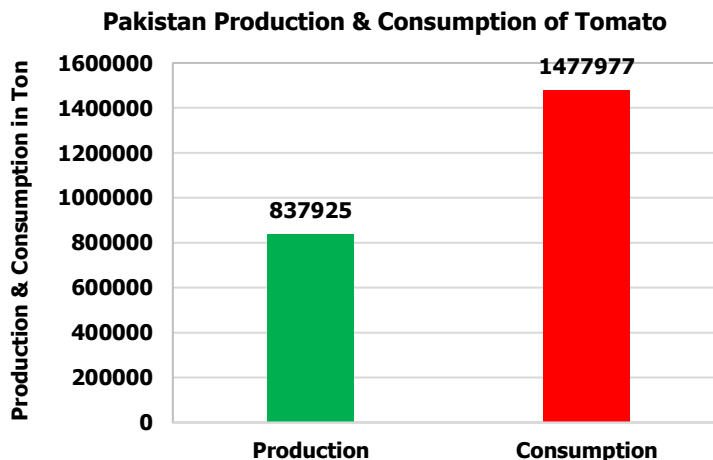
- The domestic production of tomato in the country is showing gradually increasing trend for last three years. Whereas, tomato cultivated area is slightly declining.
- During year 2024-25, domestic production of tomato is 8,37,900 tons, reflecting a 5.07% increase compared to the previous year. The cultivated area reduced to 1,61,000 acres, marking a 3.95% decrease over the preceding year.



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

Production & Consumption:

- Despite a marginal rise in domestic tomato production, output remains significantly below the level required to meet national consumption. With domestic demand estimated at 1,477,977 tons and production limited to 837,925 tons, the resulting shortfall of 640,052 tons underscores the country's dependence on imports to maintain market equilibrium.



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

Province wise Area & Production:

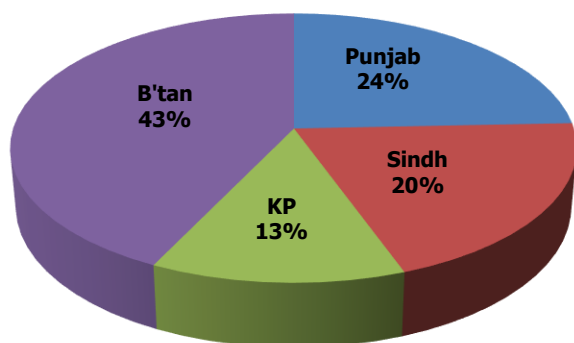


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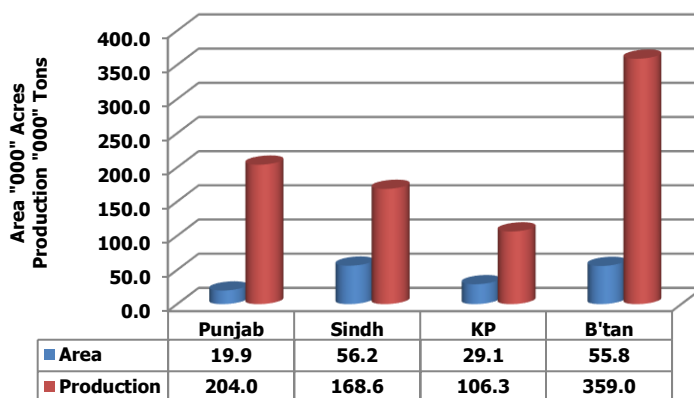


- Balochistan emerges as the foremost tomato-producing province, contributing 43% to the nation's total output, followed by Punjab with 24%, Sindh with 20%, and Khyber Pakhtunkhwa accounting for the remaining 13%.
- Balochistan secured the top position in tomato production during 2024–25, yielding 359,000 tons from a cultivated area of 55,800 acres. Punjab ranked second by attaining production of 204,000 tons from 19,900 acres. Sindh produced 1,68,600 tons from 56,200 acres, whereas Khyber Pakhtunkhwa registered the lowest output among the provinces, producing 106,300 tons from 29,100 acres.

Province Wise Production Share of Tomato 2024-25



Province Wise Area & Production of Tomato 2024-25

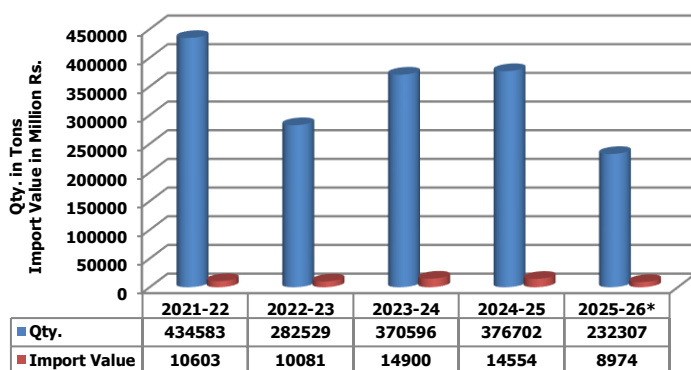


Source: Agricultural Statistics of Pakistan

Import Insights:

- In the fiscal year 2024–25, Pakistan imported 376,702 tons of tomato at expense of Rs. 14,554 million—reflecting a slight increase in quantity but a marginal decline in value compared to the preceding year. During year 2025–26 (July–September), tomato imports have been recorded at 232,307 tons, amounting to Rs. 8,974 million.
- Pakistan primarily sources its tomato imports from Afghanistan and Iran. During year 2025–26 (July–September), imports from Afghanistan amounted to 210,752 tons, at expense of Rs. 7,921 million, whereas Iran supplied 21,555 tons at a cost of Rs. 1,053 million.

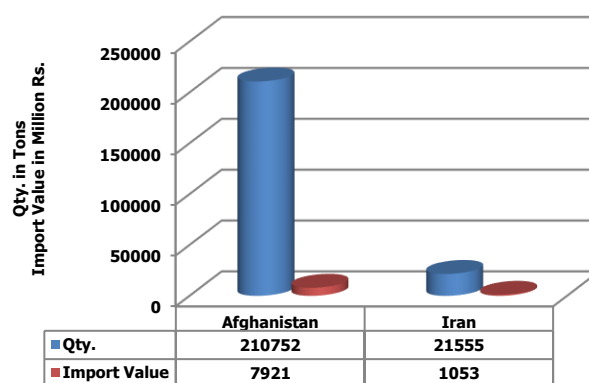
Import of Tomato



*=Import during July 2025 to September 2025

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

Country Wise Import of Tomato 2025-26



*=Import during July 2025 to September 2025

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

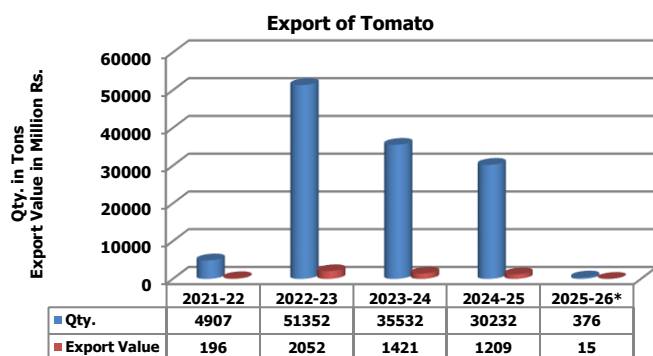


Price Control & Commodities Management Department



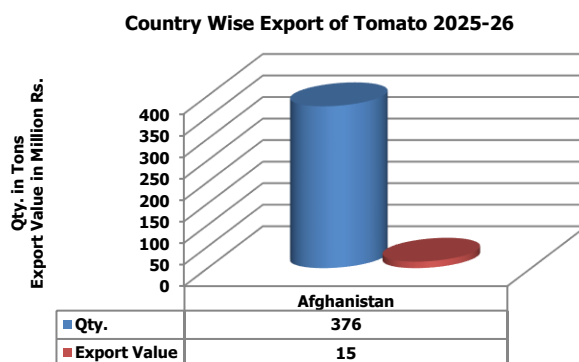
Export Insight:

- Interestingly, despite its substantial dependence on imports to fulfill domestic requirements, Pakistan continues to export tomatoes to international markets, thereby contributing modestly to foreign exchange earnings.
- On the export front, Pakistan exported 30,232 tons of tomato during year 2024–25, earning Rs. 1,209 million—reflecting a decline in both volume and value compared to the previous year. In year 2025–26 (July–September), export performance further contracted to just 376 tons, generating Rs. 15 million. Afghanistan remains the principal destination for Pakistan's tomato exports.



*=Export during July 2025 to September 2025

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



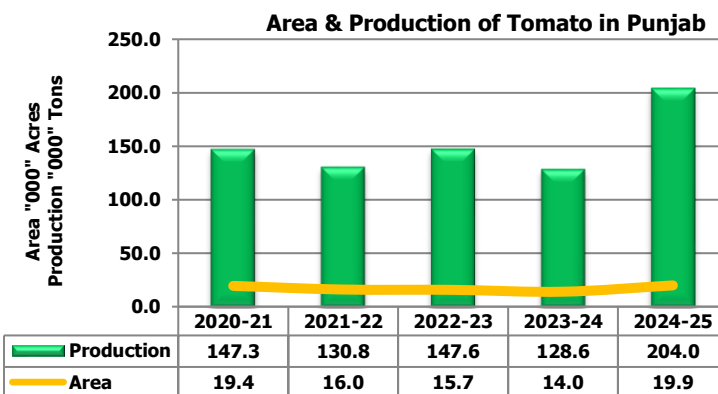
*=Export during July 2025 to September 2025

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

PROVINCIAL OVERVIEW

Area & Production:

- In Punjab, production of tomato has been showing significant fluctuations over the last five years. Similarly, cultivated area of tomato is also exhibiting instable trend over the years.
- During the year 2024–25, tomato production in Punjab reached 204,000 tons, reflecting a substantial increase of 58.6% compared to the previous year. Likewise, the cultivated area expanded to 19,900 acres, registering a 42.14% growth over the preceding year.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

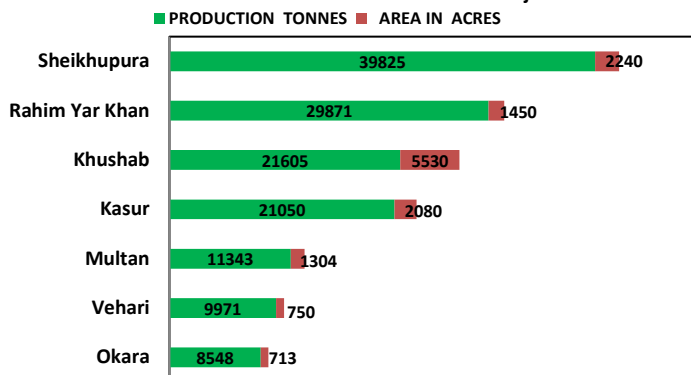


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- The leading tomato-producing districts in Punjab are Sheikhupura, Rahim Yar Khan, Khushab, Kasur, Multan, Vehari and Okara.
- District Sheikhupura holds the top position with a production of 39,825 tons, followed by Rahim Yar Khan with 29,871 tons and Khushab ranking third with 21,605 tons.

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



Source: Crop Reporting Service Punjab

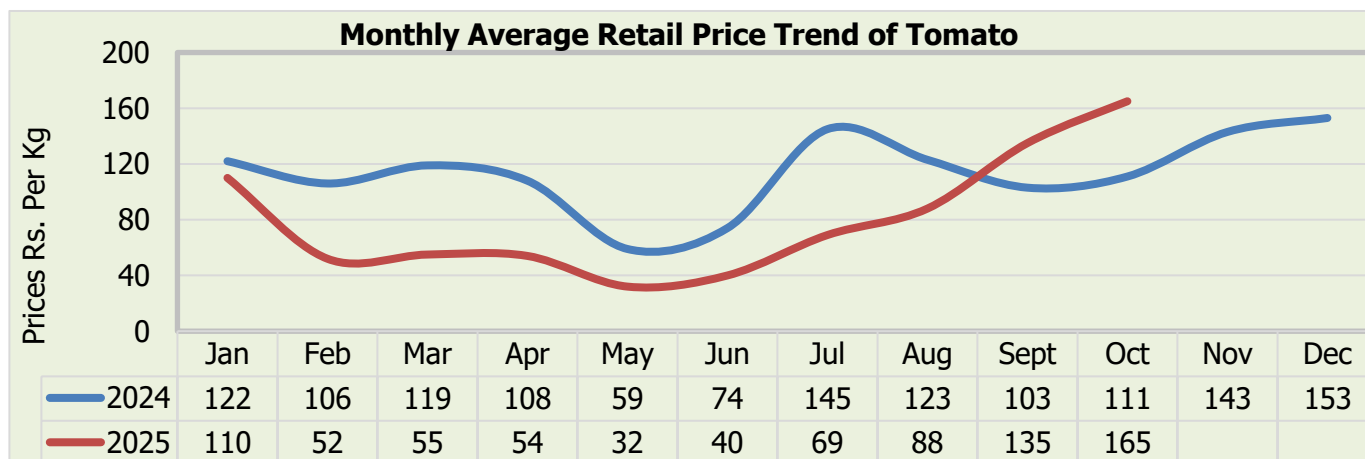
Supply Cycle:

- Due to seasonal variation, availability of tomato supply from different provinces varies throughout the year. The major tomato-producing districts in each province, along with their respective production seasons, are outlined 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:

- Tomato supply is under stress due to local off production season, declining supply from KP & Balochistan and disturbance in import from Afghanistan. Thus, prices are swelling on higher side in local markets. Monthly average retail price of tomato in Punjab is Rs.165 per Kg during month of October.





SUPPLY MANAGEMENT ADVISORY



Assessment

The major supply of tomato is entirely dependent on arrivals from Khyber Pakhtunkhwa and Balochistan, along with imports from Iran. However, the domestic supply from KP & Balochistan has started to decline which resulted in higher dependence on imports. Furthermore, import from Afghanistan has been disrupted which aggravated supply stress and subsequently tomato prices went on higher side. However, now import from Iran is smoothly progressing along with start of supply from Sindh, resultantly supply situation is improving and prices have started to decline in local markets.

Forecast

Due to smooth import of tomato from Iran, supply situation is improving & its price is expected to further decline in local markets subject to stable import situation from Iran. Moreover, Sindh crop has also been started which will reach its full swing during end November-2025, thereafter supply & price situation of tomato is anticipated to be normal in local markets.



Advisory



- PAMRA Authority through EADAs & Secretaries Market Committees may ensure;
 - smooth supply from KP, Balochistan, Sindh & Iran with the help of commission agents
 - persuade commission agents to undertake future contracts for arranging future supplies from Sindh.
 - strict auction monitoring
 - fair & transparent price fixation to pass relief to common man.
- The District Administration, through Price Control Magistrates, should intensify market surveillance and take stringent action against retailers involved in profiteering or overcharging.

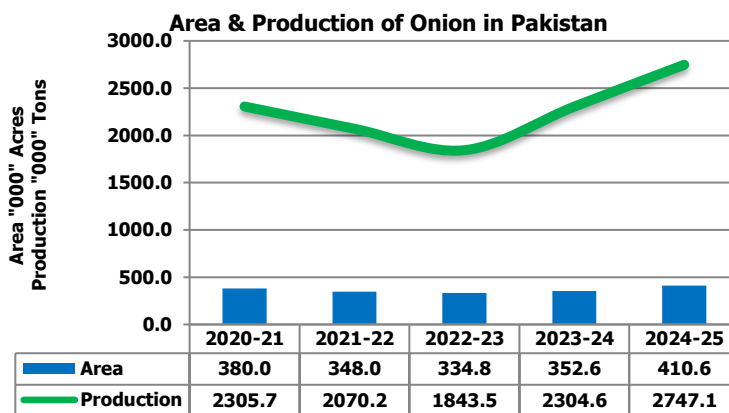
3. ONION



NATIONAL OVERVIEW

Domestic Area & Production:

- With respect to onion, both domestic production and the cultivated area in Pakistan have been showing consistent upward trend over the past three years.
- During the year 2024–25, domestic production of onion has reached to 2.747 million tons—reflecting 19.2% increase as compared to last year.



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

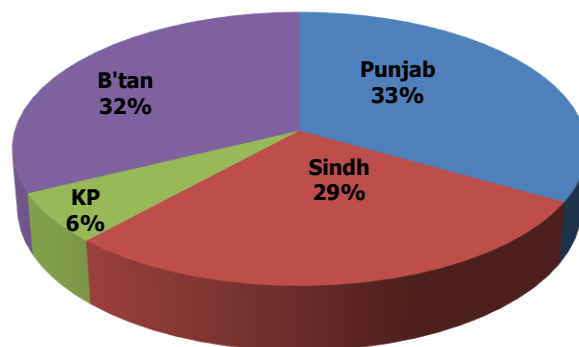
- Similarly, cultivated area has also expanded to 4,10,600 acres, marking an increase of 16.44% in comparison with last year.

Province wise Area & Production:

- Punjab stands as the leading contributor to Pakistan's onion production, accounting for 33% share in national production, closely followed by Balochistan with 32%.

Sindh holds the third position with a 29% share, whereas Khyber Pakhtunkhwa (KP) makes the smallest contribution, producing only 6% of the country's total production of onion.

Province Wise Production Share of Onion 2024-25



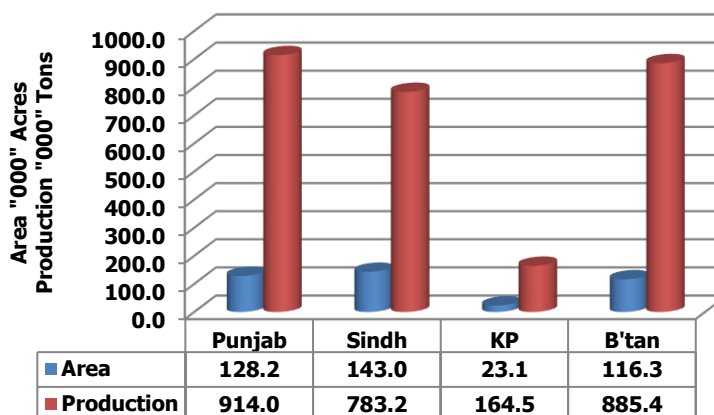


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- During year 2024–25, Punjab led onion production with 9,14,000 tons harvested from 1,28,200 acres. Balochistan stood at 2nd rank, by producing 8,85,400 tons across 1,16,300 acres.
- Whereas, Sindh contributed 4,83,200 tons from 1,43,000 acres and Khyber Pakhtunkhwa (KP) recorded the lowest share, with 1,64,500 tons cultivated over 23,100 acres.

Province Wise Area & Production of Onion 2024-25

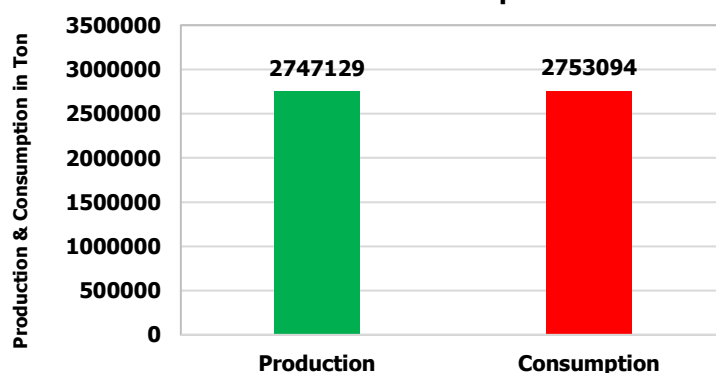


Source: Agricultural Statistics of Pakistan

Production and Consumption:

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

Pakistan Production & Consumption of Onion

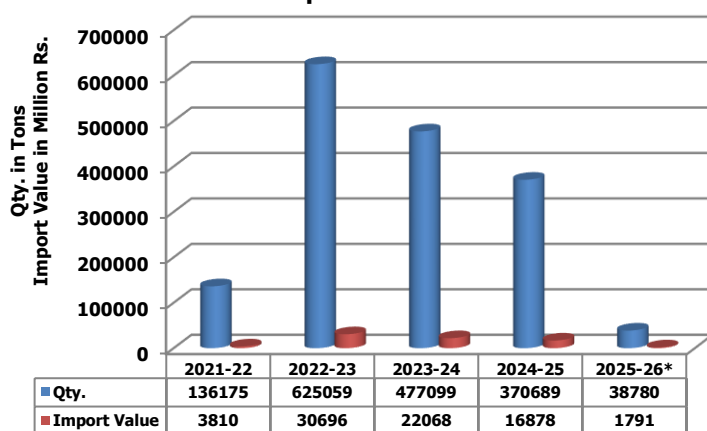


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights:

- In the fiscal year 2024–25, onion import recorded at 370,699 tons at a cost of Rs. 16,878 million, reflecting a decline in both import volume and value compared to the previous year.
- However, during year 2025-26 (July-September), imports stood at 38,780 tons, incurring an expenditure of Rs. 1791 million. Pakistan arranges onion imports primarily from Afghanistan.

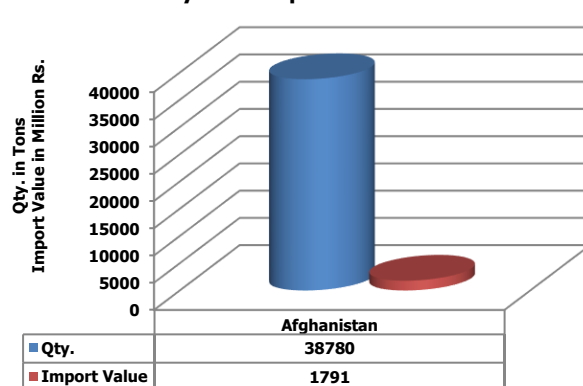
Import of Onion



*=Import during July 2025 to September 2025

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

Country Wise Import of Onion 2025-26



*=Import during July 2025 to September 2025

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

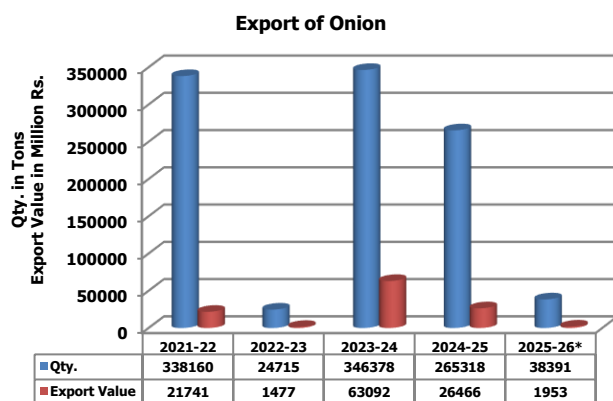


Price Control & Commodities Management Department



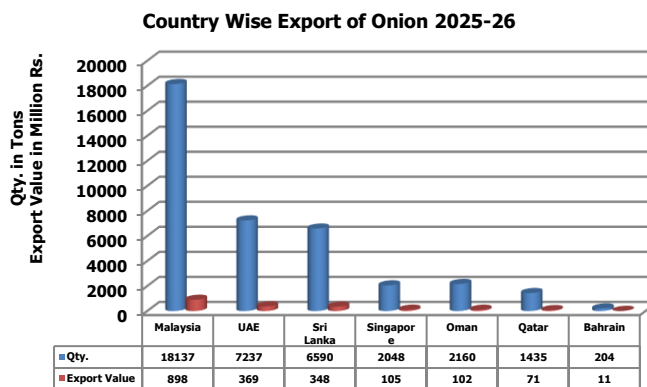
Export Insights:

- Pakistan also exports onions to a range of international markets to contribute in foreign exchange reserves.
- During the fiscal year 2024–25, onion exports amounted to 265,318 tons, generating Rs. 26,466 million in revenue—reflecting a decline in both quantity and value compared to the preceding year.
- In 2025–26 (July–September), export volumes reached 38,391 tons, earning Rs. 1,953 million.
- Key export destinations include Malaysia, the United Arab Emirates (UAE), Sri Lanka, Singapore, Oman, and Bahrain.
- Exports to Malaysia, the UAE, and Sri Lanka are particularly significant, highlighting the robust demand for Pakistani onions in these premium markets.



*=Export during July 2025 to September 2025

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



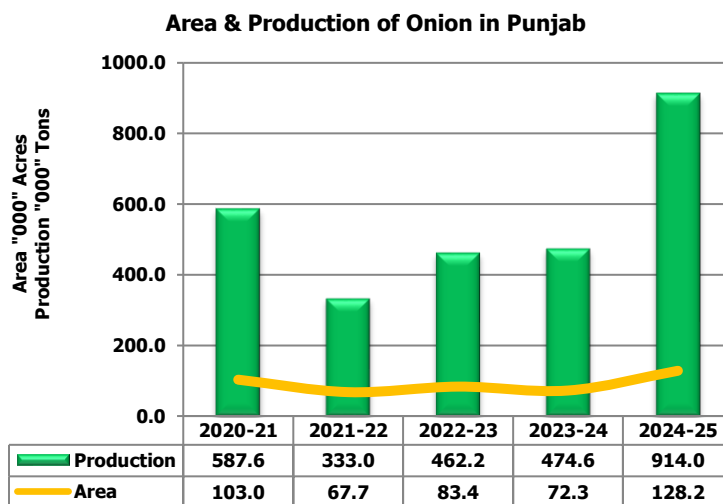
*=Export during July 2025 to September 2025

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

PROVINCIAL OVERVIEW

Area & Production:

- Onion production in Punjab has exhibited a steady upward trend over the past three years. In the fiscal year 2024–25, production reached 914,000 tons—representing a remarkable 92.5% increase compared to the previous year. Similarly, the cultivated area expanded to 128,200 acres, reflecting a substantial rise of 77.3% over the preceding year.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

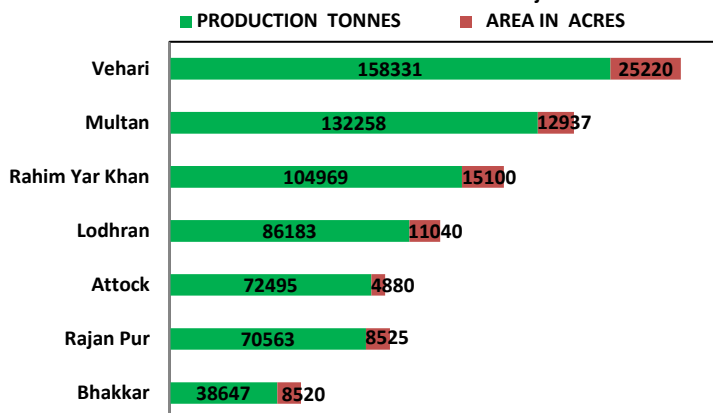


Price Control & Commodities Management Department



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

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



Source: Crop Reporting Service Punjab

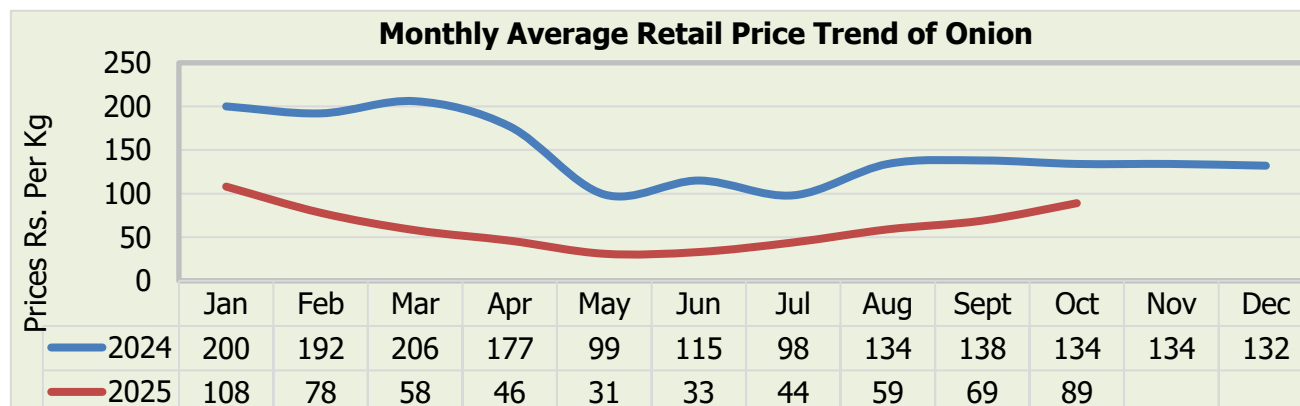
Supply Cycle:

- The supply of onion across country experiences seasonal fluctuations, with production shifting among provinces at different times of the year. The major onion-producing districts in each province, along with their respective production seasons, are outlined 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:

Onion supply is mainly dependent on arrival from Balochistan and Afghanistan. Supply is stable, however onion price is slightly on higher side due to local off production season and dependency on arrival from Balochistan and import. The graphical trend of monthly average retail price of onion in Punjab is given as under:



SUPPLY MANAGEMENT ADVISORY



Assessment

Due to the prevailing local off production season, onion supply is entirely being arranged from Balochistan as import from Afghanistan is disrupted. Thus, onion supply is under stress and price is slightly on higher side in the local markets.

Forecast

Production season of onion in Balochistan will sustain till November-2025. Due to halt import situation from Afghanistan and entire dependence on arrival from Balochistan, supply is under stress and price is expected to increase in local markets. However, onion crop of Sindh is expected to arrive during mid November-2025, which will improve supply situation and prices are expected to decline in local markets.



Advisory



- PAMRA Authority with the help of concerned EADAs & Secretaries Market Committee should;
 - arrange sufficient supply of onion from Balochistan & Sindh through close coordination with commission agents.
 - persuade commission agents to undertake future contracts for arranging future supplies from Sindh.
 - ensure regular monitoring of auction proceedings in Agricultural Produce Markets
 - strictly implementation of transparent and fair price fixation mechanism.
- The District Administration with the help of Price Control Magistrates may;
 - Intensify market surveillance
 - take strict action against retailers involved in over charging
 - ensure true implementation of retail notified rates.

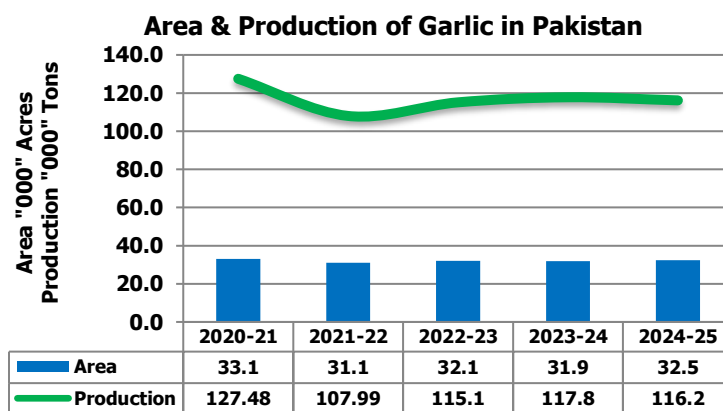
4. GARLIC



NATIONAL OVERVIEW

Domestic Area & Production

- Domestic production of garlic and its cultivated area are exhibiting almost stable trend with slight variations during the last three years.
- During the year 2024-25, domestic production of garlic has been recorded at 1,16,200 tons, showing a mere 1.35% decrease in contrast with last year.
- The cultivated area of garlic has been registered at 32,500 acres during year 2024-25, showing 1.88% increase over the last year.

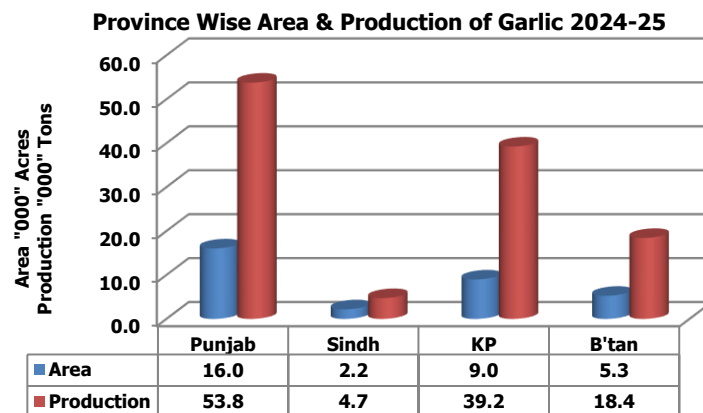
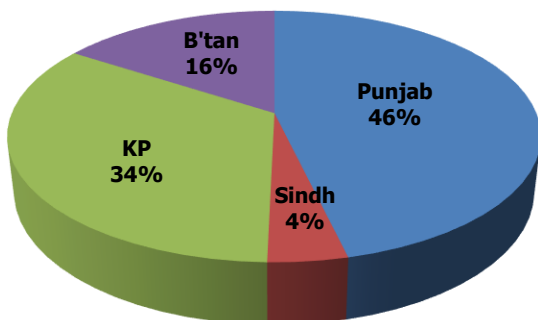


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

- Punjab dominates national garlic production, accounting for 46% of the total output, followed by Khyber Pakhtunkhwa with 34%, Balochistan with 16%, and Sindh contributing the remaining 4%.
- During year 2024-25, Punjab achieved a garlic production of 53,800 tons cultivated over 16,000 acres, while Khyber Pakhtunkhwa produced 39,200 tons

Province Wise Production Share of Garlic 2024-25



Source: Agricultural Statistics of Pakistan

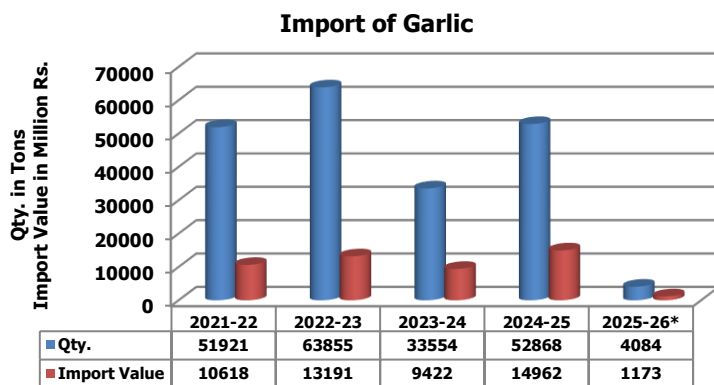


Price Control & Commodities Management Department

from 9,000 acres. In Balochistan, garlic output reached 18,400 tons from 5300 acres, whereas Sindh recorded the lowest production at 4,700 tons harvested from 2200 acres.

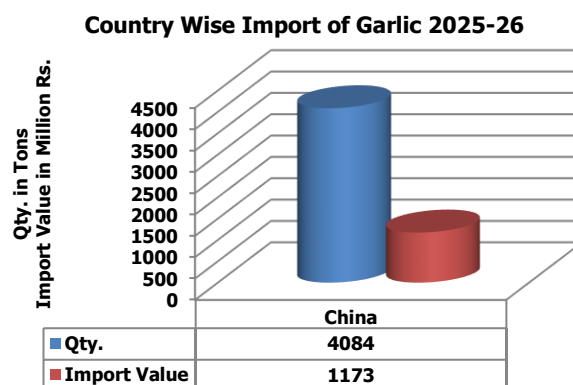
Import Insights:

- To meet domestic consumption needs, Pakistan has to rely on garlic import from China.
- During the year 2024–25, Pakistan imported 52,868 tons of garlic at a cost of Rs. 14,962 million. However, during year 2025–26 (July-September), garlic import from China has been recorded at 4084 tons, driving the import expenditure up to Rs. 1173 million.



**=Import during July 2025 to September 2025*

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



**=Import during July 2025 to September 2025*

Source: Pakistan Single Window & Pakistan Bureau of Statistics

Export Insights:

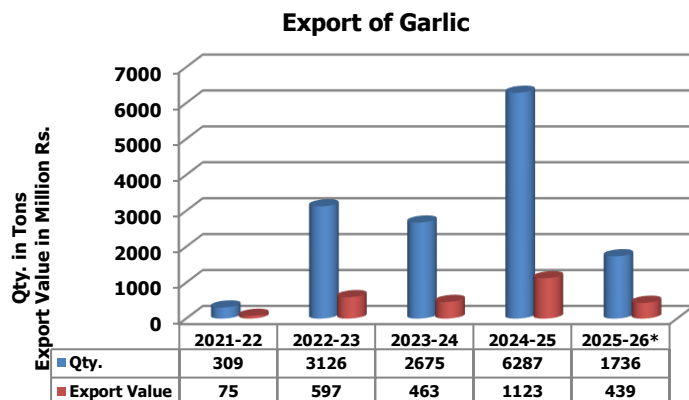
- While Pakistan relies on garlic imports to satisfy domestic consumption, it simultaneously engages in garlic exports, supporting the country's foreign exchange reserves.
- During the year 2024–25, Pakistan exported 6287 tons of garlic, earning Rs. 1123 million. During the July 2025–26 (July-September), exports has been recorded at 1736 tons, contributing Rs. 439 million to foreign exchange earnings.
- The principal export destinations for Pakistani garlic include the United States, Afghanistan, Vietnam, Kazakhstan, Tajikistan, Uzbekistan, and the United Kingdom, among others.



Price Control & Commodities Management Department

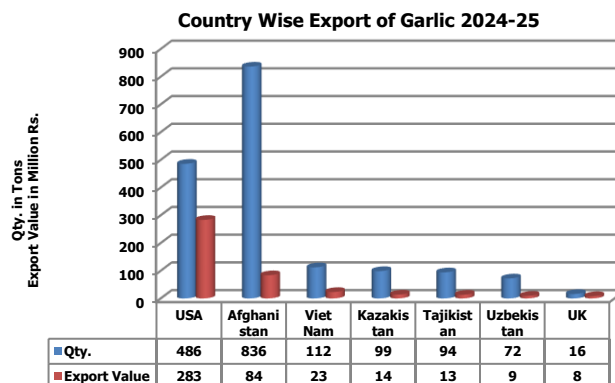


- A substantial portion of Pakistan's garlic exports is directed to Afghanistan and USA, which represents the largest share of total export volume, while export to other countries remain comparatively limited. However, in value terms, export to the United States yields significantly higher earnings than export to Afghanistan.



*=Export during July 2025 to September 2025

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



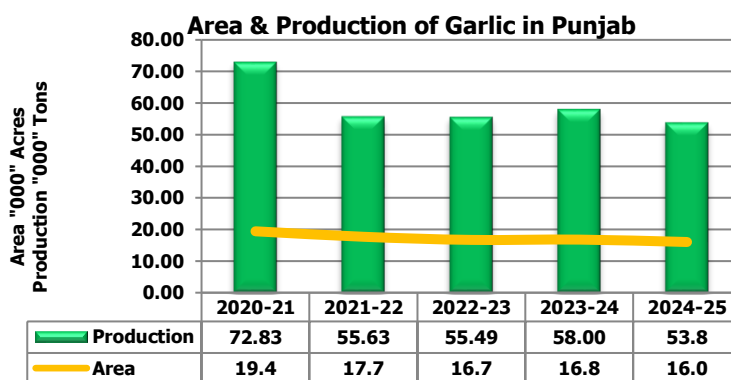
*=Export during July 2025 to September 2025

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

PROVINCIAL OVERVIEW

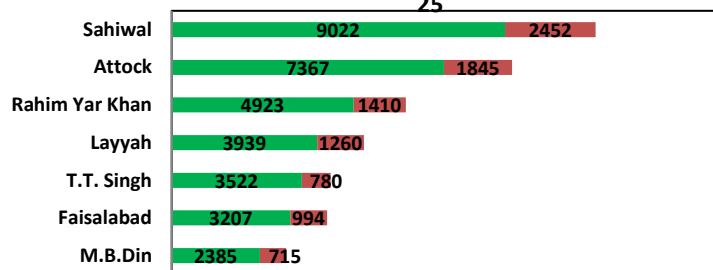
Area & Production:

- Over the past four years, garlic cultivation and production in Punjab have remained almost stable, exhibiting only minor fluctuations..
- During year 2024-25, garlic production in Punjab was recorded at 53,800 tons—reflecting a 7.2% decline compared to the previous year and a 26.1% decrease relative to the production level in year 2020-21. Similarly, the cultivated area stood 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.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

District Wise Area & Production of Garlic Year 2024-25



Source: Crop Reporting Service Punjab

- The major garlic-producing districts in Punjab include Sahiwal, Attock, Rahim Yar Khan, Layyah, Toba Tek Singh, Faisalabad, and Mandi Bahauddin. Sahiwal ranks as the leading garlic-producing district, achieving an output of 9,022 tons from a cultivated area of 2,452 acres.



Price Control & Commodities Management Department

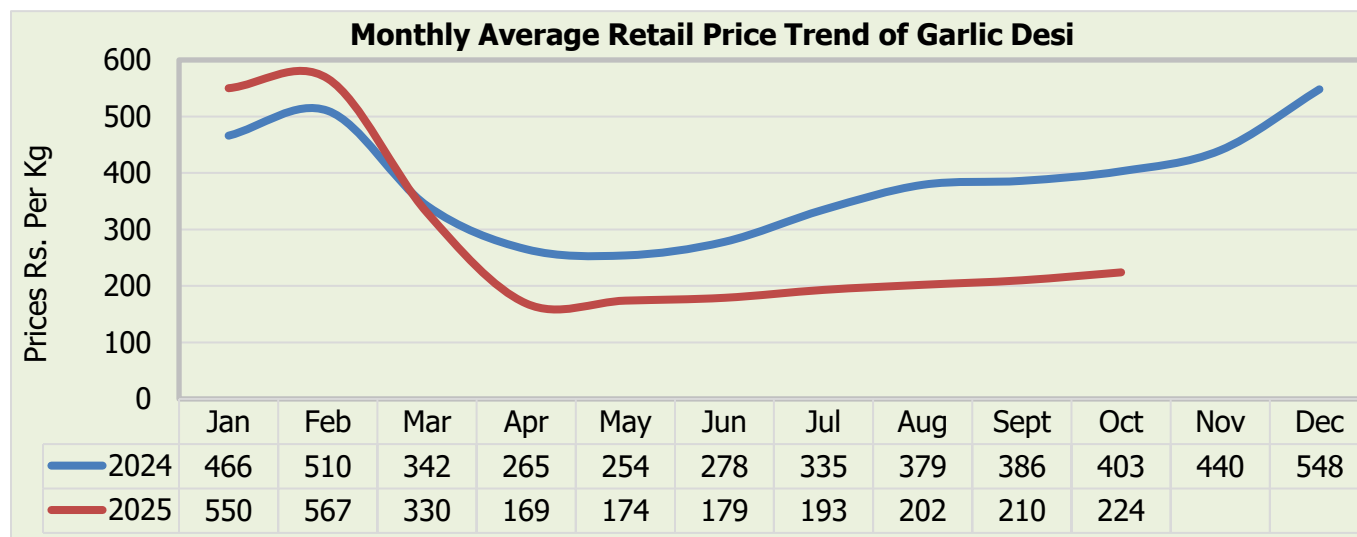
Supply Cycle:

- Local supply of garlic is available. 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 showing slightly increasing trend, however yet 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.224/Kg during month of October.



SUPPLY MANAGEMENT ADVISORY



Assessment

Local garlic production during 2024-25 was recorded at 53,800 tons, representing a 7.2% decline from the previous year's production of 58,000 tons. The local production season commenced during March and the availability of the local crop has helped to maintain overall supply stability. However, currently local production of garlic is reaching its end and sowing for next crop is in progress, therefore garlic prices are showing slightly increasing trend, even then price is significantly lower



Price Control & Commodities Management Department



than last year. Furthermore, import from China is in progress to supplement supply situation and meet consumption requirements.

Forecast

Due to ending of local production, price of garlic is expected to increase in local markets. Garlic supply from other provinces KP & Balochistan will remain available in the local market along with import from China. Now, sowing season for next crop of garlic is in progress and next fresh crop is expected to arrive during first week of March-2026. Till then, price is expected to increase in local markets.



Advisory



- The PAMRA Authority, in coordination with the EADAs & Secretaries of Market Committees should:
 - Ensure adequate garlic supply from Punjab, Khyber Pakhtunkhwa and Balochistan through close collaboration with commission agents.
 - Persuade commission agents to sustain smooth import from China to meet domestic consumption needs.
 - Ensure consistent monitoring of auction proceedings and the strict implementation of a fair and transparent price determination mechanism.
- The District Administration, through Price Control Magistrates, should intensify market surveillance and take stringent action against retailers involved in profiteering or overcharging.
- As sowing season of garlic is in progress, thus Agriculture Department may take measures to enhance local production of garlic so that dependency on import could be reduced.

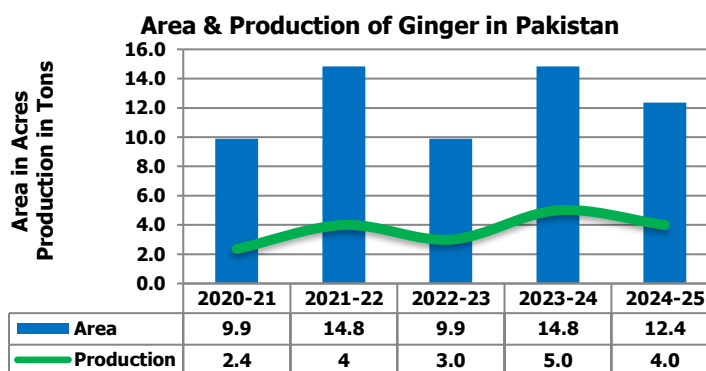
5. GINGER



NATIONAL OVERVIEW

Domestic Area & Production

- Pakistan's domestic production of ginger remains minimal, rendering the country highly reliant on imports to meet its local consumption requirements.
- During the year 2024–25, domestic ginger production was recorded at only 4 tons, through cultivated area of 12,400 acres. In stark contrast, national consumption demand stood at 81,231 tons—revealing a substantial deficit and emphasizing Pakistan's near-complete dependence on imports to meet domestic consumption requirements

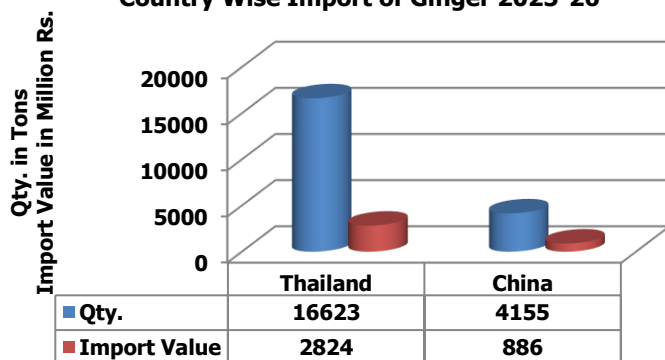


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights

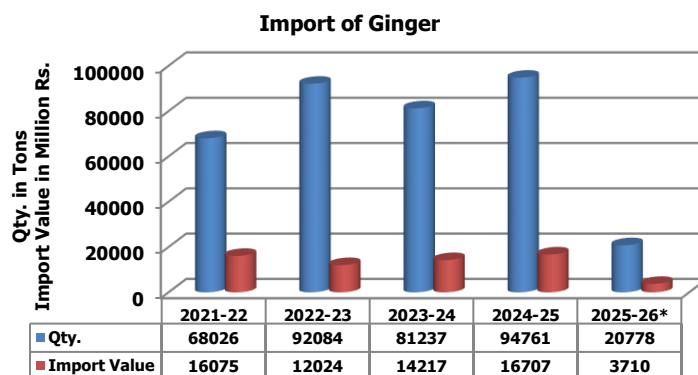
- In the fiscal year 2024–25, Pakistan imported 94,761 tons of ginger at a total expenditure of Rs. 16,707 million. During 2025–26 (July–September), imports were recorded at 20,778 tons, incurring a cost of Rs. 3,710 million.
- Pakistan primarily imports ginger from Thailand and China.
- During 2025–26 (July–September), the country imported 16,623 tons of ginger from Thailand at a cost of Rs. 2,824 million, while an additional 4,155 tons were sourced from China, incurring import expenses of Rs. 886 million.

Country Wise Import of Ginger 2025-26



*=Import during July 2025 to September 2025

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



*=Import during July 2025 to September 2025

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

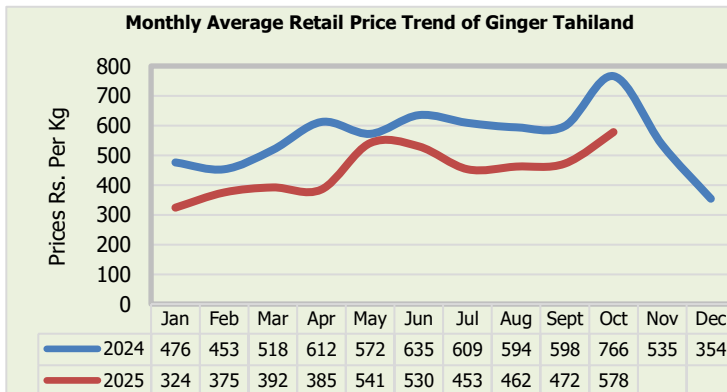
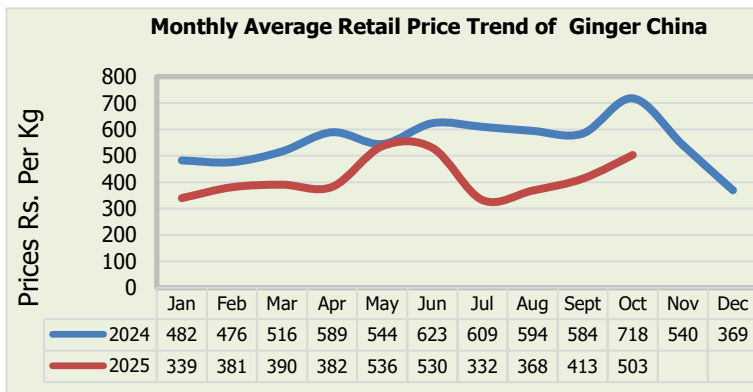


Price Control & Commodities Management Department



Market Prices

- Ginger supply in Pakistan remains consistently dependent on imports, predominantly from Thailand and China. In October, the average monthly retail price of Thai ginger was recorded at Rs. 578 per kilogram, while Chinese ginger stood at Rs. 503 per kilogram. Prices have shown an upward trend in local markets.



SUPPLY MANAGEMENT ADVISORY



Assessment

Domestic consumption requirement of ginger is entirely met through its import from Thailand and China due to nil domestic production of ginger in the country. Currently, local prices of ginger are showing increasing trend due to just start of production season of ginger in China & Thailand. With the time supply of ginger from China & Thailand will improve and subsequently local prices will come to normal range.

Forecast

Supply situation of ginger is expected to remain stable due to start of production season of ginger in China & Thailand. Resultantly, import situation will improve gradually and local prices are expected to decline during month of November-2025.





Advisory

Price Control & Commodities Management Department



- Fresh crop of ginger from China & Thailand has started to arrive. Therefore, PAMRA Authority, in collaboration with EADAs and Secretaries Market Committees, should proactively coordinate with local importers and commission agents to maintain a consistent flow of ginger imports, ensuring stable supply & price situation of ginger in local markets.
- Promoting the processing of ginger into paste can help to mitigate supply disruptions and reduce price volatility.
- The Agriculture Department should introduce climate-suitable seed varieties to enhance domestic production and lessen dependence on imports.

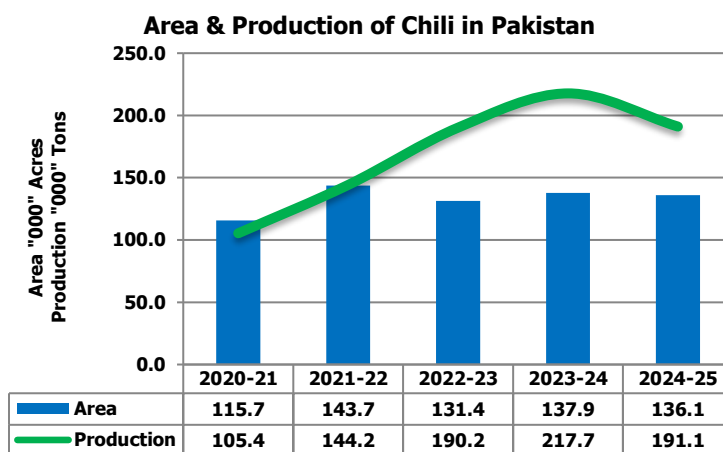
6. CHILLIES



NATIONAL OVERVIEW

Domestic Area & Production

- Domestic chili production in Pakistan experienced a consistent upward trend from year 2020-21 to year 2023-24; however, a slight decline was observed during 2024-25. The cultivated area for chilies has remained relatively stable over the past three years, exhibiting only minor fluctuations.
- During year 2024-25, domestic chili production was recorded at 191,100 tons, reflecting a 12.21% decline compared to the previous year. The cultivated area stood at 136,100 acres, indicating a relatively stable trend over the same period.

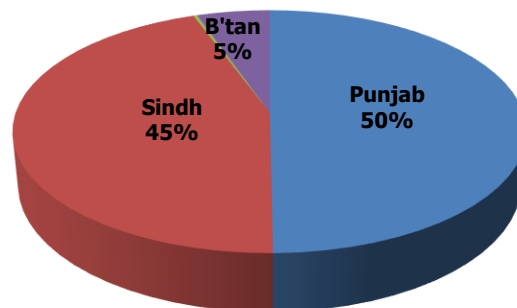


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production

- At the provincial level, Punjab leads national chili production, contributing 50% of the total output. Sindh follows with a 45% share, while Balochistan accounts for the remaining 5%. Khyber Pakhtunkhwa (KP) has no recorded share in chili production.

Province Wise Production Share of Chilli 2024-25





Price Control & Commodities Management Department

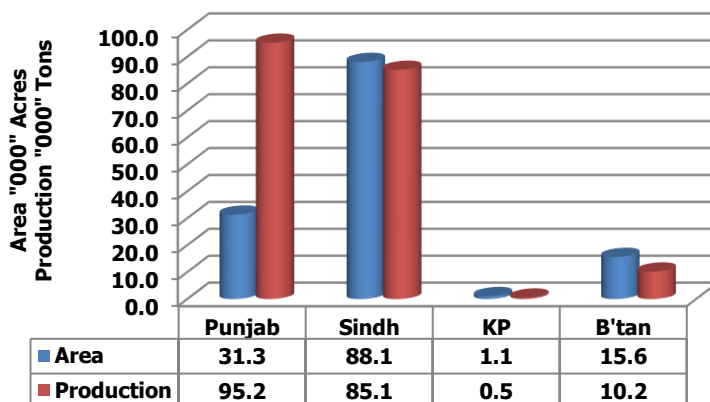


- Punjab emerged as the leading province in chili production during year 2024–25, achieving an output of 95,200 tons from a cultivated area of 31,300 acres. Sindh ranked second, producing 85,100 tons over 88,100 acres.
- Whereas, chili production in Balochistan and Khyber Pakhtunkhwa (KP) remained minimal, recorded at merely 10,200 tons and 500 tons, respectively.

Import Insights

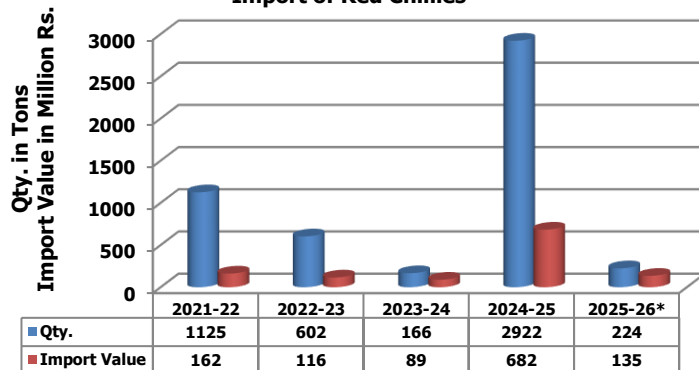
- In the fiscal year 2024–25, Pakistan imported 2,922 tons of chillies at a total cost of Rs. 682 million, reflecting a notable increase compared to the previous year in both value and volume. However, during 2025–26 (July–September), chili imports were recorded at 224 tons, incurring an expenditure of Rs. 135 million.
- Pakistan primarily imports red chillies from China. During year 2024-25 (July to September), imports from China recorded at 224 tons, incurring cost of Rs. 135 million.

Province Wise Area & Production of Chili 2024-25



Source: Agricultural Statistics of Pakistan

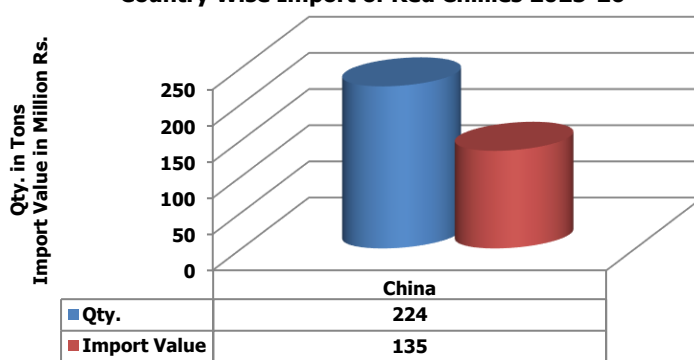
Import of Red Chillies



*=Import during July 2025 to September 2025

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

Country Wise Import of Red Chillies 2025-26



*=Import during July 2025 to September 2025

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



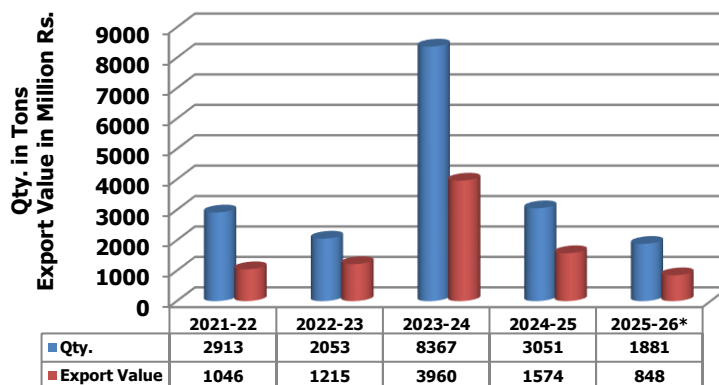
Price Control & Commodities Management Department



Export Insights

- Pakistan's red chili exports substantially surpassed its imports in both volume and value. During the fiscal year 2024-25, the country exported 3,051 tons of red chilies, earning Rs. 1,574 million in export revenue.
- However, during year 2025-26 (July to September), exports of red chilies are registered 1881 tons, generating export earning of Rs. 848 million.
- Key export destinations for Pakistani red chilies include China, the United Arab Emirates, Iraq, Saudi Arabia, Qatar & Oman.

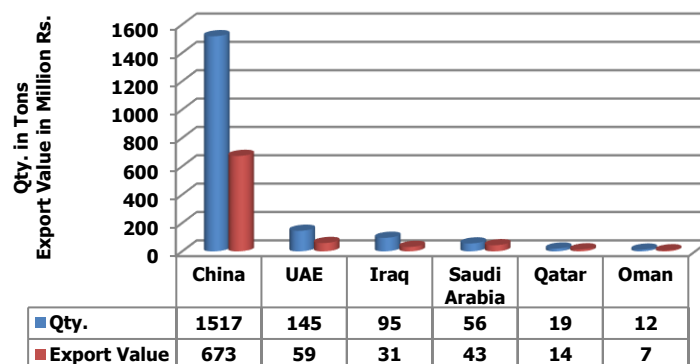
Export of Red Chillies



*=Export during July 2025 to September 2025

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

Country Wise Export of Red Chilli 2025-26



*=Export during July 2025 to September 2025

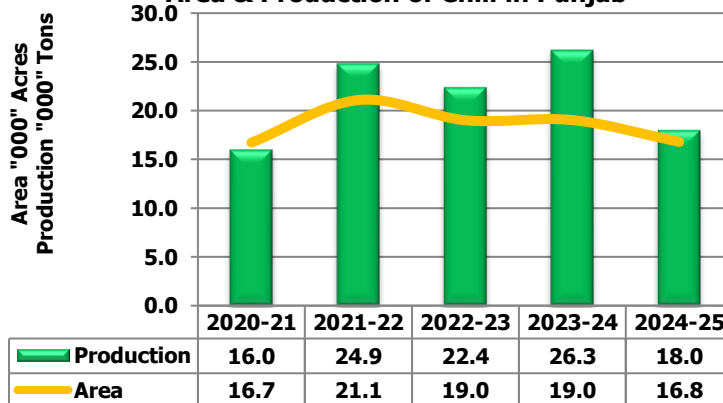
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production

- In Punjab, chili cultivation and production have remained uncertain with fluctuations over the past five years. During year 2024-25, chili production in the province declined sharply to 18,000 tons, representing a 31.48% drop compared to the previous year. However, when compared with year 2020-21, this figure reflects a 12.5% increase, indicating inconsistent production trends in recent years.
- The cultivated area for chilies stood at 16,800 acres during year 2024-25, showing a 11.75% reduction from the previous year—signaling a continued decline in land allocated to chili farming within the province.

Area & Production of Chili in Punjab



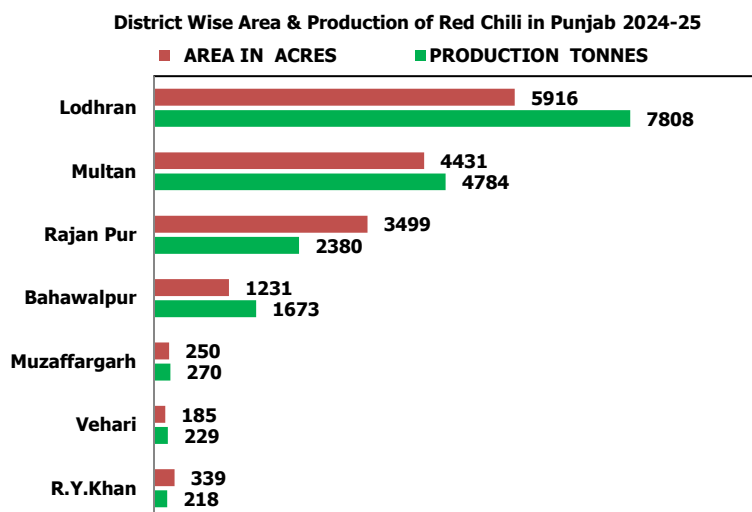
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Price Control & Commodities Management Department



- Major chili-producing districts in Punjab include 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

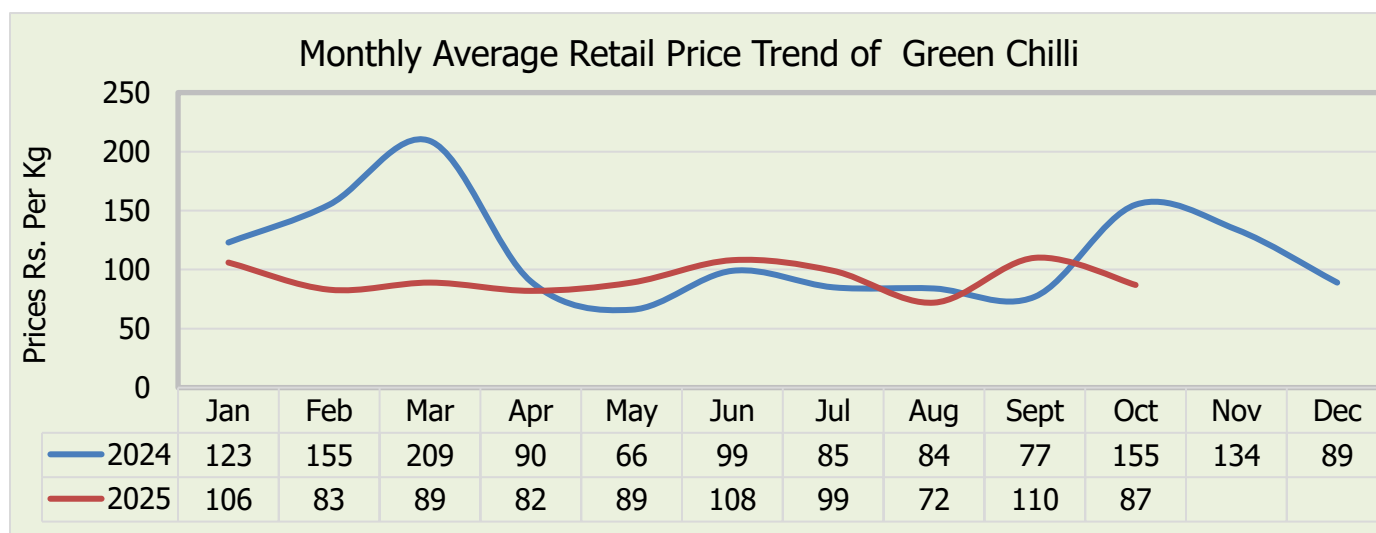
Supply Cycle

- The main crop of chilies in Punjab will be available during July and from Sindh will be available during October. 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. 87 per kilogram during October. The graphical trend of monthly average retail prices of red chilies in Punjab is illustrated below:





SUPPLY MANAGEMENT ADVISORY



Assessment

Currently, off production season is prevailing in Punjab, however some local minor crop of chilies is arriving along with major supply from Sindh due to start of production season thereby. As supply from Sindh is yet not in full swing, therefore prices of chilies are on higher side in local markets.

Forecast

As production season of chilies in Sindh has been commenced and some minor local crop is also available. Thus, with the passage of time, supply situation is likely to improve and price is expected to come to normal range.



Advisory



- The PAMRA Authority, in collaboration with the concerned EADAs and Secretaries of Market Committees, should actively coordinate with local commission agents and traders to ensure a steady inflow of chilies from Sindh and Punjab at affordable prices.
- Moreover, promoting kitchen gardening initiatives can effectively contribute to ensure stable supply and fulfilling domestic chili consumption needs.
- The Agriculture Department should introduce high-yielding, climate-resilient, and off-season seed varieties to achieve self-sufficiency in domestic chili production and reduce reliance on other provinces.

7. GRAM (Chickpea)

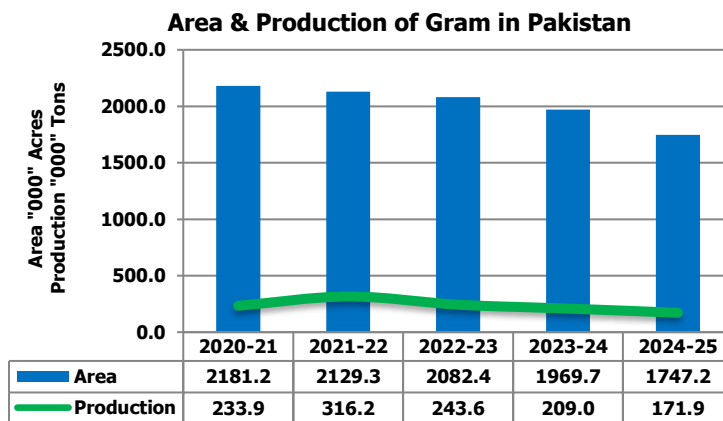


NATIONAL OVERVIEW

Domestic Area & Production:

According to the Agricultural Statistics of Pakistan and the Economic Survey of Pakistan, both the cultivated area and domestic production of gram have shown a declining trend during the period from year 2021-22 to 2024-25.

- During the year 2024-25, Pakistan's domestic production of gram stood at 171,941 tons, reflecting a decline of 17.7% compared to the previous year and 45.6% decrease relative to year 2021-22. This substantial fall in output has further exacerbated the supply deficit, necessitating increased imports to meet national consumption requirements.
- Similarly, cultivated area of gram in the country has been recorded at 17,47,200 acres during year 2024-25, which is 11.2% less as compared to last year and 17.9% less than area recorded during year 2021-22.



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

Province wise Area & Production:

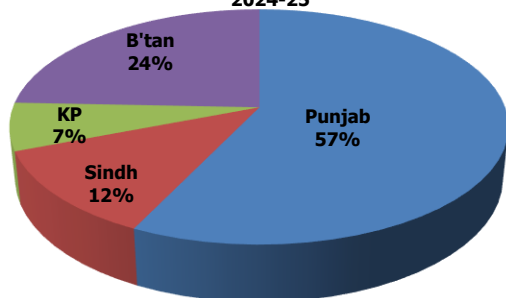
- Punjab serves as the primary hub of gram cultivation, contributing nearly 57% to the country's total output, followed by Balochistan with 24%, Sindh with 12%, and Khyber Pakhtunkhwa (KP) with 7%. The province consistently retains its position as the country's foremost producer of gram.
- During the year 2024-25, Punjab's production was documented at 98,500 tons, obtained from cultivated area of 15,05,000 acres. In contrast, Balochistan, Sindh, and Khyber Pakhtunkhwa registered outputs of 42,000 tons, 20,700 tons, and 11,300 tons, respectively.



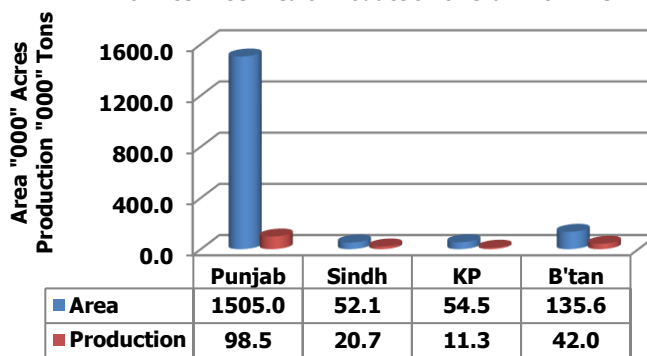
Price Control & Commodities Management Department



Province Wise Production Share of Gram
2024-25



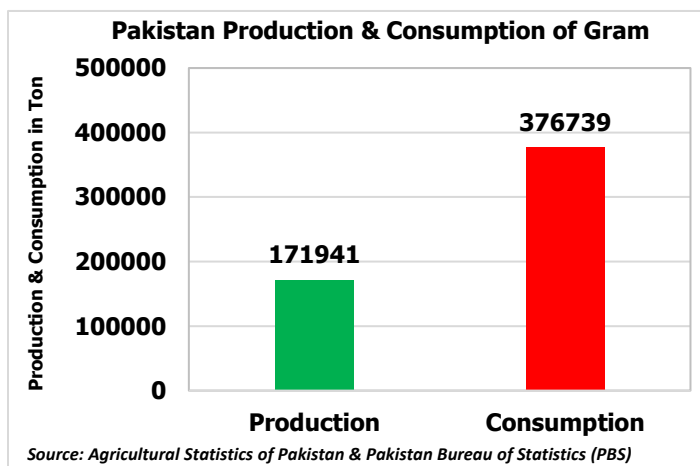
Province Wise Area & Production of Gram 2024-25



Source: Agricultural Statistics of Pakistan

Production and Consumption:

- Owing to inadequate domestic production, Pakistan remains dependent on gram imports to satisfy local consumption needs. During the year 2024-25, national production was estimated at 171,941 tons against a consumption requirement of 376,739 tons—reflecting a substantial supply deficit of 201,798 tons.

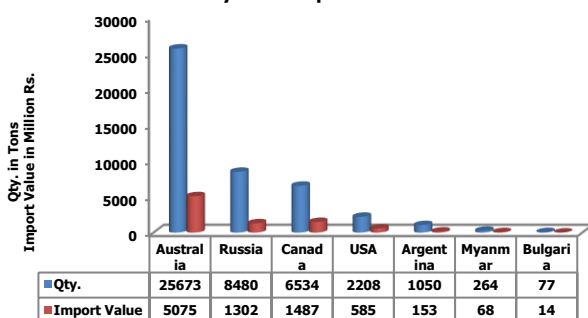


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights:

- During the year 2024-25, Pakistan imported 112,047 tons of gram, incurring a total expenditure of Rs. 23,458 million. In the subsequent period of 2025-26 (July-September), imports were recorded at 44,333 tons, costing Rs. 8,691 million.
- Pakistan primarily imports gram from Australia, Russia, Canada, the United States, Argentina, Myanmar and Bulgaria. Among these, Australia, Russia, and Canada serve as the principal suppliers, while the remaining countries contribute relatively smaller quantities in both volume and value.

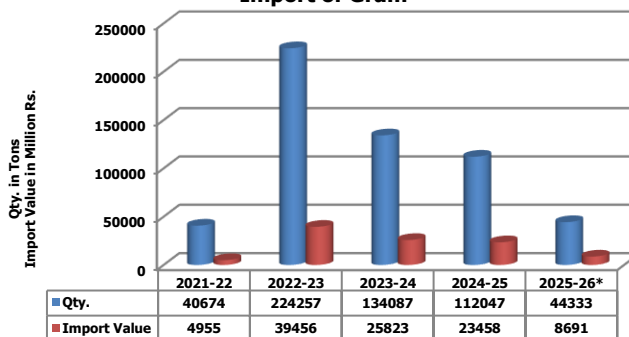
Country Wise Import of Gram 2025-26



*=Import during July 2025 to September 2025

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

Import of Gram



*=Import during July 2025 to September 2025

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



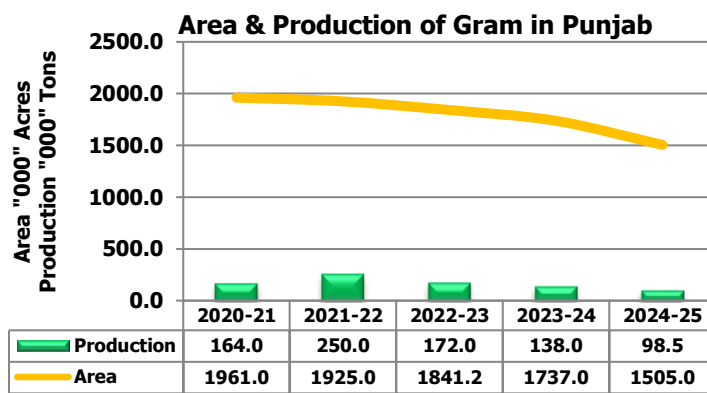
Price Control & Commodities Management Department



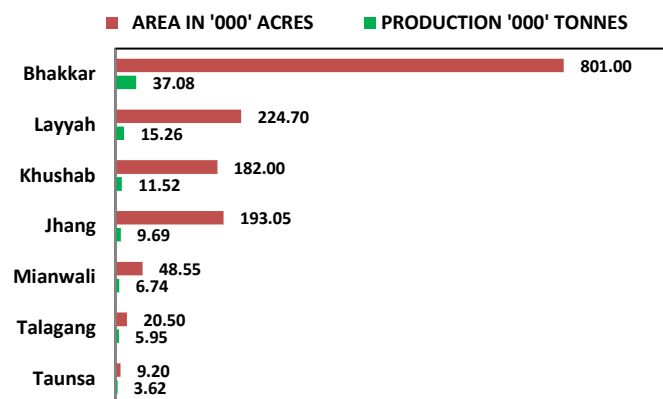
PROVINCIAL OVERVIEW

Area & Production:

- The cultivation as well as production of gram in Punjab is exhibiting a persistent downward trend over recent years.
- During the year 2024–25, production was recorded at 98,500 tons, reflecting a substantial decline of 28.6% compared to the previous year. Similarly, the cultivated area contracted to 1,505,000 acres, marking a 13.35% decrease over the same period. This pronounced fall in gram production poses serious concerns regarding the long-term sustainability of gram supply in domestic markets.
- In Punjab, key producing districts of gram are Bhakkar, Layyah, Khushab, Jhang, Mianwali, Talagang & Taunsa. Bhakkar stands out as the leading producer with the largest cultivated area of 8,01,000 acres and the highest production volume at 37,100 tons

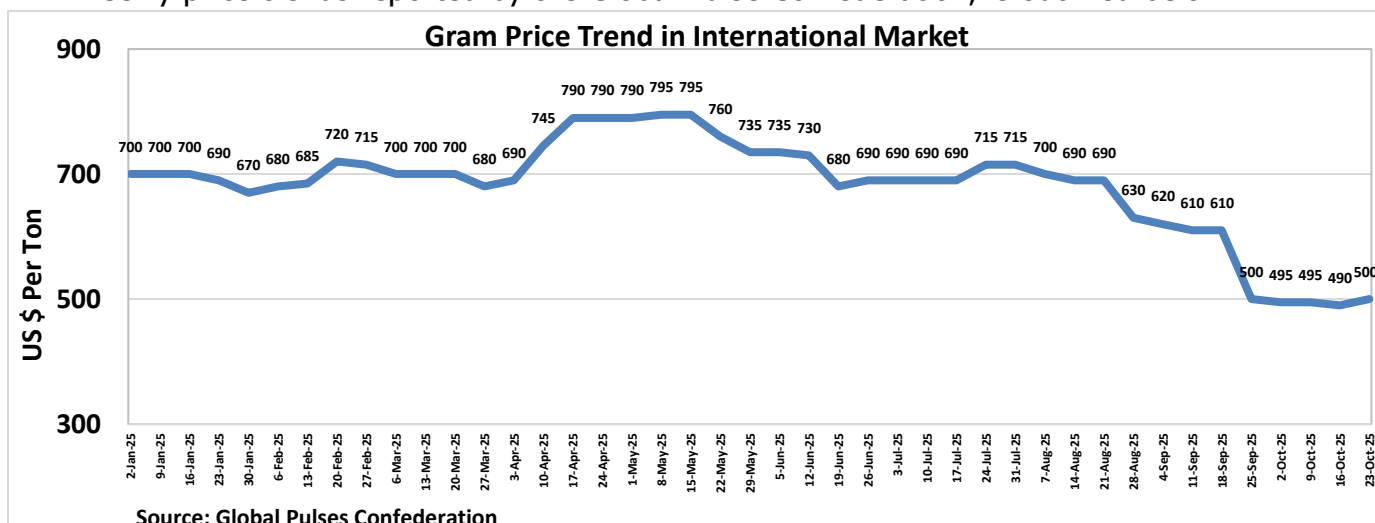


District Wise Area & Production of Gram in Punjab 2024-25



International Market Trends

- Due to availability of gam crop from Australia & Canada, international prices of gram have significantly decreased from USD 700/ton to USD 500/ton during August to October. The weekly price trends reported by the Global Pulse Confederation, is outlined below:



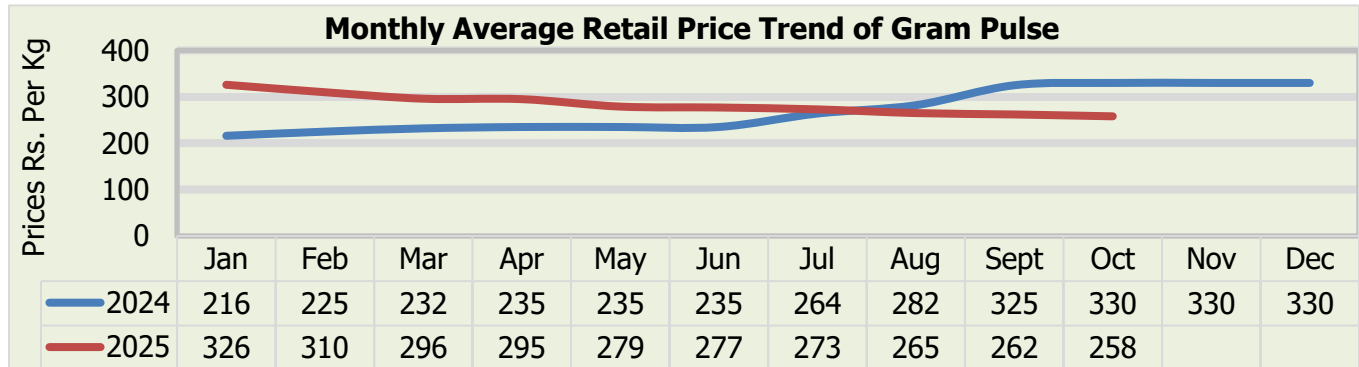


Price Control & Commodities Management Department



Local Market Price:

- Due to a decline in international prices, slight decrease in local prices of gram has also been witnessed. In Punjab, the average monthly retail price of gram pulse during October has been recorded at Rs. 258 per kilogram, which is comparatively lower than the price observed during the corresponding month of the previous year.



SUPPLY MANAGEMENT ADVISORY

Assessment



Currently, gram supply is dependent on imports due to the off-production season and reduced domestic output. Presently, international gram prices remain on the lower side owing to fresh crop availability from Australia and Canada. Resultantly, during August-October 2025, global prices of gram declined from USD 700 per ton to USD 490 per ton. Consequently, imports have continued smoothly, leading to a decrease in local market prices from Rs. 273 per kilogram to Rs. 259/Kg.

Forecast

In the international market, gram supply is stable as a result of arrival of fresh crops from Australia and Canada. Due to stability in international market, import situation of gram is smooth, resultantly supply and price situation is likely to remain stable in local markets.





Advisory

Price Control & Commodities Management Department



- The availability of gram supplies from Australia and Canada has resulted in a significant decline in international prices from USD 700 per ton to USD 450 per ton during August to October. Deputy Commissioners and EADAs (E&M) in Punjab should duly consider this price reduction while determining gram prices in their respective districts during DPCC meetings.
- Deputy Commissioners of Faisalabad and Sargodha are advised to engage with local traders and importers to ensure uninterrupted gram imports, thereby maximizing the advantage of the recent drop in international prices.
- The Price Control Mechanism should be further reinforced to curb profiteering and overcharging by retailers, ensuring fair pricing for consumers.



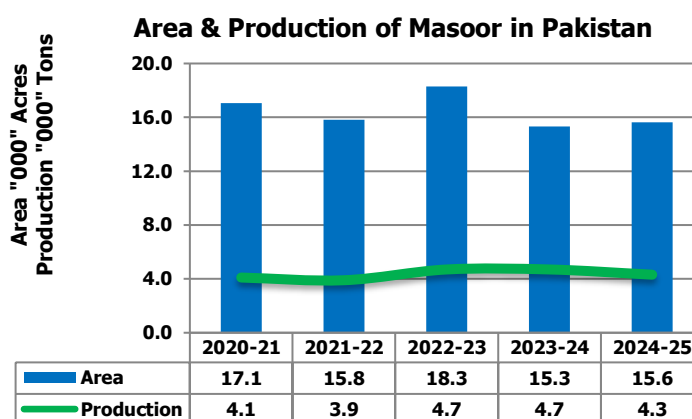
8. LENTIL (MASOOR)



NATIONAL OVERVIEW

Domestic Area & Production:

- Due to insufficient domestic production, Pakistan remains highly dependent on masoor (lentil) imports to fulfill national consumption requirements.
- During the past five years, domestic masoor production has exhibited an overall stable trend with minor fluctuations. In year 2024-25, production was estimated at 4,300 tons, reflecting an 8.5% decline from the preceding year. The cultivated area stood at 15,600 acres, showing a 1.96% increase over the previous year but an 8.77% decline compared with the acreage recorded in year 2020-21.

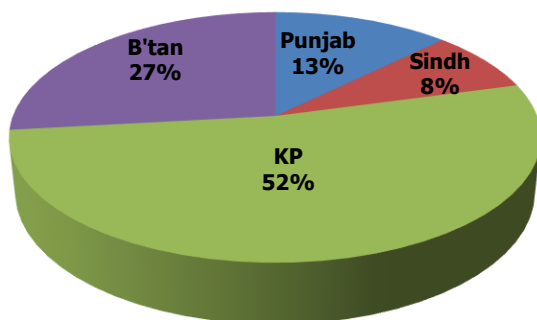


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

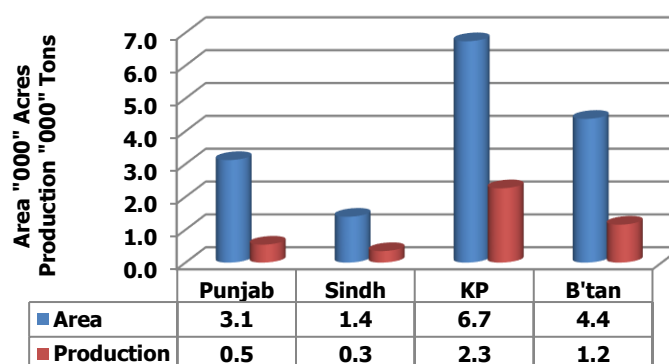
Province wise Area & Production:

- A provincial analysis indicates that Khyber Pakhtunkhwa (KP) dominated masoor production, contributing 52% to the national output, while Balochistan followed with 27%, Punjab with 13%, and Sindh comprising the remaining 8%. During the year 2024-25, Khyber Pakhtunkhwa (KP) achieved a masoor production of 2,300 tons from a cultivated area of 6,700 acres.
- Balochistan ranked second with an output 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

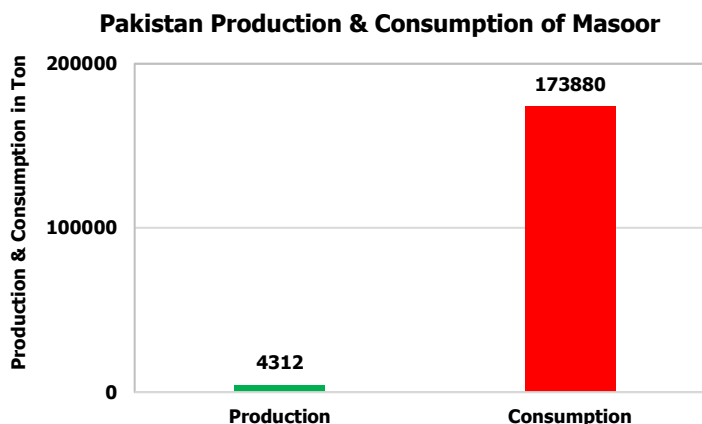


Price Control & Commodities Management Department



Domestic Production & Domestic Consumption

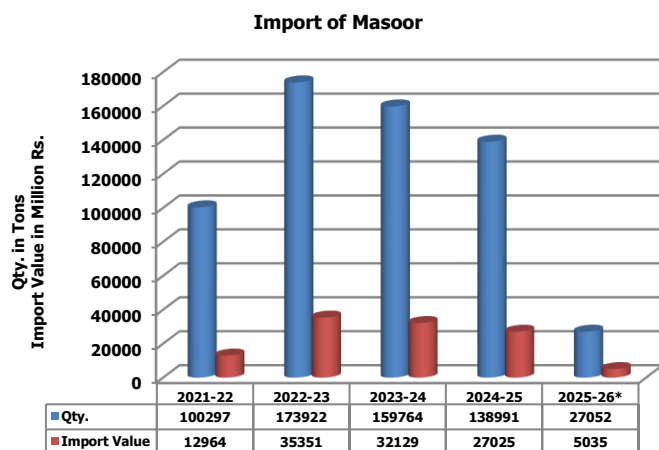
- During the year 2024–25, domestic masoor production was recorded at 4,312 tons against national consumption requirements of 173,880 tons, resulting in a substantial supply deficit of 169,568 tons.



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

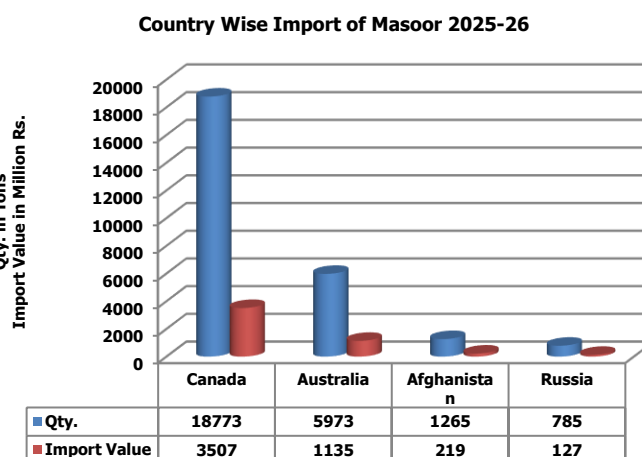
Import Insights

- Given the minimal scale of domestic production, Pakistan remains predominantly dependent on masoor (lentil) imports to fulfill its national consumption needs.
- During the year 2024-25, the country imported 138,991 tons of masoor at cost of Rs. 27,025 million, indicating a decline compared to the preceding year. However, during year 2025–26 (July–September), imports were recorded at 27,052 tons, costing Rs. 5,035 million.
- Pakistan primarily sources its masoor imports from Australia, Canada, Afghanistan and Russia, with the bulk of supplies arriving from Australia and Canada, while imports from Afghanistan and Russia remain relatively minor.
- During 2025–26 (July–September), Pakistan imported 18,773 tons of masoor from Canada incurring cost of Rs. 3,507 million and 5,973 tons from Australia at an expense of Rs. 1,135 million.



*=Import during July 2025 to September 2025

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



*=Import during July 2025 to September 2025

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



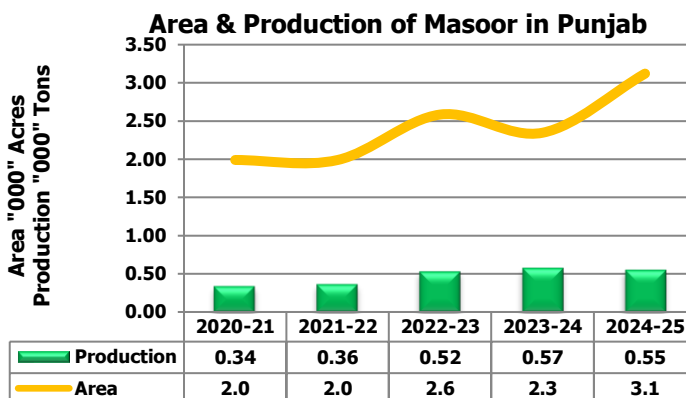
Price Control & Commodities Management Department



PROVINCIAL OVERVIEW

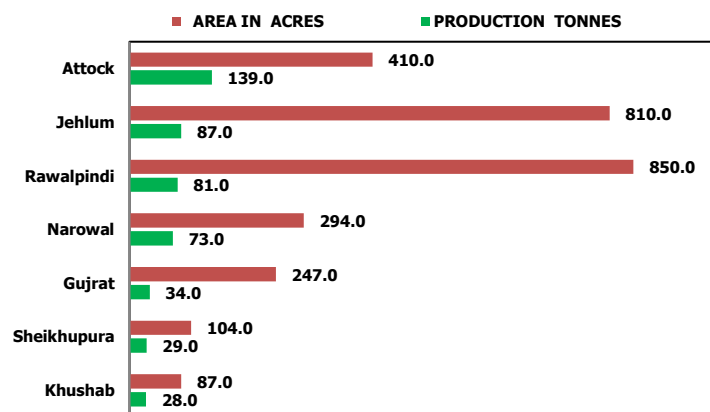
Area & Production:

- The production of masoor in Punjab remains marginal. Over the past five years, cultivated area and production of masoor are exhibiting slightly increasing trend, even then provincial production of masoor is recorded very minimal in contrast with provincial consumption requirement.
- During the year 2024-25, the cultivated area expanded to 3,100 acres, marking a 34.7% increase over the previous year and a 55% rise compared to year 2020–21. Production was recorded at 546 tons, indicating a slight decline of 3.5% from the preceding year but a significant 61.76% increase relative to the year 2020–21 level.
- The principal masoor-producing districts in Punjab include Attock, Jhelum, Rawalpindi, Narowal, Gujrat, Sheikhupura, and Khushab. Among these, Attock stands out as the leading producer, recording the highest output of 139 tons harvested from 410 acres of cultivated land.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

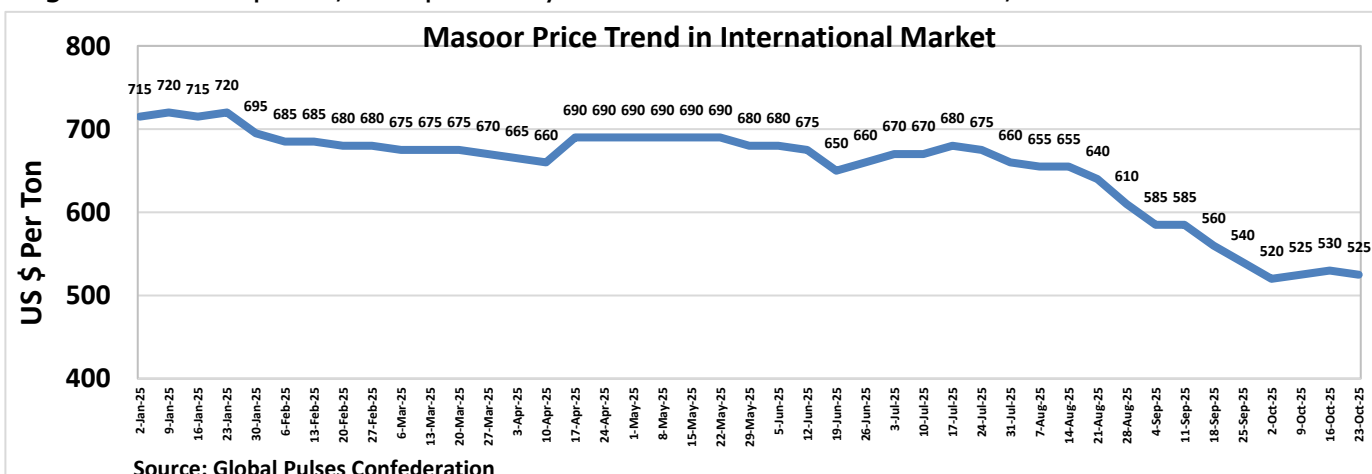
District Wise Area & Production of Masoor in Punjab 2024-25



Source: Crop Reporting Service Punjab

International Market Trend:

- With the arrival of masoor crops from Australia and Canada, international prices have declined from USD 655 per ton to USD 525 per ton during August to October. The weekly trend in global masoor prices, as reported by the Global Pulse Confederation, is illustrated below:



Source: Global Pulses Confederation

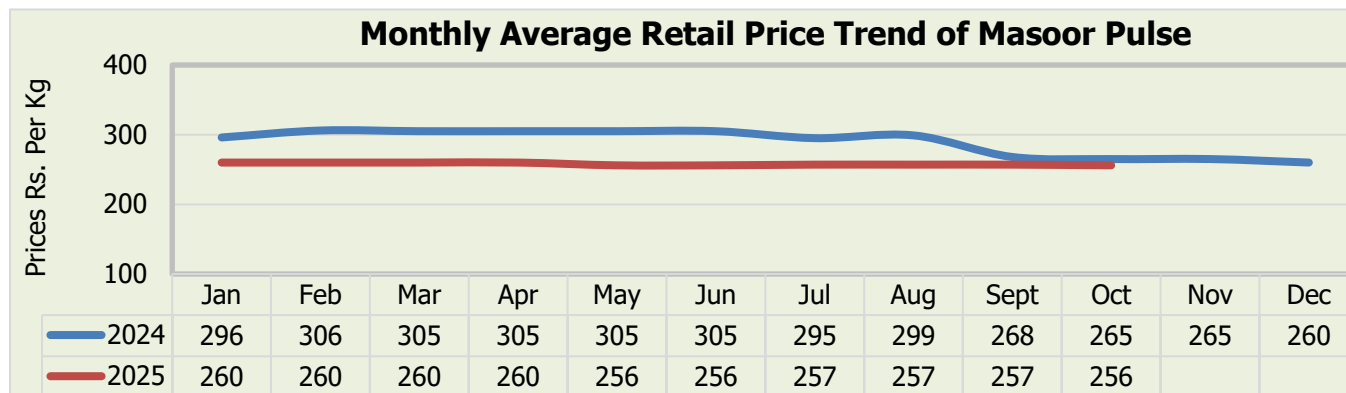


Price Control & Commodities Management Department



Local Market Price:

- As a result of decline in international prices of masoor, import is progressing smoothly. Thus, supply & price situation of masoor is showing stable trend in local markets. In Punjab, the average monthly retail price during October has been recorded at Rs. 256 per kilogram, which is showing stable trend over the months.



SUPPLY MANAGEMENT ADVISORY

Assessment



Due to the negligible scale of domestic production, Pakistan continues to rely predominantly on imports to fulfill domestic demand. The availability of masoor crops from Australia and Canada has exerted downward pressure on international prices, facilitating uninterrupted imports into the country. Resultantly, supply and price situation of masoor is depicting stable trend in local markets.

Forecast

As the international market of masoor is stable due to the availability of masoor crops from Australia & Canada, thus import of masoor is expected to remain uninterrupted and subsequently supply & price situation of masoor is expected to remain stable in local markets.





Advisory

Price Control & Commodities Management Department



- The Deputy Commissioners Faisalabad and Sargodha may persuade their local traders/ importers to ensure uninterrupted import of masoor to get maximum benefits from decline in international prices
- Deputy Commissioners & EADAs (E&M) across Punjab with the help of commission agents should arrange sufficient supply of masoor as per consumption requirements of their respective district. Moreover, decline in international prices should be considered during DPCC meetings while fixing retail prices of masoor.
- Price Control Magistrates (PCMs) should reinforce Price Control Mechanism through increased inspections and stern action against retailers involved in profiteering and over charging.

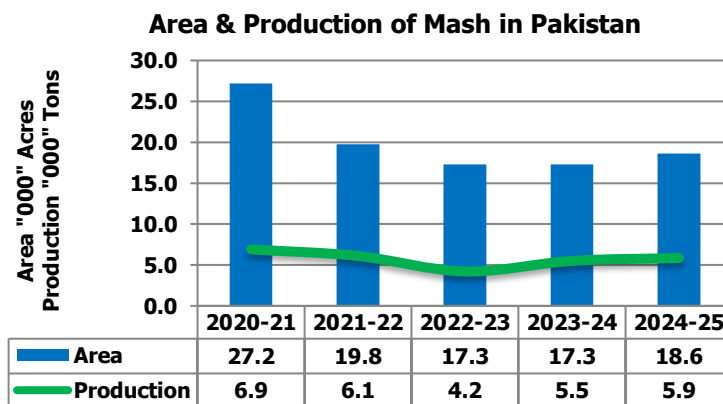


9. MASH



Domestic Area & Production:

- Domestic production of mash remains minimal, with nearly 92% of national consumption needs being met through imports.
- Domestic cultivated area and production of mash have been showing slightly increasing trend over last 3 years. During year 2024-25, domestic production has been recorded at 5850 tons which is 6.36% higher over last year production i.e. 5500 tons. The cultivated area recorded at 18,600 acres showing 7.51% higher as compared to last year acreage.

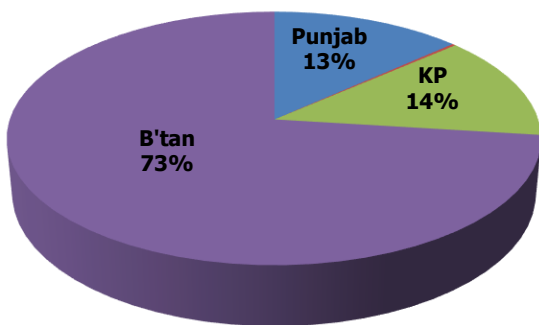


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

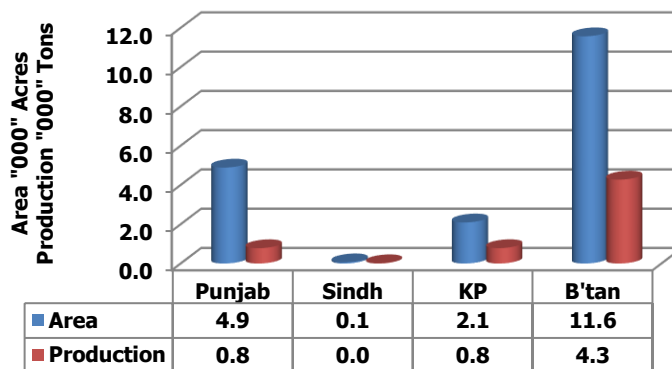
Province wise Area & Production:

- In the country, Balochistan stands out as the major producing province of mash, contributing 73% of total production. It was followed by Khyber Pakhtunkhwa with 14% and Punjab with 13%, while production of mash in Sindh reported to be nil.
- 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.

Province Wise Production Share of Mash 2024-25



Province Wise Area & Production of Mash 2024-25



Source: Agricultural Statistics of Pakistan

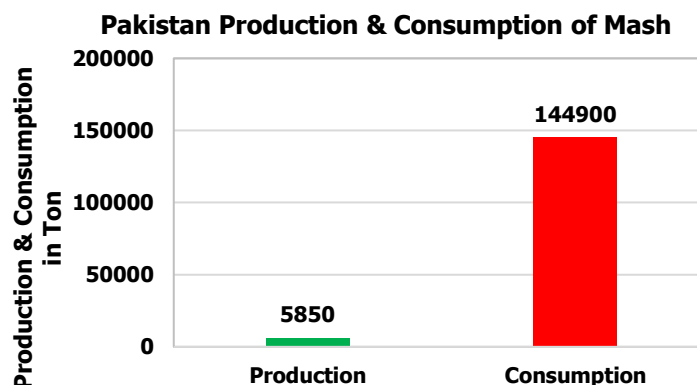


Price Control & Commodities Management Department



Domestic Production & Domestic Consumption:

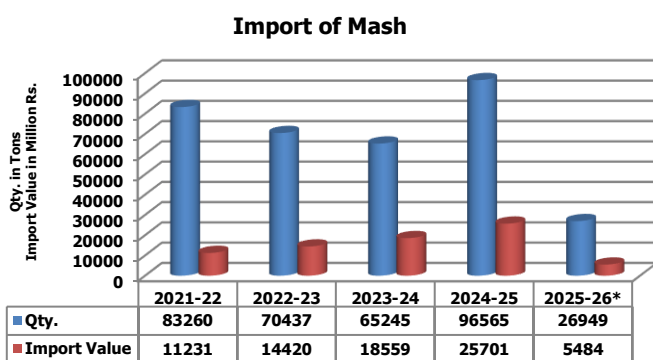
- In fiscal year 2024–25, domestic output of mash was registered at only 5850 tons, against a national requirement of 144,900 tons, leaving a massive supply deficit of 139,050 tons



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

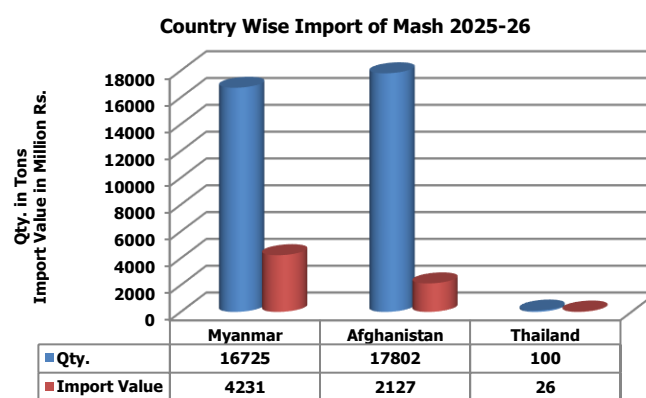
Import Insights:

- Owing to limited domestic production, Pakistan remains highly reliant on imports to meet its national mash consumption needs. In year 2024-25, import of mash was recorded at 96,565 tons in lieu of Rs. 25,701 million. During year 2025-26 (July to September), import of mash has been recorded at 26,949 tons, at expense of Rs. 5484 million.
- The majority of these imports arrives from Myanmar, Afghanistan and Thailand, with Myanmar and Afghanistan serving as the principal suppliers. During year 2025-26 (July to September), Pakistan imported 16,725 tons of mash from Myanmar and 17,802 tons from Afghanistan, while imports from Thailand stood at 100 tons



*=Import during July 2025 to September 2025

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



*=Import during July 2025 to September 2025

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

PROVINCIAL OVERVIEW

Area & Production:

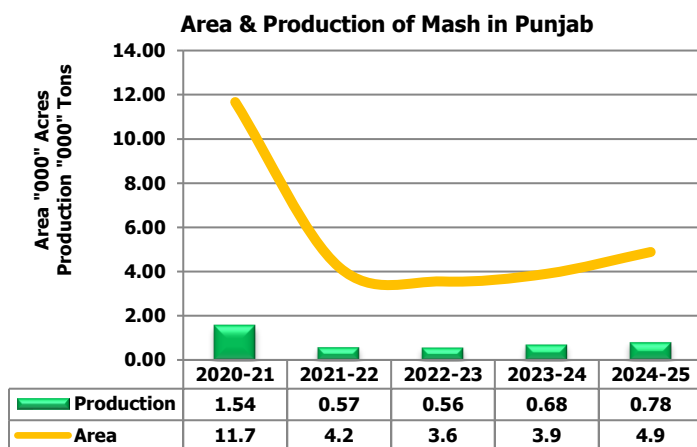
- During 2024–25, both the cultivated area and production of mash in Punjab exhibited a modest upward trend compared to the preceding three years.
- The cultivated area expanded to 4,900 acres, reflecting a 25.6% year-on-year increase, though it still represents a 58.1% decline relative to 2020–21.



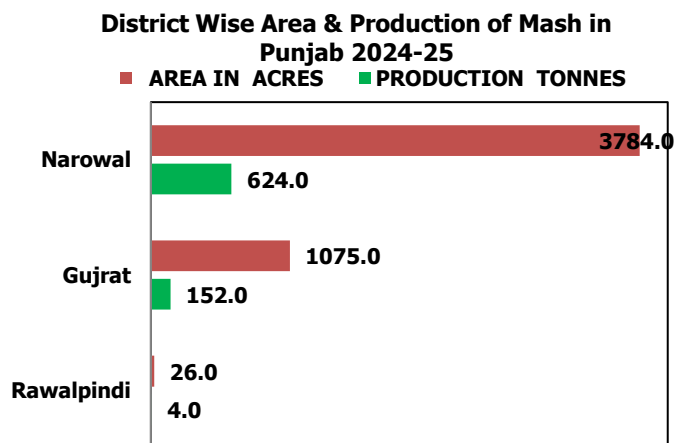
Price Control & Commodities Management Department



- Similarly, mash production rose to 780 tons, marking a 14.7% improvement over the previous year. Nevertheless, this output remains 49.3% lower than the level recorded in 2020–21, underscoring a persistent long-term contraction in domestic production.
- In Punjab, the main mash-producing districts are Narowal, Gujrat and Rawalpindi. Narowal ranked as the leading district, contributing 624 tons, harvested from 3,784 acres of cultivated land.



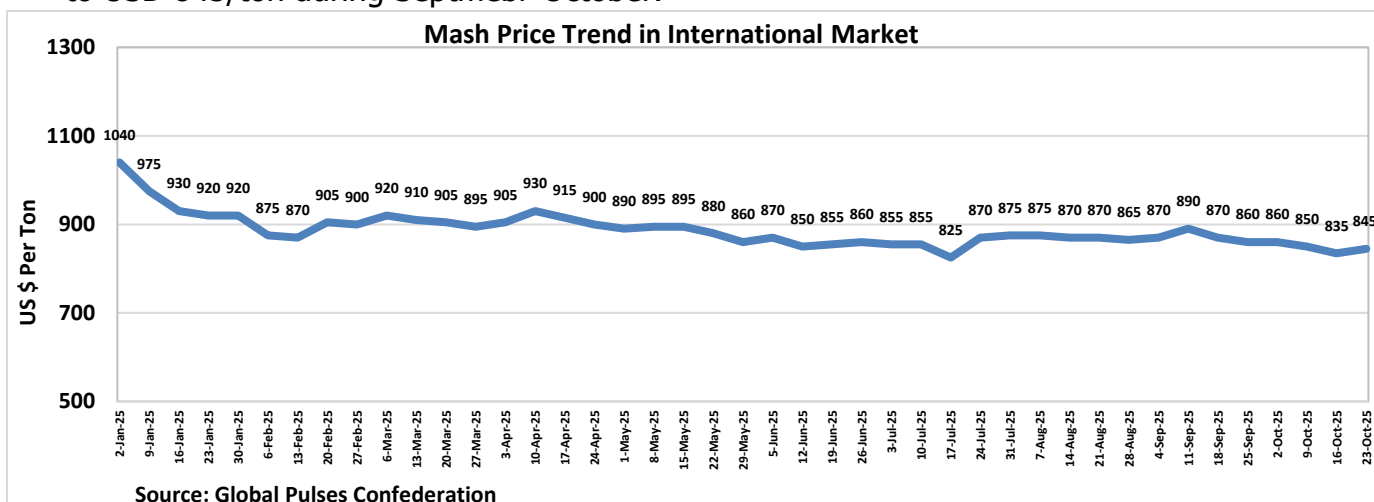
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

International Market Trend:

- The weekly trend of international prices of mash sourced from the Global Pulses Confederation, depicted slight decrease in international prices of Mash from USD 890/ton to USD 845/ton during Septmebr-October.



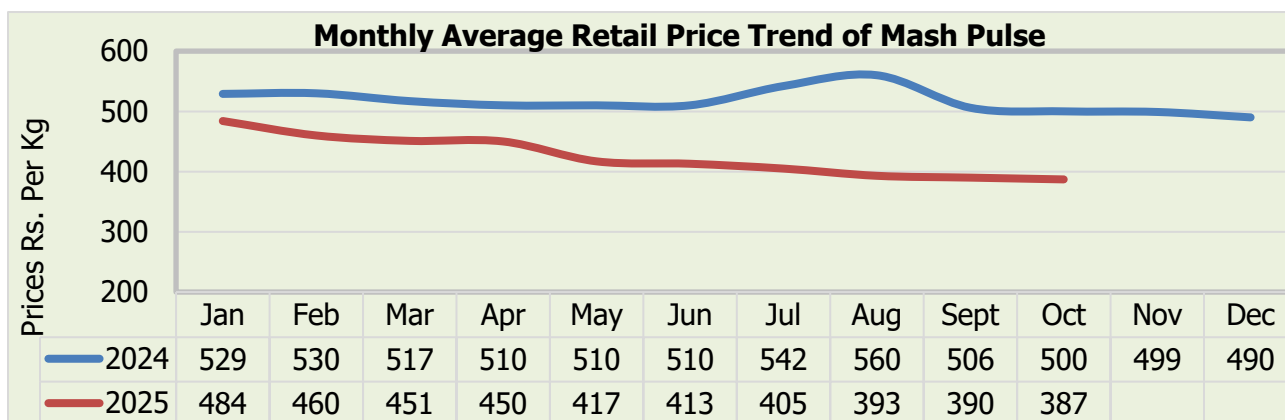
Source: Global Pulses Confederation

Local Market Price:

- Monthly average retail price of mash in Punjab is recorded at Rs. 387/kg during month of October. Mash crop from Afghanistan is available, which has improved supply situation of mash in local markets and subsequently local prices are depicting slightly decreasing trend.



Price Control & Commodities Management Department



SUPPLY MANAGEMENT ADVISORY



Assessment

Mash production in Pakistan remains minimal, making the country heavily dependent on imports to meet domestic consumption needs. However, the availability of mash crop from Afghanistan in local markets has improved the overall supply situation, leading to a slight decline in prices over the past month as well as considerable decrease as compared to the corresponding period of last year.

Forecast

Due to decrease in international prices along with availability of mash crop from Afghanistan, supply and price situation of mash is likely to remain stable in local markets subject to restore of import from Afghanistan.



Advisory



- Deputy Commissioners and EADAs (E&M) across Punjab should take into account availability of fresh crop from Afghanistan and decline in international prices during DPCC meetings while fixing prices so that relief may be transmitted to the general public.
- The Deputy Commissioners Faisalabad and Sargodha may persuade their local traders/ importers to ensure smooth import, enabling stable supply in local markets.
- Price Control Magistrates (PCMs) may reinforce Price Control Mechanism through regular inspections of retailers to curb overcharging.



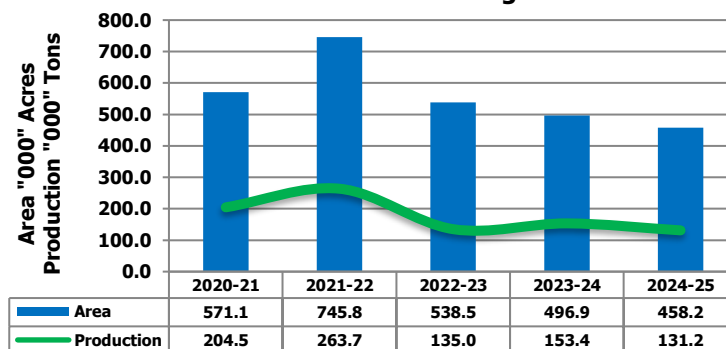
10. MOONG



Domestic Area & Production

- Over past five years, domestic production of moong is exhibiting instable even declining trend, likewise cultivated area has also been declining over the years.
- During year 2024-25, domestic production of moong was registered at 131,200 tons, marking a 14.47% decline from the previous year and a 35.9% drop compared to year 2020-21.
- Similarly, the cultivated area reduced to 458,200 acres, representing a 7.78% decrease year-on-year and a 19.76% contraction relative to year 2020-21.

Area & Production of Moong in Pakistan

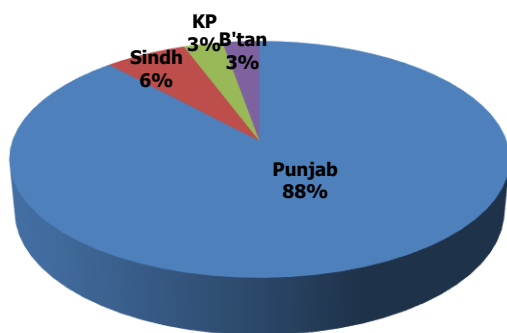


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

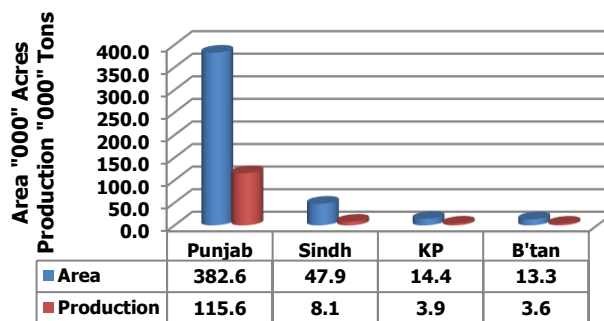
Province wise Area & Production:

- Punjab remained the dominant contributor, accounting for 88% of total production, followed by Sindh with 6%, Balochistan with 3%, and Khyber Pakhtunkhwa with 3%.
- Punjab emerged as the leading producer of moong, producing 1,15,600 tons of moong from 3,82,600 acres. Sindh ranked second with production of 8,100 tons, while Khyber Pakhtunkhwa secured third place with 3,900 tons. Balochistan recorded the lowest production, 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



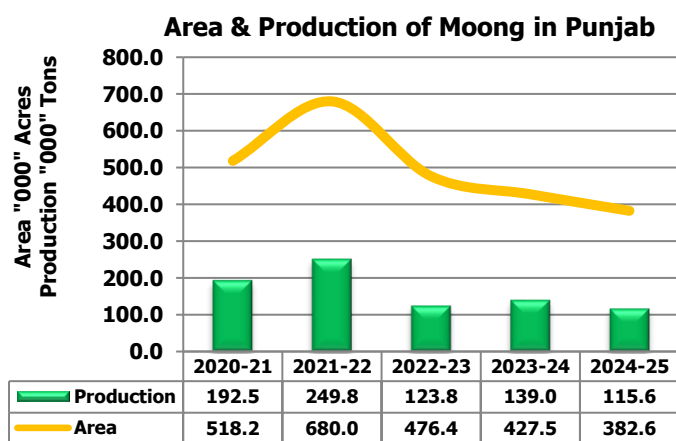
Price Control & Commodities Management Department



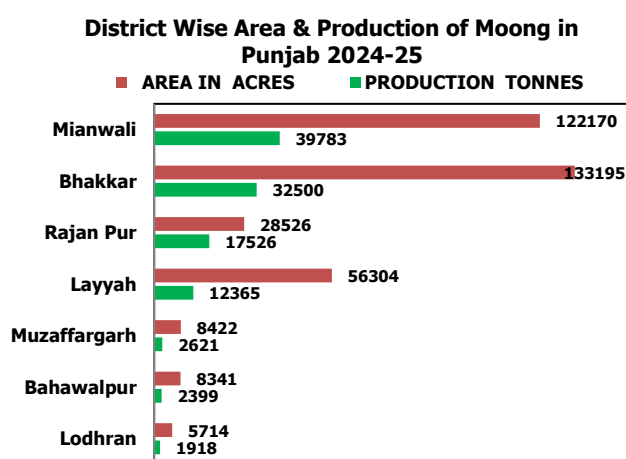
PROVINCIAL OVERVIEW

Area & Production:

- The cultivated area under moong in Punjab has exhibited a consistent downward trend over the past three years, while production has remained unstable during the same period.
- In the year 2024–25, moong production in Punjab was recorded at 115,600 tons, marking a 16.8% decline from the previous year and a 39.9% decrease compared to 2020–21. Likewise, the cultivated area reached 382,600 acres, representing a 10.5% reduction from the preceding year and a 26.2% fall relative to 2020–21.
- The major moong-producing districts in Punjab include Mianwali, Bhakkar, Rajanpur, Layyah, Muzaffargarh, Bahawalpur and Lodhran.



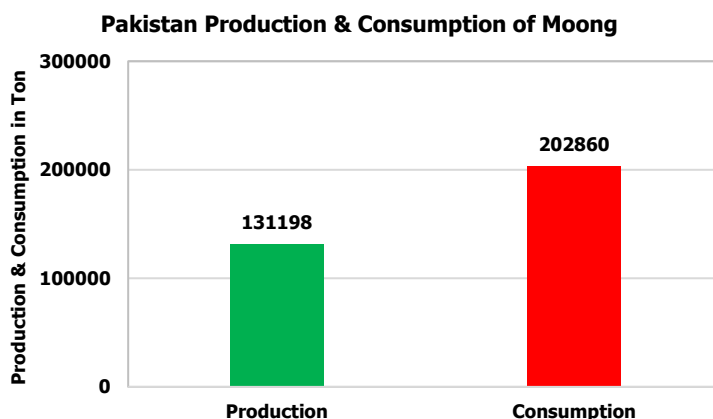
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

Domestic Production & Domestic Consumption:

- During year 2024-25, domestic production of moong has been recorded at 1,31,198 tons which is comparatively less than consumption requirement of moong i.e. 2,02,860 tons, resulting in a supply deficit of 71,662 tons.



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

Import Insights:

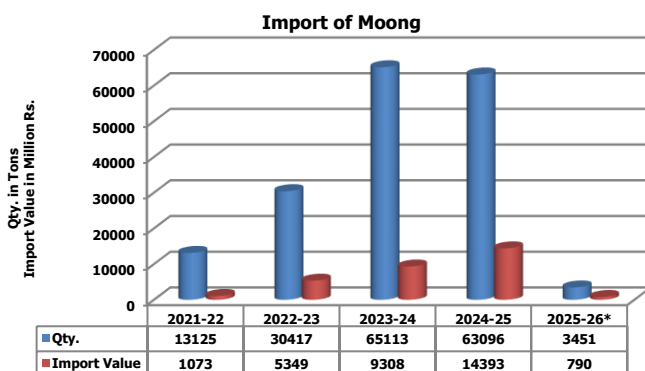
- To bridge the supply gap, Pakistan relies on imports to fulfill domestic consumption requirements.
- During year 2024-25, the country imported 63,096 tons of moong at a cost of Rs. 14,393 million. However, during year 2025-26 (July to September), imports sharply declined to 2660 tons, valued at Rs. 612 million.



Price Control & Commodities Management Department

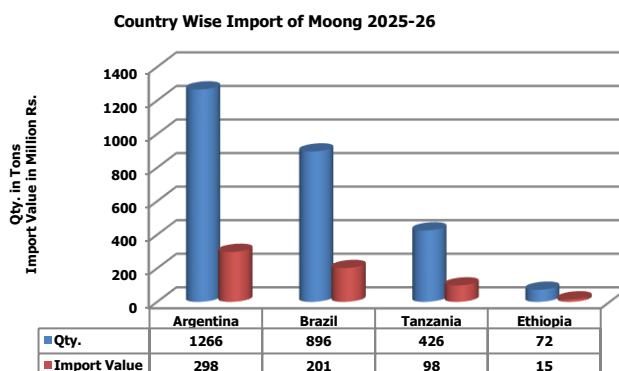


- Pakistan primarily sources moong imports from Argentina, Brazil, Tanzania, and Ethiopia.



*=Import during July 2025 to September 2025

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

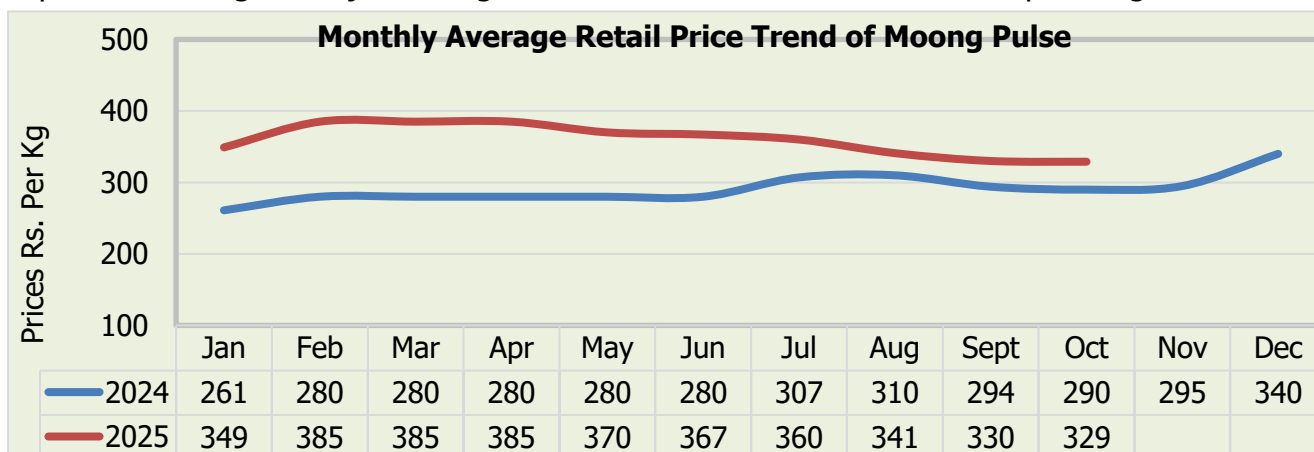


*=Import during July 2025 to September 2025

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

Market Prices

- Due to availability of local crop during July-August, supply situation of moong improved and prices showed slightly declining trend in local markets. The monthly average retail price of moong in Punjab during October 2025 is recorded at Rs. 329 per kilogram.



SUPPLY MANAGEMENT ADVISORY



Assessment

Local prices of moong have shown slightly decreasing trend in local markets due to availability of local crop during August. However, local production does not appear to be healthy, thus prices are yet on higher side in contrast with prices of last year. The price of moong has declined from Rs. 360 per kilogram to Rs. 329 per kilogram on account of availability of local crop.



Price Control & Commodities Management Department



Forecast

Local crop of moong is available, thus its supply is somewhat improved. However, production is not appreciable due to which prices are not likely to decline very much and in future import may be required to off set the supply stress and keep prices of moong within normal arrange.



Advisory



- The PAMRA Authority may coordinate with commission agents to make arrangements for import of moong in view of the reduced domestic production.
- The Price Control Mechanism should be reinforced through active involvement of Price Control Magistrates to prevent overcharging and profiteering by retailers.

The End